Ontario Arts and Culture Tourism Profile

Prepared by

Research Resolutions & Consulting Ltd.

for

Ontario Arts Council

November 2012

ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO
50 YEARS OF ONTARIO GOVERNMENT SUPPORT OF THE ARTS
50 ANS DE SOUTIEN DU GOUVERNEMENT DE L'ONTARIO AUX ARTS

Table of Contents

EXECUTIVE SUMMARY

KEY FINDINGS

ARTS AND CULTURE TOURISM IN ONTARIO[1]

VOLUME OF ARTS AND CULTURE OVERNIGHT TOURISTS

At 9.5 million, tourists who participated in arts and culture activities represent over one fifth of the 42.8 million overnight trips to Ontario in 2010 (22%).

Of these 9.5 million arts and culture tourists, 6.2 million (66%) were Canadians, 2.2 million (23%) were Americans, and 1.1 million (11%) were from overseas.

The domestic group of arts and culture tourists accounts for close to one fifth of *all* Canadians who took overnight trips in the province over the year (18%). Most of the 6.2 million Canadian arts and culture trips, or 5.4 million, were made by Ontario residents.

An even higher proportion of Ontario's foreign tourists engaged in arts and cultural activities during 2010. At 2.2 million, American arts and culture overnight tourists represent two fifths of all overnight tourists to the province from the U.S.A. (39%). Almost two thirds (63%) of Ontario's overseas market engaged in an arts or cultural activity, yielding 1.1 million overnight arts and culture visitors.

ARTS AND CULTURE ACTIVITIES

Historic sites are the most frequent arts and culture activity, representing 4.1 million overnight trips or one tenth (10%) of the 42.8 million overnight trips in the province over the year.

Museums/art galleries and arts performances were also quite popular at 3.4 million and 3.3 million visitors, respectively, or one twelfth of total overnight tourism activity (8% each). Festivals and fairs attracted 2.1 million arts and culture tourists (5% of all overnight tourists) and attractions such as zoos, aquariums and/or botanical gardens drew 1.2 million (3% of all overnight tourists).

VALUE OF ARTS AND CULTURE OVERNIGHT TOURISTS

Spending in Ontario by arts and culture tourists reached $4.1 billion, or 36% of spending by *all* overnight tourists in the province over the year.

Arts and culture tourists outspent typical overnight tourists in Ontario at a rate of almost two-to-one. On average, they spent $667.00 per trip in Ontario, compared to $374.00 spent by the typical overnight tourist.

Many sectors of Ontario's economy benefited from arts and culture tourists. For example, they contributed $1.1 billion to the lodging sector, or close to two-fifths of all spending on lodging during the year (38%). The $1.1 billion spent by arts and culture overnight tourists on food and beverages accounted for one third of all overnight trip spending (34%). At $0.6 billion, these arts and culture tourists also contributed over two fifths of annual retail

[1] Figures are for the 2010 calendar year, based on Statistics Canada's domestic and international travel surveys (TSRC and ITS). They include trips by Canadians, Americans and residents of all other countries.

spending (43%) and, at $0.5 billion, one half of the entertainment/recreation spending by all overnight tourists in Ontario (51%).

Lodging

Arts and culture tourists spent approximately 41.2 million nights in Ontario during 2010, or close to one third of all nights spent in the province over the year (31%). At 4.4 nights, on average, members of the arts and culture sector spent over one night *longer* in Ontario than the typical tourist (3.1 nights).

Hotels were a more popular lodging choice among arts and culture tourists (22%) than was the case for *all* overnight tourists (16%).[2] Over the year, arts and culture tourists spent 12.7 million nights in paid commercial lodging (hotels, motels, B&Bs, etc.), or approximately one third of the 34.9 million nights in these properties (36%).

Economic Impacts[3]

Based on their spending in the province, Ontario's arts and culture tourists contributed $3.7 billion toward the province's gross domestic product (GDP). Approximately 67,700 jobs and $2.4 billion in wages were generated in Ontario as a result of their spending.

At $1.7 billion in taxes, all levels of government benefited from spending by arts and culture tourists in Ontario during 2010. Of the $1.7 billion, approximately $1.0 billion were federal government taxes, a further $0.7 billion were provincial taxes and $11.0 million were municipal taxes.

North American Arts and Culture Tourists[4]

The Americans and Canadians who took an overnight trip to Ontario in 2010 are likely drawn from the pool of *all* North American tourists who have been to Ontario over a two year span and were motivated to take a trip by an arts or cultural activity. Information about these North Americans tourists, available from the Travel Activities and Motivation Study (TAMS), provides a fuller understanding of trip motivations and demographic characteristics of the **people** who take trips to engage in arts or cultural pursuits than is available in the Travel Survey of Residents of Canada and International Travel Survey (TSRC/ITS).

Markets of Millions

Nine-in-ten or 18.5 million of the 20.8 million North Americans with Ontario travel experiences have participated in an arts or cultural activity as one of their many travel activities on trips taken over a two year period.[5]

Different types of activities attract North American pleasure tourists at different rates. For example, *Other Arts* activities such as shopping for local arts and crafts or going to exhibitions/fairs (13.2 million, 64%) and visiting historic sites or strolling in cities to see architecture (*Historic Sites, Buildings, Architecture*, 12.6 million, 61%) are

[2] Person nights spent in Ontario's hotels.

[3] Estimates of economic impact are based on MTCS's TREIM model. Figures include direct, indirect and induced impacts.

[4] Findings presented here are based on the Travel Activities and Motivation Study (2006). The study captured activities, motivations and demographics for residents of Canada and the USA who took overnight pleasure trips to any destination over a two-year period. In this report, term *North Americans* (excluding Mexico) is used to describe these tourists. Trip activities and those identified as trip drivers (*main reason for the trip*) are not linked to a particular destination. Hence, overnight pleasure tourists with travel experience in Ontario over the two-year span may or may not have engaged in arts/culture activities *in* Ontario.

[5] See note # 10.

very popular tourist activities among North Americans who have been to Ontario. Each group represents more than 6-in-10 of the 20.8 million people with Ontario travel experience.

Museums and *other cultural attractions* such as zoos and aquariums are also favourites among Ontario's North American visitors. Each attracts 8.9 million tourists as one-of-many trip activities, or two fifths of the Ontario-bound tourism market (43% each).

Ethnic, food/drink and other festivals (*Cultural Festivals*, 7.4 million, 36%), concerts including classical, jazz, opera, popular/rock 'n roll and country (*Music Performances,* 6.5 million, 31%), and *Other Performing Arts* such as free outdoor performances and circuses (6.4 million, 31%) each represents about one third of the North Americans who have taken overnight trips to Ontario over a two year span.

At least 5.0 million tourists include *theatre performances* and/or *art galleries* as a trip activity. *Arts festivals* such as international film festivals, music and/or literary festivals (3.8 million) and *ballet/dance* performances (1.7 million) also attract substantial numbers of North American tourists as one-of-many trip activities.

