

Blockbusters & The Cultural Visitor

**A Special Analysis Of Out-of-Town
Visitors To The Barnes Exhibit
At The Art Gallery Of Ontario**

Prepared for:

The Department Of Canadian Heritage

The Department of Canadian Heritage wishes to acknowledge the support of the Ontario Ministry of Citizenship, Culture and Recreation (formerly the Ontario Ministry of Culture, Tourism and Recreation) in undertaking this project by permitting access to the visitor survey data which they had collected during the Barnes Exhibit.

Prepared by:

Judy Rogers



**Research
Resolutions**

Blockbusters & The Cultural Visitor

**A Special Analysis Of Out-of-Town
Visitors To The Barnes Exhibit
At The Art Gallery Of Ontario**

Prepared for:

**Heritage Policy and Research Directorate and Strategic
Research and Analysis Directorate
Department of Canadian Heritage**

The Analysis Plan was developed jointly by the Strategic Research and
Analysis Directorate and Judy Rogers

**Judy Rogers
November 1996**



**Research
Resolutions**

**Strategic
Research and
Analysis**

**Recherche
et analyse
stratégique**



Table of Contents

I.Introduction	1
II.Executive Summary	3
III.Just How Influential Can A Blockbuster Cultural Event Be?	6
Total Visitors To The Barnes Exhibit	6
Barnesians And Other Visitors	7
A Halo of Influence	8
Creating Cultural Opportunities: Substitutions	9
IV.Demographics: Who Came To The Barnes Exhibit?	12
V.The Culture Vulture.....	15
Can I Get There From Here? Transportation Linkages	17
VI.Participation In Other Activities While Travelling in Ontario	18
Spin-off Effects	18
Quebeckers	19
Americans.....	19
Pre-Planning	20
A Retailer's Dream	21
VII.Nights And Accommodation	22
VIII.Spending Patterns	26
Appendix Tables	30
Notes.....	43

I. Introduction

Cultural visitors . . . for all reasons

A major blockbuster event such as the Barnes Exhibit held at the Art Gallery of Ontario in 1994 provides all cultural institutions with a unique opportunity to examine a relatively rare creature: the visitor who leaves his or her home town in order to attend a widely publicised cultural event.

Similarities and differences between this person — the out-of-town visitor who came specifically to see the Barnes Exhibit — and the one who travelled to Toronto for other reasons but elected to see the Barnes Exhibit as long as he/she was in town, can provide guidance in the planning, development and marketing of other major cultural events.

- ◆ Is the cultural visitor who takes a trip especially to see a major cultural event to be experienced identical to one who happens upon it during a trip that was taken for other reasons?
- ◆ Do these types of visitors have similar demographic profiles?
- ◆ Do they engage in the same types of activities?
- ◆ Do they spend similar amounts of money on similar types of purchases?
- ◆ Is one type of visitor “more valuable” from a cultural or economic perspective than the other?

Questions such as these are answered in the following pages, using information collected in a study of visitors to the Barnes Exhibit at the Art Gallery of Ontario in the autumn and early winter of 1994. The study was conducted by Judy Rogers, Research Resolutions, on behalf of the Ontario Ministry of Culture, Tourism and Recreation (MCTR) and with the full co-operation of the Art Gallery of Ontario. The Department of Canadian Heritage, with the study sponsor’s permission, supported the preparation of additional tabulations and analysis of the Barnes Exhibit Economic Impact Study and funded preparation of this report.

What was the Barnes Exhibit?

A major art exhibition From Cézanne to Matisse: Great French Paintings from the Barnes Foundation was open to the public at the Art Gallery of Ontario (AGO) from September 17, 1994 through January 1, 1995. During this time period, it is estimated that nearly 600,000 individuals — including almost 500,000 general admission visitors and about 100,000 school students, corporate guests and other visitors — saw the collection of 83 impressionist and post-impressionist paintings.¹ The Barnes Exhibit was promoted by the AGO as a “once in a lifetime” or “blockbuster” event and received widespread attention from Canada’s cultural community and the media.

The Barnes Exhibit took place at a specific time, in a specific place, with an extensive and well-constructed marketing and promotional campaign. It was a shoulder season event in Canada’s largest city — a city that supports considerable business and pleasure travel throughout the year, and one that is situated in relatively close proximity to and on easy auto, rail and air transportation corridors with other major population centres including Montreal, Ottawa, and Hamilton in Canada and Buffalo, Syracuse, and Detroit in the USA. The extent to which the composition of visitors attracted to the Barnes Exhibit from outside Metropolitan Toronto would resemble visitors to the same event in other centres, and/or at other times is not known. The reader is, therefore, encouraged to use discretion in extrapolating the information presented herein to other events, other times, and other places.

Those for whom seeing the Barnes Exhibit was the main purpose of the whole trip are called Barnesians. People who took the trip that included a visit to the Barnes Exhibit, but said their main purpose was business, visiting friends or relatives, or other pleasure purposes, are referred to throughout this report as Other Visitors. Barnesians and Other Visitors described in the following pages do not include residents of Metropolitan Toronto who visited the Barnes Exhibit or out-of-town visitors who live in Canadian provinces other than Ontario and Quebec, or in countries other than Canada and the USA even though all these visitors are included in the estimates of economic impact generated by the Barnes Exhibit during its run at the Art Gallery of Ontario. For comparative purposes, a profile of all visitors to the Barnes Exhibit, including local residents, is appended to this report (see A-12A, A-12B).

II. Executive Summary

- ◆ A major blockbuster event like the Barnes Exhibit, particularly when supported by an intensive and extensive marketing program in key feeder regions has the power to attract many visitors and to exert influence on many others.
- ◆ Of all out-of-town visitors from Ontario, Quebec and the USA to the Barnes Exhibit, 7-in-10 made the trip specifically to see the paintings. The fact that almost all other visitors — those who came to Toronto on business, to see friends and relatives or for general holiday purposes — had planned to visit a museum or gallery before they left home also suggests that an exhibit such as the Barnes creates a wide halo of influence.
- ◆ People who made a special trip to see a blockbuster cultural event are different from those who took trips away from home for other reasons and happened to attend the same event. Like many other cultural events, the Barnes Exhibit attracted a high proportion of women. It also attracted a middle-aged crowd, but Barnesians who live outside Ontario were more likely to be older women than were their counterparts who were in Toronto for other reasons and saw the Barnes Exhibit while there.
- ◆ Even though they have fewer advanced university degrees and are slightly less affluent than business travellers who found their way into the Art Gallery of Ontario to see the Barnes Exhibit, Barnesians make a very significant contribution to spending at the site of the blockbuster event. They spent considerably more money at the Art Gallery of Ontario than did those who took their trip for other purposes.
- ◆ Since blockbuster events such as the Barnes Exhibit seem to attract the comparatively affluent and highly educated, an event such as this could be expected to capture more impromptu traffic in centres that attract executive business travellers: those with sufficient seniority and expertise that they are elected to travel inter-provincially and/or internationally on behalf of their firms. The success of an event such as the Barnes Exhibit could, in turn, be closely tied to whether it is held in a centre that can provide the business connections that a location like Canada's financial centre — Toronto — can.
- ◆ In this context, cross-marketing a culture/business trip at the “executive” level might prove to be a powerful mechanism for attracting visitors to an exhibit of this type, particularly in the current era of short, getaway holidays that are being linked to business travel.
- ◆ Generally, a blockbuster event is thought of in terms of what the exhibit or event has to offer the consumer, but there is another side to such a cultural activity: the consumer constructing a trip to match the stature of the event. This “event

building” was most evident among Barnesians who crossed a border to see the exhibit. They “treated” themselves — they dined in high quality restaurants and stayed in hotels or other forms of commercial accommodation at much higher rates than did Other Visitors.

- ◆ Creation of their own “event” in parallel with the “blockbuster event” could explain why Barnesians spent so much money at the gallery itself — they wanted momentos and souvenirs to remind them of this “special occasion”.
- ◆ The Barnes Exhibit generated a net gain for “culture”. It enticed a substantial number of people to a cultural activity that would not otherwise have engaged in one. 62,000 out-of-town parties, or about 90,000 people, indicated that they would not have been at a cultural or recreational event on the day of their Barnes visit had this particular exhibit not been available for them. Cannibalisation of potential markets for other cultural institutions was considerably lower than the extension of the cultural umbrella: the Barnes Exhibit drew about 17,000 visitor parties that were in town for “other” reasons away from other cultural activities.
- ◆ Barnesians had a more highly focused trip than did those who came for other reasons. They were, for example, less likely to engage in other cultural activities while in the province, largely because many of those from Ontario — the “home” province — were on same-day trips and may simply not have had time to do more than attend the blockbuster event.
- ◆ Barnesians from Quebec and the USA who did spend nights away from home spent fewer of them than did people who were travelling for other purposes. On average, a Barnesian visitor party that spent any nights away from home in Ontario spent just over two nights (2.3) whereas the corresponding Other Visitor spent almost twice this number (4.1). Like their same-day counterparts, these overnight Barnesians had less time available to spend on “other activities” than did overnight travellers who came for other reasons.
- ◆ Regardless of the length of the trip, just about everyone found time to shop. For many, this was an unplanned activity, and therefore, yielded unplanned spending. Shopping was, in fact, the most “impromptu” of activities. Approximately 4-in-10 visitors planned to shop while on the trip, but about 7-in-10 actually did so. Information such as this, and the actual amount spent within the retail sector can be powerful incentives for encouraging cross-marketing and cooperation between a cultural institution and local retailers, chambers of commerce and other business stakeholders in the planning and marketing of a cultural event.
- ◆ The most economically “beneficial” groups to attract to a blockbuster event such as the Barnes Exhibit are those who come specifically for the event and who have few options but to rely on commercial accommodation for their lodging: out-of-province and most especially out-of-country visitors. This economic attractiveness must be balanced against the fact that the primary catchment area

for a cultural event is likely to be people living in close proximity. Decisions about market balance must, of course be made in the context of the relative marketing and promotional costs inherent in “near” and “far” markets.

