Attraction audiences in Ontario's Big Cities

Attractions at home and while travelling among Toronto & Ottawa residents

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INTRODUCTION

Major attractions in the Toronto area including the Art Gallery of Ontario (AGO), McMichael Canadian Art Collection, Ontario Science Centre (OSC), Royal Botanical Gardens (RBG), Royal Ontario Museum (ROM), the Ontario Tourism Marketing Partnership (OTMP) and the City of Toronto provided support for Research Resolutions & Consulting Ltd. to undertake a special analysis of the Tourism Activity and Motivation Survey (TAMS) from a resident perspective. The project is designed to provide attractions in Ontario's major urban centres – Toronto and Ottawa/Hull[1] Census Metropolitan Areas (CMAs) – with a better understanding of what types of cultural and entertainment activities residents participate in at home and when they travel. The primary objectives of the project include the following:

- Identify the size and characteristics of the Big City attractions market in order to estimate which Big City residents in Ontario are apt to seek specific cultural and entertainment activities at home and on overnight trips;
- Identify opportunities for cross-marketing between Toronto and Ottawa as part of an import substitution strategy for Ontario;
- Utilize the tourism data set as a surrogate for a resident survey for Toronto and Ottawa in order to provide major attractions in both cities with profile data of *at home* attraction users;
- Provide Toronto attractions with a generic summary report that depicts the size and potential for various types of cultural and entertainment attractions among Toronto residents.

To meet these objectives, special tabulations of the TAMS Canada data file were generated with a focus on Ontario residents of Toronto and Ottawa CMAs who go to museums, art galleries and/or zoos/botanical gardens as day-to-day activities in their own communities and in other locations when they are on overnight trips.

In this report, an overview of the Big City market segment is provided, but the focus is on the Toronto CMA market because Toronto area attractions are primary partners in the project. For more information on the Ottawa CMA and Big City markets (Toronto/Ottawa combined), the reader is referred to the detailed tabulations provided to OTMP.

Definitions and a general description of the TAMS methodology are appended to this report.

Toronto, Ontario
January, 2002

SOME HIGHLIGHTS & REFLECTIONS

- Approximately one-third of Toronto's adults are in the market for local cultural activities such as the Royal Ontario Museum or Ontario Science Centre on a frequent or occasional basis. The same proportion is in the market for art experiences such as those they might find at the Art Gallery of Ontario or the McMichael Canadian Art Collection and for flora or fauna experiences such as they would find at the Royal Botanical Gardens or the Toronto Zoo.

- The proportions of Ottawa/Hull residents who go to local museums, art galleries and zoos/botanical gardens on a frequent or occasional basis are even greater than they are in Toronto, likely reflecting the more homogeneous ethnic mix and higher levels of formal education found among adults in the national capitol region.

- University educated residents are much more likely to be frequent or occasional art gallery, museum and theatre goers in their local community than are those who do not have a university degree. Since only one-quarter of Toronto's population has a university degree compared to one-third of Ottawa's population, it is not surprising to find that the incidence of frequent or occasional reliance on museums and art galleries for recreation in the home community is appreciably higher in Ottawa than it is in Toronto.

- More Toronto and Ottawa residents go to art galleries, museums and/or zoos or botanical gardens when they travel away from home than do so in their home communities (frequently/occasionally). Thus, *not-at-home-but-when-travelling* activity groups represent opportunities for local attractions to capture additional customers from within their local community.

- *Tourists in your own town* campaigns that highlight what might have changed since the last visit by local residents and promotional materials that encourage people to consider local attractions as a *tourist* might entice some of the thousands of Ontario big city residents to their own attractions on a more frequent basis.

- Effective cross-marketing between attractions in Ontario's two major cities creates the opportunity to retain tourism volume and value in the province – residents and their spending that are currently leaving the province for other parts of Canada, the USA and overseas destinations.

- There may be greater opportunity for Toronto to attract the Ottawa museum or gallery goer than vice versa. The cultural uniformity of Ottawa's population is consistent with the profile of frequent art gallery goers and museum goers in their local communities. Most of Ottawa's residents are Canadian born (80%) and/or claim that their ethnic/cultural heritage is Canadian or British (78%), compared to about 50% in Toronto, making Ottawa a logical marketing target for cultural attractions in Toronto.

- Projections of immigration and population characteristics for Toronto suggest that immigrants will continue to exert a strong influence on recreational activity utilization by Toronto's adult population. Presently, new Canadians represent just over half of Toronto's adult population (51%). By 2026, it is projected that immigrants will represent a slightly higher proportion (55%). It is also anticipated that the mix of Toronto's immigrant population will change over time, with higher proportions of new Canadians coming from outside western Europe than is currently the case. As these population changes occur, cultural institutions such as museums and art galleries that draw disproportionately high levels of their frequent local visitors from residents who were born in Canada or who have European backgrounds will have to consider the needs and interests of residents with a wider array of cultural backgrounds.

- Different attractions may experience special challenges in their attempts to draw visitors of different ethnic backgrounds. For example, zoos and botanical gardens attract 1-in-3 Torontonians (total) on a frequent or occasional basis but only 1-in-5 Torontonians with a Chinese heritage. In contrast, museums and art galleries attract those of Chinese heritage at the same rate as they attract the population at large but are not as successful in reaching those of African ancestry. While museums seem to draw out Torontonians of South Asian heritage on a frequent or occasional basis at par with Toronto adults in total, art galleries are not as popular within the South Asian community.[2]

- To a large extent, cultural and entertainment attractions in Toronto draw from the same pool of local residents. Among the 173,000 Torontonians who claim to go to local museums frequently and the 206,000 who make this claim with respect to local art galleries, 121,000 are frequent customers of *both* local museums and art galleries. Close to three-quarters of the frequent/occasional visitors to local museums are also regular or occasional visitors at local art galleries. These dual-attraction visitors (museum/gallery) represent 880,000 Toronto adults or one-quarter of Toronto's adult population.[3]

- Torontonians have only so much time and money to spend on leisure activities. In light of these constraints, the high level of overlap among customers for a wide variety of cultural and entertainment activities poses a challenge for local attractions. For example, in addition to going to galleries and museums, many members of the dual-attraction market (museum/gallery) in Toronto[4] are drawn to local live theatre performances (75%), music concerts (71%), zoos or botanical gardens (60%), professional sporting events (49%), or amusement parks (49%) frequently or occasionally. To a lesser extent, these gallery/museum goers also attend ballet (31%), and/or opera (26%) on a frequent or occasional basis.[5]

- More information on Toronto residents interested in specific types of attractions is available in an analysis of the many travel activities *away from home* included in the TAMS study. When the profiles of those who claim to go to the more general category of *museums at home* is contrasted to *science and technology* museums or *general history* museums on trips, the findings suggest that these two types of attractions appeal to very similar people. The *travelling market* for both attractions is, however, more educated, more affluent and more apt to be of Canadian or British heritage than is the local market. These differences likely reflect the reality of the cost of travel.

- Toronto travellers who go to botanical gardens on their trips differ substantively from the people who go to zoos *or* botanical gardens at home. In fact, those interested in understanding the market profile for botanical gardens are encouraged to use the *travel* profiles rather than the combined zoo/garden profiles. Toronto residents who go to botanical gardens when they travel tend to represent older women who, likely as a function of their age, live in adult-only households.

Next Steps

- Each Toronto-area attraction is interested in expanding its local market. With half of the city's population born outside Canada, growth projections and opportunities will have to take this reality into account.

- To better understand how the local market for attractions such as the Royal Ontario Museum, Ontario Science Centre, Art Gallery of Ontario, McMichael Canadian Art Collection or the Royal Botanical Gardens will change over time, these attractions are encouraged to undertake a rigorous analysis of demographic projections for Toronto. The sizeable impacts of immigration and the sources of immigrant populations could counter traditional expectations of future demand that generally reflect the aging of baby boomers. Toronto's population is unlikely to age in the same way as Ottawa's population. As a major immigrant reception centre, Toronto will continue to be infused with a younger, ethnically diverse population.

- Recent changes to the immigration laws in Canada should also be taken into account. If the educational and financial requirements to immigrate to Canada are raised substantively, there will likely be differences between the cultural and entertainment practices of new immigrants vis à vis current immigrants. In other words, the present cannot simply be projected into the future in this type of analysis.

- There are two fundamental ways to increase attendance: attract *new* visitors or encourage current visitors to come *more often*. In turn, efforts to attract *new* visitors can focus on the local market or they can focus on tourists. Since two-thirds of Toronto adults claim to go to local museums or art galleries rarely or not at all, there is ample opportunity for the ROM, OSC, AGO and McMichael to attempt to reach these residents. Only 1-in-25 Torontonians go to these types of attractions *frequently* but a further 1-in-4 go occasionally. These occasional visitors – over one million adults in Toronto – represent an opportunity to increase the frequency of visiting local museums and galleries.

- If further study of the occasional markets for local Toronto attractions is considered as a tool to determining how best to increase frequency among occasional visitors, two different approaches might be considered.