	% of 20.8 Million North American Tourists	**Arts/Culture[6] Participants**
Any Arts and Culture Tourist Activity as One-of-Many	**89%**	**18.5 million**
Other Arts (e.g., shop for local arts/crafts, exhibitions/fairs)	64%	13.2 million
Historic Sites, Buildings, Architecture	61%	12.6 million
Museums	43%	8.9 million
Other Cultural Attractions (e.g., zoos, aquariums, gardens)	43%	8.9 million
Cultural Festivals	36%	7.4 million
Music Performances (classical, jazz, opera, popular, country)	31%	6.5 million
Other Performing Arts (e.g., free outdoor performances, circus)	31%	6.4 million
Theatre/Dinner Theater	28%	5.8 million
Art Galleries	24%	5.0 million
Arts Festivals (e.g., film, literary, music)	18%	3.8 million
Ballet/Dance	8%	1.7 million

Popular Arts and Culture Trip Drivers

For more than two fifths (44%) of the 20.8 million North Americans with Ontario travel experiences – 9.1 million – at least one arts and culture activity was their *main reason* for travelling (*trip driver*).

Some arts and culture activity groups are more likely to motivate trips than others. For example, seeing *historic sites* and/or strolling through cities to see architecture is the largest arts and culture trip driver, attracting 4.0 million, or one fifth of Ontario's 20.8 million North American tourists (19%). Over two million travellers in Ontario's market take overnight trips motivated by *music performances* including rock 'n roll/popular concerts (14%), *other cultural attractions* such as zoos and aquariums (12%), *other arts* such as shopping for local arts/crafts and going to exhibitions/fairs (12%), *cultural festivals* (12%), *museums* (11%) and *live theatre* (11%). Each of these groups accounts for over one tenth of the 20.8 million Americans and Canadians who have travelled to Ontario

[6] Eleven groups, each containing allied arts/culture activities that were included in the TAMS questionnaire, were generated and form the basis of this analysis. A list of the individual activities included in each group is provided in Appendix B.

over a two year span. The number of Ontario's North American tourists who claim each activity group was a *trip driver* is displayed in the table below.

Changing the focus to the 18.5 million tourists who participated in arts and culture activities on their trips, the table also shows the extent to which specific arts and culture activities are a motivation for tourists who engage in these activities. For example, over two fifths of the tourists who went to *arts festivals* (46%) and/or *music performances* (44%) while travelling claim that these activities were the main reason a trip took place. *Other arts* including shopping for local arts and crafts (19%), *art galleries* (22%), *other performing arts* (24%) and *museums* (25%) are trip drivers for between one fifth and one quarter of Ontario's North American tourists who engage in these activities as one-of-many things they see and do when travelling.

	% of Activity Participants for whom Activity is Trip Driver	# of Tourists for whom the Group is a Trip Driver	% of Ontario's North American Tourists
Any Arts and Culture Activity[7]	**50%**	**9.1 million**	**44%**
Historic Sites, Buildings, Architecture	32%	4.0 million	19%
Music Performances (e.g., classical, jazz, rock & roll/popular concerts)	44%	2.9 million	14%
Other Cultural Attractions (e.g., zoos, aquariums, gardens)	29%	2.6 million	12%
Other Arts (e.g., shop for local arts/crafts, exhibitions/fairs)	19%	2.6 million	12%
Cultural Festivals (e.g., food or ethnic festivals, fireworks display)	33%	2.4 million	12%
Museums	25%	2.3 million	11%
Theatre	38%	2.2 million	11%
Arts Festivals (film, literary, music or theatre festivals)	46%	1.8 million	8%
Other Performing Arts (e.g., free outdoor performances, circus)	24%	1.5 million	7%
Art Galleries	22%	1.1 million	5%
Ballet/Dance	32%	0.5 million	3%

SEEKING A VARIETY OF TRAVEL EXPERIENCES

Members of each arts and culture tourist group resemble Ontario's North American tourists overall with respect to their pursuit of *other* types of activities on trips. About 9-in-10 claim to have engaged in an outdoor activity, over 8-in-10 included shopping and/or culinary activities, about half went to theme parks and two fifths attended sporting events as one of the many things they did on a trip.

Tourists motivated to take trips for arts and culture activities are also motivated to travel by *additional* trip activities. In fact, they are more likely than the typical North American tourist to include activities associated with the outdoors, food and wine and shopping as *trip drivers.* Representing the majority, outdoor experiences are more popular additional trip motivations among arts and culture tourists (69%) than within the travelling public at large (54%). Though volumes are smaller, arts and culture tourists are motivated to take trips for culinary experiences or to shop at twice the rates found within the Ontario's North American travelling public (culinary, 37% versus 19%; shopping, 23% versus 12%).

[7] In rank order by number of tourists

	Ontario's North American Tourists	Tourists with Arts and Culture Trip Driver
Other Trip Driver Groups	20.8 million	9.1 million
Outdoors	54%	69%
Theme Parks	21%	36%
Culinary experiences	19%	37%
Spectator sports events	18%	28%
Shopping	12%	23%

DEMOGRAPHIC PROFILES

ALL ARTS AND CULTURE TOURISTS

Ontario's 20.8 million North American tourists as a whole and the 9.1 million of them motivated to take trips for arts and cultural experiences have very similar demographic profiles.

- ✓ The typical North American arts and culture tourist who visited Ontario over a two year period is as likely to be male as female.
- ✓ All age groups are represented, with somewhat fewer in the 18 to 34 year age group (29%) than in the 35 to 54 year (36%) or 55+ years age group (34%). On average, Ontario's North American arts and culture tourist is 47 years of age.
- ✓ Close to one half are university graduates (45%), one third have some post-secondary education (34%) and one fifth of arts and culture tourists have no more than a secondary school education (20%).
- ✓ About half live in family households – those with at least one child under the age of 18 at home (47%). Couples are also widely represented (38%) whereas adults living alone are a minority at about one eighth of the market (12%).
- ✓ All income levels are represented in the North American arts and culture market for Ontario.[8] Over one third of these tourists have household incomes under $60,000 (37%), one third fall in the $60,000 to $99,999 range (33%) and the remaining three in ten claim to have household incomes of $100,000 or more (30%).

IN SUMMARY

Arts and cultural experiences make a valuable contribution to tourism in Ontario, generating 9.5 million overnight visitors or over one fifth of *all* overnight tourists in 2010 (22%). They spent $4.1 billion or 36% of *all* overnight trip spending in the province. Compared to typical overnight tourists in Ontario, arts and culture visitors spent twice as much money per trip, spent more nights in the province and made more extensive use of Ontario's hotels.

[8] Reported household income for calendar year 2005. Percentages are based on survey respondents who volunteered an income.

The economic impacts of Ontario's arts and culture tourism are substantial. These overnight tourists generated $3.7 billion in gross domestic product (GDP), 67,700 jobs, $2.4 billion in wages, and $1.7 billion in taxes for all levels of government.[9]

The market for arts and culture tourism in North America is very large: almost all of the 20.8 million North American tourists with travel experience in Ontario over a two year period seek an arts or culture activity on their trips (18.5 million). Over two fifths of these tourists, or 9.1 million (44%), identify an arts and culture activity as a *trip driver* – the main reason for the trip.

Whether as one-of-many trip activities or as a trip driver, some arts and culture pursuits are more popular than others. At the top of both lists are activities associated with *historic sites/architecture*, *music performances*, *cultural attractions* such as zoos and aquariums, *other arts activities* (e.g., local arts and crafts, exhibitions/fairs), *cultural festivals* including ethnic or food/drink festivals and *museums*.