- ◆ Just because they came to the Barnes Exhibit in 1994 does not mean that this culture-oriented, well-educated, affluent population moves out of the market for other major cultural events for the next year or so. In fact, more than 8-in-10 say they usually take at least one out-of-town trip a year to attend a cultural event, and on average, they take between five and six such trips per year!
- ◆ The inclination to take frequent trips to other locations for cultural events may depend on the size of community the Barnesian lives in, whether it is within driving distance of the “culture” destination, and the extent to which the “home community” provides cultural opportunities to its residents. When planning a major cultural event such as the Barnes Exhibit, the nature of feeder markets — in terms of their distance and cultural richness — should be seriously considered. Another key factor, ease of access, also likely played a major role in the attractiveness of the Barnes Exhibit to out-of-town visitors.
- ◆ The advantages of “hassle free” travel become especially important in a market that is ageing. Almost one-third of the out-of-town Barnes Exhibit visitors covered in this report were 55 years of age or over: as this population continues to age, will it still want to get in a car and drive two or three hundred kilometres to reach an art exhibit? Are these mainstays of cultural events likely to find a “package” that includes tickets and a downtown-to-downtown train or plane ride increasingly attractive?
- ◆ Culture as a powerful economic force is clearly evident in the Barnes Exhibit: about two-thirds of the out-of-town visitor parties from Ontario, Quebec and the USA who came to the Barnes Exhibit would not have taken their trip had this exhibit not been available for them to see. These same households contributed more than three-quarters of new spending in Ontario — spending that would not have taken place if the Barnes Exhibit had not been in Toronto. While not insignificant, Other Visitors from the three out-of-town locations examined in this report make a less substantial contribution to new money than would be expected in light of their visitor volumes: they represent almost one-in-three visitor parties, but are responsible for only about one-in-five new dollars.
- ◆ A study such as the Barnes Exhibit Economic Impact Study provides cogent, clear arguments in support of cultural activities. It can provide direction for further exploration on the nature and motivations of cultural visitors — explorations that will enable Canada’s culture institutions to plan and market more strategically, more economically, and more effectively.

III. Just How Influential Can A Blockbuster Cultural Event Be?

Total Visitors To The Barnes Exhibit

During its sixteen week run at the Art Gallery of Ontario, the Barnes Exhibit attracted almost 600,000 visitors. Almost one-half of all visitors to the Barnes Exhibit were residents of Metropolitan Toronto (48%), approximately one-third live in Ontario, but outside Toronto, and the remainder came to Ontario from their homes in Quebec (6%), other Canadian provinces (3%), the United States (9%), and other countries (2%).

Origin Of All Barnes Exhibit Visitors		
	Total Visitors 597,300	
Place of Residence	#	%
Local Residents ⁱⁱ	284,000	48
Other Ontario	196,000	33
Quebec	35,400	6
Other Canadian Provinces	16,600	3
USA	52,900	9
Other Countries	12,400	2

Source: Research Resolutions Detailed Tables, Volume II, page 1 and special calculations by MCTR based on non-general admission visitor information provided by the AGO. Figures have been rounded to the nearest 100.

All of these visitors contributed to the overall success of the Exhibit, but only some of them are the subject of this report. Of particular interest for this analysis is the group of individuals who came to Toronto from other parts of Ontario, from Quebec and from the USA and saw the Barnes Exhibit while they were in town (see shaded areas of table, above).

Barnesians And Other Visitors

The Barnes Exhibit was such a strong motivator for travel that it convinced 71,500 out-of-town visitor parties from Ontario, Quebec and the USA to leave their homes and make their way to Toronto to see it. The remaining 32,300 out-of-town visitor parties would have taken their trip irrespective of the Barnes Exhibit, but nonetheless, found their way to the 83 impressionist and post-impressionist paintings at the Art Gallery of Ontario.

Barnesians & Other Visitors								
	Out-Of- Towners¹							
	Total		Ontario²		Quebec		USA	
Total Visitor Parties Unweighted	954		379		260		315	
Weighted Parties	103,782		67,976		15,197		20,609	
	%	#	%	#	%	#	%	#
Barnesians (Took trip because of Barnes Exhibit)	69	71,500	76	51,800	64	9,700	48	10,000
Other Visitors (Took trip for some other purpose)	31	32,300	24	16,200	36	5,500	52	10,600
¹ Ontario (excluding Metro Toronto), Quebec, USA. ² “Ontario” excludes residents of Metropolitan Toronto. Source: Department of Canadian Heritage Tabulations, page 15. Figures have been rounded to the nearest 100.								

Three-quarters of Ontario’s residents who came to see the Barnes Exhibit from locations outside Metropolitan Toronto did so specifically because they wanted to see the exhibit. Almost two-thirds of Quebecers made the trip from their province to Toronto primarily to see the Barnes collection, but fewer Americans took their trip for this purpose. In fact, less than one-in-two residents of the USA came to Toronto primarily to see the Barnes Exhibit. One-in-five came for business or work-related purposes, and the remainder came to see friends or relatives, to see other attractions or events or for general holiday purposes.ⁱⁱⁱ

A Halo of Influence

A major blockbuster event like the Barnes Exhibit, particularly when supported with an intensive and extensive marketing program in key feeder regions such as the states that border Ontario (especially New York and Michigan) and Montreal, has the power to attract many visitors and to exert influence on many others.

Barnesians are a measure of “direct influence” but Other Visitors provide an indication of the halo of influence that can surround a blockbuster cultural event: even though it was not their main purpose, and even though almost all of them would have come to Toronto whether the Barnes Exhibit were in town or not, a sizeable minority — almost 4-in-10 Other Visitors — claim that the presence of the exhibit exercised at least a moderate (30%) or a major (9%) influence on their decision to stop in Toronto. No breakdowns by place of residence are shown in the following table because there are no significant differences among the three origin sub-groups. In fact, the reader should anticipate that when sub-groups are not included in the tables within this report, survey findings have been examined and have revealed no significant differences among these sub-groups.

The Pull Of The Barnes Exhibit			
	Out-Of- Towners¹		
	Total	Barnesians	Other Visitors
Total Visitor Parties Unweighted	954	602	352
Weighted Parties	103,782	71,486	32,296
	%	%	%
Would Have Come To Toronto Even If The Barnes Exhibit Had Not Been There			
Yes	39	14	93
No	61	86	7
Level Of Importance Of Barnes Exhibit In Decision To Visit Toronto²			
Single Main Reason (10)	61	86	5
Major Influence (10,9,8)	67	92	9
Moderate Influence (4/7)	13	6	30
Little Influence (0/3)	21	2	61
No Influence (0)	17	2	52
Average Influence	7.3	9.5	2.6
¹ Ontario (excluding Metro Toronto), Quebec, USA. ² Eleven point bi-polar scale ranging from 0 (no influence) to 10 (single main reason for visit to Toronto). Source: Department of Canadian Heritage Tabulations, pages 64, 70/71.			

Creating Cultural Opportunities: Substitutions

The Barnes Exhibit drew thousands of people to a cultural activity who otherwise would not have engaged in one.

Not only did it draw visitors to Toronto who otherwise would not have come there, and not only did it exercise influence over the decision to stop in Toronto among out-of-town visitors who would have taken the trip irrespective of the Barnes Exhibit, but the Barnes Exhibit also provided a cultural experience for people who said they otherwise would not have engaged in one on the day they visited the Art Gallery of Ontario.

There are, of course, two sides to any form of substitution. On the one hand, the replacement of one cultural event for another can result in cannibalisation within a cultural community. One institution's gain becomes, in effect, another institution's loss. On the other hand, an exhibit such as the Barnes can extend the cultural umbrella to cover people who otherwise would not have experienced a cultural activity.

Losses to other cultural institutions

From the cannibalisation perspective, other cultural or recreational institutions in Toronto might have benefited from visits by about 1-in-7, or about 17,000 out-of-town parties, if the Barnes Exhibit had not been available. These are the visitor parties who claim that they would have engaged in some other cultural or recreational activity if they had not gone to the Barnes Exhibit on the day they did so and did not come to Toronto with the intention of seeing the Barnes Exhibit. A further 20,000 visitor parties who did come to the city with a primary objective of seeing the Barnes Exhibit also claim that they would have engaged in some other cultural activity if they had not been at the Barnes.^{iv}

Cannibalisation of other cultural and recreational activities by a blockbuster event such as the Barnes Exhibit seems highest among visitors from the USA: one-third of all USA visitors were in Toronto for reasons other than the Barnes Exhibit and claim that they would have visited a different cultural or recreational institution if they had not gone to the see the Barnes Exhibit.

