

Renoir's Portraits: Impressions of an Age

Visitor Profile and Economic Impact Study

Final Report

Partners:

National Gallery of Canada

Canadian Tourism Commission

Department of Canadian Heritage

I. INTRODUCTION

The National Gallery of Canada mounted a very successful major Exhibition — Renoir Portraits — 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 Resolutions¹ 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 505²), Ontario and Quebec.³

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 Exhibition (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 – that is, economic activity that took place because the Renoir Exhibition was at the National Gallery of Canada during the summer of 1997.⁴

Findings of the study are included in the following volumes:

- Volume I -- Executive Summary covering key findings and a brief overview of the study methodology (stand-alone publication available in English or French);
- Volume II -- Detailed report outlining visitor profiles and expenditures; and
- Volume III -- Technical Appendix, describing the methodology, including details of the survey 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.⁵
- 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).⁶

III. EXECUTIVE SUMMARY

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 E-1).⁷

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).⁸

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 E-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 E-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.⁹

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 E-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 E-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 E-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 E-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 E-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.¹⁰ 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 E-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 E-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 E-6).¹¹

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 E-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 E-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 E-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 E-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 E-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 E-11).

Executive Summary Tables

Table E-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 E-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 E-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 E-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 48-1/2; 52-1/2. 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 E-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 48-1/2; 52-1/2. All dollar figures are rounded to the nearest 100,000. Percentages and spending estimates may not add to 100%/total due to rounding.

Table E-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 42-1. All figures are rounded to the nearest 100. *A night spent by a household visitor party is considered to be a "room night".

Table E-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, pages 13-1/2. 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 E-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 57-1/2.

Table E-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 61-1. *Less than 0.5%.

Table E-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 66-1/2.

Table E-11

Profile of Renoir Exhibition Visitors	
	Total Visitors
Education	
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 69-1/74-1. Household income has been re-percentage on total providing a response.

IV. DETAILED FINDINGS

A. WHO CAME TO THE RENOIR EXHIBITION?

A-1. Where Do They Live?

More than one-in-three Renoir Exhibition visitors are residents of the local area (121,100 from Ottawa/Hull CMA). The remaining two-thirds are highly concentrated in other parts of Quebec (99,200, or 30%) and Ontario (70,900, or 22%) but are especially likely to live in Montréal (74,200). This city sent almost one-quarter of all visitors to the Renoir Exhibition (23%) whereas Toronto, Canada's largest city, contributed only one-tenth of the Exhibition's visitors (33,900, or 10%).¹²

Visitors to the Exhibition from more distant provinces are relatively rare. Only about 1-in-25 visitors came from provinces east of Quebec or west of Ontario (11,400). Despite their comparatively small numbers, these *long haul* domestic visitors represent virtually every province in Canada and the Yukon.

More than 13,000 visitors to the Exhibition came from the United States (4%). Over the course of the summer, visitors from twenty-seven states viewed the Portraits. Almost 4,000 of these visitors were from New York State and more than 1,000 came from California. About the same proportion of Renoir Exhibition visitors came from Overseas as came from the USA (4%). The predominant countries include several of Canada's major international tourism markets: the United Kingdom (2,600), France (1,900), Germany (1,300), and Mexico (1,700). Other South/Central American countries were also common among Exhibition visitors (1,800), but not as many visitors were from Asia/Pacific countries as might have been expected (900).

The local/non-local split and the proportions of visitors to the Renoir Exhibition that live in other

parts of Ontario and other parts of Quebec are consistent with generic Gallery attendance (summer) and attendance at other exhibitions such as *Corot*. In fact, a comparison of previous visitor study information supplied by the National Gallery including those who came to other *special exhibitions* such as *Egyptomania* (1994), *Queen's Pictures* (1995) and *Corot* (1996) suggests a high degree of homogeneity with the profile of Renoir Exhibition visitors.¹³

Table 1

Origin Of Renoir Exhibition Visitors	
	Total
Unweighted	(942)
Weighted, Projected Visitors	(328,600)
	%
Canada	92
Ottawa/Hull CMA	37
Ottawa	32
Hull	5
Other Ontario	22
Toronto	10
Other Quebec	30
Montréal	23
Other Canadian Provinces	4
USA	4
New York	1
California	*
Other Countries	4
United Kingdom	1
France	1
Germany	*
Mexico	1
Other South/Central America	1
Asia/Pacific	*

Source: Research Resolutions Detailed Tabulations, pages 1-1/5-7. *Less than 0.5%.

A-2. Educated, Older Women

Visitors to the Renoir Exhibition, like visitors to the National Gallery at other times, are generally very well educated, older, and predominantly female. At least 7-in-10 visitors to the Exhibition have one or more university degrees, the same proportion are women, about 3-in-10 report household incomes of at least \$75,000 per year (CND\$), and the average age approaches fifty (47 years).¹⁴

Most household visitor units included only adults (15 years of age or more), with an average of two people from the same household coming to the Renoir Exhibition together.¹⁵

Local Visitors

Compared to visitors at the Exhibition from other places, Ottawa/Hull residents tend to be more highly concentrated among women (75%), and among the affluent.

Visitors From Outside Canada

Tourists who live outside North America and came to the Renoir Exhibition are somewhat younger than their North American colleagues. In fact, more than half of Overseas visitors are under 40 years of age and more than one-third are between the ages of 15 and 30. Their relative youth also explains the lower level of formal education they have obtained . . . one-fifth of the Overseas visitor group would appear to be students who have yet to complete their secondary school education. The gender split among Overseas visitors is somewhat more balanced than is the case among visitors from any other location. Even though women still predominate among these Overseas visitors, 4-in-10 are men.

In contrast to their Overseas counterparts, only one-in-fourteen visitors from the United States are in the youngest age group (15 to 29) and more than one-in-four are at least sixty years of age.

Table 2

Demographic Profile Of Visitors To The Renoir Exhibition							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Respondents	(175,600)	(63,800)	(37,300)	(54,000)	(7,000)	(6,500)	(7,000)
	%	%	%	%	%	%	%
Education							
Graduated Secondary Or Less	11	9	18	7	9	6	20
Some College/ University	17	20	17	15	17	21	5
Graduated University/ Post Graduate	72	72	65	77	74	71	73
Household Income							
Over \$75,000	29	34	28	26	27	40	9
\$50,000 - \$75,000	22	20	26	24	23	14	10
Under \$50,000	24	23	21	27	31	22	21
Refused/Don't Know/ Other Currency*	24	23	25	23	19	23	59
Gender							
Women	70	75	69	68	67	66	61
Men	30	25	31	32	33	34	39
Age							
15 To 29 Years	14	14	14	12	25	7	34
30 To 39 Years	16	15	14	19	15	11	21
40 To 59 Years	47	50	45	46	48	54	32
60 Years Or Older	22	20	27	22	11	28	11
Average Age	47	47	48	47	43	52	39
Language**							
English	58	68	85	19	94	94	45
French	31	21	2	73	4	2	15
Other	10	9	8	6	2	4	40
Household Visitor Party							
Adult Only	90	89	87	93	93	90	86
With Any Teens/Children	10	11	13	7	7	10	14
Average Household Party Size	1.9	1.9	1.9	1.8	1.6	2.0	1.8

Source: Research Resolutions Detailed Tabulations, pages 69/74-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100. *Overseas only. **Language First Learned & Still Understood

B. Why Did Visitors Come To Ottawa/Hull?

B-1. Many Non-Local Visitors Have Been To Ottawa/Hull In The Past

Not surprisingly, the greater the distance a person travelled from home to the Ottawa/Hull area, the greater the chance that he or she is in the National Capitol Region for the very first time. Nonetheless, the number of Renoir Exhibition visitors who do not live in the local area but have been to Ottawa/Hull in the past is surprisingly high -- a finding that is undoubtedly linked to the high proportion of visitors from provinces other than Ontario/Quebec (29%) and Overseas (39%) who took their trip primarily in order to see friends and relatives. Those with friends and relatives in the National Capitol area may be more likely to make repeat visits to the region than are those who elected the area as a *pleasure travel* destination (see Section B-2 for a discussion of Main Purpose of trip).¹⁶

- Few of the visitors to Ottawa/Hull from other parts of Ontario or Quebec are *newcomers* to the city. In fact, only 1-in-14 Ontarians who live outside Ottawa/Hull and went to the Renoir Exhibition arrived in the city for the first time, and only 1-in-33 Quebeckers are newcomers.
- In contrast, more than 1-in-4 of the Canadians from other provinces were in Ottawa/Hull for the very first time.
- Four-in-ten Americans and two-in-three Overseas Exhibition visitors had never been to Ottawa/Hull before the trip that included the visit to the National Gallery.

Table 3

History Of Visits To Ottawa/Hull					
	Place of Residence				
	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%
Newcomers	7	3	28	41	66
Number Of Previous Overnight Trips In Past 5 Years					
Any	66	77	55	42	27
One/Two	29	24	22	21	10
Three/Four	10	18	10	7	5
Five Or More	27	35	23	15	12

Source: Research Resolutions Detailed Tabulations, pages 20-1, 22-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

An overnight trip to the Ottawa/Hull Area within the past five years is particularly characteristic of Renoir Exhibition visitors who live in Quebec (77%) and Ontario (66%). Such a trip, while less common among *long haul* Canadian travellers (55%) and those from the United States (42%), is surprisingly high among these groups.

B-2. What Brought Non-Local Visitors To Ottawa/Hull?

The main purpose of the trip that included a visit to the National Gallery to see the Renoir Exhibition tends to be *pleasure* for most non-local residents, irrespective of where they live. The strength of the pleasure component is likely a function of the season in which the Renoir Exhibition was held. Exhibition dates coincided with the peak summer *pleasure travel* season (late June through mid September).