North American arts and culture tourists also take trips motivated by outdoor adventure, culinary experiences, theme parks, spectator sporting events and shopping. Compared to the population at large, those in the arts and culture sector are twice as likely to identify culinary and shopping experiences as trip motivations.

Because the range of arts and cultural activities that motivate North Americans' trips is so broad, the sector covers all demographic groups. It includes men and women equally and spans all age, education and income groups. At the aggregate level, sector members closely resemble *all* North Americans who have travelled to Ontario. There are, however, noteworthy demographic differences from one arts and culture group to another. These variations are described in this report.

Readers are encouraged to explore the profiles of arts and culture tourists provided herein for more insights into the motivations and demographic characteristics of this large, varied and important market for tourism in Ontario.

[9] Estimates include direct, indirect and induced impacts.

INTRODUCTION

TWO PERSPECTIVES ON ARTS AND CULTURE TOURISM IN ONTARIO

The Ontario Arts Council (OAC) commissioned Research Resolutions & Consulting Ltd. to provide a profile of Ontario's arts and culture tourists and their economic impact. Using two different types of existing data sources, the project covers market share, tourist spending and economic impact, demographic and motivational characteristics and information on tourist participation rates in a variety of arts and cultural activities.[10]

The domestic and international travel surveys (TSRC/ITS) and the Travel Activities and Motivations Surveys (TAMS) offer different perspectives on the scale and characteristics of arts and cultural tourism in Ontario, as described in the following paragraphs.

TRIPS IN ONTARIO WITH ARTS AND CULTURE ACTIVITIES (TSRC/ITS)

Statistics Canada's annual travel surveys offer insights into overnight trips in Ontario with an arts or cultural component and the share they represent of *all* overnight tourism. They detail where the tourists live, what other activities they engaged in on the *same* trip, the amount of money spent on the trip, the share arts/culture tourists' spending represents of all tourism spending, and the economic impact of such spending.[11]

Activities could have been engaged in *anywhere on the trip* although in light of the fact that most Ontario tourists do not visit other provinces on their trip, the activities in which Ontario's overnight tourists participated can be assumed to have taken place in the province.[12]

Trip activities used to define an arts/culture tourist in the TSRC/ITS are listed below.[13]

- Arts performance such as a play or concert
- Aboriginal event (pow wow, performance, other)
- Festival or fair
- Historic site
- Museum or art gallery
- Zoo or aquarium (plus botanical gardens in ITS only)

[10] Sources include Travel Survey of Residents of Canada 2010 (TSRC), International Travel Survey 2010 (ITS US & OVS), and Travel Activities and Motivations Surveys (TAMS Canada & US, 2006). Note that Mexico is included in the ITS Overseas study (overseas) but is not included when the term *North American* is used in this report to describe TAMS tourists. Further, note that 2010 is the most recent year for which TSRC/ITS data are available. Detailed information about these sources is provided in Appendix A. *Volume and value estimates are based on Statistics Canada's International Travel Survey (ITS) and Travel Survey of Residents of Canada (TSRC) Microdata, which contain anonymized data collected in the ITS and TSRC. All computations on these microdata were prepared by Research Resolutions & Consulting Ltd. on behalf of the Ontario Arts Council and the responsibility for the use and interpretation of these data is entirely that of the author.* [Disclaimer required by Statistics Canada's license agreements.]

[11] Estimates of economic impacts were generated using the Ontario Ministry of Tourism, Culture and Sport's TREIM model.

[12] Activities are reported for the entire trip in the TSRC and ITS. Almost all Canadians and Americans and most overseas tourists on overnight trips to Ontario *only* visit locations within this province on their trip.

[13] TSRC/ITS and TAMS include different types of activities such as those associated with arts and culture, outdoor adventure, food and wine, entertainment, spectator sports and the like. In order to operationalize *arts/culture tourism* for this analysis, the activities selected from those available in each study were grouped in a manner deemed to be consistent with the core set of activities used by other cultural research organizations. For more information on operational definitions of *arts/cultural tourism* used by other organizations, contact the Ontario Arts Council.

Arts/culture trips in Ontario include those originating in Canada, the U.S.A. and other countries. They also include trips taken for pleasure, to visit friends and relatives, for business or other reasons.

North Americans Who Take Trips Motivated by Arts and Culture Activities (TAMS)

Unlike the TSRC/ITS studies which provide a snapshot of volume, value and characteristics of a **trip** to a specific place during a specific year by tourists from Canada, U.S.A. and overseas countries, TAMS is about the **people** living in Canada and the U.S.A. who have taken overnight pleasure trips to any destination, worldwide, over a two year period.

TAMS findings in this project describe North American tourists who have travelled to Ontario and include an arts/culture activity as the motivation for at least one of their overnight pleasure trips to any destination over a two year period. In other words, TAMS provides a profile of tourists who have exhibited a willingness to travel in Ontario and are predisposed to take trips in order to engage in arts/culture activities. Recognize, however, that the Ontario-destined trips may or may not have been driven by an arts/culture pursuit because reported activities could have been associated with any of the trips taken over a two year period to any destination.

North American pleasure tourists were asked to identify which of over 160 different activities they engaged in on at least one of their trips. Options included many arts/culture activities as well as those associated with the outdoors, sporting events, shopping, food and wine, and others. For each activity sought, respondents were asked if it was the *main reason* for the trip (*trip driver*). Arts/culture *trip drivers* were grouped into two major categories: **Arts** and **Other Cultural Activities.** In turn, each category includes several groups as listed below.[14] Details about North American travellers in these groups are provided in this report.

TAMS ARTS AND CULTURE TRIP DRIVERS[15]

ARTS	**OTHER CULTURAL ACTIVITIES**
Music Performances	Historic Sites/Buildings/Architecture
Theatre	Museums
Ballet or Other Dance Performances	Cultural Festivals
Other Performing Arts (e.g., outdoor performances, circuses)	Other Cultural Attractions/Experiences (e.g., zoos, aquariums)
Arts Festivals	
Art Galleries	
Other Arts (e.g., local arts and crafts, exhibitions/fairs)	

Different Perspectives For Different Information Needs

Ontario's Arts and Culture Trip Volume, Value and Economic Impact: Readers interested in the size, characteristics and value of arts/culture tourism in Ontario for the most recent time period available are advised to

[14] In order to operationalize *arts/culture tourism* for this analysis, the activities selected from those available in the study were deemed to be consistent with the core set of activities used by other cultural research organizations. For more information on operational definitions of *arts/cultural tourism* used by other organizations, contact the Ontario Arts Council.
[15] A list of the individual activities included in each group is provided in Appendix B.

use the information in Part I of this report based on the TSRC/ITS. These studies are the definitive sources of tourism's volume, value and economic impact for national and provincial organizations including the Department of Canadian Heritage and the Ontario Ministry of Tourism, Culture, and Sport. They are also the trusted inputs for estimating the economic impact of tourism as a whole and for activity-based groups including arts and culture. Unlike TAMS, these trip-based data provide a direct link between activities and places visited. In other words, for the most part, a trip's arts/culture activities are assumed to have occurred *in* Ontario.[16] Also, unlike TAMS, the TSRC/ITS include visitors from overseas countries as well as those who reside in Canada and the U.S.A.