  1. Focus the study on traditional, well-educated European heritage markets to better understand how they decide where to spend their leisure time and money and what might entice them to visit local attractions on a more regular basis;

  2. Invest in greater understanding of other cultural markets that are expected to grow in the future.

- Direct some marketing and packaging opportunities at the Ottawa market. The composition and interests of national capital residents make Ottawa an ideal market for *tourists* for Toronto's museums, art galleries and botanical gardens. Not only are there easy transportation links between the two cities including road, rail and air, but there are considerable packaging opportunities based on Ottawa residents' keen interest in theatre, music concerts, museums and art galleries.

THE ATTRACTIONS MARKET IN ONTARIO'S BIG CITIES - AN OVERVIEW

Big City Markets for Specific Attractions

At least half of the 4.5 million adults (18+) who live in the combined Toronto and Ottawa/Hull Census Metropolitan Areas claim to rely on their local museums, art galleries, zoos or botanical gardens, theatres, amusement parks and/or professional sports events for day-to-day entertainment or recreation (*any*).

These Ontarians, often looked to by the Ontario Tourism Marketing Partnership as representative of *Big City* markets for leisure and travel activities, constitute a market for local attractions as well as the *Big City* potential market for similar types of attractions in other parts of the province.

Fewer Big City dwellers claim to go to these types of cultural and entertainment attractions or events on a *frequent* basis than say they go at all (frequently/occasionally/rarely, self-defined). Less than one-tenth of Ontario's Big City residents claim to go to live theatre performances (9%), professional sporting events (8%), art galleries or museums on a frequent basis (7% each). Even fewer say they go to local zoos/botanical gardens (4%) or amusement

Audiences for Various Local Attractions

	BIG CITIES (TORONTO/OTTAWA HULL)		TORONTO CMA	OTTAWA CMA
ADULTS 18+	4.5MILLION		3.6 MILLION	857,000
UNWEIGHTED BASE SIZE	(2,753)		(1,730)	(1,023)
ART GALLERIES				
ANY*	2,241,000	50%	48%	61%
FREQUENTLY	288,000	7%	6%	10%
OCCASIONALLY	1,152,000	26%	24%	33%
MUSEUMS				
ANY*	2,554,000	57%	53%	74%
FREQUENTLY	293,000	7%	5%	14%
OCCASIONALLY	1,383,000	31%	29%	41%
ZOOS/BOTANICAL GARDENS				
ANY*	2,614,000	59%	60%	53%
FREQUENTLY	180,000	4%	4%	3%
OCCASIONALLY	1,290,000	29%	30%	25%
LIVE THEATRE				
ANY*	2,676,000	60%	59%	66%
FREQUENTLY	412,000	9%	9%	12%
OCCASIONALLY	1,477,000	33%	33%	34%
AMUSEMENT PARKS				
ANY*	2,517,000	56%	56%	57%
FREQUENTLY	232,000	5%	5%	5%
OCCASIONALLY	1,336,000	30%	31%	27%
PRO SPORTS EVENTS				
ANY*	2,365,000	53%	53%	54%
FREQUENTLY	350,000	8%	8%	9%
OCCASIONALLY	1,161,000	26%	26%	26%

*ANY INCLUDES FREQUENTLY, OCCASIONALLY, AND RARELY. SOURCE: TAMS CANADA, SPECIAL TABULATIONS, TABLE 2 (OTTAWA/TORONTO CMAS; TORONTO CMA; OTTAWA HULL parks frequently (5%). Occasional patronage of these types of attractions and events in the local community is characteristic of between one-quarter and one-third of Ontario's Big City residents.

Differences between Toronto & Ottawa Hull

Attendance at local cultural activities such as museums and art galleries is significantly more characteristic of Ottawa Hull residents than for Toronto residents. For example, while 3-in-10 Toronto residents go to local art galleries on a frequent or occasional basis, over 4-in-10 Ottawa residents do so. About one-third of Torontonians go to local museums frequently or occasionally but more than one-half of Ottawa residents do. Explanations for these differences are likely to be found in both *supply* and *demand.*

- From the supply perspective, the nation's capital may simply have a greater critical mass of galleries and museums for local residents to frequent than does Toronto. Alternatively, there may be a wider variety of *other* types of competing activities for residents of the larger city to choose from than is the case in Ottawa.
- From the demand perspective, the formal education and place of birth/ethnic background profiles of residents of the two cities may result in different quantities of and approaches to using leisure time.

These differences are discussed in the following section but the reader is advised to explore the characteristics of each city's population separately in order to obtain a more detailed picture of who goes to art galleries, museums and zoos or botanical gardens in Toronto and in Ottawa. These data are available in detailed tabulations for each city and in the second chapter of this report for the Toronto CMA.

Demographic Differences & Activity Differences

The demographic profile of Big City audiences for local art galleries, museums and zoos or botanical gardens tends to "average out" substantive differences in the populations of Toronto on the one hand and Ottawa on the other hand. This "averaging" is particularly evident with respect to characteristics such as education, place of birth and ethnicity. These are the very same characteristics that seem to play a role in determining use of local galleries, museums and zoos or botanical gardens.

As is evident from the accompanying table, university educated residents are much more likely to be frequent or occasional art gallery, museum and theatre goers in their local community than are those who do not have a university degree. Since only one-quarter of Toronto's population has a university degree compared to one-third of Ottawa's population, it is not surprising to find that the incidence of frequent or occasional reliance on museums and art galleries for recreation in the home community is appreciably higher in Ottawa than in Toronto.

Similarly, Canadian-born Big City residents are more apt to take advantage of local cultural attractions, especially on a frequent basis, than are residents born in other countries. Again, Ottawa has a much higher proportion of Canadian-born residents (80%) than does Toronto (48%), contributing to the higher levels of attendance at local attractions such as art galleries and museums in the capital region than in Toronto.

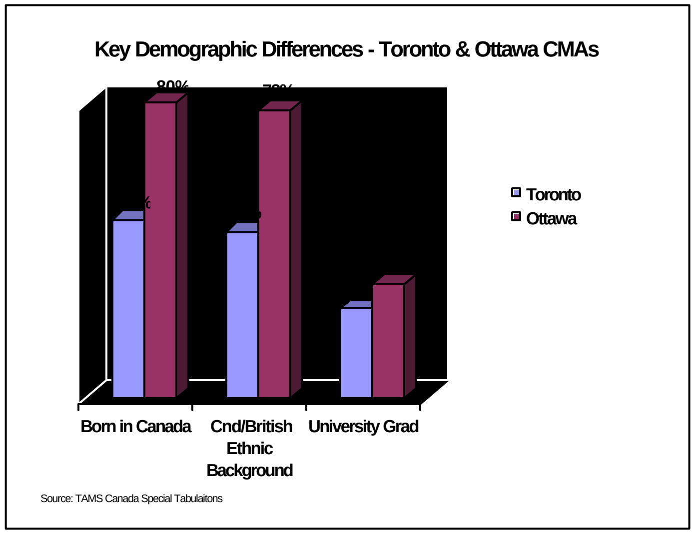
Some of the key demographic differences between the two cities that likely contribute to different leisure and travel patterns of the resident populations are shown in the accompanying chart. For more details about the Ottawa market, the reader is directed to the detailed tabulations. More information on the Toronto CMA market can be found in the body of this report. A summary

Demographic Characteristics of Local Big City Attraction Audiences (Frequently/Occasionally)

ADULTS, 18+	BIG CITIES (TORONTO/OTTAWA)	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	4.5 MILLION	1.7 MILLION	1.4 MILLION	1.5 MILLION
UNWEIGHTED BASE SIZE	(2,753)	(1,152)	(978)	(877)
GENDER				
MEN	49%	50%	47%	49%
WOMEN	51%	50%	53%	51%
AGE				
18 – 24 YEARS	13%	12%	11%	9%
25 – 34 YEARS	22%	21%	21%	23%
35 – 44 YEARS	24%	28%	24%	31%
45 – 54 YEARS	17%	20%	20%	19%
55 – 64 YEARS	11%	11%	13%	10%
65+ YEARS	14%	9%	11%	8%
AVERAGE AGE (18+)	43 YEARS	42 YEARS	44 YEARS	42 YEARS
EDUCATION				
COMPLETED SECONDARY OR LESS	38%	25%	22%	30%
SOME POST SECONDARY	35%	37%	38%	39%
UNIVERSITY GRADUATE	26%	38%	40%	31%
ANNUAL HOUSEHOLD INCOME				
UNDER $60,000	60%	52%	51%	54%
$60,000 - $99,999	25%	28%	26%	29%
$100,000+	15%	21%	23%	17%
AVERAGE HOUSEHOLD INCOME ('98)	$58,000	$65,000	$67,000	$63,000

Source: TAMS Canada special tabulations, pages 11/14 (Toronto/Ottawa Hull CMAs).

table detailing the place of birth and ethnicity profile of *Big City* residents can be found in the appendix.