The closer an Exhibition visitor lives to Ottawa/Hull, the more likely it is that his or her trip was motivated by the Exhibition itself. For example, about half of the Ontarians (55%) who live outside Ottawa claim to have come to Ottawa/Hull specifically to see the Exhibition and even more Quebecers make this claim (76%). It should be noted that about two-thirds of all non-local Quebec visitors are residents of Montréal -- a relatively short-haul distance from the National Gallery.

While many other Canadians, Americans and Overseas visitors at the National Gallery were also on a pleasure trip, considerably fewer of these pleasure visitors indicate that the primary purpose of the trip was to see the Renoir Portraits than is the case among those who had to travel much shorter distances to reach Canada's capitol.

Table 4

Main Purpose Of Trip To Ottawa/Hull					
	Place of Residence				
	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%
Pleasure	79	86	48	64	50
For Renoir Exhibition	55	76	13	31	2
Holiday/Vacation	21	9	34	32	48
Second Home/Cottage	2	1	-	-	-
Visit Friends/Relatives (VFR)	18	10	29	18	39
Business	3	1	13	1-	8
Other	2	3	11	8	3

Source: Research Resolutions Detailed Tabulations, pages 7-1/4. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

Travelling in order to see friends and relatives is a particularly widespread motivation for the trip among people who came to Ottawa/Hull from Canadian provinces to the east of Quebec and west of Ontario, and among those who arrived in the region from countries outside North America.

The Renoir Exhibition may have been the purpose of an excursion on a trip with a destination other than Ottawa/Hull. Perhaps the one-in-six Other Ontario residents who came to the city on trips that were destined elsewhere would not have come to Ottawa/Hull if the Renoir Exhibition had not been at the National Gallery. Similarly, the Exhibition may have been a salient factor in getting an Overseas or American visitor to Ottawa/Hull for at least one day even though this individual was *destined* to Montréal or some other part of Canada.

Table 5

Main Destination Of Trip					
	Place of Residence				
	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%
Ottawa/Hull	85	95	72	61	32
Toronto	*	*	5	5	5
Montréal	4	*	4	11	23
Other Location In Ontario	4	2	6	7	15
Other Location in Quebec	4	3	1	9	3
USA	1	-	4	4	4

Source: Research Resolutions Detailed Tabulations, page 12-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100. *Less than 0.5%.

B-3. Matters Of Degree

The *main purpose* of the trip is a useful measure in understanding the single primary motivation for travel, but does not provide an opportunity for the visitor to express the *degree* of importance an event such as the Renoir Exhibition might have had in a trip decision. The Exhibition might not have been the primary reason for travel, but could have played a role in this decision. To obtain an estimate of the role a specific event -- the Renoir Exhibition -- might have played in the decision, an eleven point scale ranging from "no influence" (zero on the scale) to "the single primary reason for taking the trip" (ten on the scale) was adopted to augment main purpose information.¹⁷

This scale is very easy for survey respondents to use and permits a more subtle understanding of the decision-making impact of an event such as the Renoir Exhibition on a potential visitor's travel plans than does "main purpose". It also provides a simple *respondent-driven* mechanism for determining what portion of consumer spending on the trip should be linked to an event (*incremental* consumer spending) and what portion would have been spent even if the Renoir Exhibition had not been at the National Gallery.¹⁸

The degree of influence the Renoir Exhibition had in determining whether the trip to Ottawa/Hull was made increases as the distance from home to Ottawa/Hull decreases.

- All local visitors to the Renoir Exhibition were assigned a score of ten, assuming that they would not have purchased tickets to the Renoir Exhibition if it had not been the primary reason for their visit to the National Gallery on the day they were interviewed.

- About one-half of Ontario residents outside Ottawa indicated that they came to the Ottawa/Hull area because of the Renoir Exhibition, and almost one-fifth claimed that the presence of the Exhibition at the National Gallery had nothing whatsoever to do with their decision to make the trip. On average, Ontario visitors accord the Renoir Exhibition a modestly important role in their decision (6.9 out of eleven).

- Visitors from Quebec are most apt to have been motivated to take their trip to Ottawa/Hull because of the Renoir Exhibition. Almost 8-in-10 of these visitors state that the Exhibition was the *single main reason* for making the trip, and very few suggest that the Exhibition had *no influence* on their trip decision.
- Most *long haul* Canadian visitors would have travelled to Ottawa/Hull whether the Renoir Exhibition was at the National Gallery or not. More than half accord the Exhibition *no influence* on their trip decision. The average influence of the Exhibition on the trip decision for this group of visitors is quite low (3.3).
- American visitors are somewhat divided in the level of influence they accord the Exhibition in their travel decision-making. Three-in-ten indicate that the Portraits were instrumental in the trip decision, and more than 4-in-10 state that the paintings had no influence on their decision. The substantial proportion of American visitors that are "short-haul travellers" likely explains why a sizeable minority of these visitors accord the Renoir Exhibition a high degree of influence over their decision to visit Ottawa/Hull (30%). This proportion is almost identical to the proportion *short-haul* US markets comprise of the total US market for the Exhibition: about one-third of the Americans who came to the Exhibition live in New York State, New Jersey, or Connecticut.
- Did about 1-in-8 Overseas visitors really make their decision to travel from Europe, Mexico or South America because the Renoir Exhibition was at the National Gallery? Yes and no. The Overseas visitors who accorded the Exhibition a "ten" on the influence scale do not appear to have made the *entire* trip because of the Renoir Portraits, but more likely elected to add Ottawa/Hull to a North American itinerary in order to see the paintings. As noted previously, of all Overseas visitors, only about one-third named Ottawa or Hull as the main destination of their trip. One-fifth of them were destined to Montréal, and the same proportion were headed to Toronto or some other Ontario location.

Table 6

Level Of Influence Of Renoir Exhibition On Trip Decision							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(328,600)	(121,100)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%	%
Single Main Reason (10)	74	100	54	78	19	30	13
No Influence (0)	13	-	18	7	56	43	70
Average Influence*	8.2	10.0	6.9	8.7	3.3	4.8	2.3

Source: Research Resolutions Detailed Tabulations, page 8-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100. *Average is based on numeric bi-polar eleven point scale where 0 is *no influence* and 10 is the *single main reason* the trip was made.

B-4. How Did Visitors Find Out About The Renoir Exhibition?

Newspapers are a particularly effective form of communication for an event such as the Renoir Exhibition for the local community and, it would appear, for residents of Quebec. About two-thirds of Exhibition visitors from these locations claim to have heard about it via a newspaper. Immediate, local inputs such as recommendations of family or friends seem to have special efficacy among out-of-towners, and especially those travelling from more distant locations such as *long haul* Canada, (55%), the USA (52%) and Overseas (47%).

It should be noted, however, that newspapers may prove to be a particularly *ineffective* means of reaching a "young" audience. Only one-quarter of the young people (15 - 24) who came to the Renoir Exhibition used a newspaper as a source of information, compared to at least half of those in the older age groups. Billboards/posters are, it would seem, at least as functional in attracting the attention of young people as are newspaper advertisements (24%) but informal networking is the most widespread source of information among this group (friends/family, 65%).

Table 7

Total Sources of Information about the Renoir Exhibition (First/All Other)							
	Total	Place of Residence					
		Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(328,600)	(121,100)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%	%
Newspapers	60	66	56	67	40	19	22
Friends/Relatives	37	36	36	34	55	52	47
Television	20	23	16	25	10	1	12
Radio	15	23	11	11	5	4	1
Billboards/Posters	14	23	8	6	10	23	24
Brochures/Pamphlets	7	8	9	3	7	18	11
Magazines	6	2	12	7	4	4	4
At Other Out of Town Art Gallery	6	13	2	2	3	*	-
Tourist Information Office	2	1	4	*	1	7	14
Hotel/Other Local Source	2	*	1	-	7	11	10

Source: Research Resolutions Detailed Tabulations, page 63-1/2. *Less than 0.5%. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

Ottawa/Hull's tourism information offices and hotel concierges were more widely used by Exhibition visitors from Overseas as a way of learning about the Exhibition than was the case among domestic visitors. About 1-in-10 Americans also relied on their hotel as a source of information about the exhibit.

C. Past, Present, Future: Experience With The National Gallery Of Canada

C-1. Most Local Visitors Are National Gallery Veterans

Approximately one-quarter of all visitors to the Renoir Exhibition are *newcomers* to the National Gallery of Canada. As would be expected, the proportion of newcomers rises quite dramatically as the place of residence of the visitor moves further and further away from Ottawa/Hull. For example, only about one-tenth of the local population who came to the Exhibition were attracted to the Gallery for the very first time by the Renoir Portraits. In contrast, about 7-in-10 Americans and Overseas visitors were in the Gallery for the very first time on the day they were seeing the Portraits.

The attraction of the Exhibition to newcomers is quite consistent with other recent special events at the National Gallery. Among all visitors to *Egyptomania* in 1994, about 1-in-3 were newcomers to the Gallery, about 4-in-10 of those who went to the *Queen's Pictures* in 1995 had never been to the Gallery before, and about 1-in-4 visitors at the *Corot* Exhibition in 1996 were new visitors to the Gallery. In fact, the proportion of *Corot* visitors who were new (27%) is virtually identical to the level of newcomers achieved by the Renoir Exhibition (27%).

Table 8

Experience With The National Gallery Among Visitors To The Renoir Exhibition							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(328,600)	(121,100)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%	%
Previous Visits							
Not Been Prior To Renoir Exhibition Visit	27	11	29	32	51	67	70
Had Been Before	73	89	71	68	49	33	30
Membership							
Yes, Member	6	13	2	1	-	-	-
Intention To Return In Next 12 Months							
Very likely	49	68	35	47	27	20	15
Somewhat likely	26	22	33	29	18	11	23

Source: Research Resolutions Detailed Tabulations, pages 57-1/2. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

The relatively low level of newcomers from Ottawa/Hull may suggest that the Renoir Exhibition did not convert Gallery non-attenders into attenders at a substantial rate within the immediate catchment area. The Exhibition was, however, comparatively successful in bringing in a new audience from other parts of Ontario and Quebec. The rates of first time National Gallery visitors are appreciably higher than the rates of new arrivals from these two provinces, suggesting that even though many Ontarians and Quebecers had been to the city before, it was the Renoir Exhibition that drew them into the National Gallery for the first time.