Findings from these surveys are, perhaps, best regarded as black and white snapshots of arts/culture tourism (trips) vis à vis all tourism activity in Ontario.[17]

Activity and Demographic Profiles of North American Arts and Culture Tourists In essence, TAMS adds colour to the snapshots: it provides descriptions of the **people** who likely took the **trips** measured in the TSRC/ITS. As such, TAMS offers a richer profile of North Americans who have taken a trip to Ontario and have exhibited a special interest in arts/culture activities. Part II of the report provides considerable detail about the *types* of arts and cultural activities in which travellers engage and that motivate their trips to destinations worldwide, the relative draw of these activities and tourists' demographic characteristics.

A word of caution: Because the units being reported for TSRC/ITS (**trips** by Canadians, Americans and overseas visitors) and TAMS (**people** residing in Canada and the U.S.A.) are different, direct comparisons of volume estimates from the two sources cannot be made.

FINDINGS

Detailed computer tabulations were provided to OAC for each of the studies covered in this project (under separate cover). The tabulations were used to generate this report. Key findings are presented under two headings:

- Part I: Ontario's Arts and Culture Tourism Volume, Value and Economic Impact (TSRC/ITS)
- Part II: Profiles of Ontario's North American Arts and Culture Tourists (TAMS)

[16] See note #3.
[17] Note that for convenience, *person trips* and *person visits* – the units of measurement used in the TSRC and ITS -- are referred to as *tourists* and/or *visitors* throughout this report.

PART I: ONTARIO'S ARTS AND CULTURE TOURISM VOLUME, VALUE AND ECONOMIC IMPACT

INTRODUCTION

As noted in the introduction to this report, Statistics Canada's annual travel surveys (TSRC and ITS) offer insights into overnight trips in Ontario with an arts or cultural component and the share they represent of all overnight tourism. They detail where the tourists live, what other activities they engaged in on the same trip, the amount of money spent on the trip, the share arts/culture tourists' spending represents of all tourism spending, and the economic impact of such spending.

VOLUME OF ARTS AND CULTURE OVERNIGHT TRIPS

There were 9.5 million overnight arts/culture trips by tourists in Ontario in 2010, representing 22% of all overnight visitors to the province.[18] Canada generates most of the arts/culture tourists in the province. Of the 9.5 million overnight arts/culture tourists trips in Ontario during 2010, two thirds (66%) or 6.2 million were made by Canadian residents. Close to one quarter or 2.2 million were made by visitors from the United States (23%) and one tenth or 1.1 million trips were made by visitors from overseas (11%).

At 6.2 million, the domestic overnight arts/culture tourism group accounts for close to one fifth of *all* Canadians who took overnight trips in the province over the year (18%). Most of these Canadians or 5.4 million arts/culture tourists were Ontario residents.

The 2.2 million Americans on overnight trips with an arts or cultural activity represent about two fifths of all overnight tourists to Ontario from the U.S.A. (39%).

Close to two thirds (63%) of all overnight tourists from overseas countries engaged in an arts or cultural activity while on their Ontario trip, yielding 1.1 million overnight arts/culture visitors.

[18] For convenience, a *person trip/visit* is commonly referred to as a *tourist* or *visitor* throughout this report. In the TSRC and ITS, activities could have been engaged in *anywhere on the trip* although in light of the fact that most Ontario tourists do not visit other provinces on their trip, the activities can be assumed to have taken place in the province. These estimates include people travelling for pleasure, visiting friends and relatives, business, and other purposes.

Table 1. Origin of Overnight Trips in Ontario in 2010

	Total Overnight Trips in Ontario	Arts and Culture Trips as % of Trips in Total/ Each Origin Group	Overnight Arts and Culture Trips	
Overnight person visits	42.8 million			
Arts and Culture Trips	**9.5 million**	**22%**	9.5 million	*(100%)*[1]
PLACE OF RESIDENCE				
Canada	**35.5 million**	**18**%	**6.2 million**	*(66%)*
Ontario	32.2 million	17%	5.4 million	*(57%)*
Other Provinces	3.3 million	26%	0.9 million	*(9%)*
U.S.A	**5.6 million**	**39**%	**2.2 million**	*(23%)*
Overseas	**1.7 million**	**63**%	**1.1 million**	*(11%)*

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
Estimates are overnight person visits/trips. [1]*Italicised percentages are based on all overnight arts/culture trips (vertical %s).*

ACTIVITIES ON OVERNIGHT TRIPS IN ONTARIO

ARTS AND CULTURE ACTIVITIES ON ONTARIO TRIPS

Each arts/culture activity attracted at least one million of the 9.5 million arts/culture overnight trips over the year.[19]

- 3.3 million went to **arts performances such as plays or concerts** on their trip
    - 34% of arts/culture tourists; 8% of *all* overnight tourists
- 3.4 million went to **museums and/or art galleries**
    - 36% of arts/culture tourists; 8% of *all* overnight tourists
- 4.1 million went **to historic sites**
    - 44% of arts/culture tourists; 10% of *all* overnight tourists
- 2.1 million went to **festivals and/or fairs**
    - 22% of arts/culture tourists; 5% of *all* overnight tourists
- 1.2 million went to **zoos, aquariums and/or botanical gardens**
    - 12% of arts/culture tourists; 3% of *all* overnight tourists

As a point of reference, compared to the 3.3 million who attended an arts performance representing 8% of all overnight trips in Ontario, 2.0 million (5% of total) went to a spectator sporting event (see Table 3 for figures).

[19] The activities listed are the only ones in both the TSRC and ITS questionnaires associated with arts and culture (*Aboriginal events* is included in the TSRC questionnaire).

Table 2. Arts and Culture Activities on Arts and Culture Trips in Ontario in 2010

	Overnight Trips in Ontario		
	Total	**% of Total**	**% of Arts and Culture Trips**
Overnight person visits	42.8 million	42.8 million	9.5 million
		%	%
Arts and Culture Tourists	**9.5 million**	**22**	**100**
Arts performances	3.3 million	8	34
Museums/art galleries	3.4 million	8	36
Historic sites	4.1 million	10	44
Festivals/fairs	2.1 million	5	22
Zoos/aquariums/gardens*	1.2 million	3	12

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Note that *botanical gardens* are included in this activity *only* for American and overseas visitors (ITS). Estimates are overnight person visits/trips. Percentages may add to more than 100% because tourists took part in more than one activity on the same trip.

OTHER ACTIVITIES ON ARTS AND CULTURE TRIPS

Ontario's 9.5 million arts/culture overnight tourists commonly engage in *other* activities on the same trip. Most notably, 4.6 million of them participate in outdoor activities such as going to nature parks, boating and fishing. Thus, arts/culture tourists represent 28% of the 16.0 million overnight tourists who participate in outdoor activities while on their trip. At 2.8 million, going to nature parks is the most popular outdoor activity for arts/culture tourists. These tourists account for 55% of the 5.0 million tourists who go to nature parks while on an Ontario trip.

Additionally, arts/culture tourists go to casinos (1.1 million) and, less commonly, theme parks (0.7 million) and spectator sporting events (0.6 million) when travelling. At these levels, they account for almost two thirds of those who go to theme parks (65%), two fifths of casino visitors (43%) and about one third of the 2.0 million overnight tourists who attend spectator sporting events while on a trip with nights spent in Ontario (31%).