Activities on Trips

Much of the TAMS study is dedicated to understanding what *travellers* do while on overnight trips. Furthermore, the sections of the survey dedicated to travel activities provide more detailed descriptions of attractions than is available in the TAMS "at home" activity list. The Big City *traveller* market for **general history museums** such as the ROM exceeds one million residents (1,084,000). The market for **science and technology museums** such as the Ontario Science Centre is somewhat smaller (854,000). Botanical gardens such as the Royal Botanical Gardens might attract as many as 657,000 Big City travellers. Even though the lists of "at home" activities and those a person might engage in while travelling are not identical in the study, the potential size of the Big City market for museums, art galleries and zoos or botanical gardens can be estimated by combining these measures.[6]

When looked at together, the at-home or on-trip market for art galleries in Ontario's Big Cities reaches 1.8 million adults. The museum market reaches 2.3 million and the zoo/botanical garden market reaches 2.2 million. These millions of Ontario residents offer opportunities for visitor retention – by the local municipality and/or by the province. If a resident of Ottawa Hull seeks museums, art galleries or botanical gardens while on overnight trips, this person might be encouraged to stay at home . . . or to go from Ottawa to Toronto in order to engage in the activity. Conversely, Toronto residents who seek gardens or galleries while away from home can be encouraged to find these experiences at home . . . or in Ottawa. By encouraging these travellers to find the types of experiences they are looking for *in Ontario*, the province and local attractions benefit from increased audiences, increased revenues and a reduction in travellers and money leaving the province.

There is an obvious logic in Toronto marketing its museums, galleries and gardens to Ottawa and vice versa. There is also an obvious logic for attractions in both cities to identify other entertainment/learning partners that might be incorporated into packaging cultural experiences – partners such as theatres, concerts, sports events and the like. For this reason, estimates of the populations of Toronto and Ottawa interested in these attractions are also provided in the accompanying table.

Audiences for Attractions at Home or On Trips

	BIG CITY TOTAL	TORONTO CMA	OTTAWA HULL CMA
TOTAL ADULTS 18+	4.5 MILLION	3.6 MILLION	857,000
ART GALLERIES			
FREQUENTLY/OCCASIONALLY AT HOME *	1,441,000	1,079,000	362,000
ON TRIPS OR AT HOME**	1,818,000	1,380,000	438,000
MUSEUMS			
FREQUENTLY/OCCASIONALLY AT HOME *	1,677,000	1,209,000	468,000
ON TRIPS OR AT HOME**	2,344,000	1,747,000	597,000
GENERAL HISTORY MUSEUM ON TRIPS	1,084,000	846,000	238,000
SCIENCE /TECH MUSEUM ON TRIPS	854,000	629,000	225,000
ZOOS/BOTANICAL GARDENS			
FREQUENTLY/OCCASIONALLY AT HOME *	1,469,000	1,231,000	238,000
ON TRIPS OR AT HOME**	2,205,000	1,835,000	370,000
BOTANICAL GARDEN ON TRIPS	657,000	518,000	139,000
AMUSEMENT PARKS			
FREQUENTLY/OCCASIONALLY AT HOME *	1,567,000	1,292,000	275,000
ON TRIPS OR AT HOME**	2,194,000	1,831,000	363,000
PROFESSIONAL SPORTS EVENTS			
FREQUENTLY/OCCASIONALLY AT HOME *	1,512,000	1,215,000	297,000
ON TRIPS OR AT HOME**	1,976,000	1,585,000	391,000
LIVE THEATRE			
FREQUENTLY/OCCASIONALLY AT HOME *	1,889,000	1,498,000	31,000
ON TRIPS OR AT HOME**	2,320,000	1,876,000	444,000
MUSIC CONCERTS			
FREQUENTLY/OCCASIONALLY AT HOME *	1,761,000	1,351,000	410,000
ON TRIPS OR AT HOME**	2,095,000	1,615,000	480,000

*FROM TELEPHONE QUESTIONNAIRE, BASE SIZE = 1730. **INCLUDES FREQUENTLY, OCCASIONALLY AT HOME AND/OR ANY ON RECENT OVERNIGHT TRIPS, FROM MAILBACK SEGMENT PLUS NONQUALIFIERS. BASE SIZE = 725. SOURCE: TAMS CANADA, SPECIAL TABULATIONS, TABLES 2, 3.

THE ATTRACTIONS MARKET IN THE TORONTO CMA

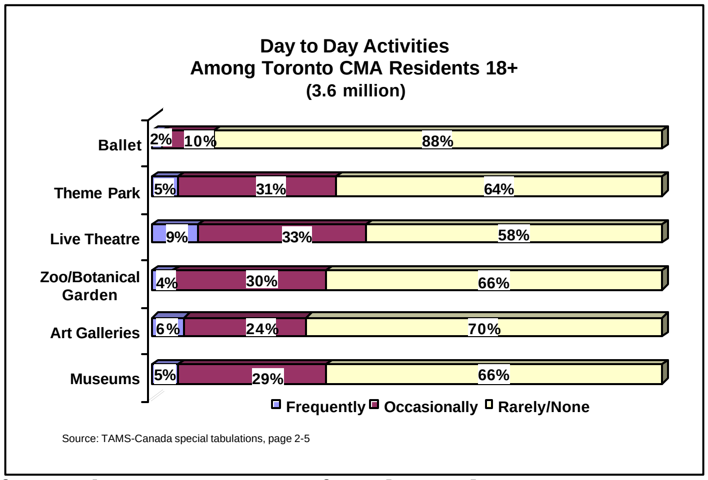
The Current Local Market

About 1-in-2 Toronto adults are in the market for local art galleries or museums on a self-declared *frequent*, *occasional* or *rare* basis. Similarly, about 1-in-2 go to local amusement parks and/or professional sports events for day-to-day recreation. Slightly more area residents claim to go to local zoos or botanical gardens (60%).

Audiences for Various Local Attractions

	TORONTO CMA	
TOTAL ADULTS 18+	3.6 MILLION	
ART GALLERIES		
ANY*	1,716,000	48%
FREQUENTLY	206,000	6%
OCCASIONALLY	873,000	24%
MUSEUMS		
ANY*	1,920,000	53%
FREQUENTLY	173,000	5%
OCCASIONALLY	1,036,000	29%
ZOOS/BOTANICAL GARDENS		
ANY*	2,160,000	60%
FREQUENTLY	153,000	4%
OCCASIONALLY	1,078,000	30%
LIVE THEATRE		
ANY*	2,115,000	59%
FREQUENTLY	312,000	9%
OCCASIONALLY	1,186,000	33%
AMUSEMENT PARKS		
ANY*	2,028,000	56%
FREQUENTLY	188,000	5%
OCCASIONALLY	1,104,000	31%
PRO SPORTS EVENTS		
ANY*	1,899,000	53%
FREQUENTLY	272,000	8%
OCCASIONALLY	943,000	26%

*ANY INCLUDES "FREQUENTLY, OCCASIONALLY, AND RARELY. SOURCE: TAMS CANADA, SPECIAL TABULATIONS, TABLE 2.



Frequent patrons of these attractions represent a considerably smaller number of Torontonians, ranging from a high of 9% for live theatre productions to a low of 4% for zoos and botanical gardens. Museums and art galleries attract about 1-in-20 local residents on a frequent basis.

Torontonians who claim that they rely on specific attractions for day-to-day entertainment on a frequent or occasional basis are the best estimate available from TAMS for typical or regular gallery, museum and zoo/botanical garden local markets. When frequent and occasional customers are combined, local adult market potential reaches just over one million people for art galleries such as the AGO or McMichael Canadian Art Collection (1,079,000) and somewhat more for museums such as the ROM, OSC and more specialized museums such as the Bata Shoe Museum (1,209,000).

It is more difficult to estimate local market opportunity for an attraction such as the Royal Botanical Gardens since the only available category from TAMS combines zoos with botanical gardens. Assuming that the same interest ratio evident for Toronto *travellers* who go to zoos and those who go to botanical gardens applies to the resident population for local entertainment and recreation, the market opportunity for the RBG would be in the range of 604,000 Toronto adults (see note for explanation).[7]

Who are they?

Frequent or occasional local museum, art gallery and zoo/botanical garden patrons closely resemble the Toronto population as a whole from a demographic perspective, with some noteworthy exceptions.

Basic Demographics

Like Torontonians in total, these attraction audiences are about evenly divided between men and women and tend to span the age spectrum.