Table 9

Newcomers to Ottawa/Hull & Newcomers To The National Gallery		
	Other Ontario	Other Quebec
Unweighted	(215)	(275)
Weighted, Projected Visitors	(70,900)	(99,200)
	%	%
Newcomers To The City	7	3
Newcomers To The National Gallery	29	32

Source: Research Resolutions Detailed Tabulations, pages 20-1; 57-1. Note: All projected bases rounded to nearest 100.

Of local visitors to the Renoir Exhibition, about one-seventh are Gallery members (13%). Being a member, however, is clearly not regarded by the local population as a prerequisite for coming to the National Gallery.

When asked if they planned to visit the Gallery again within the next twelve months, two-thirds of the local population at the Renoir Exhibition claimed that they are *very likely* to return, and a further one-fifth state that they are *somewhat likely* to do so. Quebecers also appear to be particularly staunch supporters of the National Gallery: of those who came to the Renoir Exhibition, about one-half anticipate that they are *very likely* to be at the Gallery again within the coming twelve months and a further 3-in-10 indicate that they are *somewhat likely* to be back.

Not surprisingly, the farther away a Renoir Exhibition visitor lives from Ottawa/Hull the less apt he or she is to expect a return visit to the Gallery within the next year or so. Coming as they did from Toronto, London, Hamilton and other parts of the province, many Ontarians travel farther to reach Ottawa than do many of their Quebec neighbours from Montréal. The greater distance they must travel to reach Ottawa/Hull could explain why Ontarians are noticeably less likely to express an intention to return to the Gallery in the near future than are their counterparts from Quebec. Because of the distances they travelled to reach Ottawa/Hull, American, *long haul* Ca-

nadians and Overseas visitors' anticipated return rates might be more accurately interpreted as expressions of satisfaction with their current visit and/or as wishful thinking than as a prediction of future behaviour.

C-2. The Renoir Exhibition Brought *Veterans* Back To The National Gallery

This section is confined to Renoir Exhibition visitors who claim to have been to the National Gallery in the past. Within this "veteran" population, the Renoir Exhibition seems to have brought 6-in-10 of the Ontarians and Quebecers into the building *for the first time in at least one year*. On average, these *veterans* come to the Gallery less than once a year but were clearly motivated by the Portraits.

Local Gallery-goers are avid visitors -- they average between two and three visits to the Gallery in a year and one-fifth of them claim to have gone to the Renoir Exhibition at least twice during its eleven week run.

Table 10

Experience With The National Gallery -- Among Those Who Had Been To The Gallery Prior To Renoir Exhibition Visit				
	Place of Residence			
	Total	Local	Other Ontario	Other Quebec
Unweighted	(627)	(194)	(151)	(194)
Weighted, Projected Visitors Who Have Been To The National Gallery Before Renoir Exhibit	(239,200)	(107,300)	(50,500)	(67,800)
	%	%	%	%
Visits In Past 12 Months**				
None	38	13	59	60
One	22	21	24	20
Two	16	24	9	10
Three to Six	20	36	7	9
More Than Six	3	7	1	*
Average # Of Visits In Past 12 Months	1.7	2.7	0.9	0.8
Previous Visits To Renoir Exhibit				
None (Only on day of interview)	89	82	94	94
One Other Time	9	15	4	4
Two Or More Other Times	2	4	2	1

Source: Research Resolutions Detailed Tabulations, pages 60-1/2. *Less than 0.5%. ¹Caution: Small base size. Note: All projected bases rounded to nearest 100. **Excludes visit for the Renoir Exhibit.

C-3. Profile: *Newcomers* and *Veterans* At The National Gallery

The National Gallery is aware of the consistent pattern evident in its visitor profile: the image of the Gallery's visitor is an older, affluent woman. Did the Renoir Exhibition attract a different type of visitor to the Gallery, by expanding the base of visitors to include more young people? More men? A comparison of profiles of *veterans* and people who *plan to return to the Gallery* suggests that such inroads in new market segments will not be accomplished as a result of the Renoir Exhibition. In fact, the demographic profiles of those who are Gallery *veterans* and those who claim that they are likely to return to the Gallery within the next year or so are remarkably similar.

- The Renoir Exhibition may have attracted more young people as *newcomers* with corresponding differences in education and income than is the case within the Gallery's *veteran* population but it has not sparked interest in future visits to the Gallery among a clientele that is any different from those who have been to the Gallery prior to the Renoir Portraits.

- Even though a comparatively high proportion of *newcomers* are young people, these youthful visitors are concentrated in the Overseas segment of the Renoir Exhibition visitor population. As such, they are unlikely to constitute a market with long-term development possibilities.

Table 11

Newcomers, Veterans & Visitors Likely To Return To The National Gallery				
	Experience With National Gallery			
	Total	Veteran*	Newcomer	Likely To Return Within 12 Months
Unweighted	(942)	(627)	(315)	(650)
Weighted, Projected Respondents	(175,600)	(129,700)	(45,900)	(131,900)
	%	%	%	%
Place Of Residence				
Local	36	45	13	43
Other Ontario	21	21	23	20
Other Quebec	31	29	35	31
Other Provinces	4	3	8	2
USA	4	2	11	2
Overseas	4	1	-	2
Education				
Graduated Secondary Or Less	11	9	15	11
Some College/University	17	17	17	18
Graduated University/ Post Graduate Courses	72	74	68	72
Household Income				
Over \$75,000	29	33	32	24
\$50,000 - \$75,000	22	22	22	22
Under \$50,000	24	23	21	27
Refused/Don't Know/ Other Currency**	24	21	32	24
Gender				
Women	70	76	68	71
Men	30	24	32	29
Age				
15 To 29 Years	14	12	22	13
30 To 39 Years	16	13	24	15
40 To 59 Years	47	52	34	48
60 Years Or Older	22	24	26	24
Average Age	47	48	43	48

Source: Research Resolutions Detailed Tabulations, pages 2-3/4; 69-2/70-4; 74-2. Note: All projected bases rounded to nearest 100. *Excludes visit for the Renoir Exhibit. **Overseas visitors only.

D. Reactions To The Renoir Exhibition

D-1. Overall Satisfaction With The Exhibition

When asked to provide an overall evaluation of the Renoir Exhibition, almost 9-in-10 visitors respond favourably (8/10 on a ten point bi-polar scale). On average, the Exhibition achieves a very positive 8.9 out of ten point satisfaction rating. There are no significant differences in the ratings accorded the Renoir Exhibition by place of residence.

Table 12

Overall Satisfaction with the Renoir Exhibit							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(328,600)	(121,100)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%	%
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, pages 13-1/2. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100. 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.

Satisfaction with the Renoir Exhibition differs somewhat by the characteristics of the visitor. For example:

- Younger visitors (15 - 24 years) are less satisfied (8.5) than are those between 55 and 64 years (9.2) or those who are 65 years of age or over (8.9); and
- Women (9.0) are more satisfied than are men (8.7).

These differences suggest that the Exhibition was better able to meet expectations and needs of *core Gallery patrons* (older women) than of market segments that are less common within the museum-going population (younger people and men).

Interest in visiting the Exhibition another time can be taken as a further indication of satisfaction with the Portraits. Of course, residents of the region are in a much better position to make multiple visits to the Gallery than are those who are in town on overnight trips and have a limited amount of time to spend. Of the local visitor group, 4-in-10 indicate that they are *very likely* to make another visit to see the Renoir Exhibition and a further 1-in-4 indicate that they are *somewhat likely* to do so. These levels of interest surpass those of non-local visitors, but even among those who do not live in the region, at least 2-in-10 claim that they are *very likely* to see the Exhibition again. It is quite unlikely that as many visitors made the second or third visit as claim to be interested in a repeat visit (See Section C-2). These figures are best interpreted as a *vote of confidence* in the Exhibition: it is sufficiently interesting that it warrants a second or third visit even if such a visit is impractical for out-of-towners to make.

Table

Likelihood Of A Return Visit To The National Gallery To See The Renoir Exhibit							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(328,600)	(121,100)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%	%
Very Likely	29	40	18	25	25	21	23
Somewhat Likely	19	24	18	16	19	9	6

Source: Research Resolutions Detailed Tabulations, pages 15-1/2. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

D-2. Areas For Improvement

During the course of the interview, visitors were given the opportunity to indicate whether they had any complaints about the organization or facilities at the Renoir Exhibition, and if so, to volunteer their concerns. Approximately 1-in-2 visitors provided comments that could be useful to the National Gallery in planning future exhibitions. The primary focus of concern was crowding and/or difficulties in obtaining access to the paintings. In some cases, this concern was coupled with the comment that the text in signs next to the paintings was too small to read from the distance visitors had to maintain.

Interestingly, *price* did not emerge as a source of widespread comment. Only 1-in-100 Exhibition visitors indicated that they thought prices -- of the Exhibition itself, food/beverages at the Gallery, or gifts/souvenirs -- were too high. While not a measure of price sensitivity, the low level of voluntary comment on this topic suggests that visitors thought their tickets to be fairly priced for the value they obtained. More specific feedback from visitors can be found in the detailed computer tabulations (Table 18-1/3).