Table 3. Other Activities on Arts and Culture Trips in Ontario in 2010

	Overnight Trips in Ontario			
	Total	**% of Total**	**Arts and Culture Trips**	**Arts and Culture Trips as % of Each Activity's Participants**
Overnight Person Visits	42.8 million	42.8 million	9.5 million	
		%		
Outdoor Activities	16.0 million	37	4.6 million	28
Nature park	5.0 million	12	2.8 million	55
Other outdoors	11.1 million	26	1.8 million	16
Theme park	1.1 million	3	0.7 million	65
Casinos	2.5 million	6	1.1 million	43
Spectator sports event	2.0 million	5	0.6 million	31

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Estimates are overnight person visits/trips.

Information on additional trip activities is available for American and overseas tourists that is not covered in the Canadian survey. Ontario's 2.3 million American arts/culture tourists' participation rates are appreciably higher for shopping, sightseeing and going to bars and clubs than is the case for *all* overnight trips by American visitors to the province. The 1.1 million overseas arts/culture tourists in Ontario are somewhat more likely than all overnight overseas visitors to Ontario to go shopping, sightseeing and/or to bars and clubs while on their trip.

	Ontario's American Tourists		Ontario's Overseas Tourists	
	All Trips	Arts and Culture Trips	All Trips	Arts and Culture Trips
Overnight Person Visits	5.6 million	2.3 million	1.7 million	1.1 million
Shopping	49%	68%	86%	92%
Sightseeing	38%	64%	70%	84%
Bar/Nightclubs	19%	26%	27%	31%

VARIETY IN TRIP ACTIVITIES WITHIN ARTS AND CULTURE TOURIST GROUPS

As described in the previous section, many trips with an arts/culture activity also include an outdoor activity. Similarly, tourists who engage in one arts or cultural activity on a trip tend to participate in *other* arts/culture activities on the same trip. For example, Ontario's tourists who go to an *arts performance* on a trip might also go to a *museum* or *art gallery* on the same trip. The variety of other arts/culture activities engaged in by arts/culture tourists is evident in the examples provided below.

- About one quarter of overnight tourists who **attend an arts performance such as a concert or play** also visit an historic site (24%) and/or museum or art gallery (26%) while on their trip.
- Arts/culture tourists who go to **museums/art galleries** on their travels are also especially likely to go to an historic site (51%).
- Correspondingly, **historic site visitors** are drawn to museums/galleries (42%) at a particularly high rate.
- About half of Ontario's overnight tourists who include visits to **zoos, aquariums and/or botanical gardens** on their trip go to historic sites (50%) on the same trip.

Table 4. Activities on Overnight Trips among Arts and Culture Tourists in Ontario

	All Overnight Trips	Arts and Culture Trips					
	Total	**Total**	**Arts Performance**	**Museum/ Gallery**	**Historic Site**	**Festival /Fair**	**Zoo/ Aquarium/ Garden***
Overnight Person Visits	42.8 million	9.5 million	3.3 million	3.4 Million	4.1 million	2.1 million	1.2 million
	%	%	%	%	%	%	%
ARTS/CULTURAL ACTIVITY (NET)	**22**	**100**	**100**	**100**	**100**	**100**	**100**
Historic site	10	44	24	51	100	28	50
Museum/art gallery	8	36	26	100	42	24	37
Arts performance	8	34	100	25	19	25	24
Festival or fair	5	22	16	15	14	100	16
Zoo, aquarium, gardens*	3	12	9	13	14	9	100
OUTDOOR ACTIVITY (NET)	**37**	**48**	**36**	**53**	**64**	**53**	**64**
Nature park	12	29	19	40	49	25	48
Other outdoors	26	19	17	13	16	28	16
OTHER							
Casino	6	11	14	11	14	7	14
Theme park	3	8	7	11	11	8	26
Spectator sports event	5	6	9	8	7	7	9

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Note: Activities could have taken place at any location visited on the trip. They did not necessarily take place in Ontario. **Botanical gardens* are included *only* for American and overseas visitors (ITS). Estimates are overnight person visits/trips.

SPENDING ON ARTS AND CULTURE TRIPS IN ONTARIO

VALUE OF ARTS AND CULTURE TRIPS IN ONTARIO

In 2010, the 9.5 million arts/culture visitors from Canada, the United States, and other countries who took overnight trips in Ontario spent over $4.1 billion on goods and services. Spending by members of the arts/culture sector accounted for more than one third of *all* spending on overnight trips in the province (36%). Recall that this sector represents one fifth (22%) of Ontario's 2010 overnight tourists. Thus, at 36%, the sector contributes a substantively higher share of revenue than its volume would suggest.

Because they represent the largest source of arts/culture tourists, Canadians generate the largest share of arts/culture spending. Of the $4.1 billion in spending by arts/culture tourists, one half (51%) or about $2.1 billion was spent by Canadians. The remaining half was divided almost equally between arts/culture tourists from the United States at $1.0 billion (25%) and overseas countries at $1.0 billion (24%).

The $2.1 billion spent by the domestic overnight arts/culture tourism group account for more than one quarter of spending by *all* Canadians who took overnight trips in the province over the year (28%). Most of the Canadians contributing to this spending were Ontario residents. Provincial arts/culture tourists spent $1.5 billion in Ontario, or 26% of the $5.8 billion all Ontario residents spent on overnight trips in the province over the year.

The $1.0 billion spent by Americans in Ontario on overnight trips with an arts or cultural activity represent over two fifths of all overnight spending in Ontario by Americans (43%). An even higher proportion of spending by overseas tourists in the province derives from trips that include arts/culture activities. Close to two thirds (64%) of all overnight spending in Ontario by tourists from overseas countries was on trips with an arts or cultural activity, yielding approximately $1.0 billion.

Relative to their volume, Canadian arts/culture tourists spend less (66% volume; 51% spending), Americans spend about on par (23% volume; 25% spending) and because of their extended stays in Ontario, overseas tourists in the sector spend more than would be anticipated (11% volume; 24% spending).[20]

Table 5. Spending on Overnight Trips in Ontario in 2010

	Total Overnight Trip Spending/ From Each Origin $	**Arts and Culture Trip Spending as % of Total Spending/ From Each Origin**	**Overnight Arts and Culture Trip Spending $**	
Total	**$11.4 billion**	**36%**	**$4.1 billion**	*(100%)*[1]
Canada	**$7.4 billion**	**28%**	**$2.1 billion**	*(51%)*
Ontario	$5.8 billion	26%	$1.5 billion	*(37%)*
Other Provinces	$1.5 billion	37%	$0.6 billion	*(14%)*
U.S.A	**$2.4 billion**	**43%**	**$1.0 billion**	*(25%)*
Overseas	**$1.6 billion**	**64%**	**$1.0 billion**	*(24%)*

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Estimates exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas). Estimates are spending on overnight person visits/trips. [1]*Italicised percentages are based on all overnight arts/culture trip spending (vertical %s).*

[20] See *Length of Stay and Lodging* section for figures.