Those who go to Toronto area museums or art galleries frequently or occasionally are, however, more affluent and have more formal education than does the city's population at large. For example, 1-in-4 Toronto adults has a university

Demographic Characteristics of Local Toronto Attraction Audiences (Frequently/Occasionally)

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(1,730)	(600)	(548)	(596)
GENDER				
MEN	49%	51%	48%	49%
WOMEN	51%	49%	52%	51%
AGE				
18 – 24 YEARS	13%	12%	11%	10%
25 – 34 YEARS	22%	21%	23%	24%
35 – 44 YEARS	24%	27%	23%	31%
45 – 54 YEARS	17%	20%	19%	18%
55 – 64 YEARS	11%	11%	13%	10%
65+ YEARS	15%	10%	11%	8%
AVERAGE AGE (18+)	44 YEARS	42 YEARS	44 YEARS	42 YEARS
EDUCATION				
COMPLETED SECONDARY OR LESS	40%	25%	23%	32%
SOME POST SECONDARY	35%	38%	39%	39%
UNIVERSITY GRADUATE	24%	37%	38%	29%
ANNUAL HOUSEHOLD INCOME				
UNDER $60,000	60%	51%	50%	55%
$60,000 - $99,999	25%	27%	25%	28%
$100,000+	16%	22%	24%	17%
AVERAGE HOUSEHOLD INCOME ('98)	$58,000	$66,000	$67,000	$63,000

Source: TAMS Canada special tabulations, pages 12/14.

degree but more than 1-in-3 art gallery (38%) and museum goers (37%) do. The average annual household income in Toronto is about $58,000 whereas the corresponding income for gallery goers is $67,000 and for museum goers is $66,000.[8]

Those who go to zoos or botanical gardens for day-to-day recreation or entertainment more closely resemble the city's population as a whole with respect to education and income than do museum and gallery goers. Nonetheless, zoo/garden goers are somewhat more affluent ($63,000 average income) and slightly more likely to have a university degree (29%) than the general public.

Household Composition

Most Torontonians live in adult-only households (61%). The same can be said about frequent or occasional visitors to local museums (59%), art galleries (64%) and to a lesser extent, zoos or botanical gardens (52%).

Of the three types of local attractions covered here, zoos/botanical gardens have the greatest *kid appeal*. This is likely the result of children's greater fascination with animals than with gardens![9] Two-fifths of the Toronto adults who claim to go to zoos or botanical gardens on a frequent or occasional basis live in households with children twelve years of age or younger (41%). This proportion is considerably higher than is the case for Torontonians as a whole (30%) or for local audiences for museums (33%) and art galleries (26%). Because art gallery patrons tend to be somewhat older than other attraction audiences, it is not surprising that they are least apt to live in households with young children.

Household Composition of Local Toronto Attraction Audiences (Frequently/Occasionally)

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(1,730)	(600)	(548)	(596)
AVERAGE HOUSEHOLD SIZE	3.1	3.1	2.9	3.3
ALL HOUSEHOLD MEMBERS 18+	61%	59%	64%	52%
ANY CHILDREN/TEENS	39%	41%	35%	48%
THOSE WITH ANY CHILDREN . . .				
13 - 17 YEARS	16%	15%	14%	16%
12 YEARS OR YOUNGER	30%	33%	26%	41%
UNDER 3 YEARS	10%	9%	6%	13%

Source: TAMS Canada special tabulations, page 15.

Place of Birth & Ethnic Heritage

Approximately one-half of Toronto's adult population was born outside Canada (51%), with about one-fifth coming to Canada from the United Kingdom or continental Europe (19%), one-seventh coming from Asia (16%), and just under one-tenth from Central or South America (9%).

Ethnic Background / Place of Birth of Local Toronto Attraction Audiences (Frequently / Occasionally)

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(1,730)	(600)	(548)	(596)
PLACE OF BIRTH				
CANADA	48%	51%	52%	50%
UK/EUROPE	19%	19%	19%	18%
ASIA	16%	15%	12%	12%
CENTRAL/SOUTH AMERICA	9%	6%	6%	10%
ETHNIC / CULTURAL BACKGROUND				
CANADIAN	19%	20%	20%	22%
BRITISH	25%	28%	29%	28%
OTHER EUROPE	27%	28%	26%	27%
SOUTH ASIA	8%	8%	6%	9%
AFRICAN ANCESTRY/BLACK	6%	4%	5%	7%
MIDDLE EAST/WEST ASIA/NORTH AFRICA	3%	3%	2%	2%
EAST ASIA/SOUTHEAST ASIA	10%	10%	10%	6%
Chinese	6%	6%	6%	4%

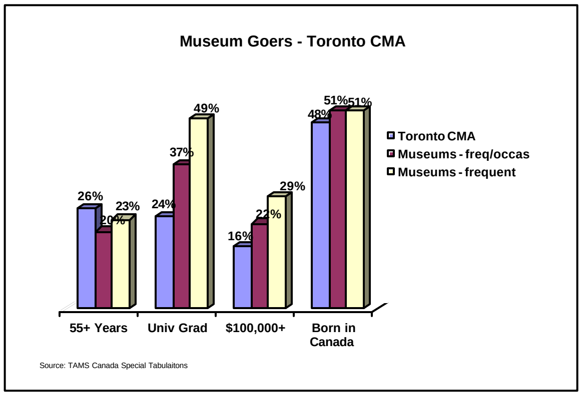
Source: TAMS Canada special tabulations, pages 16, 17

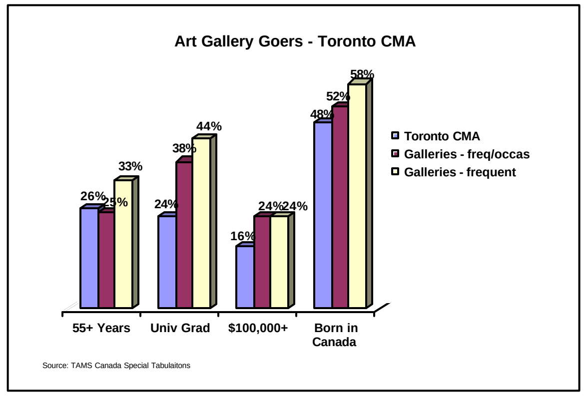
Of the three types of attractions highlighted in this analysis, museums and art galleries attract new Canadians from the U.K. / Europe and other countries in about the same proportions as these populations are represented in Toronto as a whole. Zoos and botanical gardens are also visited on a frequent or occasional basis by those born in and outside Canada at par with the Toronto adult population.

Very similar patterns are evident when the population is examined from the perspective of ethnic or cultural background (self-declared). Most Toronto adults describe themselves as being *Canadian* (19%), *British* (25%) or *other European* (27%) including Italian, German, or French. Similarly, most local visitors to museums, art galleries and zoos / botanical gardens fall into one of these cultural groups [see appendix for Statistics Canada's ethnic background coding scheme].

Differences between Frequent & Frequent/Occasional Audiences

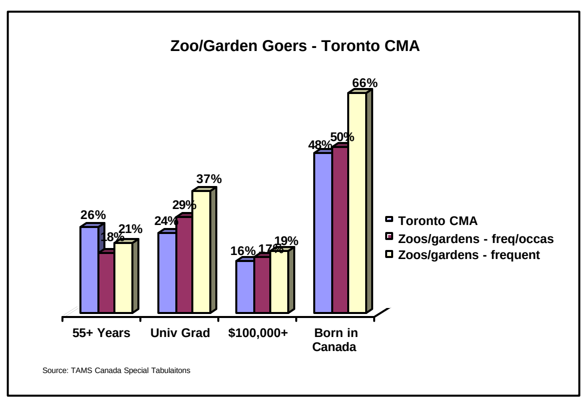
Frequent audiences for local attractions exhibit greater divergences from a demographic perspective than do broader audiences (frequent / occasional). For example, twice as many frequent art gallery patrons are between the ages of 55 and 64 (22%) as is the case in the Toronto population (11%) or in the frequent/ occasional local art gallery visitor (13%).[10]





In a similar vein, frequent museum goers are much more likely to be university graduates (49%) than are Torontonians in general (24%) or than those who go to museums frequently or occasionally (37%).

Frequent zoo/botanical garden visitors are also more apt to be well educated than is the Toronto adult population at large, and than are those who go to these types of attractions on a frequent or occasional basis . . . and they are much more likely to be Canadian-born (66%).



Ethnic differences in audiences for museums, galleries and zoos/gardens become more evident when the *frequent* audiences are examined. Although base sizes are small for *frequent* visitors, there appears to be a tendency for these visitors to be over-represented among Torontonians of Canadian, British and other European heritage and to be under-represented among those of South Asian, Chinese and African ancestry. As noted above, these differences are especially evident for those who go to zoos/botanical gardens on a frequent basis. A deterrent to attraction attendance among those of African heritage may be their level of formal education – only 14% of these Torontonians have a university degree, compared with 24% of the city's adult population in total. Education is not, however, a likely deterrent among Torontonians of East Asian/Southeast Asian (including Chinese) ancestry. At 29% with a university degree, these individuals are as likely to be university educated as are Toronto residents in total. The same can be said for Toronto's South Asian community. More than one-third of these residents have a university degree (36%), suggesting that education is not a barrier to attraction attendance.[11] Perhaps for these groups, other cultural issues might be at play in their relative reluctance to go to Toronto's major attractions such as museums, art galleries and zoos/botanical gardens on a frequent basis.