Table 14

Areas For Improvement							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(328,600)	(121,100)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%	%
Any Areas For Improvement	49	52	43	51	37	38	50
Crowding/Poor Access To Paintings	26	28	26	23	19	25	32
Signage in Exhibition (too small/could not read)	5	8	2	4	2	8	10
Audio Guides (sold out/contents)	5	4	5	8	3	3	5
Any Concerns About Personal Comfort*	8	9	8	7	8	9	5
Any Concerns About Tickets	3	3	3	4	-	-	1
Any Concerns About Prices	1	2	2	1	-	-	-
Any Concerns About Parking/Access To Gallery	2	1	1	4	-	-	-

Source: Research Resolutions Detailed Tabulations, pages 18-1/3. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.
*Temperature, wheelchair access, noise level, checking of personal belongings.

E. Spending At the Renoir Exhibition

E-1. Spending Attributable To The Renoir Exhibition

Spending in the provinces of Ontario and Quebec that is directly associated with a visitor's decision to go to the Renoir Exhibition at the National Gallery exceeds \$31.5 million.¹⁹ About one-third of this spending was done by non-local residents of Ontario (\$10.0 million) and a similar proportion was done by non-local residents of Quebec (\$11.1 million). Approximately one-tenth, or \$3.3 million was spent by visitors from Overseas, and somewhat less was spent by Americans (\$2.7 million), and *long haul* Canadian visitors (\$1.7 million). The reader is reminded that only spending *within* the provinces of Ontario and Quebec were captured in the study, and the figures discussed here are only those dollars that are directly attributable to the Renoir Exhibit²⁰

Table 15

Attributable Spending & Visitors To The Renoir Exhibit			
	Attributable Spending		Visitors
	\$31,500,000		328,600
By . . . Residents	\$	%	%
Local	2,700,000	9	37
Other Ontario	10,000,000	32	22
Other Quebec	11,100,000	35	30
Other Provinces	1,700,000	5	4
USA	2,700,000	9	4
Other Countries	3,300,000	11	4

Source: Research Resolutions Detailed Tabulations, pages 1-1/2; 4-1/2.

When visitor volumes are contrasted with the proportion of all attributable consumer spending associated with the Renoir Exhibition, it is clear that the best "yields" derive from American and Overseas visitors. In each case, a higher proportion of spending derives from these groups than their volumes would suggest.

- Almost 1-in-10 attributable dollars are spent by American visitors, but Americans represent only 1-in-25 Renoir Exhibition visitors;

- Approximately 1-in-8 attributable dollars are spent by Overseas visitors, but this group represents 1-in-25 Renoir Exhibition visitors.

E-2. Category Spending Attributable To The Renoir Exhibition

Because they were taking different types of trips, had different lengths of stay in Ontario and Quebec, and used different types of accommodation if they were on an overnight trip, visitors from the major origin groups display different spending patterns. These are described in the following paragraphs. The reader is reminded that only spending *within* the provinces of Ontario and Quebec were captured in the study, and the figures discussed here are only those dollars that are directly attributable to the Renoir Exhibit²¹

Local Residents

Most of the \$2.7 million spent by *local* residents is confined to the National Gallery itself. One-third of the local markets' attributable spending covered admissions to the Renoir Exhibition, and one-quarter was spent on souvenirs at the Bookstore and gift kiosks within the Gallery. Purchases of food and beverages within the National Gallery represent 1-in-20 of the attributable dollars spent by the local community.

While the National Gallery is the key beneficiary of local spending associated with the Exhibition, other restaurants in Ottawa/Hull tallied receipts of close to three-quarters of a million dollars because of special meals that *local* Renoir Exhibition visitors enjoyed because they went to see the paintings (\$722,000).

Other Domestic Visitors

Renoir Exhibition visitors from other parts of Ontario, Quebec and more distant Canadian provinces share relatively similar spending patterns, although the comparatively low level of accommodation expenditure among "Other Canada" visitors (15%) is undoubtedly associated with the heavy reliance this group placed on the hospitality of their friends and relatives in Ottawa/Hull. Their comparatively high level of spending on restaurants compared to other Quebecers and other Ontarians likely reflects the fact that the *long haul* Canadians spend longer in the region -- they spend an average of 6.4 nights in Ottawa/Hull.

Most *Other Ontario* visitors spend at least one night in Ottawa/Hull (82%), and those who are overnights spend 2.8 nights, on average. While *Other Quebec* visitors who spend any nights in Ottawa/Hull stay about the same length of time as do *Other Ontario* visitors (2.2 nights), Quebecers are considerably less likely to spend *any* nights in Ottawa/Hull on their Renoir Exhibition trip. Almost half of them (47%) are on a same-day trip, and the remaining half are on an overnight trip (53%). The ease of making a same-day trip between Ottawa/Hull and Montréal is likely a key factor in determining the spending patterns of Montréalers.

Table 16

Spending In Ontario/Quebec Attributable To The Renoir Exhibit							
	Place of Residence						
	Total (\$31,500)	Local (\$2,700)	Other On- tario (\$10,000)	Other Quebec (\$11,100)	Other Canada (\$1,700) ¹	USA (\$2,700) ¹	Other Country (\$3,300) ¹
Weighted, Projected CND Dollars (000s)	%	%	%	%	%	%	%
Entertainment/Recreation	13	33	10	14	13	9	4
Tickets To Renoir Exhibit	9	33	7	10	4	4	2
Retail	19	26	18	20	23	15	19
Souvenirs At National Gallery	12	26	10	14	8	6	3
Transportation To Ottawa/Hull*	8	-	8	9	1	5	13
Accommodation*	23	-	29	20	15	41	23
Food/Beverages*	34	32	34	34	42	28	37
At National Gallery	2	5	2	2	1	1	1
At Other Restaurants	27	27	28	28	35	23	26
At Stores	5	-	4	4	7	4	10
Local Transportation	1	9	1	1	1	1	2
All Other Expenses	2	-	1	3	5	2	3

Source: Research Resolutions Detailed Tabulations, pages 54-1/3. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100,000. *In Ontario/Quebec only.

USA & Overseas

With one notable exception, spending patterns for USA and Overseas visitors do not differ appreciably from their non-local domestic counterparts. American visitors are considerably more likely than any other visitor group to rely on hotels in the Ottawa/Hull area for their accommodation on the Renoir Exhibition trip. For this reason, accommodation costs represent a consid-

erably higher proportion of their total attributable spending (41%) than is evident for the domestic or Overseas markets.

Overseas visitors, much like *long haul* Canadians, are especially reliant on the hospitality of friends and relatives in Ottawa/Hull. Consequently, accommodation takes a smaller "bite" out of their total attributable spending (23%) than it does for American visitors (41%).

E-3. On-Site Spending Attributable To The Renoir Exhibition

Spending at the National Gallery itself that is directly attributable to the Renoir Exhibition totals \$7.1 million. Approximately 40% of this spending, or \$2.9 million, is ticket revenue and more than half, or \$3.7 million, is spending done at the Bookstore or gift kiosks on souvenirs and memorabilia by Renoir visitors. Approximately \$0.6 million was spent on food and beverages at the National Gallery by Renoir Exhibition visitors.

An analysis of attributable on-site spending by place of residence provides some insights on which visitor groups have the most dramatic impacts on revenues for the Gallery. Any such analysis must, of course, be tempered by many other considerations. For example, the Gallery has an educational and recreational role to play for all Canadians, and for its local community. "Impacts" such as these are not measured by this study. Furthermore, the sheer "volume" of local visitation and the comparatively low marketing costs to attract these visitors to an exhibition such as the Renoir must be weighed against the volumes brought in from more distant communities and the marketing costs involved. Bearing these caveats in mind, local visitors account for more than 1-in-3 Renoir Exhibition visitors but represent only 1-in-4 of the dollars spent at the Gallery because of the Exhibition, and only 1-in-5 of the dollars spent on gifts and souvenirs at the Bookstore and kiosks.

Long haul visitors -- be they Canadians or from other countries -- tend to "spend" at the Gallery in the same proportion that they are represented in the Renoir Exhibition visitor population. These out-of-town visitors from other Canadian provinces, the USA and Overseas contribute significantly more benefit overall to the Ontario/Quebec economies because of their reliance on accommodation, transportation, food services and other retail establishments than their numbers would suggest, but the National Gallery itself obtains economic benefits commensurate with these visitor groups' volumes. At least in part, the relatively flat level of on-site *attributable* expenditures by American and Overseas visitors is associated with the likelihood that these visitors would have engaged in other cultural activities if they had not gone to the Renoir Exhibition on their trip to Ottawa (See Summary Table, Appended).

Residents of other parts of Quebec, on the other hand, account for 3-in-10 visitors to the Renoir Exhibition, but they contribute more than 4-in-10 of all dollars spent at the National Gallery on gifts and souvenirs attributable to the Exhibition. From a marketing perspective, it is worth noting that more than three-quarters of the "other Quebecers" at the Renoir Exhibition live in Montréal.

Table 17

Spending At The National Gallery Attributable To The Renoir Exhibition					
	Spending At The Gallery Attributable To The Renoir Exhibition				
	Visitors	Total	Tickets	Souvenirs	Food/ Beverages
Weighted, Projected CND Dollars (000s)	(328,600)	(\$7,100)	(\$2,900)	(\$3,700)	(\$600)
	%	%	%	%	%
Local	37	25	31	19	23
Other Ontario	22	26	23	28	33
Other Quebec	30	40	38	42	35
Other Canada	4	3	2	4	2
USA	4	4	4	5	5
Overseas	4	2	2	2	3

Source: Research Resolutions Detailed Tabulations, pages 54-1/3. ¹ Caution: Small base size. The only spending at the National Gallery that is *not* attributable to the Renoir Exhibition is associated with substitution effects -- a visitor would have spent the same amount of money at another museum in the region on the same day.

F. Other Trip Characteristics

F-1. Other Activities In Ottawa/Hull

Out-of-town visitors were asked to indicate which, if any, other specific activities they engaged in while in the Ottawa/Hull area. Sightseeing on foot, shopping and a visit to Parliament Hill were particularly widespread, especially among *long haul* Canadian, American and Overseas visitors. About 7-in-10 Overseas and "Other Canada" tourists walked around Ottawa/Hull to see the sights and shop although slightly fewer Americans did so. Sightseeing by car or bus was particularly popular among visitors from *long haul* Canadian origins, Americans and residents of other countries. Approximately one-in-two Renoir Exhibition visitors from these locations engaged in this method of taking in the sights of the region.