AVERAGE TRIP SPENDING IN ONTARIO

At $667.00 per trip, overnight arts/culture tourists in Ontario spent 1.8 times as much money, on average, as did Ontario's typical overnight tourist ($374.00 per trip). Their major contribution to tourism spending in the province is, at least in part, a function of arts/culture tourists' longer stays in Ontario (see Table 11).

Arts/culture tourists also outspent typical Ontario overnight visitors on per-person and per-night bases. Averaging $384.00 per person, these tourists spent 1.7 times as much as the typical overnight visitor ($228.00 per person). On a per-person per-night basis, arts/culture tourists spent 1.2 times as much as did overnight visitors as a whole ($88.00 versus $73.00).

Three Types of Average Spending Estimates

- **Average per trip** for all members of the travel party during the trip's entire duration in Ontario.
- **Average per person**, taking into account all tourism spending in the province and the number of individuals in the travel party.
- **Average per-person per-night**, adjusting for the number of individuals in the travel party *and* the number of nights spent in Ontario on the trip.

Because of their longer stays in Ontario, American and overseas arts/culture tourists' average trip spending at about $1,000.00 and $1,500.00 respectively, is appreciably higher than the $467.00 spent by a typical Canadian in the sector.

	Average Spending Per Trip
All Arts and Culture Tourists	**$667.00**
Canadians	$467.00
Americans	$1,003.00
Overseas Visitors	$1,522.00

Table 6. Average Spending on Overnight Trips in Ontario in 2010*

	Average Overnight Trip Spending $	Average Overnight Arts and Culture Trip Spending $	Rate of Difference
Total Spending	**$11.4 billion**	**$4.1 billion**	
Average per trip**	$374.00	**$667.00**	1.8
Average per person	$228.00	**$384.00**	1.7
Average per person, per night	$73.00	**$88.00**	1.2

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. *Averages are rounded to nearest dollar. Averages exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas). **All members of household/travel party for all nights spent in Ontario. Estimates are spending on overnight person visits/trips.

TRIP SPENDING BY CATEGORY

Arts/culture tourist spending benefits many sectors of Ontario's economy. For example, $1.1 billion were spent by members of this sector on food and beverage services in the province, representing one-third of food/beverage spending by all overnight tourists in Ontario (34%). Similarly, lodging establishments attracted $1.1 billion in spending by arts/culture tourists. This spending accounts for close to two fifths of all tourist spending on lodging in Ontario over the year (38%).

By virtue of the very activities that define *arts/culture* tourists, it is not surprising that they make a particularly sizeable contribution to revenues for attractions and events in the province. At $0.5 billion, their spending represents half of the $1.0 billion spent on entertainment and recreation by all of Ontario's overnight tourists (51%).

Table 7. Category Spending on Overnight Trips in Ontario in 2010

	Total Overnight Trip Spending	**Arts and Culture Trip Spending as % of Total Spending in Each Category**	**Overnight Arts and Culture Trip Spending**	
	$		**$**	
Total	**$11.4 billion**		**$4.1 billion**	*(100%)*[1]
Transportation	$2.7 billion	28%	$0.7 billion	*(18%)*
Food/beverage	$3.2 billion	34%	$1.1 billion	*(27%)*
Lodging	$3.0 billion	38%	$1.1 billion	*(27%)*
Attractions/events	$1.0 billion	51%	$0.5 billion	*(13%)*
Retail/other	$1.4 billion	43%	$0.6 billion	*(15%)*

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Estimates exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas). Estimates are spending on overnight person visits/trips. [1]*Italicised percentages are based on all overnight arts/culture trip spending (vertical %s).*

Average spending on major categories of goods and services in the province is appreciably higher for arts/culture trips than for all overnight trips in Ontario. For example, arts/culture tourists spent 1.7 times as much per trip on food and beverages as did overnight tourists as a whole. Compared to typical overnight tourists in Ontario, sector members also spent almost twice as much on lodging and more than twice as much on attractions/events and in retail establishments.

Table 8. Average Category Spending on Overnight Arts and Culture Trips in Ontario in 2010

	All Overnight Trips	**Overnight Arts and Culture Trips**	**Rate of Difference**
Average Spending Per Trip	**$374.00**	**$667.00**	**1.8**
Food/beverage	$106.00	$179.00	1.7
Lodging	$98.00	$181.00	1.9
Attractions/events	$34.00	$87.00	2.5
Retail/other	$47.00	$100.00	2.1

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Estimates exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas). Estimates are spending on overnight person visits/trips.

ECONOMIC IMPACT OF ARTS AND CULTURE TOURISM IN ONTARIO[21]

The money spent by overnight arts/culture tourists in Ontario ripples throughout the provincial economy. Their expenditures generate economic activity including contributions to gross domestic product[22] (GDP); jobs in tourism-related sectors such as accommodation, transportation and food services; jobs in other sectors such as manufacturing and agriculture; and taxes.

GROSS DOMESTIC PRODUCT

Arts/culture tourist spending in Ontario in 2010 generated $3.7 billion in GDP province-wide.[23] Total GDP includes about $2.0 billion in direct economic activity (i.e. direct GDP) and an additional $1.7 billion in indirect and induced GDP for Ontario's economy.

JOBS, WAGES, AND SALARIES

Approximately 67,700 jobs were generated as a result of arts/culture tourists' spending in 2010.[24] Of these jobs, 46,100 were direct and an additional 21,700 were indirect and induced. They include part- and full-time positions, on both annual and seasonal bases.

In turn, the 67,700 jobs generated $2.4 billion in wages and salaries province-wide. This labour income included $1.3 billion associated with direct jobs and a further $1.1 billion in wages and salaries associated with the 21,700 indirect and induced jobs generated by arts/culture tourism in Ontario.

TAXES

At $1.7 billion in taxes, all levels of government benefited from spending by arts/culture tourists in Ontario during 2010. Of this total, almost $1.0 billion were federal government taxes, a further $0.7 billion were provincial taxes and $11.0 million were municipal taxes (direct, indirect, and induced). The direct portions of these taxes were $0.5 billion at the federal level, $0.5 billion for Ontario and $3.1 million for municipalities.

---

[21] MTCS's TREIM model was used to generate economic impacts. The Ministry's glossary of terms for use in conjunction with outputs from TREIM is appended (Appendix C).

[22] Gross domestic product (GDP) is the value of goods and services produced by labour and capital located within the province and associated with overnight trips in the arts/culture sector. Economic impact estimates provided reflect visitor spending only, that is, spending by visitors who spent nights in Ontario and engaged in at least one arts or cultural activity on their trip (*demand-side*). They do **not** include contributions to Ontario's economy from the supply side – revenues generated by the operation of arts and cultural attractions and events throughout the province. Furthermore, the estimates do not include spending by Ontario residents who leave the province for other destinations (e.g. they exclude Canadian carrier fares purchased by Ontario residents to travel to other destinations).

[23] GDP retained in Ontario is smaller than the total amount of spending by arts/culture tourists in the province because many of the goods and services produced to serve tourists in Ontario are produced outside the province.

[24] Estimates of jobs produced by the economic impact model use the same definition as is used in Statistics Canada's Labour Force Survey. Thus, jobs generated by the model include part-time, full-time and seasonal jobs. They also include paid employees and unpaid family employees.