Ethnic Background of Frequent Local Toronto Attraction Audiences

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	173,000[1]	206,000	153,000[1]
UNWEIGHTED BASE SIZE	(1,730)	(93)	(109)	(77)
ETHNIC / CULTURAL BACKGROUND				
CANADIAN	19%	21%	28%	24%
BRITISH	25%	28%	26%	31%
OTHER EUROPE	27%	27%	24%	31%
SOUTH ASIA	8%	6%	5%	3%
AFRICAN ANCESTRY/BLACK	6%	5%	2%	4%
MIDDLE EAST/WEST ASIA/NORTH AFRICA	3%	6%	3%	*
EAST ASIA/SOUTHEAST ASIA	10%	6%	10%	2%
Chinese	6%	3%	3%	*

Source: TAMS Canada special tabulations, pages 16, 17. *Less than 0.5%. [1]Small base size – interpret with caution.

There are also different patterns within the *frequent* visitor group for each type of attraction with respect to the presence or absence of children in the household. Local frequent audiences for art galleries and museums seem to be concentrated in the "adult only" population segment. The incidence of having young children (27%) is somewhat *lower* among frequent museum goers than it is among frequent/occasional visitors to this type of attraction (33%). An even more dramatic divergence in the incidence of children is evident for art gallery goers. Those who go to these attractions frequently are much less likely to have children twelve years of age (17%) or under in the household than is the case among frequent/occasional visitors (26%).[12]

In contrast, many *more* frequent zoo/garden goers in Toronto have children 12 years of age or younger (56%) than do those who go to these attractions on a frequent or occasional basis (41%). Again, the lure of these attractions to households with children is more likely linked to zoos than to botanical gardens.[13]

A comparison of *frequent* versus *occasional* visitors to museums and art galleries for basic demographic characteristics is provided in the appendix. Small base sizes of the frequent groups require that caution be used in interpreting these findings (see appendix tables 3/4). These profiles suggest that differences between the frequent and occasional local audiences for museums differ most prominently with respect to education: 1-in-2 *frequent* museum goers are university educated compared to about 1-in-3 *occasional* visitors. In the case of art galleries, *frequent* visitors are more apt to be older and, consequently, to live in adult-only households (73%) than is the case for *occasional* art gallery visitors (62%).

Crossovers

There is considerable overlap between museum and art gallery audiences in Toronto. Three-in-four of Toronto's 1.2 million museum-going adults claim to go art galleries on a frequent or occasional basis (73%) and an even higher proportion of the city's 1.1 million art gallery users say they go to museums in their local community frequently or occasionally (82%).

Cross-Over Among Local Toronto Attraction Audiences (Frequent/Occasional)

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(1,730)	(600)	(548)	(596)
FREQUENTLY OR OCCASIONALLY				
MUSEUMS	34%	100%	82%	58%
Frequently	5%	14%	14%	8%
ART GALLERIES	30%	73%	100%	49%
Frequently	6%	15%	19%	9%
ZOOS/BOTANICAL GARDENS	34%	59%	56%	100%
Frequently	4%	8%	8%	12%

Source: TAMS Canada special tabulations, page 1-1.

Somewhat less overlap is evident between Toronto adults who go to zoos or gardens on a regular or occasional basis and museum or gallery goers. Of the 1.2 million zoo/garden goers, over half say they go to museums frequently or occasionally (58%) and slightly fewer make the same claim with respect to art galleries (49%).

About one-seventh of Toronto's museum-going adults claim to go to these attractions on a *frequent* basis – the same proportion that claim to go to art galleries frequently (15%) and twice the proportion that go to zoos or botanical gardens frequently (8%). A similar pattern is evident for art gallery goers -- about one-seventh are frequent *museum* goers, even more are frequent gallery goers (19%), but only about one-twelfth are frequent zoo/garden goers (8%).

Other Frequent Day-to-Day Activities in the Local Area

To gain a better understanding of the recreational interests of local visitors to Toronto's museums, art galleries and zoos/botanical gardens, it is possible to look at what other types of activities they engage in on a day-to-day basis. In this analysis, only *frequent* enthusiasts of other types of recreation and entertainment are shown.

Other Frequent Day-to-Day Activities of Local Toronto Attraction Frequent/Occasional Audiences

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(1,730)	(600)	(548)	(596)
FREQUENTLY . . . AT HOME				
GARDENING	27%	33%	36%	35%
PICNICING/OUTINGS IN PARKS	19%	28%	27%	28%
CYCLING	15%	22%	21%	20%
DANCING	12%	14%	14%	17%
GOLFING	10%	14%	15%	12%
LIVE THEATRE	9%	15%	19%	13%
PRO SPORTS EVENTS	8%	11%	12%	10%
MUSIC CONCERTS	8%	16%	20%	11%
ART GALLERIES	6%	15%	19%	9%
MUSEUMS	5%	14%	14%	8%
AMUSEMENT/THEME PARKS	5%	7%	7%	9%
ZOOS/BOTANICAL GARDENS	4%	8%	8%	12%
BALLET	2%	5%	6%	3%
OPERA	2%	4%	5%	3%

Source: TAMS Canada special tabulations, pages 2-1/6.

Local museum, gallery and zoo/garden goers are simply more active than are Torontonians in general. It does not matter whether it is picnicking, gardening, going to the theatre or golfing: Torontonians who go to local art galleries, museums or zoos/botanical gardens are more apt to be frequent participants in many of the activities their city has to offer. They are "doers".

While those who go their local museums, art galleries and zoos/botanical gardens on a frequent or occasional basis might be expected to be more intensively involved in arts and cultural activities such as theatre, concerts, ballet, and opera than is the general public – and they are – they are also more apt to garden, to go on picnics, to cycle, and to go to professional sporting events than the average Toronto adult. About 1-in-3 garden, over 1-in-4 frequently picnic in parks and about 1-in-5 cycle on a frequent basis.

Museum, zoo/botanical garden and especially art gallery customers are frequent theatre and concert goers at appreciably higher rates than are Torontonians in general. While participation levels are considerably lower for opera and ballet, these activities too draw appreciably larger audiences from frequent or occasional museum and art gallery patrons than is the case among

Torontonians as a whole. Those who go to zoos or botanical gardens, however, are not especially likely to be found at these types of performances. Instead, zoo/garden customers show a special interest in amusement parks and/or dancing.

For information on other activities of interest to frequent or occasional museum, gallery and zoo/garden visitors when they *travel*, see subsequent sections of this report (page 28).

Market Potential: Activities at Home and On Recent Trips

The TAMS study permits analysis of activities in the local community as well as activities engaged in on recent overnight leisure trips. As a result of methodological idiosyncrasies of the study, the base size of the group available for analysis in terms of their *trip* activities (725) is appreciably smaller than is the base size for Torontonians at large (1,730). Consequently, all information provided here about the *travel patterns* of attraction audiences should be interpreted with some caution.

As described in the initial chapter of this report, Toronto residents display considerable interest in visiting museums, art galleries or zoos/botanical gardens whether in their local community (frequent/occasional) or while on an overnight trip. When *at home* and *on trip* interest is combined (NET), the full potential market for museums (48%) and zoos/botanical gardens (51%) reaches close to half of Toronto's adult population. The full potential market for art galleries is somewhat smaller, at about two-fifths of Torontonians (38%).

These proportions are on par with competing recreational or entertainment activities – experiences offered by amusement parks (51%), live theatre (52%), professional sporting events (44%) and/or music concerts (45%).

Audiences for Attractions at Home or On Trips

TOTAL ADULTS 18+ TORONTO CMA	3.6 MILLION	
ART GALLERIES		
FREQUENTLY/OCCASIONALLY AT HOME *	1,079,000	32%
ON TRIPS OR AT HOME**	1,380,000	38%
MUSEUMS		
FREQUENTLY/OCCASIONALLY AT HOME *	1,209,000	34%
ON TRIPS OR AT HOME**	1,747,000	48%
GENERAL HISTORY MUSEUM ON TRIPS	846,000	23%
SCIENCE /TECH MUSEUM ON TRIPS	629,000	17%
ZOOS/BOTANICAL GARDENS		
FREQUENTLY/OCCASIONALLY AT HOME *	1,231,000	34%
ON TRIPS OR AT HOME**	1,835,000	51%
BOTANICAL GARDEN ON TRIPS	518,000	14%
AMUSEMENT PARKS		
FREQUENTLY/OCCASIONALLY AT HOME *	1,292,000	36%
ON TRIPS OR AT HOME**	1,831,000	51%
PROFESSIONAL SPORTS EVENTS		
FREQUENTLY/OCCASIONALLY AT HOME *	1,215,000	34%
ON TRIPS OR AT HOME**	1,585,000	44%
LIVE THEATRE		
FREQUENTLY/OCCASIONALLY AT HOME *	1,498,000	42%
ON TRIPS OR AT HOME**	1,876,000	52%
MUSIC CONCERTS		
FREQUENTLY/OCCASIONALLY AT HOME *	1,351,000	38%
ON TRIPS OR AT HOME**	1,615,000	45%

*FROM TELEPHONE QUESTIONNAIRE, BASE SIZE = 1730 **INCLUDES FREQUENTLY OR OCCASIONALLY AT HOME AND /OR ANY ON RECENT OVERNIGHT TRIPS, FROM MAILBACK SEGMENT PLUS NONQUALIFIERS. BASE SIZE = 725. SOURCE: TAMS CANADA, SPECIAL TABULATIONS, TABLES 2, 3.