Gains for “culture” at large

Alternatively, the Barnes Exhibit can be said to have enticed a substantial number of people to a cultural activity that would not otherwise have engaged in one. 62,000 out-of-town parties, or about 90,000 people, indicated that they would not have been at a cultural or recreational event on the day of their Barnes visit had this particular exhibit not been available for them.

The Barnes . . . or nothing at all for Barnesians

Not surprisingly, Barnesians — out-of-towners from Ontario, Quebec and the USA who travelled primarily to see the Barnes Exhibit — are considerably less likely than Other Visitors to claim that they would have engaged in some other cultural or recreational activity if they had not gone to the Barnes Exhibit on the day they were surveyed: these people essentially planned a trip around the Barnes Exhibit. Most of them claim that they would not have found a cultural or recreational substitute activity for the day.

To Have A Cultural Experience . . . Or Not			
	Out-of-Towners		
	Total	Barnesians	Other Visitors
Would have substituted	36%	28%	53%
Would not have substituted	60%	68%	42%
Don't Know	4%	3%	5%

Other Visitors, on the other hand, were in town for business or other purposes and likely had some “free time” to fill. As such, they were more apt to have arrived at the Barnes Exhibit on an impromptu basis, although many of them had pre-planned some museum or gallery visit before they left home (see page 23). With less pre-planning and advanced commitment to the exhibit —both emotionally and financially — than Barnesians who had likely bought tickets and made travel arrangements prior to leaving home, it is not surprising that a substantial proportion of Other Visitors — over one-half — claim that they would have found a substitute activity if the Barnes Exhibit had not been available.

Building an “event”

Generally, a blockbuster event is thought of in terms of what the exhibit or event has to offer the consumer. Barnes Exhibit survey data, however, suggest that there is another side to such a cultural activity: the consumer builds a trip that matches the stature of the blockbuster event he or she is going to see. In the case of the Barnes Exhibit, this “event building” is most evident among people who cross a border to see the exhibit. They manifest their sense of “event” through their accommodation choices, spending patterns, and a spirit of adventure that is evident in their responses to a variety of measures.

Border crossings — be they inter-provincial or international — seem to have a role to play in the commitment a Barnes Exhibit visitor has to a cultural event. Only 1-in-4 Barnesians from Ontario would have sought a substitute cultural experience if they could not have gone to the Barnes Exhibit on the day they did, whereas 1-in-3 who crossed the Ontario/Quebec border and 1-in-2 who crossed the Canada/USA border state that they would have done so.

“Border crossings” may, in fact, be a surrogate for the distance a person travelled to reach Toronto. It would seem that the further someone travels with a cultural objective in mind, the more committed he/she is to actualise that objective — be it at the intended event (in this case, the Barnes Exhibit) or, if that opportunity is denied, at some other event (substitution).

“Exotica”

More intensive analysis is required, but the Barnes Exhibit study suggests that distance may be too quantitative a measure to fully capture the commitment of a cultural visitor to cultural activities. For example, many Ontarians who came to the Barnes Exhibit travelled no further than did residents of Buffalo or Syracuse and yet their interest in substitution is considerably different. A qualitative measure — akin to the “exoticness” of the trip (a provincial or national change of venue; whether nights were spent away from home to make it a “real” trip rather than an excursion) — is also likely to be a significant factor in the type of commitment a cultural visitor has to cultural activities.

IV. Demographics: Who Came To The Barnes Exhibit?

Middle-Aged Women Predominate

Within the sub-group of visitors examined in this report, the Barnes Exhibit was an adult event — shared by singles or couples from the same household. Although they may have travelled to the Art Gallery of Ontario on a chartered bus tour with representatives of many different households, for the most part, one or, less commonly, two adults from a household came together to see the exhibit. Only 1-in-50 household parties came to see the paintings with any children under 15 years of age (see Table A-1).

In fact, for the out-of-towners examined here, the Barnes Exhibit was a middle-aged adult event. Almost one-half of visitors^v — Barnesians and Other Visitors alike — were between 35 and 54 years of age. On average, these out-of-town visitors were in their mid-forties, but Barnesians from Quebec

The Typical Out-of-Town Barnes Exhibit Visitor									
	Out-of-Towners ¹			Ontario ²		Quebec		USA	
	Total	Purpose		Purpose		Purpose		Purpose	
		Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted	954	602	352	295	84 ³	159	101	148	167
Weighted Parties	103,782	71,486	32,296	51,801	16,175	9,719	5,478	9,966	10,643
	Years	Years	Years	Years	Years	Years	Years	Years	Years
Average Age of Visitors 15+	46	46	45	44	43	49	45	51	48
	%	%	%	%	%	%	%	%	%
Male	30	30	30	30	28	23	40	34	30
Female	70	70	70	70	72	77	60	66	70

¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. ³Caution: small base size. Source: Department of Canadian Heritage Tabulations, pages 13/16.

(49 years) and those from the USA (51 years) were older than the “typical” visitor and older than their respective neighbours who took their trip for other purposes (see Table A-2 for more details).

Barnesians and Other Visitors from Ontario, Quebec and the USA were more likely to be women than to be men. The particular attractiveness of cultural activities to women is common among all cultural travellers — whether they are those in Toronto to see the Barnes Exhibit or those at other cultural events in other centres.^{vi}

The gender split between Barnesians and Other Visitors from Quebec differs from other out-of-town visitor groups: women are even more predominant within the Barnesian population from Quebec (77%) than they are among Quebeckers who came to Toronto for other reasons (60%).

Affluence and Education

The Barnes Exhibit attracted out-of-town visitors with considerable affluence and with many years of formal education. In fact, all Barnes Exhibit visitors were more affluent and more highly educated than is the general population of Canada or the USA (see Table 12B for a profile of all visitors, including local residents).

In spite of their upscale nature, it is worth noting that Barnesians, and especially those who came from Quebec and the USA, were somewhat less affluent and had fewer advanced university degrees than did Other Visitors. The particularly high level of very affluent households and visitors with many years of formal education represented among Other American Visitors seems to be a reflection of the affluence and education of business visitors from the USA.

Baccalaureates & Affluence									
	Out-of-Towners ¹			Ontario ²		Quebec		USA	
	Total	Purpose		Purpose		Purpose		Purpose	
		Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted	954	602	352	295	84 ³	159	101	148	167
Weighted Parties	103,782	71,486	32,296	51,801	16,175	9,719	5,478	9,966	10,643
	%	%	%	%	%	%	%	%	%
Graduated University/ Post Graduate Work	68	65	75	63	67	65	79	75	87
Annual Household Income \$60,000 +	50	50	52	49	51	45	51	56	55
Annual Household Income \$100,000 +	19	18	22	18	15	16	24	21	30

¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. ³Caution: small base size. All income figures are reported in Canadian dollars. Source: Department of Canadian Heritage Tabulations, pages 22,23; 27, 28.

Since blockbuster events such as the Barnes Exhibit seem to appeal to the comparatively affluent and highly educated, an event such as this could be expected to capture more impromptu traffic in centres that attract executive business travellers: those with sufficient seniority and expertise that they are elected to travel inter-provincially and/or internationally on behalf of their firm.

The success of an event such as the Barnes Exhibit could, in turn, be closely tied to whether it is held in a centre that can provide the business connections that a location like Canada's financial centre — Toronto — can. Furthermore, the potential for cross-marketing a culture/business trip at the "executive" level might prove to be a powerful mechanism for attracting visitors to an exhibit of this type, particularly in the current era of short, getaway vacations linked to business travel.

V. The Culture Vulture

Among the out-of-town visitors examined in this report, the Barnes Exhibit attracted a very committed “culture-driven” market segment that remains available as potential customers of other cultural events. In other words, an event such as the Barnes Exhibit does not seem to erode the base of available visitors to other cultural attractions and events in the short or medium term.

The audience is not lost to other cultural activities just because they went to the Barnes Exhibit. On the contrary, out-of-town Barnes visitors are quite likely to take other out-of-town trips in order to attend additional cultural events in the same year. This conclusion is based on an examination of out-of-town visitors who said that the Barnes Exhibit was a significant factor in their decision to come to Toronto.^{vii} These visitors were asked the number of out-of-town trips they usually take each year for the purpose of attending a major culture event.