Table 9. Economic Impact of Arts and Culture Trips in Ontario	
Total Arts and Culture Overnight Trip Spending	**$4.1 billion**
Gross Domestic Product (GDP)	
Direct	$2.0 billion
Indirect	$0.9 billion
Induced	$0.8 billion
Total	$3.7 billion
Labour Income	
Direct	$1.3 billion
Indirect	$0.6 billion
Induced	$0.5 billion
Total	$2.4 billion
Employment (Jobs)	
Direct	46,100
Indirect	11,700
Induced	10,000
Total	67,700
Direct Taxes	
Federal	$0.5 billion
Provincial	$0.5 billion
Municipal	$3.1 million
Total	$1.0 billion
Total Taxes	
Federal	$1.0 billion
Provincial	$0.7 billion
Municipal	$11.0 million
Total	$1.7 billion

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. and MTCS's TREIM model. Estimates are based on spending on overnight person visits/trips.

OTHER TRIP CHARACTERISTICS

MAIN PURPOSE OF TRIP

Pleasure travel is clearly predominant among arts/culture tourists: approximately 5.5 million arts/culture tourists say that *pleasure* was their main purpose, representing 29% of all overnight pleasure travel in Ontario over the year. Additionally, 3.3 million Ontario overnight arts/culture tourists were travelling in order to see friends and relatives (VFR). These VFR visitors have the potential to engage their hosts in a cultural or arts activity in Ontario, thereby increasing attendance at arts and cultural events and attractions by including tourists and local residents.

Table 10. Main Purpose of Overnight Trips in Ontario in 2010

	Total Overnight Trips by Purpose	**Arts and Culture Trips as % of Trips in Each Purpose Category**	**Overnight Arts and Culture Trips**	*(100%)*[1]
Pleasure	**19.0 million**	**29%**	**5.5 million**	*(58%)*
Visit friends/relatives (VFR)	19.0 million	17%	3.3 million	*(35%)*
Business	3.0 million	16%	0.5 million	*(5%)*
All other reasons*	1.9 million	15%	0.3 million	*(3%)*

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. *Includes those not stating a response. Estimates are overnight person visits/trips. [1]*Italicised percentages are based on all overnight arts/culture trips (vertical %s).*

LENGTH OF STAY AND LODGING

Arts/culture tourists spent approximately 41.2 million nights in Ontario during 2010, or close to one third of all nights spent in the province over the year (31%). On average, members of the arts/culture sector spent 4.4 nights in Ontario – over one night *longer* than the typical tourist (3.1 nights).

Overnight tourists in the arts/culture sector accounted for over one third of all tourist nights spent in the province's hotels, motels, bed and breakfast establishments, resorts and other paid roofed lodging (36%), or 12.7 million of the 34.9 million nights tourists spent in these types of lodging. Their duration of stay in commercial lodging was on par with the total tourist population (2.8 nights vs. 2.7 nights).

Private homes and cottages accounted for 23.1 million of the nights arts/culture tourists spent in the province in 2010, representing over one quarter of nights spent in these types of lodging by all overnight tourists (27%). At 5.1 nights, arts/culture tourists' stays with friends and relatives or in private cottages were about two nights longer, on average, than were those of tourists in total (3.0).

Table 11. Lodging Nights in Ontario on Overnight Trips in 2010*

	All Overnight Trips	Overnight Arts/Culture Trips	Arts and Culture Nights as % of Total Nights in Each Category
# of Nights in Ontario	**134.4 million**	**41.2 million**	**31%**
Average nights per person	3.1	4.4	
Hotels, motels, other paid, roofed lodging nights	**34.9 million**	**12.7 million**	**36%**
Average nights per person*	2.7	2.8	
Private homes, other unpaid roofed lodging nights	**86.1 million**	**23.1 million**	**27%**
Average nights per person*	3.0	5.1	

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. *Averages are based on those using the specified type of accommodation. Estimates are overnight person visits/trips.

Generally, foreign arts/culture tourists and especially those from outside North America spent more nights in Ontario than did Canadians. On average, Canadians in the sector spent just over three nights (3.1 nights); Americans spent slightly longer (3.7 nights) while overseas arts/culture tourists spent almost two weeks (12.5 nights).

	Average Length of Stay in Ontario
All Arts and Culture Trips	**4.4 nights**
Canadians	3.2 nights
Americans	3.7 nights
Overseas Visitors	12.5 nights

Compared to overnight tourists as a whole, those in the arts/culture sector were more likely to use hotels during their stay in Ontario. These establishments were the lodging of choice for over one fifth of the 41.2 million nights arts/culture tourists spent in the province over the year (22%). This is a higher proportion than is evident for *all* overnight tourists (16%). In spite of their greater reliance on hotels, arts/culture tourists spent most of their nights in the province either in the homes of friends and relatives or in private cottages (56%).

Table 12. Lodging Nights on Overnight Trips in Ontario in 2010

	All Tourists	Arts and Culture Tourists
Person Nights in Ontario, 2010	134.4 million	41.2 million
	%	%
In hotels	**16**	**22**
In motels	3	4
Other paid roofed lodging	8	5
Private homes/cottages	**64**	**56**
Campgrounds	6	7

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Figures may not add to 100% due to rounding.

TRAVEL PARTY SIZE AND COMPOSITION

Consistent with *all* overnight tourists in Ontario, arts/culture tourists travel singly or in couples. Their average party size is 1.7 people. And, like the market as a whole, over eight-in-ten arts/culture travel parties are composed of adults only. They represent the same proportions of all overnight tourists who travel in adult-only parties and those travelling with teenagers or children (20%, each).

Table 13. Travel Party Size/Composition of Overnight Trips in Ontario in 2010

	All Overnight Trips	Overnight Arts/Culture Trips	Arts and Culture Trips as % of Trips in Each Party Composition Type
Average Party Size	**1.6 people**	**1.7 people**	
Party Composition			
Adults Only	25.6 million	5.2 million *(85%)*[1]	20%
Any Teens/Children	4.4 million	0.9 million *(15%)*	20%

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Party size is based on household/party trips. . [1]*Italicised percentages are based on all overnight arts/culture trips (vertical %s).*

SEASONALITY

Consistent with *all* overnight tourists in the province, arts/culture tourists come to Ontario in all seasons. To an even greater extent than the typical overnight tourist, those in the arts/culture group are most likely to have come in warm weather periods. About half of them came in the July through September calendar quarter (49%), accounting for 29% of *all* overnight tourists in Ontario during this quarter. The spring months, April through June, account for a further one quarter of the overnight arts/culture market in Ontario (24%), or about one fifth of all springtime overnight tourists (20%).