Parliament Hill attracted about 6-in-10 visitors from outside Ontario and Quebec, but was comparatively low on the popularity list among Quebeckers (27%). In fact, Quebeckers were least likely to go to any other sites or engage in other activities while in Ottawa to see the Renoir Exhibition. Their low participation rate is likely associated with the comparative shortness of their visit -- about 1-in-2 of the non-local visitors from this province were on a same-day excursion to Ottawa. By way of contrast, only 1-in-6 non-local Ontarians were on a same-day excursion. Not surprisingly, the longer-staying Ontarians were more apt to engage in other activities while in the city than were their shorter-staying counterparts from Quebec.

Going to another museum or art gallery is characteristics of more than one-in-three non-local Ontario residents, about one-in-two visitors from Overseas and from Canadian provinces other than Ontario and Quebec. American visitors are least apt to go to other museums or galleries on their Ottawa/Hull visit: only about one-in-four claim to have done so.

The casino in Hull was a partner with the National Gallery for the Renoir Exhibition and proved to be an attraction for one-in-twelve non-local visitors to the Exhibition. The casino's popularity was most evident among Quebeckers (11%) and Overseas visitors (11%), and least popular among visitors from the United States (3%) and other parts of Ontario (4%).

Table 18

Activities In Ottawa/Hull Among Non-Local Visitors						
	Place of Residence					
	Total	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(730)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors (Non-Local)	(207,500)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%
Walk Around To See Architecture & Scenery	54	60	44	75	68	69
Go Shopping	47	51	36	67	58	70
Go To Parliament Hill	38	42	27	61	56	61
Do Sightseeing By Car or Bus	31	36	20	51	51	52
Visit Friends	30	34	25	51	20	38
Visit Museum/Art Gallery Other Than National Gallery of Canada	29	36	21	49	27	48
Visit Relatives	27	30	25	40	16	31
Visit City Park	19	20	14	29	27	37
Other Outdoor Activities (Swim, Picnic, Cycle)	17	15	14	34	16	29
Attend Festival/Fair	13	14	10	23	17	18
Go To The Casino	8	4	11	6	3	11
Attend A Cultural Performance	6	5	5	16	8	10
Take A Cruise/Boat Tour	6	4	4	15	13	15
Go Camping/Hiking	6	6	5	11	7	15
Canoeing, Kayaking, Sailing	4	5	2	8	7	10
No Activity Named	12	8	16	-	11	7

Source: Research Resolutions Detailed Tabulations, pages 67-1/3. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

F-2. Other Trip Details

Readers interested in more details of the trip that brought non-local visitors to Ottawa for the Renoir Exhibition are encouraged to review the summary tables appended and the detailed tabulations (under separate cover). Some of the highlights of these trip characteristics, asked primarily to facilitate the assignment of spending to appropriate items and locations within the economic impact assessment, are listed below:

- Most visitors from other parts of Ontario and Quebec came by car to the Ottawa/Hull area. Not surprisingly, those who came considerably greater distances were more apt to use airplanes, trains and busses to get to Ottawa/Hull.
- A future visit to Ottawa/Hull within about two years is predicted by more than half of the non-local Ontario and Quebec residents who came to the Renoir Gallery, and by about 4-in-10 Canadians from other provinces. Almost 3-in-10 visitors from the United States and Overseas anticipate that they will return to the Ottawa/Hull area within the next two years.
- The average length of the trip that brought the non-local visitor to Ottawa/Hull ranges from about three nights among Quebecers (overnight) to almost one month among Overseas visitors (29 nights, on average). Overnight visitors from *long haul* Canadian provinces and American visitors who spent any nights away from home seem to have been on two week holidays. They were spending an average of thirteen nights away from home on the trip that brought them to the National Gallery.
- In all cases, overnight visitors spent fewer nights in Ottawa/Hull than they did on their trip as a whole. For overnight visitors from Ontario and Quebec, the average length of stay in Ottawa/Hull was between two and three nights. American overnight travellers spent between three and four nights in Ottawa/Hull, whereas *long haul* Canadians and Overseas visitors spent about six nights in the city, on average.

- In keeping with the predisposition of *long haul* Canadian and Overseas visitors to be on trips with a main purpose of visiting friends and relatives, it is not surprising that these travellers are more reliant on the hospitality of friends and relatives for their local accommodations than are visitors from other locations. In fact, equal proportions of Overseas visitors stayed with friends/relatives in Ottawa/ Hull as stayed in a hotel in the city (39%, each). More *long haul* Canadian visitors stayed with friends/relatives (52%) than utilized hotels in the Ottawa/ Hull area (34%). Hotels were, however, particularly popular forms of accommodation in Ottawa/Hull among overnight travellers from Ontario (52%), Quebec (45%) and the United States (44%).

- Comparatively few visitors to the Renoir Exhibition utilized travel *packages* for their trip. Incidence of purchasing two or more items including tickets to the Exhibition or other entertainment/recreation, accommodation, meals and/or transportation as a *package* is characteristic of about 1-in-12 to 1-in-14 visitors from Overseas and the USA and even fewer Canadians from Ontario, Quebec and other provinces.

V. THE ECONOMIC IMPACT LEARNING CURVE

G-1. Introduction

The *Renoir Exhibition Visitor Profile & Economic Impact Study* is the third iteration of a study design that was initiated with the Barnes Exhibit at the Art Gallery of Ontario (1994) with the support of the Ontario Ministry of Culture, Tourism and Recreation (sic). The techniques used in the Renoir Exhibition project are based on the methodology inaugurated at the Barnes Exhibit, and modified during the *Economic Impact of the Breeders' Cup*, a major horse-racing event held in the autumn of 1996 in Toronto. The Breeders' Cup project was supported by The Ontario Jockey Club and the Ontario Ministry of Economic Development, Trade and Tourism.

The *learning curve* can be approached from two very different vantage points: technical improvements to the design and implementation; and practical considerations for extending the application of credible economic benefit studies. At the inception of the Renoir Exhibition economic impact project, it was agreed that both of these topics would be considered as part of the final report. In the following paragraphs, both learning curve perspectives are discussed . . . with the expectation that further debate and discussion of some of the hypotheses raised herein will take place within the tourism research community.

The methodology is not yet at a point that a generic economic impact assessment plan can be described because the three projects conducted to date are quite different from one another. Furthermore, each project has relied on a professional team of trained, skilled tourism researchers -- resources that may not be affordable or available in all settings that might benefit from a common methodology.

Even though the *generic plan* has not yet emerged from the process, the Renoir Exhibition has made a substantive contribution to its development. These are described in the paragraphs below.

G-2. Activity & Trip Substitution Effect Enhancements

The basic survey approach of the three studies is characteristic of many other visitor intercept studies, and relies on trusted principles of random selection of visitors through a tally process to capture basic weighting/projection information and a follow-up interview at the end of the event or trip. At the same time, all three projects have been predicated on the need to differentiate spending that would have occurred irrespective of the particular touristic event and spending that is done by visitors *because* the event took place (*incremental expenditure impacts*). Identification and capture of spending and other tourism information has become more refined over the three studies because of enhancements to design and data management principles.

Activity Substitution

7-a)	Do you think you would have gone to a different museum or art gallery today if the Renoir <i>Portraits</i> Exhibit had not been at the National Gallery?			
	Yes	34-1	ASK Q7-b)	
	No	2	SKIP TO Q.7-c	
	DON'T KNOW	X	SKIP TO Q.7-c	
	REFUSED		Y	SKIP TO Q.7-c
7-b)	Would these other museums or art galleries have been in . . . READ LIST? REFER TO MAP IF NECESSARY			
	Ottawa		35-1	
	Toronto			2
	Some other location in Ontario			3
	Hull			4
	Montréal			5
	Some other location in Québec			6
	Some other location in Canada			7
	The USA			8
	Some other country			9
	DON'T KNOW			X
	REFUSED			Y

Design improvements, incorporated into the Breeders' Cup and the Renoir Exhibition projects included additional substitution effect questions related to *trip* replacement. While all studies included a series of questions about substitution effects of the "activity" and the location in which an analogous activity might have taken place (see sample sequence 7-a/-b from the Renoir



questionnaire) in order to determine how much activity-related spending should accrue, the Barnes study did not include a reference to trip replacement.

The trip replacement question permits a further level of substitution effect to be taken into account. If the visitor's trip to Ottawa/Hull during the Renoir Exhibition was a replacement for a different trip planned for the future, the spending on the Renoir trip cannot be said to wholly accrue to the Exhibition. Of course, future behaviour is *hypothetical* so caution is required in the use of a respondent's prediction. For example, adjustments were made only for records in which the answer to Q.12-a) as a clear *Yes*. Separate adjustments were made based on the location and number of nights predicted for the hypothetical trip. Procedural details associated with trip replacement are discussed in the Technical Appendix (under separate cover).

Trip Replacement

12-a) Did your trip to the Renoir *Portraits* Exhibit replace a different overnight trip that you had planned to take to the Ottawa/Hull area in 1997?

No	55-	1	→ SKIP TO Q.13
DON'T KNOW		X	→ SKIP TO Q.13
REFUSED		Y	→ SKIP TO Q.13
Yes		3	→ ASK -b)

-b) On the trip that the Renoir *Portraits* Exhibit replaced, about how many nights do you think you would have spent in Ottawa/Hull, in other parts of Ontario outside Ottawa, and in other parts of Québec outside Hull?