Almost two-thirds of all out-of-towners claim that they usually take at least one trip away from their place of residence to visit a cultural event, but Barnesians

Culturally-Driven Visitors		
	Out-Of- Towners¹	
	Total	Barnesians
Total Visitor Parties Unweighted	954	602
Weighted Parties	103,782	71,486
	%	%
Usually Take Any Out-of-Town Trips Each Year To See Cultural Events	62	83
Number Of Out-of-Town Trips Usually Taken Each Year To See Cultural Events		
One to Three Per Year	30	40
Four To Six Per Year	20	27
Seven To Ten Per Year	5	7
More Than Ten Per Year	7	9
None	9	11
Not Asked — Barnes Not Influential ²	29	6

¹Ontario (excluding Metro Toronto), Quebec, USA. ²Eleven point bi-polar scale ranging from 0 (no influence) to 10 (single main reason for visit to Toronto). Source: Department of Canadian Heritage Tabulations, pages 37/39. Other Visitors are not shown in this table because only those who rated the Barnes Exhibit a “6” or more on the 11 point influence scale were asked about other culturally-driven out-of-town trips. Very few Other Visitors — almost by definition — accorded the Barnes Exhibit sufficient influence to be asked the subsequent question. See Table A13 for the proportions of Barnesians and Other Visitors who answered.

are especially likely to take out-of-town culture-driven trips: 8-in-10 claim to do so each year. Approximately 4-in-10 Barnesians take up to three such trips each year and about the same proportion usually take four or more over a twelve month period.

Average Number Of Out-Of-Town Culture Trips Per Year			
	Out-Of-Town¹ Barnesians		
	Ontario	Quebec	USA
Average Number Of Out-of-Town Trips Usually Taken Each Year To See Cultural Events	5.5	2.5	4.1
<small>¹Ontario (excluding Metro Toronto), Quebec, USA Source: Department of Canadian Heritage Tabulations, pages 37/39.</small>			

Out-of-towners who came to Toronto to see the Barnes Exhibit take in more cultural exhibitions in other cities if they live in Ontario or the USA than if they live in Quebec. Even though Barnesians from each region are as likely as one another to take at least one out-of-town trip per year to attend a cultural event, those in Ontario take more than five such trips per year (5.5) and those in the USA take just over four (4.1). In contrast, Barnesians from Quebec take only two to three (2.5) such trips per year. ^{viii}

The inclination to take frequent trips to other locations for cultural events may depend on the size of community the Barnesian lives in, whether it is within driving distance of the “culture” destination, and the extent to which the “home community” provides cultural opportunities to its residents. For example, most Ontarians who came to Toronto for the Barnes Exhibit live in relatively small centres that are within easy driving distance of Toronto. Similarly, many American Barnesians are residents of Buffalo, Syracuse and other smaller “border” cities, also within relatively easy driving distance of Toronto. Most Quebecers who came to the Barnes Exhibit, however, live in Montreal — a large city with a rich cultural infrastructure of its own.

When planning a major cultural event such as the Barnes Exhibit, these data suggest that the nature of feeder markets — in terms of their distance and cultural richness — should be seriously considered. Another key factor, ease of access, also likely played a major role in the attractiveness of the Barnes Exhibit to out-of-town visitors.

Can I Get There From Here? Transportation Linkages

Transportation corridors need to be examined as determinants in cultural tourism flows. For example, two-thirds of Barnesians came to Toronto by automobile. Approximately one-eighth took the train, the same proportion took a bus (charter or scheduled) and about one-twentieth took an airplane.

Mode of transport varied quite dramatically by place of residence. Although figures are based on all visitors (not just Barnesians) from each location, rail service between Toronto and Montreal clearly figured prominently in Quebecers’ choices of transport. More than one-fifth of Barnes Exhibit visitors from Quebec came to Toronto to see the Barnes Exhibit by train.

Transportation Links				
	Out-Of- Towners¹			
	All Visitor Parties From . . .			
	Total Barnesians	Ontario²	Quebec	USA
Total Visitor Parties (Telephone) Unweighted	324	180	174	164
Weighted Parties (Telephone)	33,857	31,423	10,028	10,120
	%	%	%	%
Any Automobile (Own/Rented)	67	68	44	58
Rail	13	13	22	8
Bus	14	14	13	10
Airplane	5	3	19	23

¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. Source: MCTR Tabulations, pages 1119/1121.

The advantages of “hassle free” travel become especially important in a market that is ageing. Almost one-third of Barnes Exhibit visitors were 55 years of age or over: as this population ages, will they still want to get in a car and drive two or three hundred kilometres to reach an art exhibit? Are they likely to be wooed into a “package” that includes tickets and a downtown-to-downtown train or plane ride? While there is more analytical work to be done within the Barnes Exhibit Study data to identify and quantify patterns of transport within age groups, an overview suggests that such linkages should be considered in planning events such as the Barnes Exhibit.

The propensity of Quebecers and Americans to use air transport is likely related to two factors: the longer distances they had to travel to reach Toronto from home, and the comparatively large proportion of business travellers — a group that traditionally travels by air — among these two visitor groups.

VI. Participation In Other Activities While Travelling In Ontario

Spin-off Effects

Visitors to the Barnes Exhibit shopped, ate in fine restaurants, visited friends and relatives, went sightseeing, took in nightlife and entertainment, and attended cultural performances while on their trips. Did Barnesians do different things than Other Visitors?

No, and yes. While the same activities were popular among Barnesians and Other Visitors, the activity profile of people who came specifically to see the paintings at the AGO reflects the single-minded focus of their trip, the greater probability that it was a same-day trip — leaving Barnesians with relatively little time to engage in other activities — and the fact that many were Ontarians who might already be familiar with the sites and other attractions of the province’s largest city.

Other Activities			
Barnesians (In Rank Order)		Other Visitors (In Rank Order)	
Shop	66%	Shop	70%
High Quality Restaurants	44%	Visit Friends & Relatives	62%
Visit Friends & Relatives	32%	High Quality Restaurants	53%
Sightsee	31%	Sightsee	46%
Nightlife & Entertainment	15%	Cultural Performance	36%
Cultural Performance	12%	Nightlife & Entertainment	33%
Visit Historic Site	10%	Attend Festival, Fair or Event	18%
Attend Festival, Fair or Event	4%	Visit Historic Site	13%
Event			

See Appendix Tables for details and sources.

Barnesians focus on shopping and eating in restaurants — activities that are as likely to be engaged in on a same-day trip as they are on an overnight trip. About one-third spent some of their time in Ontario visiting friends and relatives and/or sightseeing, but only about one-seventh participated in nightlife/entertainment activities or attended a cultural performance.

By way of contrast, Other Visitors were especially likely to see friends and relatives — for many, this was the primary reason for their trip — and were more likely than Barnesians to sightsee and to participate in other cultural and/or entertainment related activities such as attending cultural performances, taking in nightlife and going to festivals, fairs or events in the province.

One out-of-town visitor is not every out-of-town visitor

There are substantial differences between out-of-towners' activity profiles, based in part on where they live, why they took the trip, and their level of connectedness to their destination. For example, it comes as no surprise that Ontarians are most likely to have family or friends to visit in Toronto, and that Americans who came to the Barnes Exhibit are least likely to have Canadian friends and relatives. These differences are reflected in activity patterns, and, in turn, in the ultimate economic impact of each visitor. The one who spends all nights away from home in a hotel will have a considerably greater impact on the local economy than one who is offered free room and board from family or friends.

Quebeckers

The Quebecker who came specifically for the Barnes Exhibit acts considerably more like a classic "tourist" in terms of her/his propensity to sightsee and to dine out than does the Other Visitor. Conversely, the person who came to Toronto for other reasons but visited the Barnes Exhibit is more

What Else Did Barnes Exhibit Visitors From Quebec Do In Ontario?		
	Quebec	
	Barnesians	Other Visitors
Total Visitor Parties Unweighted (Telephone)	110	64 ³
Weighted Parties (Telephone)	6,623	3,405
ACTIVITIES	%	%
Shop	60	61
Sightsee	56	35
Visit Friends & Relatives	48	77
Dine At High Quality Restaurants	41	28
Attend A Cultural Performance	10	23
Visit Historic Site	8	13
Take in Nightlife & Entertainment	8	24
Attend A Festival, Fair or Exhibition	5	9
<small>¹Ontario (excluding Metro Toronto), Quebec, USA. ²"Ontario" excludes residents of Metropolitan Toronto. ³Caution: small base size. Source: Department of Canadian Heritage Tabulations, pages 108/135.</small>		

apt to have taken in additional cultural and evening entertainment activities while on the trip than is more uni-focused Barnesian.

Americans

Barnesians from the USA are less likely to don the mantle of the "traditional tourist" than are American Other Visitors, although all visitors from the USA show a greater

inclination to take in other cultural and entertainment activities than do their counterparts who came from Quebec or locations in Ontario — they are, after all, in a new city and a new country.

One-third of Barnesians from the USA went to a cultural performance and/or took in nightlife while in Ontario to see the Barnes Exhibit. About one-half went sightseeing and/or dined in high quality restaurants and approximately one-fifth went to a historic site during their travels.

What Else Did Barnes Exhibit Visitors From The USA Do In Ontario?		
	USA	
	Barnesians	Other Visitors
Total Visitor Parties Unweighted (Telephone)	84 ³	80 ³
Weighted Parties (Telephone)	5,564	4,556
ACTIVITIES	%	%
Shop	77	86
Sightsee	49	72
Dine At High Quality Restaurants	49	73
Attend A Cultural Performance	37*	47*
Take in Nightlife & Entertainment	34	43
Visit Historic Site	21	16
Visit Friends & Relatives	20	34
Attend A Festival, Fair or Exhibition	8	22
<small>¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. ³Caution: small base size. *Despite appearances, the difference between these two figures is not statistically significant. Source: Department of Canadian Heritage Tabulations, pages 108/135.</small>		

The Americans who came for reasons other than the Barnes Exhibit, however, more closely resemble the image of the “traditional tourist” than do American Barnesians in their propensity to sightsee, to engage in fine dining, to take in nightlife and entertainment, to visit with friends and relatives, and to attend a festival, fair or exhibition.