Science & Technology Museums and Botanical Gardens – On Trips Only

The "on trip" activity list is the only source of information on the incidence of Torontonians' interest in **science and technology museums** and **botanical gardens** in the TAMS survey.

There is considerable overlap between Toronto residents who claim that they go to science/technology museums on overnight trips and those who go to generic "museums" in their local community, suggesting that an organizations such as the Ontario Science Centre could use the *traveller* market as a viable surrogate for the *resident* market. Specifically, of the 629,000 Toronto adults who go to science/technology museums when they travel, 441,000 (70%) also claim to go to "museums" in Toronto on a frequent or occasional basis.[14]

To provide a point of comparison, about 846,000 Toronto adults say they go to *general history or heritage museums* on trips. Of these, about 6-in-10 or 522,000 also claim to go to "museums" in their home community on a frequent or occasional basis (62%).

A different pattern is evident for the zoo/garden activity segment. Going to a botanical garden while on a trip is characteristic of 518,000 Toronto adults whereas going to a zoo on a trip is characteristic of 797,000. The fact that Toronto is home to about one-half million people who say they went to botanical gardens on recent overnight trips is a clear indication that there is considerable local market *potential* for the Royal Botanical Gardens.

Demographic data for those who claim to have gone to science and technology museums, general history museums and botanical gardens on a recent overnight trip are provided as surrogates for profiles of *at home* markets in an effort to extract as much useful information from TAMS as possible for attractions such as the Royal Ontario Museum (general history), the Ontario Science Centre (science and technology museums) and the Royal Botanical Gardens (botanical gardens). In the accompanying table, "on trip" participants are compared to frequent/occasional "at home" museum and zoo/botanical garden visitors and to the profile of Toronto adults in total.

Science & Technology Museum Goers – On Trips Toronto residents who claim to go to any type of museum on a frequent or occasional basis closely resemble those who visit a *science or technology museum* while travelling away from home in terms of gender, age, household composition, education and income.

They are, however, considerably more likely to be Canadian-born (63%) than is Toronto's general public (48%). Correspondingly, they are more likely to be of Canadian or British heritage (64%) than Torontonians in total (44%). Since the same pattern in ethnic background and place of birth is evident for *travellers* from Toronto who go to general history museums, these differences may reflect the ethnic differences between Torontonians who *travel* versus those who do *not travel* rather than idiosyncrasies of the Ontario Science Centre's core Toronto audience. For figures on country of birth and ethnic background, see Appendix Table 2.

Demographic Characteristics of Science / Tech & General History Museum Goers & Botanical Garden Goers – on Trips

	TORONTO CMA	MUSEUMS FREQ/ OCCAS AT HOME	SCIENCE/ TECH MUSEUMS ON TRIPS	GENERAL HISTORY MUSEUMS ON TRIPS	ZOOS/ GARDENS FREQ/ OCCAS AT HOME	GARDENS ON TRIPS
ADULTS 18+	3.6 MILLION	1.2 MILLION	629,000	846,000	1.2 MILLION	518,000[1]
UNWEIGHTED BASE SIZE	(1,730)	(600)	(104)	(142)	(596)	(86)
GENDER						
MEN	49%	51%	48%	43%	49%	43%
WOMEN	51%	49%	52%	57%	51%	57%
AGE						
18 – 24 YEARS	13%	12%	8%	6%	10%	9%
25 – 34 YEARS	22%	21%	26%	26%	24%	20%
35 – 44 YEARS	24%	27%	30%	22%	31%	15%
45 – 54 YEARS	17%	20%	12%	17%	18%	12%
55 – 64 YEARS	11%	11%	15%	16%	10%	22%
65+ YEARS	15%	10%	10%	13%	8%	22%
AVERAGE AGE (18+)	44 YEARS	42 YEARS	43 YEARS	45 YEARS	42 YEARS	48 YEARS
EDUCATION						
SECONDARY/ LESS	40%	25%	17%	22%	32%	36%
SOME POST SECONDARY	35%	38%	48%	39%	39%	40%
UNIVERSITY GRADUATE	24%	37%	35%	40%	29%	25%
HOUSEHOLD COMPOSITION						
ALL HOUSEHOLD MEMBERS 18+	61%	59%	62%	70%	52%	69%
ANY CHILDREN/TEENS	39%	41%	38%	30%	48%	31%
THOSE WITH ANY CHILDREN WHO ARE . . .						
13 - 17 YEARS	16%	15%	11%	12%	16%	12%
12 YEARS OR YOUNGER	30%	33%	33%	24%	41%	25%
UNDER 3 YEARS	10%	9%	8%	6%	13%	4%
ANNUAL HOUSEHOLD INCOME						
UNDER $60,000	60%	51%	47%	43%	55%	57%
$60,000 - $99,999	25%	27%	35%	35%	28%	26%
$100,000+	16%	22%	18%	22%	17%	18%
AVERAGE HOUSEHOLD INCOME ('98)	$58,000	$66,000	$69,000	$72,000	$63,000	$63,000

Source: TAMS Canada special tabulations, pages 11-3, 12-2, 14-3/4, . [1]Small base size – interpret with caution.

General History Museum Goers – On Trips The profile of these museum goers is very similar to the one just described for Toronto travellers who go to science and technology museums. There are, however, directional indications to suggest that the Toronto resident who goes to general history museums when on trips is more apt to be female, to be slightly older, to have a university degree and to live in an adult-only household than is the traveller who seeks science and technology museums when on trips.

Botanical Garden Goers – On Trips Compared to Toronto residents who claim to go to zoos or botanical gardens on a frequent or occasional basis, those who visit a botanical garden while travelling away from home are more apt to be women (57%) and to be older. In fact, over two-fifths of these garden visitors are at least 55 years of age (44%) with half this proportion falling into the 65 plus age group (22%). Likely as a function of their advanced ages, these garden travellers live in adult-only households (69%) to a slightly greater extent than do Torontonians as a whole (61%) but match the city profile in terms of education and household income.

Even though the base size of Toronto botanical garden travellers is comparatively small, these findings suggest that the inclusion of zoo visitors in the "at home" mix obscures the true profile of the local botanical garden market. For planning purposes, the profile of botanical garden *travellers* is likely a better reflection of the composition of this market at the local level than is the combined zoo/garden group.

Other Cultural Activities When Travelling

By providing information on what Torontonians do when they travel away from home, the TAMS survey provides a 'backdoor' to understanding more about what Toronto residents like to do. If they engage in an activity *when travelling* they might also form part of an audience for local attractions that offer the same types of experiences.

Additionally, by understanding what local residents do *while away from home*, local attractions can gain some insights into cross-marketing and programming opportunities.[15]

It should be noted that the "on trip" activity list shown here represents only a fraction of the on-trip information available in TAMS. The reader is directed to the detailed tabulations for a more complete list of entertainment and cultural activities.[16]

Activities on Recent Trips Among Local Toronto Attraction Audiences (Frequently / Occasionally)

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(725)	(232)	(210)	(236)
ART GALLERY/MUSEUMS (NET)	36%	57%	64%	44%
Art Galleries	23%	39%	51%	26%
Children's Museums	7%	14%	11%	11%
General History Museums	23%	40%	41%	31%
Science/ Technology Museums	17%	34%	31%	28%
Historic Sites	14%	20%	24%	16%
ANY FESTIVALS (NET)	16%	27%	33%	20%
Music Festivals	5%	11%	10%	9%
International Film Festivals	6%	10%	13%	6%
Literary Festivals Or Events	4%	7%	9%	5%
Theatre Festivals	8%	14%	17%	11%
CULTURAL PERFORMANCE S (NET)	33%	48%	54%	36%
Opera	5%	9%	11%	6%
Ballet/Other Dance	8%	14%	17%	9%
Theatre	25%	39%	43%	29%
Classical Concerts	9%	17%	18%	10%
Jazz Concerts	8%	12%	16%	8%
ABORIGINAL CULTURAL ACTIVITIES (NET)	5%	8%	8%	8%
FRENCH CANADIAN CULTURAL EXPERIENCES	10%	17%	18%	15%
THEME PARKS (NET)	33%	48%	52%	42%
ZOOS/AQUARIUMS/BOTANICAL GARDENS (NET)	32%	46%	46%	46%
Botanical Gardens	14%	21%	24%	20%
Zoos	22%	34%	32%	36%
Aquariums	13%	23%	22%	22%
OTHER ATTRACTIONS				
Movies	36%	48%	53%	43%
Casinos	21%	22%	20%	25%
Dining At Internationally Acclaimed Restaurants	21%	31%	38%	26%
Wine Tasting/Winery Tours	13%	19%	22%	13%
Shop – Local Arts & Crafts	37%	53%	57%	45%

Source: TAMS Canada special tabulations, pages 4-1/6. Based on non-qualifiers and mailback respondents. Total n = 725.