_____ Estimated # of nights in Ottawa/Hull

56- 57-

_____ Estimated # of nights in Ontario outside Ottawa

58- 59-

_____ Estimated # of nights in Québec outside Hull

60- 61-

-c) Do you think you would have gone to the National Gallery on this other trip?

Yes	62-	1
No		2
DON'T KNOW		X
REFUSED		Y

Questions in a survey that attempt to capture future behaviour and/or "what if" scenarios are not necessarily accurate reflections of what will or might have happened. Nonetheless, by including sequences such as the Activity and Trip Substitution sequences in the Renoir Exhibition study, results can be put forward with the knowledge that estimates of *incremental economic impact* have been taken into account to the extent possible.

From a practical perspective, activity and trip substitution questions, while useful to "cover all the angles" are somewhat problematical. Because of their hypothetical nature, they are difficult for some respondents to understand, especially if the visitor is fluent in neither English nor French. Secondly, adjustments to take into account the dollar value of such hypothetical predictions of future behaviour place considerable burden on the data management process. Very fine distinctions are made in the handling of these dollars, requiring a series of *if/then* programming specifications at the data management stage. While such steps have been incorporated into the data management procedures, they add two requirements to future studies of this type:

- Sophisticated technical skills for data management; and
- Additional budget to ensure that the appropriate technical skills are in place and are paid for in the budget.

These requirements limit the type and number of firms that can conduct studies of this nature, and the number of events or touristic activities that can afford to have them conducted.

Suggestion 1

Retention of activity and trip substitution effects is necessary in principle, but might be handled via survey-generated adjustment factors.

Further analysis of the volume of change that results from the application of the procedures to capture and manage activity and trip substitution could be undertaken with the objective of establishing factors that could be applied to simplified studies. An examination of the three studies conducted to date might be initiated to determine whether they can provide a meaningful "con-

stant" for adjusting impact estimates so that a more simplified data capture and management process could be developed for wider application at events and festivals.

G-3. A Single Scaling Question For *Incremental* Impact Assessment

In the Barnes Exhibit project, several hypotheses were tested. One was associated with the most appropriate *consumer-based* measurement of *incremental consumer spending*. As alluded to in earlier sections of this report, *main purpose* is a useful but relatively gross measure for establishing the proportion of consumer spending that can be said to have occurred solely because a touristic event took place. A variety of questions were tested in the Barnes Exhibit study, including the eleven point bi-polar scale used in the Breeders' Cup and Renoir Exhibition projects (see Q.4).

4. How much influence, if any, would you say the Renoir *Portraits* Exhibit had in determining the choice of Ottawa/Hull as a stop or destination on your trip? Using this scale (HAND CARD 2), please choose any number between 0 and 10, where 0 indicates "no influence" and 10 is that the *Renoir Portraits Exhibit is the main single reason* for visiting Ottawa/Hull on this trip. CIRCLE ONE NUMBER ONLY.

NO
INFLUENCE
KNOW

SINGLE MAIN

DON'T
REASON

0 1 2 3 4 5 6 7 8 9 10 X

An estimate of the incremental consumer spending associated with an event or activity is not subject to an empirical test for its reliability. Nonetheless, the eleven-point scale used in the three projects described herein has met the tests of internal consistency (e.g., people who say the main purpose of the trip was "to attend the event/activity" also assign the event/activity a "10" on the scale; those with different main purposes do *not* assign a "10" to the influence, etc.). This measure has the benefit of simplicity on two levels:

- It is simple to administer to respondents and is relatively easy for them to answer.
- It constitutes a practical, straightforward method of estimating how much consumer spending should be assigned to the event by converting each point on the scale to ten percentage points of spending, ranging from zero ("no influence", 0 on scale) to one hundred percent ("single main reason", 10 on scale).

Suggestion 2

Utilize an eleven point scale for establishing the role of the activity or event in the trip decision, and rely on the conversion of scale points to ten percent intervals for application of basic consumer spending.

Additional questions, such as main purpose of trip, could be retained in a questionnaire for other analytical purposes, but the scalar approach could be used to identify both the role of the event and the level of spending for core categories that would be considered *incremental*.

G-4. Transportation Spending

As described in the Technical Appendix, *transportation* is the most complex spending category from an accrual perspective. In each of the three studies conducted to date, refinements have been made to increase the accuracy of this expenditure item while not imposing undue strain on the respondent. The complexity of this measure is associated with the need to separate domestic and foreign carriers that bring a visitor to a region and differentiating between inter and intra-regional travel costs.

In the Renoir Exhibition, a question sequence was developed that is quite complex in appearance but relatively simple to administer for the interviewer and to respond to on the part of the visitor. This sequence proved to remove numerous uncertainties about which travel costs should and should not accrue to the region under study (Ontario/Quebec). While an improvement over previous surveys, this question sequence (see Q.13, long form questionnaire, appended) has several drawbacks:

- It requires well-trained and skilled interviewers to administer; and
- It requires considerable review at the data management stage to determine the flow of transportation and the portions of spending that are associated with the region under study as either "origin" or "destination" spending.

While transportation, particularly for long-haul visitors, can be a very significant cost, comparatively few transportation dollars are ultimately attributable to an event or activity if traditional rules such as those employed by Statistics Canada in the Canadian and International Travel Surveys are followed. Most transportation spending, by convention, accrues to the place of origin rather than to the destination. Thus, the cost of an airplane ticket for a Vancouver or Paris visitor to Ottawa would accrue to British Columbia or France, respectively. If, however, the Vancouver resident flew to Toronto and took a train to Ottawa to see the Renoir Exhibition, the train fare would accrue to Toronto and would, therefore, be associated with the regional economic impact of the Exhibition.

Suggestion 3

The complexities of travel mode and carrier branding (domestic/foreign) must be addressed if a simplified, more affordable survey design is to emerge.

If economic benefit assessments of major touristic activities or events are to become more widely used and more affordable, efforts must be made to simplify the amount of information required to manage transportation spending. Options that require further study include:

1. Elimination of transportation *to* the region as a component of the economic impact assessment since this spending is assigned based on a set of principles wholly external to the traveller's intentions or spending patterns;
2. Utilization of factors or algorithms to estimate *intra-regional* spending based on distance travelled within the region and mode(s) of transport.

G-5. Post-Trip Confirmation Of Spending

The Renoir Exhibition project relied exclusively on estimates of total trip expenditure captured prior to the respondent completing his/her trip. This approach differs from the Barnes and Breeders' Cup studies: for selected North Americans in both earlier studies, a follow-up telephone call was made to respondents once they had returned home to obtain travel spending information *once the trip was over*. The decision to limit the Renoir Exhibition project to *expected* total trip spending was made on the basis of budget constraints and the fact that a comparison of "during trip" and "post trip" spending from the Barnes produced very similar findings for all categories of spending apart from retail. In the case of retail spending, some groups reported higher spending once the trip was completed (*impulse purchases*) while others reported lower spending.²²

Within the Renoir Exhibition project, there is no evidence to suggest that respondents felt unable to provide estimates for their total trip spending. Levels of "don't know", "not stated" and "total only" (rather than category-by-category estimates) are quite low in the Renoir Exhibition study. Average per diems are also well within the ranges obtained in studies such as the Canadian or International Travel Surveys. Other arguments that favour collecting only one estimate of trip spending, via an exit survey at the event or attraction, include the following:

- Because of language, logistical and cost issues, neither the Barnes nor the Breeders' Cup projects obtained post-trip estimates from Overseas visitors. In the Renoir Exhibition project, budget constraints ruled out any telephone follow-up. In so doing, the Renoir Exhibition data set adopts a uniform approach to spending estimates irrespective of visitor origin. This study does not, therefore, create an imbalance between North American and Overseas visitor estimates.
- Spending on long duration trips is likely to be the most difficult for a traveller to estimate before the trip has ended. Most long duration trips are made by "long haul" travellers who are either from overseas or distant Canadian provinces or American states. Among Barnes Exhibit and Renoir Exhibition visitors, these *long-haul* visitors are the same ones

who claim that the art exhibit had little or no influence on their trip decision. Consequently, for many of these travellers, the only spending that accrues to the incremental "account" is spending that took place at the gallery on the day they saw the paintings. Loss of accuracy is not, therefore, a major concern since the spending that accrues to the "account" can be reported quite accurately: it is, in most cases, restricted to on-site spending.

On the other hand, as noted in the Breeders' Cup report, this single-day *event* attracted a much higher proportion of visitors from long-haul destinations who were in Toronto *only* because the horse racing event was being held in this city than was the case for the Barnes Exhibit and than is the case for the Renoir Exhibition. A conclusion of the Breeders' Cup study was that a single day *event* is quite different from a multi-week *attraction* in terms of the types of visitors it attracts and the amount of spending that is directly attributable to the event or attraction. In the case of the Breeders' Cup, budgetary constraints were in place to the extent that overseas visitors were asked to provide only minimal information about their trip and had long-haul North American *surrogate* spending patterns assigned to them on a per person/per night basis.

Suggestion 4

A program of "spot-checking" might be an appropriate mechanism for creating a *generic* approach to economic benefit studies such that every nth study includes a component that checks for calibration of "during trip" expenditures.

To keep costs under control, a research program could be created to allow most attraction-based economic impact assessments to rely on exit surveys for obtaining expenditure estimates, so long as a commitment is made to undertake every nth study with a "post trip" spending approach to ensure that the estimates do not deviate significantly from "during trip" estimation.

G-6. Some Thoughts For The Future

Next steps in developing a *generic* model for economic benefit analysis require that serious consideration within Canada's tourism research community be given to the following issues:

How rigorous is rigorous enough?

Any research program can be made increasingly precise, by increasing the sample sizes, the level of detail at which data are collected and the procedures used to manage the data file. Up to now, the methodology described in this report and its predecessors have been sufficiently well funded that a high degree of rigour can be maintained. Is it enough? Too much?

What criteria should we use to determine the scale and scope of an economic impact assessment?