Pre-Planning

Even though it was not the main purpose of their trip, almost all out-of-town visitors came to Toronto with the intention of seeing the Barnes Exhibit — suggesting that the marketing campaign outside of Toronto generated widespread awareness of the exhibit before visitors arrived in Toronto.

A comparison of activities Barnes Exhibit visitors planned in advance of their trip and their actual participation rates in these same activities clearly indicates that even though the Barnes Exhibit may not have been the main purpose of the trip to

Toronto, the vast majority of Other Visitors — 8-in-10 — left home with the intention of visiting at least one museum or gallery while on the trip.

Pre-planned Activities						
	Barnesians			Other Visitors		
Total Visitor Parties Unweighted (Telephone)	324			194		
Weighted Parties (Telephone)	33,857			17,714		
	Activities . . .			Activities . . .		
	Done On Trip	Pre-Planned	Impromptu (Net Difference)	Done On Trip	Pre-Planned	Impromptu (Net Difference)
	%	%	±	%	%	±
Visit A Museum or Gallery	100	95	+5	100	82	+18
Cultural Performance	12	9	+3	36	29	+7
Nightlife & Entertainment	15	11	+4	33	18	+15
Visit Friends & Relatives	32	29	+3	62	59	+3
Sightsee	31	21	+10	46	32	+14
Shop	66	39	+27	70	45	+25
Source: Department of Canadian Heritage Tabulations, pages 108/135.						

A Retailer’s Dream . . .

In fact, Barnesians and Other Visitors alike seem to have had a fairly clear vision of their respective trips before they left home. Other Visitors are more likely to have spontaneously elected to participate in evening entertainment activities (+15%) than did Barnesians, but in other respects, the two groups closely resemble one another.

While it does not represent a difference between the two groups, it is worth noting that shopping is the most “impromptu” of activities. Approximately 4-in-10 visitors, be they Barnesians or Other Visitors, planned to shop while on the trip — but about 7-in-10 actually did so. Information such as this, and the actual amount spent within the retail sector can be powerful incentives for encouraging cross-marketing and cooperation between a cultural institution and local retailers, chambers of commerce and other business stakeholders in the planning and marketing of a cultural event.

VII. Nights And Accommodation

Throughout this report, allusions have been made to the importance of trip duration — the number of nights the Barnes Exhibit visitor was away from home — on other variables, including participation in activities, the likelihood of substitution of one cultural event for another, and so on. From a common sense perspective and based on the economic impact assessment of the Barnes Exhibit, the longer a visitor is away from home, the more opportunities he or she has to engage in activities and to spend money.

Most Barnesians Were Day Trippers

Almost two-thirds of out-of-towners who took their trip primarily because of the Barnes Exhibit were day trippers. The remaining one-third were on an overnight trip when they saw the exhibit. In contrast, 9-in-10 Other Visitors were on overnight trips and only 1-in-10 took a same-day trip that included a stop at the AGO to see the Barnes Exhibit.

Duration of the Trip			
	Out-of-Towners¹		
		Purpose	
	Total	Barnes	Other
Total Visitor Parties Unweighted	954	602	352
Weighted Parties	103,782	71,486	32,296
	%	%	%
Same-Day	47	63	12
Overnight	53	37	88
Average Number of Nights In Ontario ²	3.2	2.3	4.1
Total Party Nights Spent In Ontario	176,165	60,392	115,773

¹Ontario (excluding Metro Toronto), Quebec, USA. ²Among visitor parties who spent any nights in Ontario. Source: Department of Canadian Heritage Tabulations, pages 146/148.

Not only are Barnesians more likely to have been on same-day trips when they came to visit the Barnes Exhibit — largely because so many of them live close enough to Toronto to make an easy day trip of a museum visit — but those who did spend nights away from home in the province spent fewer of them than did Other Visitors. On average, a Barnesian visitor party that spent any nights away from home in Ontario spent just over two nights (2.3) whereas the corresponding Other Visitor spent almost twice this number (4.1).

As discussed earlier, of the almost 104,000 out-of-town visitor parties who came to the Barnes Exhibit, more than two-thirds came because of the exhibit — but these Barnesian travellers accounted for only about one-third of the nights spent in Ontario. Other Visitors, on the other hand, accounted for only one-third of the visitor parties at the Exhibit but for two-thirds of the nights spent in the province.

Relative Volumes: Visitor Parties & Room Nights		
	Visitor Parties	Room Nights In Ontario
Barnesians	69%	34%
Other Visitors	31%	66%
Source: Department of Canadian Heritage Tabulations, pages 144/148; 282, 425, 430.		

What’s the message?

The primary catchment area for a cultural event — or any other event — is likely to be people living in close proximity. These are the very same people who are least likely to invest in paid accommodation on their trip, either because they can easily complete the trip in the same day or because they can be billeted with friends and relatives. From an economic perspective, however, the “local” or “near local” market generates less spending in the community than does the person that relies on hotels, restaurants, and local transport systems.

In the planning of a major cultural event, the mix of visitors who will partake of the accommodation and hospitality infrastructure of the community and those who will not is an important consideration. As is evident in these figures, and those presented in the next few sections, overall economic impact is extremely susceptible to these ratios in the total visitor population.

Commercial Lodging

Commercial accommodation nights have a dramatic impact on spending since the visitor is not only paying to have a roof over his/her head, but is also buying meals and is often reliant on public transport or taxi services in a city.

Of all “room nights”^{ix} spent in the province by Ontario residents who visited the Barnes Exhibit — regardless of their trip purpose — about one-third were in hotels and motels and the remainder were in the homes of friends and relatives.

“Room Nights” That Were Paid For					
Ontario		Quebec		USA	
Barnesians	Other Visitors	Barnesians	Other Visitors	Barnesians	Other Visitors
Total “Room Nights” Spent In Ontario					
22,965	42,959	23,323	22,785	14,104	50,029
Percent Of “Room Nights” In Ontario That Were Paid For					
37%	34%	52%	29%	82%	59%

People who live outside the province can be expected to have fewer “free” billeting possibilities than do residents: an expectation that is clearly borne out by the figures. One-half of nights spent by Barnesians from Quebec were spent in commercial accommodation. Room nights spent by Quebeckers who came for other reasons than the Barnes, however, were especially likely to be spent in the homes of friends and family: fewer than 1-in-3 nights in Ontario by Other Visitors from Quebec were paid for.

Visitors from the USA are the least likely of the three visitor groups examined to have family and friends in Ontario — a fact that likely explains why such a high proportion of their room nights were spent in hotels. The vast majority of nights spent by Americans who came specifically for the Barnes Exhibit were spent in commercial accommodation (82%).

Friends & Family

The most “beneficial” groups to attract to a blockbuster event such as the Barnes Exhibit are those who come specifically for the event and who have few options but to rely on commercial accommodation for their lodging: out-of-province and most especially out-of-country visitors. This conclusion is reinforced when the proportion of all commercial nights is contrasted with the volume of visitation represented by each group of visitors.

Commercial Lodging				
	Total Visitor Parties From Ontario, Quebec & USA		Total Commercial "Room Nights" Spent In Ontario By Visitor Parties From Ontario, Quebec & USA	
	#	%	#	%
Total	103,782	100	83,083	100
Barnesians	71,486	69	32,097	39
Other Visitors	32,296	31	50,985	61
Ontarians	67,976	65	23,267	28
Barnesians	51,801	50	8,471	10
Other Visitors	16,175	16	14,796	18
Quebeckers	15,197	14	18,639	22
Barnesians	9,719	9	12,049	14
Other Visitors	5,478	5	6,590	8
Americans	20,609	20	41,177	50
Barnesians	9,966	10	11,578	14
Other Visitors	10,643	10	29,599	36

Source: Department of Canadian Heritage Tabulations, page 282.

Both Quebeckers and Americans spent appreciably more nights in hotels and motels throughout Ontario, but primarily in Toronto, while on the trip that brought them to the Barnes Exhibit than their respective visitation levels would have suggested. For example, of the out-of-towners examined in this report, Americans represent 20% of all Barnes Exhibit visitors, but they also represent 50% of all commercial accommodation used by people who visited the exhibit.

While not as dramatic, Quebeckers represented 14% of out-of-town visitors covered in this analysis, but 22% of the commercial lodging used by Barnes Exhibit visitors in Ontario.

At the same time, the most significant impact on the local economy, generated by the use of commercial accommodation and auxiliary expense items such as restaurant meals, derives not from those out-of-towners who came specifically for the blockbuster event, but from those who were in the area for other reasons. Specifically, one-tenth of all out-of-town visitor parties were Americans who came to Toronto for other reasons, but this group of business and general pleasure visitors accounted for over one-third of all commercial room nights spent in the province.