About a third of Toronto's adult population indicate that they seek each of the following types of activities when they are away from home:

- art galleries or museums
- cultural performances
- movies
- theme parks
- shopping for local arts and crafts
- zoos, botanical gardens, aquariums or planetariums

On a more specific level, approximately one-fifth to one-quarter of the city's adults engage in each of the following types of activities when they travel:

- art galleries
- live theatre performances
- casinos
- general history museums
- zoos
- internationally acclaimed restaurants

Not surprisingly, considerably higher proportions of Toronto residents who are frequent or occasional patrons of local museums and art galleries, and to a somewhat lesser extent, zoos or botanical garden patrons engage in many of the cultural and entertainment activities shown here than is the case for Toronto CMA residents in total.

Frequent or occasional museum goers in Toronto are about twice as likely to go to music festivals, children's museums, science/technology museums, classical concerts and/or opera on their recent travels than are Torontonians as a whole. They are also at least fifty percent more likely to seek the following activities on trips than is the Toronto general public:

- aquariums
- theatre festivals
- general history museums
- art galleries
- aboriginal cultural activities
- zoos
- botanical gardens
- literary festivals or events
- ballet/other dance
- French Canadian culture
- international film festivals
- theatre
- jazz concerts

A similar pattern is evident among **frequent or occasional art gallery goers** in Toronto. Like their museum counterparts, and likely because of the considerable overlap between art gallery and museum patrons in Toronto, these residents are about twice as likely to go to literary festivals or events, opera, international film festivals, theatre festivals, ballet/other dance performances, classical and/or jazz concerts, music festivals and, of course, art galleries on recent trips than are Torontonians as a whole.

They are also at least fifty percent more likely to seek the following activities on trips than is the Toronto general public:

- science/ technology museums
- French Canadian cultural experiences
- theatre
- historic sites
- wine tasting/winery tours
- theme parks
- general history museums
- botanical gardens
- aquariums
- aboriginal cultural activities
- children's museums
- dining at internationally acclaimed restaurants

Media Habits

TAMS includes some generic media habit information that may be of use to local attractions in understanding how to reach their respective audiences.

Newspapers & Magazines

In light of their higher level of formal education and greater propensity to travel, it is not too surprising that the frequent/occasional markets for art galleries, museums and gardens/zoos are significantly more likely to read daily, weekend and community newspapers on a regular basis than are Torontonians in general. Eight-in-ten of each type of attraction's audience are regular newspaper readers compared to 7-in-10 of Toronto's adult population.

General Media Readership Among Local Toronto Attraction Audiences (Frequently/Occasionally)

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(1,730)	(600)	(548)	(596)
READ OR LOOKED THROUGH ON A REGULAR BASIS				
DAILY NEWSPAPER				
WEEKDAY EDITION	72%	82%	81%	81%
WEEKEND EDITION	72%	81%	84%	81%
COMMUNITY NEWSPAPERS	71%	79%	79%	81%
ANY MAGAZINES	79%	90%	91%	88%
TRAVEL MAGAZINES	24%	33%	37%	34%
CANADIAN/NATIONAL GEOGRAPHIC	29%	44%	43%	43%
SPORTS MAGAZINES	23%	26%	23%	25%
HOBBY MAGAZINES	31%	43%	41%	43%
NEWS MAGAZINES	41%	57%	58%	52%
FASHION/HOMEMAKING MAGAZINES	35%	45%	48%	44%
GENERAL INTEREST/CITY LIFE MAGAZINES	24%	40%	43%	32%

Source: TAMS Canada special tabulations, pages 6-1/2.

Magazine readership (any) is almost universal among art galleries, museums and gardens/zoos goers, with 9-in-10 claiming to read at least one type of magazine on a regular basis. Generally, magazine preferences are similar across the three attraction markets, with *news* magazines being the most popular at close to three-fifths of each group. *News* magazines are followed closely by *Canadian* or *National Geographic*, *hobby*, and *fashion/homemaking* magazines at about 4-in-10. The same proportion of museum and art gallery goers say they read *general interest/city life* magazines on a regular basis (4-in-10) but this type of magazine is not as popular with regular zoo/garden goers (32%). About one-third of the primary markets for the three types of attractions claim to read *travel* magazines and about one-quarter say they read or look through *sports* magazines regularly.

Television Viewing Habits

Toronto residents who go to art galleries, museums and/or zoos/botanical gardens on a frequent or occasional basis have television viewing habits that are almost identical to the Toronto adult population as a whole. These attraction goers are especially partial to movies (3-in-4), followed by evening sitcoms and drama (6-in-10). They are somewhat more likely than Toronto's adults to watch nature shows – more than 6-in-10 of each attraction's market claim to watch these shows on a regular basis. Early evening and late evening news broadcasts also attract about 6-in-10 attraction visitors on a regular basis.

General Television Viewing Habits Among Local Toronto Attraction Audiences (Frequently/Occasionally)

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(1,730)	(600)	(548)	(596)
PROGRAM TYPES VIEWED REGULARLY				
MORNING NEWS	36%	31%	27%	31%
EARLY EVENING NEWS	62%	57%	58%	61%
LATE EVENING NEWS	54%	61%	62%	56%
DAYTIME PROGRAMS ON WEEKDAYS	27%	21%	19%	21%
PROFESSIONAL SPORTS	57%	54%	52%	56%
NATURE SHOWS	56%	64%	63%	67%
INSTRUCTIONAL/HOBBY SHOWS	50%	55%	56%	58%
MOVIES	72%	74%	73%	77%
EVENING SITCOMS	60%	62%	61%	62%
EVENING DRAMA	59%	64%	62%	63%

Source: TAMS Canada special tabulations, page 8-1.

Clubs & Organization Membership

Consistent with their active lifestyles – their tendencies to engage in a wide variety of activities at home and when travelling – attraction goers in Toronto are more apt to be *joiners* than is the Toronto population at large. For example, a higher proportion of museum goers (41%) and art gallery goers (43%) are auto club members than is the case among Toronto adults in total (31%). About one-in-ten frequent or occasional museum goers (11%) and about the same proportion of art gallery goers (13%) claim to be members of an art gallery or museum. This proportion compares with only about 1-in-25 Toronto residents overall (4%). A similar pattern is evident for zoos and botanical gardens: membership among the museum (6%), art gallery (6%) and zoo/botanical garden audiences (7%) at the local level (frequent/occasional) is significantly higher than is the case among all Torontonians (3%).

Membership in Clubs/Organizations Among Local Toronto Attraction Audiences (Frequently/Occasionally)

	ADULTS 18+ TORONTO CMA	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	3.6 MILLION	1.2 MILLION	1.1 MILLION	1.2 MILLION
UNWEIGHTED BASE SIZE	(1,730)	(600)	(548)	(596)
ANY CLUB OR ORGANIZATION	57%	69%	73%	66%
AUTO CLUB	31%	41%	43%	37%
NATURE ORGANIZATION	6%	9%	9%	9%
ART GALLERY/MUSEUM	4%	11%	13%	7%
ZOO/BOTANICAL GARDEN	3%	6%	6%	7%
SPORTS CLUB	25%	33%	34%	29%
GARDENING CLUB	1%	1%	2%	1%

Source: TAMS Canada special tabulations, page 9-1.

Appendix

Appendix Tables

Appendix Table 1
Place of Birth & Ethnic Background of Local Big City Attraction Audiences (Frequently/Occasionally)

ADULTS, 18+	BIG CITIES (TORONTO/OTTAWA HULL)	MUSEUMS	ART GALLERIES	ZOOS/ GARDENS
	4.5 MILLION	1.7 MILLION	1.4 MILLION	1.5 MILLION
UNWEIGHTED BASE SIZE	(2,753)	(1,152)	(978)	(877)
PLACE OF BIRTH				
CANADA	54%	59%	59%	54%
UK/EUROPE	17%	16%	17%	17%
ASIA	13%	12%	10%	11%
CENTRAL/SOUTH AMERICA	7%	5%	5%	9%
ETHNIC / CULTURAL BACKGROUND				
CANADIAN	27%	31%	30%	28%
BRITISH	24%	25%	26%	27%
OTHER EUROPE	27%	28%	27%	28%
SOUTH ASIA	7%	6%	5%	8%
AFRICAN ANCESTRY/BLACK	56%	3%	4%	6%
MIDDLE EAST/WEST ASIA/NORTH AFRICA	3%	3%	2%	2%
EAST ASIA/SOUTHEAST ASIA	8%	8%	8%	6%
Chinese	5%	5%	5%	3%

Source: TAMS Canada special tabulations, pages 16/17 (Toronto/Ottawa CMAs).