Some design elements are essential for producing credible economic benefit analysis. These include:

- systematic and rigorously applied random sampling plans and large sample sizes at both the tally and detailed interview stage;
- clearly defined inputs and procedures for managing spending and trip characteristic data; and
- good economic impact models for utilization of the survey outputs.

The research community needs to come to terms with the establishment of criteria for each of these elements that might be appropriate for small events in small jurisdictions; large events in large jurisdictions and the like. In the absence of such criteria, the design pioneered in the Barnes Exhibit study and refined in the Breeders' Cup and Renoir Exhibition studies may be restricted to large, well-funded events and attractions.

As the number of points on the curve increases, there is increasing potential to examine economic impact assessment data as a basis for prediction.

Ideally, with sufficient "readings" from sufficiently diverse types of events and attractions over different seasons of the year and in different parts of Canada, the tourism community would emerge with the ability to review the scope of a potential attraction or event and *predict* the amount of economic benefit it would generate under a variety of conditions (e.g., if a certain number of long-haul Canadians could be convinced to come and spend a certain number of nights . . .).

For a variety of reasons, a predictive model of economic impact for cultural events and other touristic attractions would be of use to Canada's tourism businesses. The three studies conducted to date represent two types of events/activities (major art exhibitions and a thoroughbred horse race), two cities (Toronto and Ottawa) and three seasons (autumn, winter, summer). By virtue of the differences among the three, different spending patterns and visitor profiles emerge (see Appendix C for comparisons of key measures). While three points on a curve are not sufficient to provide a model that might predict the relative impacts of different types of events, they constitute a good beginning for initial analysis.

Appendix A: Glossary²³

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.

Appendix B: Study Methodology & Response Rates

The Fieldwork

Under the project management of Research Resolutions, fieldwork for the Renoir Exhibition Economic Impact Study was supervised by Nancy Gulland, President of Maverick Research Inc. Interviewers were residents of the Ottawa/Hull area and worked under the local supervision of Opinion Search Incorporated, an Ottawa research firm. All interviewers were fluent in English and French, and all field materials used in the study were available in both official languages.

Co-operation by staff at the National Gallery of Canada was a substantive factor in the success of the fieldwork. They ensured access to the entry area of the Exhibition for the tally component of the project, and provided very suitable space for conduct of the *exit* interview in the main lobby. Special thanks are due to Léo Tousignant and Jennifer Wall for smoothing the way for the interviewers and supervisors throughout the very busy period of the Exhibition.

Dates and times of the eighteen (18) stints are detailed below. These stints were selected in a random manner from all possible stints over the eleven week time period to ensure representation of different months and weeks throughout the Exhibition (June, July, August, September), types of days (weekend/holidays; weekdays) and different times of day (morning/afternoon).

HOLIDAYS/WEEKENDS				REGULAR WEEKDAYS (MON/TUES)				LONG WEEKDAYS (WED/THURS/FRI)					
29-Jun	PM (1:00 - 4:30)												
30-Jun	PM (1:00 - 4:30)	19-Jul	AM (9:00 - 1:00)	21-Jul	PM (1:00 - 4:30)					17-Jul	AM (9:00 - 1:00)	11-Jul	PM (1:00 - 6:30)
						29-Jul	AM (9:00 - 1:00)	23-Jul	PM (1:00 - 6:30)				
2-Aug	PM (1:00 - 4:30)			11-Aug	AM (9:00 - 1:00)								
		6-Sep	PM (1:00 - 4:30)							21-Aug	PM (1:00 - 6:30)	15-Aug	AM (9:00 - 1:00)
31-Aug	AM (9:00 - 1:00)					2-Sep	PM (1:00 - 4:30)	27-Aug	AM (9:00 - 1:00)				
		27-Jul	AM (9:00 - 1:00)										
		17-Aug	PM (1:00 - 4:30)										

In order to ensure sufficient interviews with visitors from outside the Ottawa/Hull area, quotas for completed *exit* interviews were set. These quotas, described below, were not applied at the tally stage of the process so that the visitor counts obtained in the tally procedures could be used as the basis of estimating the proportions of visitors from each of the key origin regions.

As is evident from the following table, not all quota groups were achieved, largely because of the relative scarcity of visitors from outside Ontario and Quebec in the total visitor population.

Renoir Exhibition: Quotas & Actual Interviews				
	Total Exit Interviews		Actual Interviews	
	Household Travel Parties		Household Travel Parties	
Total	1,000		942	
	#	%	%	%
Local Residents (Ottawa/Hull CMA, 505)	150	15	212	23
Other Ontario	200	20	215	23
Other Quebec	200	20	275	29
Other Canadian Provinces	125	12	86	9
USA	200	20	95	10
Overseas	125	13	59	6

The Tally Process, Record Of Contacts & Completion Rates

Interviewers approached visitors to the Renoir Exhibition as they handed over their tickets in the rotunda area of the gallery. At any one time, two to three interviewers were involved in the tally process at this location. Because visitors entered the Exhibition at half-hour intervals, substantial flows of people would come through the tally area at the hour and half-hour. Interviewers tallied as many of these visitor parties as possible. They would approach a "visitor unit" (people walking in together) and ascertain whether all members of the unit were members of the same household. If so, a spokesperson was asked to provide the necessary tally information. If multiple households were represented in the visitor unit, separate tallies were completed with *each* household.

Once a household visitor party was "tallied", an adult representative was offered the opportunity for a follow-up interview at the end of their visit to the National Gallery of Canada or not, depending on the quotas set for the day. While quotas changed marginally over the course of the survey period, in the main, all Americans, Overseas visitors and Canadians living outside Ontario and Quebec were asked to complete the follow up interview, whereas only one in every six local visitors were asked to do so. Visitors from other parts of Ontario and Quebec were asked to complete interviews consistently for the first ten stints, and, because of their high level of attendance, were reduced to an interval of every third for the final stints of the project.

Copies of the tally form used in the morning and afternoon stints are appended to this document.

Over the eighteen stints, attempts were made to tally almost 6,000 visitor units (5,928). Almost all of these parties held tickets for the correct stint period (5,910) and most were sufficiently proficient in either English or French to complete the tally (5,495).

Co-operation and completion rates for the 5,495 visitor household parties that were successfully tallied are described in the following table.

Co-operation/Completion Rates		
Total Tallied Household Visitor Parties		5,495
	#	%
Interview Requested	3,130	53
	3,130	
Disposition Of Exit Interview Requests	#	%
Refused Interview Invitation	931	30
Accepted Interview Invitation But Did Not Complete Interview	1,257	40
Completed Exit Interview	942	30

Source: Research Resolutions Detailed Tabulations, page 80-1.

The Exit Interview

Two versions of an exit survey questionnaire were used in the study: a short version for residents of the Ottawa/Hull CMA (*local*) and a longer version for all other visitors (*non-local*).

- Both versions covered details of the household travel party composition, the respondent's demographic characteristics including place of residence, evaluations of the Renoir Exhibition, details of on-site spending at the National Gallery on the day of the visit and information on past experience with and future expectations of visits to the National Gallery.
- In addition, the *non-local* visitors were asked to provide information on the main purpose of their trip, the level of influence the Renoir Exhibition had on the decision to visit the Ottawa/Hull area, and details of their trip and expenditures in Ontario and Quebec.

The short version took approximately five minutes to complete and the long version required between ten and fifteen minutes to complete, depending on the complexity of the respondent's trip. Interviews were administered in English or French, based on the preference of the visitor. Copies of the survey materials, including written instructions provided to the interviewers, are appended to this document.

Since the field quotas for place of residence were set at the tally stage of the survey, interviewers administered an exit survey to as many of the visitors who arrived with a "tag" (identification indicating that they had agreed to complete an interview as a result of their tally responses) as was possible. The number of interviewers at the exit site varied over the course of the stint, based on traffic flow. A minimum of two interviewers and a maximum of six interviewers were at the exit site at any point in time.

Prior to conducting the interview, interviewers reminded the visitor that they should be ready to leave the Gallery for the last time on the visit, and should have completed all their purchases at the Bookstore prior to the survey. At the end of each interview, a poster of the National Gallery of Canada was provided to the visitor, as a *thank you* for participation in the project. The National Gallery provided the posters. As a goodwill gesture, people who arrived at the exit inter-

view site but could not be accommodated within a reasonable period of time were also provided with a poster. No more than a ten minute wait for an available interviewer was deemed "reasonable".

Data Management Procedures

All coding and data processing were conducted by The Tilwood Group, Inc., a Toronto-based data processing specialist. The algorithms and rules used in the processes have been developed by Research Resolutions and were applied under the direct supervision of Judy Rogers, Project Manager. These procedures included:

- weighting and projection of surveyed visitors to the total visitor population,
- assignment of prepaid package spending estimates to specific categories of expense,
- identification and management of substitution impacts within consumer spending estimates; and
- development of incremental consumer expenditures on a region-by-region basis.

The National Gallery of Canada provided a final estimate of visitors for projection purposes (328,582), although this figure was subsequently revised to include "total visitors" to the Renoir Exhibition. The latter figure (approximately 340,000) includes individuals who attended the Exhibition but did not have an opportunity to fall within the sample for the survey (attendees at special events, after-hour gala events, etc.). All estimates in the tabulations provided for the project are based on the 328,582 *in frame* visitors.

Further details of the coding and data management procedures are available in the Technical Appendix.

The Economic Impact Model

Greg Hermus of the Canadian Tourism Research Institute (CTRI) was provided with final estimates of visitor spending by region and category of expense and analogous data on spending deemed to be directly attributable to the Renoir Exhibition. These estimates formed the input for CTRI's tourism economic impact model, and produced the estimates of gross and incremental impacts in the economies of Ottawa, Hull, Other parts of Ontario and Other parts of Quebec. Corresponding gross and incremental impacts on wages/salaries, employment, and taxes (federal, provincial, municipal) were also outputs of the CTRI model. CTRI is an Ottawa-based tourism consultancy affiliated with the Conference Board of Canada.