Of course, much of the spending done in Ontario by people who came to the Barnes Exhibit is not directly attributable to the exhibit since it is money that would have been spent irrespective of the cultural event. Thus, the Other Visitor may spend more nights in commercial lodging than does the Barnesian, and may, as a result, spend more money on the trip, but does not necessarily make a more significant contribution to the economic impact of the event itself (see Chapter VIII for a discussion of spending).

VIII. Spending Patterns

Total Spending & New Spending

Out-of-town visitors spent almost \$46 million in Ontario over the course of the trip that included the visit to the Barnes Exhibit. Of this substantial quantity of consumer spending, over \$28 million^x was directly attributable to the Barnes Exhibit. It was spending that would not have taken place if the Barnes Exhibit had not been at the Art Gallery of Ontario. Barnesians contributed \$22.1 million of the \$28 million directly associated with the Barnes Exhibit. This figure represents almost one-half of all consumer spending done in Ontario on trips that included a visit to the Barnes Exhibit, and more than three-quarters of the spending that is directly associated with the exhibit.

Spending In Ontario	
Total Spending By Out-of -Town Visitor Parties ¹	\$45.8 Million
Total Spending By Out-of -Town Visitor Parties Attributable To The Barnes Exhibit ¹	\$28.2 Million
Barnesians	
Amount Of “Barnes Spending” (Directly Attributable) By Barnesians	\$22.1 Million
Percentage of Total “Barnes Spending”	78%
Other Visitors	
Amount of “Barnes Spending” (Directly Attributable) By Other Visitors	\$6.1 Million
Percentage of Total “Barnes Spending”	22%
¹ All spending figures are for general admission out-of-town visitor parties. These figures are not identical to those for all Barnes Exhibit visitors published by MCTR in the reports on the economic impact of the Barnes Exhibit. Source: Department of Canadian Heritage Tabulations, pages 527, 571.	

Barnesians generate the most “new spending”

The financial impact of visitors who came to Toronto primarily to see the blockbuster event is most evident when the volumes of visitors and Barnes spending are compared. More than two-thirds of the out-of-town visitor parties who came to the Barnes Exhibit did so as a purposeful, planned activity. These households contributed more than three-quarters of new

spending in Ontario — spending that would not have taken place if the Barnes Exhibit had not been in Toronto.

While not insignificant, Other Visitors make a less substantial contribution to new money than would be expected in light of their visitor volumes: they represent almost one-in-three visitor parties, but are responsible for only about one-in-five new dollars.

Comparisons: Visitor Volumes and New Spending			
	Total Visitor Parties	Total Spending In Ontario	Total Barnes Spending In Ontario
Barnesians	69%	52%	78%
Other Visitors	31%	48%	22%

Source: Department of Canadian Heritage Tabulations, pages 15, 527, 571.

Average Spending By Category

Almost all differences in spending patterns between Barnesians and Other Visitors can be attributed to the greater propensity of people who came to Toronto for other purposes to both spend any (and more) nights away from home, and their greater reliance on commercial accommodation.

Average Spending In Ontario For Entire Trip (Per party)								
	Out-of-Towners ¹		Ontario ²		Quebec		USA	
	Purpose		Purpose		Purpose		Purpose	
	Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Accommodation	\$50	\$170	\$19	\$67	\$116	\$110	\$149	\$356
Food/Beverages	\$93	\$184	\$79	\$116	\$129	\$155	\$132	\$303
Transportation in Ontario	\$37	\$54	\$35	\$57	\$60	\$39	\$27	\$56
Local Transport	\$7	\$20	\$6	\$14	\$11	\$20	\$11	\$30
Entertainment	\$60	\$65	\$56	\$50	\$47	\$45	\$96	\$99
Shopping	\$71	\$114	\$59	\$92	\$84	\$79	\$121	\$167

All spending figures are for general admission out-of-town visitor parties. These figures are not identical to those for all Barnes Exhibit visitors published by MCTR in the reports on the economic impact of the Barnes Exhibit. ¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. All figures have been rounded to the nearest dollar. Source: Department of Canadian Heritage Tabulations, pages 527/533.

Total Spending (Includes On-Site)

Each night spent away from home increases the accommodation costs, meal costs, transportation costs and, to some extent, shopping costs of the trip. Barnesians clearly underspent Other Visitors on accommodation, food/beverages, transportation, local transport including public transit and taxis, and shopping. Interestingly, however, Barnesians and Other Visitors spent the same amount on entertainment. On average, each out-of-town household visitor party included in this analysis, regardless of the purpose of the trip, spent \$60 to \$65 on recreational and entertainment activities, including their tickets to the Barnes Exhibit.

Sizeable differences in average spending between Barnesians and Other Visitors are least evident among Quebeckers, largely because such a high proportion of visitors from Quebec came with the primary purpose of seeing the Barnes Exhibit (69%), and because the number of nights spent in Ontario was approximately the same for those who came with the Barnes Exhibit as their goal (23,323) and those who came with some other objective (22,785) (see Chapter VII).

On-Site Spending

Unlike total spending in Ontario, on-site spending at the Art Gallery of Ontario on the day visitors attended the Barnes Exhibit is higher among Barnesians than among Other Visitors. Out-of-town visitors who came to the Barnes Exhibit spent about \$4 million at the Art Gallery of Ontario on the day of their

Average Spending At The Art Gallery Of Ontario (Per party)								
	Out-of-Towners ¹		Ontario ²		Quebec		USA	
	Purpose		Purpose		Purpose		Purpose	
	Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Expenditures (In Millions)	\$4.4	\$1.6	\$2.8	\$0.7	\$0.7	\$0.3	\$0.8	\$0.6
AVERAGES								
Tickets	\$24	\$21	\$23	\$19	\$25	\$21	\$27	\$23
Food/Beverages	\$6	\$4	\$5	\$2	\$11	\$1	\$11	\$9
Souvenirs/Gifts	\$29	\$23	\$25	\$20	\$39	\$28	\$43	\$25

All spending figures are for general admission out-of-town visitor parties. These figures are not identical to those for all Barnes Exhibit visitors published by MCTR in the reports on the economic impact of the Barnes Exhibit.
¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. All figures have been rounded to the nearest dollar. Source: Department of Canadian Heritage Tabulations, pages 513/517.

visit — a figure that is more than twice the on-site spending level of people who took a trip motivated by other purposes (\$1.6 million).

Regardless of where the visitors live, Barnesians spent considerably more on retail items at the site than did those who came for other purposes — a finding that

reinforces the “event” nature of the Barnes Exhibit among those who planned a trip around it. These Barnesians wanted souvenirs and momentos of the event to a greater extent than did those who went to the Barnes Exhibit while in Toronto for other reasons.

On-site spending by Barnesians does not vary appreciably by place of residence — with one notable exception: Quebeckers (\$39) and Americans (\$43) who made the trip especially to see the Barnes Exhibit spent considerably more on gifts and souvenirs than did Ontario residents (\$29).

Pre-Paid Packages

Utilisation of pre-paid packages, including at least two items such as tickets to the exhibit, accommodation, transportation, other entertainment, and/or meals was not particularly common but is noticeably higher among Barnesians than Other Visitors. Approximately 1-in-7 Barnesians arranged some form of “packaged” purchase for the trip that included their visit to the Barnes Exhibit, compared with about 1-in-50 Other Visitors.

Pre-Paid Packages	
	Incidence Of Arranging A Pre-Paid Package
All Out-of-Town Barnesians ¹	14%
Ontario Barnesians ²	11%
Quebec Barnesians	24%
USA Barnesians	18%
¹ Ontario (excluding Metro Toronto), Quebec, USA. ² “Ontario” excludes residents of Metropolitan Toronto. Source: Department of Canadian Heritage Tabulations, page 509.	

Quebeckers, followed by American Barnesians were the most likely to have pre-arranged to pay for several expenditure items in advance of their trip. One-in-four Barnesians from Quebec and 1-in-5 of their counterparts from the USA claim to have made these prior arrangements.

The most common packages included “tickets and transportation” for Ontarians — most likely same-day charter bus trips — “tickets, transportation and accommodation” for Quebeckers, and “tickets, transportation, accommodation and meals” for Americans.

Appendix Tables

Table A-1

Household Party Size			
	Out-of-Towners¹		
		Purpose	
	Total	Barnes	Other
Total Visitor Parties Unweighted	954	602	352
Weighted Parties	103,782	71,486	32,296
	%	%	%
1 Person	62	59	66
2 People	36	36	32
3 People or more	2	5	2
Average Number In Household Visitor Party	1.4	1.5	1.4

¹Ontario (excluding Metro Toronto), Quebec, USA. Source: Department of Canadian Heritage Tabulations, pages 527/533.