Appendix Table 2
Place of Birth & Ethnic Background of Science / Tech Museum, General History & Botanical Garden Goers – on Trips

	ADULTS 18+ TORONTO CMA	MUSEUMS FREQ/ OCCAS AT HOME	SCIENCE/ TECH MUSEUMS ON TRIPS	GENERAL HISTORY MUSEUMS ON TRIPS	ZOOS/ GARDENS FREQ/ OCCAS AT HOME	GARDENS ON TRIPS
	3.6 MILLION	1.2 MILLION	629,000	846,000	1.2 MILLION	518,000[1]
UNWEIGHTED BASE SIZE	(1,730)	(600)	(104)	(142)	(596)	(86)
PLACE OF BIRTH						
CANADA	48%	51%	63%	69%	50%	57%
UK/EUROPE	19%	19%	17%	15%	18%	24%
ASIA	16%	15%	8%	7%	12%	8%
CENTRAL/SOUTH AMERICA	9%	6%	4%	4%	10%	2%
ETHNIC / CULTURAL BACKGROUND						
CANADIAN	19%	20%	24%	25%	22%	20%
BRITISH	25%	28%	40%	41%	28%	35%
OTHER EUROPE	27%	28%	28%	25%	27%	33%
SOUTH ASIA	8%	8%	2%	3%	9%	2%
AFRICAN ANCESTRY/BLACK	6%	4%	3%	1%	7%	2%
MIDDLE EAST/WEST ASIA/NORTH AFRICA	3%	3%	2%	1%	2%	1%
EAST ASIA/SOUTHEAST ASIA	10%	10%	11%	8%	6%	7%
Chinese	6%	6%	8%	4%	4%	4%

Source: TAMS Canada special tabulations, pages 16-3; 17-3/4. [1]Small base size – interpret with caution.

Appendix Table 3
Comparison of Local Museum Goers in Toronto CMA

ADULTS, 18+	ANY (FREQUENT/OCCAS/RARE LY)	FREQUENT	OCCASIONAL
	1.9 MILLION	173,000*	1.0 MILLION
Male	51%	45%	52%
Female	49%	55%	48%
18 - 34 years	36%	35%	33%
35 - 54 years	46%	42%	48%
55 + years	18%	23%	20%
University Grad	32%	49%	35%
Adult only	58%	64%	58%
Any teens/children	42%	35%	42%
Any children 12 or under	32%	27%	33%

Source: TAMS Canada special tabulations, pages 2-6. *Caution: small base size. Interpret wit h caution.

Appendix Table 4
Comparison of Local Art Gallery Goers in Toronto CMA

ADULTS, 18+	ANY (FREQUENT/OCCAS/RARE LY)	FREQUENT	OCCASIONAL
	1.7 MILLION	206,000*	873,000
Male	49%	44%	49%
Female	51%	55%	51%
18 - 34 years	37%	30%	34%
35 - 54 years	43%	37%	43%
55 + years	20%	33%	23%
University Grad	34%	44%	37%
Adult only	63%	73%	62%
Any teens/children	37%	25%	38%
Any children 12 or under	27%	17%	28%

Source: TAMS Canada special tabulations, pages 2-6. *Caution: small base size. Interpret with caution.

Ethnic or cultural background / clubs & organizations questions

Statistics Canada's code list and categories, TAMS – Canada

What is your ethnic or cultural background? (For example, British, French, North American Indian, Chinese, Black, Japanese, or Greek) . . .

British (from England, Scotland, Ireland, etc.)
French
German
Italian
Chinese
Japanese
Korean
Filipino
East Indian (from India, Pakistan, Bangladesh, East Africa, Guyana, etc.)
Black (from Africa, the Caribbean, Haiti, the U.S., Canada, etc.)
North American Indian
Metis
Inuit (Eskimo)
Arab (from Egypt, Jordan, Lebanon, Iraq, etc.)
West Asian (from Syria, Turkey, Afghanistan, Armenia, Iran, etc.)
South East Asian (from Burma, Kampuchea (Cambodia), Laos, Thailand, Vietnam, etc.)
North African (from Algeria, Morocco, Tunisia etc.)
Latin American (from Mexico, Central America, South America)
Canadian
Other European

Are you personally a member of any of the following organizations?

An automobile club like the CAA or AAA
A nature organization such as the Sierra Club or Canadian Wildlife Federation
An art gallery or museum
A zoo or botanical garden
A sports club, such as a tennis, golf club, fitness centre or gym
A gardening club

TAMS Definitions & Bases

Tourism Activity & Motivation Study (TAMS)

Telephone survey and self-completion component among travellers and travel intenders (past 2 years) in Canada and the USA. All respondents had to be at least 18 years of age. 6,378 USA mail back and 5,457 Canadian mail back responses with details about trip activities are available for analysis. Fieldwork was conducted in 1999/2000.

TAMS Variables

At Home Activities

Responses to the following question for a wide array of outdoor and cultural activities:
Now, I'd like to get an idea of the things you personally do for day-to-day recreation and entertainment when you are not travelling. In the past year or so, how frequently have you participated in each of the following? For each item, please tell me if you participated frequently, occasionally, rarely or did not participate at all.

At Home Activities Frequently / Occasionally

Responses to the question above: frequently or occasionally for a specific activity. Note: the frequency categories are self-defined by the respondent.

At Home Activities Any

Responses to the question above: frequently, occasionally or rarely for a specific activity.

On Trip Activities

Travellers on leisure trips in the past two years were provided with a mail-back self-completion questionnaire on which were listed various activities that might have been engaged in while on an overnight trip to any destination.

An affirmative response to an activity qualifies the record for inclusion in the "on trip" activity segment. There are no frequency or intensity measures for on trip activities.

Bases

Two different base sizes are used in most TAMS tabulations.

1. **Telephone:** the telephone base is a representative sample of the adult population of the geographic region (e.g., Toronto CMA, Ontario, etc.). This base reflects weighting and projection of the surveyed population to all adults 18 years of age or over, based on Statistics Canada population estimates (1996) adjusted by age within gender for various levels of geography.

2. **Mailback:** The subset of travellers (overnight trip to any destination in past two years) or travel intenders (intend to take at least one overnight trip to any destination in next two years) who completed and returned a usable mailback survey.

Bases (cont'd)

Mailback (cont'd.) This base is appreciably smaller than the telephone base for two reasons:

- Non travellers/intenders were not sent mailback questionnaires.
- Not all travellers/intenders who were sent a mailback questionnaire completed and returned it.

When data are run on the mailback base, consideration should be given to the impacts of the reduced base size on the estimates.

Mailback + Non-Qualifiers: To obtain a "total" column for analysis of measures included in the mailback questionnaire, a new base has been created that includes all non-qualifiers and those who responded to the mailback. The mailback completers are weighted and projected to all travellers/intenders and non-qualifiers are weighted and projected to all non-travellers/intenders. When combined, these two groups are adjusted to reflect the entire population on key behavioural and demographic attributes. They will differ from the full telephone sample on attributes that were not specifically included in the adjustment process and should be interpreted with care.

It is recommended that analysis of all measures in the telephone questionnaire be performed using the *Telephone* base rather than the *Mailback + Non-Qualifier* base.

Notes

[1] All references to "Ottawa" in this report refer to the "Ottawa Hull Census Metropolitan Area". While Ontario often excludes the Hull portion of this municipality from its analysis because residents of Hull do not reside in Ontario, the local attraction orientation of this report makes it prudent to include the entire metropolitan area in the analysis.
[2] See Detailed Tables, page 1-5.
[3] See Detailed Tables, page 1-1.
[4] Frequent or occasional visitors in local community.
[5] See Detailed Tables, pages 2-5/6.
[6] The base for the Big City population includes non-travellers/ non travel intenders and those travellers/intenders who qualified and returned the mailback component of the survey (n = 1,217) . This is a different base than the one used to describe the total adult Big City population for "at home" activities since at home activities were collected as part of the telephone survey (n = 2,753). Because of the reduced and somewhat idiosyncratic base, estimates for the incidence of engagement in specific activities among Big City residents as a whole should be interpreted with some caution.
[7] 1,056,000 Toronto residents claim to go to either zoos or botanical gardens while on overnight trips. Of these, 49%, or 518,000 indicate that they go to botanical gardens. By applying the 49% ratio to Toronto residents who claim to go to a zoo or botanical garden on a frequent or occasional basis (1,231,000), an estimate of about 604,000 adults in the *at home* botanical garden market is produced.
[8] Average household income (1998) is calculated on all respondents who state an income. The distributions shown for income have been re-percentaged on the total who stated incomes (excludes refusals, don't know and not stated respondents).
[9] The proportion of zoo/botanical garden goers *on trips* with children 12 years of age or under is 35% but the proportion of those who go to botanical gardens *on trips* is 25%, suggesting that zoos have more widespread "kid appeal" than do botanical gardens. See detailed tables, page 15-3 for figures.
[10] See Detailed Tables, page 11-1.
[11] See Detailed Tables, page 12-3.
[12] See Detailed Tables, page 15-1.
[13] See Detailed Tables, page 15-1.
[14] See Detailed Tables, page 2-12.
[15] The base for the Toronto CMA population includes non-travellers/ non travel intenders and those travellers/intenders who qualified and returned the mailback component of the survey (n = 725) . This is a different base than the one used to describe the total adult Toronto CMA population for "at home" activities since at home activities were collected as part of the telephone survey (n = 1730). Because of the reduced and somewhat idiosyncratic base, estimates for the incidence of engagement in specific activities among Torontonians as a whole should be interpreted with some caution.
[16] The tabulations include more detail on cultural and shopping activities on the trip. TAMS includes considerable information on outdoor activities as well, but these are not included in the tabulations prepared for this project.