Further details about CTRI and its tourism economic impact models are available in the Technical Appendix. That document also includes the final detailed outputs from the model.

Appendix C: Comparisons Between The Barnes, The Breeders' Cup and the Renoir Exhibition

In the following table, some key statistics are provided that clearly indicate the power of a special *event* with a world-wide following of affluent fans -- the Breeders' Cup -- relative to either of the multi-week art exhibits. A very sizeable proportion of visitors to both the Barnes and the Renoir Exhibition went to the respective galleries as one of multiple activities on a touristic trip or while in town to visit friends/relatives or to conduct business. Comparatively few non-local residents of Toronto and Ottawa/Hull came to these cities specifically to see the paintings. In contrast, the only reason many horse-racing fans were in Toronto in late October was to watch the Breeders' Cup Championship Races: the Breeders' Cup was accorded an average score of 9.4 on the eleven-point *influence* scale among non-local visitors compared to 7.1 among non-local visitors at the Renoir Exhibition.

Differences in duration of the three attractions are also quite important: the Breeders' Cup Horse Race lasted for a single weekend, the Renoir Exhibition ran for eleven weeks in the summer of 1997, and the Barnes Exhibit ran for 15 weeks in the winter of 1994/1995.

Key Comparisons Among Three Different Attractions/Events			
	Renoir Exhibition	Barnes Exhibit	Breeders' Cup
Incremental Expenditure Impacts	\$31,500,000	\$38,200,000	\$14,400,000
Person Years Of Employment	823	1,070	340
Total Visitors	340,000	597,300	37,500
Commercial Room Nights	159,000	120,600	24,000
Duration Of Exhibition	11 Weeks	15 Weeks	2 Days

Appendix D: Summary Tables

Table A-1

Activity - Based Substitution Effects: Would Have Gone To Another Museum							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(328,600)	(121,100)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%	%
Would Have Gone To Another Museum If Renoir Exhibition Had Not Been At National Gallery	26	23	29	27	20	43	32
In Ottawa/Hull	21	16	26	21	20	40	24
In Other Parts of Ontario	4	6	5	1	1	-	1
In Other Parts of Quebec	3	1	1	6	1	3	8

Source: Research Resolutions Detailed Tabulations, pages 19-1/2. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

Table A-2

Trip Substitutions Among Overnight Visitors						
	Place of Residence					
	Total	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(551)	(178)	(140)	(86) ¹	(88) ¹	(59) ¹
Weighted, Projected Overnight Visitors	(146,700)	(58,300)	(52,200)	(11,400)	(12,200)	(12,600)
	%	%	%	%	%	%
Trip made for Renoir Exhibition . . . Another Trip To Ottawa/Hull						
Did <i>Not</i> Replace	99	99	99	98	98	100
Did Replace	1	*	1	2	2	-

Source: Research Resolutions Detailed Tabulations, page 44-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

Table A-3

Mode(s) Of Transport					
	Place of Residence				
	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%
Any Auto	87	94	48	74	47
Any Commercial Bus/Train/Plane	12	6	71	29	94
Commercial/Charter Bus	6	4	4	3	12
Train	3	2	2	5	16
Plane	3	*	67	26	94

Source: Research Resolutions Detailed Tabulations, pages 45-1. ¹ Caution: Small base size. *Less Than 0.5%. Note: All projected bases rounded to nearest 100. Modes of transport include travel to Canada and within Canada. Columns add to more than 100% because of multiple modes of transport used on the trip.

Table A-4

History Of Visits To Ottawa/Hull					
	Place of Residence				
	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%
Newcomers	7	3	28	41	66
Number Of Previous Overnight Trips In Past 5 Years					
Any	66	77	55	42	27
One/Two	29	24	22	21	10
Three/Four	10	18	10	7	5
Five Or More	27	35	23	15	12

Source: Research Resolutions Detailed Tabulations, pages 21-1, 23-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

Table A-4

Intention To Return To Ottawa/Hull In Next 2 Years (Overnight)					
	Place of Residence				
	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%
Very Likely	58	56	42	29	27
Somewhat Likely	22	24	26	38	18
Unlikely/Don't Know	20	20	32	32	55

Source: Research Resolutions Detailed Tabulations, page 15-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

Table A-5

Length Of Trip & Length Of Stay In Ottawa/Hull					
	Place of Residence				
	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%
Same-Day Trip	18	47	-	9	-
Any Nights Away From Home	82	53	100	91	100
Average Number Of Nights Away From Home (Overnight Visitors)	4.9	3.0	13.7	13.1	29.3
Average Number Of Nights In Ottawa/Hull (Any Nights In City)	2.8	2.2	6.4	3.5	6.1

Source: Research Resolutions Detailed Tabulations, page 25-1/4. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100.

Table A-6

Accommodation Used In Ottawa/Hull						
	Total	Place of Residence				
		Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(551)	(178)	(140)	(86) ¹	(88) ¹	(59) ¹
Weighted, Projected Overnight Visitors	(146,700)	(58,300)	(52,200)	(11,400)	(12,200)	(12,600)
	%	%	%	%	%	%
Hotel	46	52	45	34	44	39
Motel	2	3	1	-	10	-
Camping/Trailer Park	4	4	6	1	5	-
Bed & Breakfast	4	4	4	3	2	6
Other Paid Accommodation	2	2	1	5	2	2
Home of Friends	16	16	14	31	9	19
Home of Relatives	18	14	20	21	13	20
Private Cottage	1	*	1	3	-	-

Source: Research Resolutions Detailed Tabulations, pages 26/41-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100. *Less Than 0.5%.

Table A-7

Average* Nights In Accommodations In Ottawa/Hull						
	Total	Place of Residence				
		Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(551)	(178)	(140)	(86) ¹	(88) ¹	(59) ¹
Weighted, Projected Overnight Visitors	(146,700)	(58,300)	(52,200)	(11,400)	(12,200)	(12,600)
	#	#	#	#	#	#
Hotel	2.4	2.2	1.8	4.8	2.6	3.6
Motel	2.3	3.0	1.0	-	1.7	-
Home of Friends	3.5	2.6	2.8	6.7	2.6	4.7
Home of Relatives	4.6	3.7	2.3	6.1	7.8	13.7

Source: Research Resolutions Detailed Tabulations, pages 26/41-1. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100. *All averages are based on those visitors who spent any nights in the particular type of accommodation.

Table A-8

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 42-1. All figures are rounded to the nearest 100. A night spent by a household visitor party is considered to be a "room night".

Table A-9

Prepaid Packages							
	Place of Residence						
	Total	Local	Other Ontario	Other Quebec	Other Canada	USA	Other Country
Unweighted	(942)	(212)	(215)	(275)	(86) ¹	(95) ¹	(59) ¹
Weighted, Projected Visitors	(328,600)	(121,100)	(70,900)	(99,200)	(11,400)	(13,400)	(12,600)
	%	%	%	%	%	%	%
Any	6	6	6	4	6	8	7
Items Included							
Tickets To Renoir Exhibit	5	5	5	4	3	3	1
Any Transportation From Home To Ottawa/Hull	1	-	3	1	2	3	6
Accommodation	3	-	5	4	4	7	7
Meals	1	-	3	-	2	4	1
Other Entertainment	1	-	1	1	4	4	-

Source: Research Resolutions Detailed Tabulations, pages 46-1/2. ¹ Caution: Small base size. Note: All projected bases rounded to nearest 100. *Less than 0.5%.

Notes

¹ Judy Rogers, Principal of Research Resolutions managed the project (Research Resolutions, 16 Hepbourne Street, Toronto, ON M6H 1J9 Tel 416/531-9973; Fax 416/534-1372; E-mail jrogers@pathcom.com).

² 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.

³ 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).

⁴ "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.

⁵ See Appendix for Record of Contact information and completion rates.

⁶ See the Technical Appendix for more details on substitution effects.

⁷ 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).

⁸ 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.

⁹ 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.

¹⁰ Groceries purchased in stores are also included in "Food/Beverages".

¹¹ Visitor household party nights are used as a surrogate for "room nights".

¹² See Detailed Tabulations, pages 5-1/7.

¹³ See *National Gallery of Canada Summer 1994 Survey*, Draft, with updates for 1995 and 1996, prepared for the National Gallery of Canada by Visitor Services; and *Comparison of Survey Results: Summer Exhibitions 1994-1996* prepared by Internal Audit, November 1996. Both of these documents are internal reports provided to Research Resolutions by the National Gallery.

¹⁴ Average ages are based on reported birthdates of visitors fifteen years of age or older.

¹⁵ "Household Party Size" represents only the number of people from the *same* household. If people came to the Exhibition with members of other households, the number of people *from each household* was counted separately. This measure is not, therefore, an estimate of "party size".

¹⁶ See Detailed Tabulations, page 7-3.

¹⁷ See *Community Economic Benefits of the Barnes Exhibit in Toronto*, Judy Rogers, published in *Tourism and Sustainable Community Development, TTRA-Canada Conference Proceedings*, St. John's, Newfoundland, 1995.

¹⁸ Substitution effects are also taken into account in determining the final portion of consumer spending that is attributed to the RE.

¹⁹ Please see Executive Summary for the economic impact of consumer spending associated with the Renoir Exhibition (*incremental*), and refer to the technical documentation for a description of procedures used to calculate gross and incremental consumer spending.

²⁰ See Detailed Tabulations for details of total trip spending in Ontario/Quebec.

²¹ See Note 20.

²² The factors developed in the Barnes Exhibit study for retail spending were applied for domestic and non-domestic Renoir Exhibition visitors. For more details, see the Technical Appendix.

²³ The *Glossary* was written by Alex Athanassakos of the Ontario Ministry of Economic Development, Trade and Tourism. It has been modified slightly, and is included with the permission of the author.