Table A-2

Age & Gender									
	Out-of-Towners¹			Ontario²		Quebec		USA	
		Purpose		Purpose		Purpose		Purpose	
	Total	Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted	954	602	352	295	84 ³	159	101	148	167
Weighted Parties	103,782	71,486	32,296	51,801	16,175	9,719	5,478	9,966	10,643
	%	%	%	%	%	%	%	%	%
AGE									
15 To 19 Years	1	1	-	2	-	-	-	1	-
20 To 34 Years	25	24	28	28	35	10	30	14	16
35 To 44 Years	21	23	18	23	14	31	18	17	23
45 To 54 Years	24	21	29	19	30	26	24	28	30
55 To 64 Years	14	13	15	11	13	17	17	19	17
65+ Years	14	16	11	15	9	14	12	22	13
Average Age	46	46	45	44	43	49	45	51	48
GENDER									
Male	30	30	30	30	28	23	40	34	30
Female	70	70	70	70	73	77	60	66	71

¹Ontario (excluding Metro Toronto), Quebec, USA. ²"Ontario" excludes residents of Metropolitan Toronto. ³Caution: small base size. Source: Department of Canadian Heritage Tabulations, pages 13/16.

Table A-3

Education & Annual Household Income									
	Out-of-Towners ¹			Ontario ²		Quebec		USA	
	Total	Barne s	Other	Barne s	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted	954	602	352	295	84 ³	159	101	148	167
Weighted Parties	103,782	71,486	32,296	51,801	16,175	9,719	5,478	9,966	10,643
EDUCATION	%	%	%	%	%	%	%	%	%
Secondary or Less	9	10	7	11	8	7	12	7	4
Courses At Community College/Some University	23	25	18	26	26	28	9	18	10
Graduated University (Bachelors Degree)	35	32	40	32	42	37	54	29	29
Post Graduate Degree	34	33	36	31	25	28	25	45	58
ANNUAL HOUSEHOLD INCOME									
Under \$40,000	20	18	23	19	26	17	26	17	16
\$40,000 - \$59,999	21	21	19	19	21	33	16	19	18
\$60,000 - \$99,999	31	31	30	31	35	29	26	35	25
\$100,000 +	19	18	22	18	15	16	24	21	30
Don't Know/ Not Stated	10	11	6	13	2	5	8	8	12

¹Ontario (excluding Metro Toronto), Quebec, USA. ²"Ontario" excludes residents of Metropolitan Toronto. ³Caution: small base size. All income figures are reported in Canadian dollars. Source: Department of Canadian Heritage Tabulations, pages 22,23; 27, 28.

Table A-4

The Pull Of The Barnes Exhibit Among Barnesians			
	Out-Of- Towners¹		
	Ontario²	Quebec	USA
Barnesian Visitor Parties Unweighted	295	159	148
Weighted Parties	51,801	9,719	9,966
	%	%	%
Would Have Come To Toronto Even If The Barnes Exhibit Had Not Been There			
Yes	15	7	17
No	85	93	82
Level Of Importance Of Barnes Exhibit In Decision To Visit Toronto³			
Single Main Reason (10)	88	82	79
Major Influence (10,9,8)	93	89	93
Moderate Influence (4/7)	5	9	7
Average Influence	9.5	9.3	9.5
¹ Ontario (excluding Metro Toronto), Quebec, USA. ² Ontario excludes Metropolitan Toronto. ³ Eleven point bi-polar scale ranging from 0 (no influence) to 10 (single main reason for visit to Toronto). Source: Department of Canadian Heritage Tabulations, pages 64, 70/71.			

Table A-5

The Pull Of The Barnes Exhibit Among Other Visitors			
	Out-Of- Towners¹		
	Ontario²	Quebec	USA
Other Visitor Parties Unweighted	84 ³	101	167
Weighted Parties	16,175	5,478	10,643
	%	%	%
Would Have Come To Toronto Even If The Barnes Exhibit Had Not Been There			
Yes	92	87	97
No	8	13	3
Level Of Importance Of Barnes Exhibit In Decision To Visit Toronto⁴			
Single Main Reason (10)	5	11	1
Major Influence (10,9,8)	9	15	7
Moderate Influence (4/7)	35	28	22
Average Influence	2.9	3.1	1.9
¹ Ontario (excluding Metro Toronto), Quebec, USA. ² Ontario excludes Metropolitan Toronto. ³ Caution: Small base size. ⁴ Eleven point bi-polar scale ranging from 0 (no influence) to 10 (single main reason for visit to Toronto). Source: Department of Canadian Heritage Tabulations, pages 64, 70/71.			

Table A-6

What Else Did Barnes Exhibit Visitors Do In Ontario?									
	Out-of-Towners ¹			Ontario ²		Quebec		USA	
	Total	Purpose		Purpose		Purpose		Purpose	
		Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted (Telephone)	518	324	194	130	50 ³	110	64 ³	84 ³	80 ³
Weighted Parties (Telephone)	51,571	33,857	17,714	21,671	9,752	6,623	3,405	5,564	4,556
ACTIVITIES	%	%	%	%	%	%	%	%	%
Visit Friends & Relatives	42	32	62	29	70	48	77	20	34
Shop	67	66	70	65	65	60	61	77	86
Sightsee	36	31	46	19	38	56	35	49	72
Attend A Festival, Fair or Exhibition	9	4	18	3	20	5	9	8	22
Attend A Cultural Performance	20	12	36	6	36	10	23	37	47
Visit Historic Site	11	10	13	7	10	8	13	21	16
Visit Zoo or Natural Exhibit	2	3	1	3	-	3	2	1	3
Visit Theme Park	1	1	1	-	-	3	1	1	1
Visit National or Provincial Park	2	2	1	2	-	5	3	-	3
Take in Nightlife & Entertainment	21	15	33	11	31	8	24	34	43
Dine At High Quality Restaurants	47	44	53	44	53	41	28	49	73
Attend Aboriginal or Native Cultural Activity	1	1	1	1	-	1	-	1	4
Participate in Outdoor Sports or Activities	5	5	7	5	5	1	15	8	7

¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. ³Caution: small base size. Source: Department of Canadian Heritage Tabulations, pages 108/135.

Table A-7

What Else Did Barnes Exhibit Visitors Do In Ontario — Rank Order For Barnesians									
	Out-of-Towners¹			Ontario²		Quebec		USA	
		Purpose		Purpose		Purpose		Purpose	
	Total	Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted (Telephone)	518	324	194	130	50 ³	110	64 ³	84 ³	80 ³
Weighted Parties (Telephone)	51,571	33,857	17,714	21,671	9,752	6,623	3,405	5,564	4,556
ACTIVITIES	%	%	%	%	%	%	%	%	%
Shop	67	66	70	65	65	60	61	77	86
Dine At High Quality Restaurants	47	44	53	44	53	41	28	49	73
Visit Friends & Relatives	42	32	62	29	70	48	77	20	34
Sightsee	36	31	46	19	38	56	35	49	72
Take in Nightlife & Entertainment	21	15	33	11	31	8	24	34	43
Attend A Cultural Performance	20	12	36	6	36	10	23	37	47
Visit Historic Site	11	10	13	7	10	8	13	21	16
Participate in Outdoor Sports or Activities	5	5	7	5	5	1	15	8	7
Attend A Festival, Fair or Exhibition	9	4	18	3	20	5	9	8	22
Visit Zoo or Natural Exhibit	2	3	1	3	-	3	2	1	3
Visit National or Provincial Park	2	2	1	2	-	5	3	-	3
Visit Theme Park	1	1	1	-	-	3	1	1	1
Attend Aboriginal or Native Cultural Activity	1	1	1	1	-	1	-	1	4

¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. ³Caution: small base size. Source: Department of Canadian Heritage Tabulations, pages 108/135.

Table A-8

What Else Did Barnes Exhibit Visitors Do In Ontario – Rank Order For Other Visitors									
	Out-of-Towners ¹			Ontario ²		Quebec		USA	
	Total	Purpose		Purpose		Purpose		Purpose	
		Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted (Telephone)	518	324	194	130	50 ³	110	64 ³	84 ³	80 ³
Weighted Parties (Telephone)	51,571	33,857	17,714	21,671	9,752	6,623	3,405	5,564	4,556
ACTIVITIES	%	%	%	%	%	%	%	%	%
Shop	67	66	70	65	65	60	61	77	86
Visit Friends & Relatives	42	32	62	29	70	48	77	20	34
Dine At High Quality Restaurants	47	44	53	44	53	41	28	49	73
Sightsee	36	31	46	19	38	56	35	49	72
Attend A Cultural Performance	20	12	36	6	36	10	23	37	47
Take in Nightlife & Entertainment	21	15	33	11	31	8	24	34	43
Attend A Festival, Fair or Exhibition	9	4	18	3	20	5	9	8	22
Visit Historic Site	11	10	13	7	10	8	13	21	16
Participate in Outdoor Sports or Activities	5	5	7	5	5	1	15	8	7
Visit Zoo or Natural Exhibit	2	3	1	3	-	3	2	1	3
Visit National or Provincial Park	2	2	1	2	-	5	3	-	3
Visit Theme Park	1	1	1	-	-	3	1	1	1
Attend Aboriginal or Native Cultural Activity	1	1	1	1	-	1	-	1	4

¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. ³Caution: small base size. Source: Department of Canadian Heritage Tabulations, pages 108/135.

Table A-9

Spending In Ontario Attributable To The Barnes Exhibit											
Total Spending By Out-of-Town Visitor ¹ Parties Attributable To The Barnes Exhibit = \$28.2 Million											
Barnesians						Other Visitors					
\$22.1			48% of Total Spending			\$6.1			13% of Total Spending		
All percentages are based on total spending in Ontario by out-of-town visitor parties (\$45.8 million)											
Ontario ²				Quebec				USA			
\$15.6		34%		\$5.1		11%		\$7.5		16%	
Barnesians		Other Visitors		Barnesians		Other Visitors		Barnesians		Other Visitors	
\$12.9	28%	\$2.7	6%	\$4.1	9%	\$1.0	2%	\$5.1	11%	\$2.4	5%
All spending figures are for general admission out-of-town visitor parties. These figures are not identical to those for all Barnes Exhibit visitors published by MCTR in the reports on the economic impact of the Barnes Exhibit.											
¹ Ontario (excluding Metro Toronto), Quebec, USA. ² “Ontario” excludes residents of Metropolitan Toronto. All figures are in millions and have been rounded to the nearest 100,000. Source: Department of Canadian Heritage Tabulations, page 571.											

Table A-10

To Have A Cultural Experience . . . Or Not									
	Out-of-Towners ¹			Ontario ²		Quebec		USA	
	Total	Purpose		Purpose		Purpose		Purpose	
		Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted	954	602	352	295	84 ³	159	101	148	167
Weighted Parties	103,782	71,486	32,296	51,801	16,175	9,719	5,478	9,966	10,643
	%	%	%	%	%	%	%	%	%
Would Have Engaged In A Specific Recreational Or Cultural Event “Today” If Had Not Gone To The Barnes Exhibit									
Yes	36	28	53	24	47	32	47	48	66
No	60	68	42	73	47	64	47	48	31
Don't Know	4	3	5	3	5	3	6	4	4
¹ Ontario (excluding Metro Toronto), Quebec, USA. ² “Ontario” excludes residents of Metropolitan Toronto. ³ Caution: small base size. Source: Department of Canadian Heritage Tabulations, page 506.									

Table A-11

Duration of the Trip									
	Out-of-Towners¹			Ontario²		Quebec		USA	
	Total	Purpose		Purpose		Purpose		Purpose	
	Total	Barnes	Other	Barnes	Other	Barnes	Other	Barnes	Other
Total Visitor Parties Unweighted	954	602	352	295	84 ³	159	101	148	167
Weighted Parties	103,782	71,486	32,296	51,801	16,175	9,719	5,478	9,966	10,643
	%	%	%	%	%	%	%	%	%
Same-Day	47	63	12	79	23	11	-	32	2
Overnight	53	37	88	21	77	89	100	68	98
Average Number of Nights In Ontario ⁴	3.2	2.3	4.1	2.2	3.4	2.7	4.2	2.1	4.8
Total Party Nights Spent In Ontario	176,165	60,392	115,773	22,965	42,959	23,323	22,785	14,104	50,029

¹Ontario (excluding Metro Toronto), Quebec, USA. ²“Ontario” excludes residents of Metropolitan Toronto. ³Caution: small base size. ⁴Among visitor parties who spent any nights in Ontario. Source: Department of Canadian Heritage Tabulations, pages 146/148.

Table A-12A

Gender & Age — Barnes Exhibit Visitors (Respondent) ¹

	All Barnes Exhibit Visitors	Origin					
		Total Ontario	Toronto ²	Other Ontario	Quebec	USA	Total Non-Domestic
Household Visitor Parties Unweighted	1595	874	495	379	260	315	375
Weighted Parties	217,213	164,978	97,002	67,976	15,197	20,609	27,033
	%	%	%	%	%	%	%
GENDER							
Male	32	32	33	30	29	31	32
Female	68	68	67	70	71	69	68
AGE OF RESPONDENT							
15 - 19 years	1	2	2	1	-	*	1
20 - 34 years	32	35	38	30	18	15	23
35 - 44 years	21	20	20	21	26	20	21
45 - 54 years	21	20	19	22	25	29	26
55 - 64 years	13	13	13	12	17	18	15
65 years or more	11	10	7	14	13	10	18
Average age	44	43	42	44	48	50	47

¹Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures. ²Toronto includes Census Division 20 and other suburban areas and visitors who claimed to be commuting to work or school. *Less than 0.5%. Source: Detailed Tabulations, Volume II, pages 221, 222.

Table A-12B

Education & Income — Barnes Exhibit Visitors (Respondent)¹							
	All Barnes Exhibit Visitors	Origin					
		Total Ontario	Toronto ²	Other Ontario	Quebec	USA	Total Non- Domestic
Household Visitor Parties Unweighted	1595	874	495	379	260	315	375
Weighted Parties	217,213	164,978	97,002	67,976	15,197	20,609	27,033
	%	%	%	%	%	%	%
EDUCATION							
Graduated Secondary or Less	9	10	10	10	9	5	7
Courses at Community College/Some University	24	26	25	26	21	14	15
Graduated University/Post Graduate	67	64	65	64	70	81	78
ANNUAL HOUSEHOLD INCOME							
Under \$40,000	25	25	29	21	20	16	15
\$40,000 - \$59,999	20	20	20	20	27	18	17
\$60,000 - \$99,999	28	29	26	32	28	30	29
\$100,000 Or More	19	17	17	18	19	26	26
Don't Know/Not Stated	9	9	8	10	6	10	13
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures.							
² Toronto includes Census Division 20 and other suburban areas and visitors who claimed to be commuting to work or school. All incomes are reported in Canadian currency. Source: Detailed Tabulations, Volume II, pages 1060, 1078, 1079.							

Table A-13

Incidence Of Answering Question Related To Other Out-of-Town Cultural Trips			
	Out-Of- Towners¹		
	Total Out-of-Towners¹	Barnesians	Other Visitors
Visitor Parties Unweighted	954	602	352
Weighted Parties	103,782	71,486	32,269
	%	%	%
Asked About Other Cultural Trips	71	94	18
Not Asked About Other Cultural Trips	29	6	82

¹Ontario (excluding Metro Toronto), Quebec, USA. Source: Department of Canadian Heritage Tabulations, page 39.

Notes

ⁱDefinitions of key terms:

Household Visitor Parties

The survey results, and all estimates provided in this report, cover general admission visitors and household visitor parties only. A household visitor party is defined to be all individuals from the same household who came to the Barnes Exhibit together. If, for example, two couples attended the Barnes Exhibit together, each couple would represent a separate household visitor party. Similarly, if two friends, who live in different households, came together, each individual would represent a separate household visitor party. The household visitor party was adopted as the primary measurement unit for the study because spending information is considered to be most accurate when reported on a household basis.

The Visitor

The visitor or respondent for the study was the individual in the household visitor party who claimed to “have made most of the travel arrangements to visit the Barnes Exhibit today and is best able to comment on trip activities and spending”.

ⁱⁱLocal residents are people who live in Census Division 20 (Metropolitan Toronto) and those commuting to school or work in Metro Toronto.

ⁱⁱⁱ See MCTR Detailed Tabulations, Volume II, page 247 for figures.

^{iv} See Department of Canadian Heritage Detailed Tabulations, page 498 for figures.

^v Survey respondents who represented the household.

^{vi} See tabulations from the 1992 Canadian Travel Survey, Person-file, contained in Rogers, Judy, Research Resolutions, Extending the Use of the Canadian Travel Survey, Final Report, The Pilot Project, Phase I, March 1995.

^{vii} “6” or more on an eleven point bi-polar scale ranging from “0” (no influence) to “10” (single main reason).

^{viii} See Department of Canadian Heritage Detailed Tabulations, pages 40/42.

^{ix} A “room night” is a night spent by a household visitor party. Since most “parties” are composed of one or two persons, it is assumed that “party nights” and “room nights” are roughly equivalent.

^x The study provides different types of spending and economic impact estimates. The starting point for all estimates is the total amount spent in Ontario on the trip that included the Barnes Exhibit visit as reported by respondents in the surveys^x. Survey respondents were asked to estimate how much they had and/or expected to spend on the trip that included the Barnes Exhibit visit, on a category by category basis. These expenditures, presented in total and for individual categories of expense, constitute total spending in Ontario.

Not all the money spent in Ontario by a Barnes Exhibit visitor is attributable to the Barnes Exhibit. Therefore, it was decided to allocate to the Barnes Exhibit Account only the proportion of total Ontario spending that corresponded to the level of influence the visitor assigned to the Barnes Exhibit in his or her decision to visit Toronto.

For example, if a person were spending three nights in a hotel in Toronto because she or he was in town on business, the hotel and meal expenses associated with the three nights may have been spent whether the Barnes Exhibit was in Toronto or not. This visitor may say that the Barnes Exhibit had no influence on his/her decision to come to Toronto and might assign a “1” or a “0” to the Barnes Exhibit’s influence on the decision, using an eleven point scale ranging from zero to ten. In this event, no spending other than that spent at the AGO on the day of the visit would be directly attributable to the Barnes Exhibit. If the visitor accorded the Barnes Exhibit an influence of “5” on his/her decision to visit Toronto, fifty percent of off-site spending would be attributed to the Barnes Exhibit.

Responses within the questionnaire were used to determine the level of influence on a case-by-case basis. With few exceptions, all spending at the AGO on the day of the Barnes Exhibit visit (on-site spending) was attributed to the Barnes Exhibit.