Table 14. Season of Overnight Trips in Ontario in 2010

	All Overnight Trips	Arts and Culture Trips as % of Trips in Each Quarter	Overnight Arts and Culture Trips	
Overnight Person Visits	42.8 million		9.5 million	*(100%)*[1]
January–March	6.9 million	16%	1.1 million	*(11%)*
April–June	10.8 million	20%	2.2 million	*(24%)*
July–September	15.8 million	29%	4.6 million	*(49%)*
October–December	9.3 million	16%	1.5 million	*(16%)*

Source: TSRC/ITS 2010 – customized tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Estimates are overnight person visits/trips. [1]*Italicised percentages are based on all overnight arts/culture trips (vertical %s).*

PART II: PROFILES OF ONTARIO'S NORTH AMERICAN ARTS AND CULTURE TOURISTS

INTRODUCTION

As noted in the introduction to this report, the TAMS study provides information about North American tourists who have travelled to Ontario and include an arts/culture activity as the motivation for at least one of their overnight pleasure trips to any destination over a two year period. As such, it is a profile of Canadians and Americans who have exhibited a willingness to travel in Ontario and are predisposed to take trips in order to engage in arts/culture activities.[25] In essence, TAMS describes the types of **people** who likely took the **trips** described in the previous pages.[26]

OVERVIEW OF NORTH AMERICAN ARTS AND CULTURE TOURISTS

MARKET SIZE

When TAMS was conducted, there were approximately 186 million overnight pleasure travellers residing in North America of which about 1-in-10 or 20.8 million had taken an overnight trip to Ontario over a two year period.

Clearly, participation in arts and cultural activities on trips is widespread among North American tourists who have travelled in Ontario. Close to 9-in-10 (89%) of the 20.8 million tourists in Ontario's North American market have engaged in at least one arts/culture activity as one activity among others. In turn, approximately 9.1 million or 44% of Ontario's North American pleasure travellers were **motivated** to take a trip in order to engage in an arts or cultural activity. These 9.1 million adults represent the potential market for the province's arts and cultural events and attractions.

At 89% of the total, North Americans reporting *any* participation in arts and cultural activities on trips would closely resemble *all* North American pleasure travellers with trips to Ontario. To gain more insights into behavioural, demographic and attitudinal factors that might distinguish arts/culture tourists from *all* tourists, the focus of this analysis is, therefore, on the 44% of Ontario's North American overnight pleasure tourists who claim that a trip was **motivated** by arts or cultural activities.[27]

Of Ontario's North American tourists motivated to take trips for an arts or other cultural experience, 5.6 million (62%) are Americans and 3.5 million (39%) are Canadians. In turn, as a function of Canadians' general propensity to travel *within* their home province rather than to other provinces, two thirds of domestic arts/culture tourists are residents of Ontario: 2.3 million of the 3.5 million Canadians in the arts/culture tourist sector (66%).

---

[25] The Ontario-destined trips may or may not have been driven by an arts/culture pursuit because the activities could have been associated with any of the trips taken over a two year period to any destination.

[26] The previous sections described **trips** by Canadians, Americans and overseas visitors to Ontario in 2010. TAMS data are based on **people** residing in Canada and the U.S.A. who have travelled to Ontario over a two year period. Because the units being reported, the geographic scope and the array of arts/culture activities available in the surveys on which to identify arts/culture tourists differ, direct comparisons of volume estimates from the two sources cannot be made.

[27] From this point forward in the report, all references to **North American tourists** are those who claim to have taken an **overnight pleasure trip to Ontario over a two-year period**.

Table 15. Arts and Culture Tourists in North America

			% of Ontario North American Tourists
North American Overnight Tourists to Ontario, Past 2 Years*	**20.8 million**		(100%)
Participated in Arts and Culture Activity on Trip as One-of-Many	**18.5 million**		89
		% of Arts and Culture Tourists	
Arts and Culture Activity as Trip Driver**	**9.1 million**	*(100%)*	44
Canadians	3.5 million	*39*	17
Ontarians	2.3 million	*25*	11
Other Canadians	1.2 million	*14*	6
Americans	5.6 million	*62*	27

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *North American adult pleasure tourists: individuals 18+ years of age who took an overnight pleasure trip over a two year period (weighted). **Adult pleasure tourists who took an overnight trip to Ontario over a two year period **and** identify at least one arts/culture activity as a trip driver.

THE WIDE ANGLE LENS: ONE-OF-MANY ACTIVITIES ON TRIPS

ARTS AND CULTURE TRIP ACTIVITIES AS ONE-OF-MANY

As noted in the previous section, 18.5 million of Ontario's 20.8 million North American tourists say that they participated in at least one arts/culture activity while on a pleasure trip over a two year span (89%). Arts activities (78%) and other cultural activities (77%) were equally popular, each attracting about 16 million travellers, or over three quarters of Ontario's North American traveller base.

Different types of arts/culture activities attract Ontario's 20.8 million North American pleasure tourists at different rates, as summarized below.

- In aggregate, various *performing arts* attracted 11.1 million travellers as one of the many activities they engaged in on trips, representing over half (53%) of Ontario's North American tourism market.
- Close to two thirds of the total market engaged in *other arts* activities on their trip, including shopping for local arts and crafts and going to an exhibition/fair (13.2 million, 64% of total).
- 12.6 million visited *historic sites*, buildings or architecture among their trip activities (61% of total).
- *Museums* and/or *other cultural attractions* such as zoos and aquariums were trip activities for 8.9 million (43%).
- *Cultural festivals* including ethnic and food/drink festivals drew 7.4 million or 36% of travellers in the target population.
- Slightly fewer attended *music performances* including classical, popular and country music (6.5 million or 31%).
- Approximately one quarter (28%) went to live *theatre* (5.8 million) as one of the many activities engaged in on a trip.
- One quarter (24%) went to *art galleries* (5.0 million) as a trip activity.
- 2.9 million participated in an *Aboriginal cultural activity* (14% of total).
- Ballet and other dance performances were attended by 1.7 million or eight per cent of all North American tourists who have been to Ontario over two years.

Table 16. Ontario's North American Tourists – Participation in Arts and Culture Activity Groups on Trips*

	One-Of-Many Activities on Trip	% of Ontario's North American Tourists
Ontario's North American Tourists**	20.8 million	20.8 million
	#	%
Any Arts and Culture Activity as One-of-Many Trip Activities	**18.5 million**	**89%**
Any Arts Activity	**16.2 million**	**78%**
Performing Arts	11.1 million	53%
Music performances (classical, jazz, opera, popular, country)	6.5 million	31%
Theatre/dinner theater	5.8 million	28%
Ballet/dance	1.7 million	8%
Other performing arts (e.g., free outdoor performances, circus)	6.4 million	31%
Arts festivals (e.g., film, literary, music)	3.8 million	18%
Art galleries	5.0 million	24%
Other arts (e.g., shop for local arts/crafts, exhibitions/fairs)	13.2 million	64%
Any Other Cultural Activity	**16.1 million**	**77%**
Historic sites, buildings, architecture	12.6 million	61%
Museums	8.9 million	43%
Cultural festivals	7.4 million	36%
Other cultural attractions/experiences(e.g., zoos, aquariums, gardens)	8.9 million	43%
Aboriginal Cultural Activity***	2.9 million	14%

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. **Trip drivers* and *one-of-many* activities do not represent mutually exclusive groups. **Adult pleasure tourists who took an overnight trip to Ontario over a two year period. Percentages do not add to 100% because tourists may have different trip drivers/activities for different trips taken over a two year period. *** *Aboriginal Culture* includes activities also included in museums, other cultural attractions, cultural festivals and other arts activities.

OTHER TRIP ACTIVITIES AS ONE-OF-MANY

In addition to participating in arts/culture activities, Ontario's North American tourists seek *other* types of experiences when travelling. In this section, the focus is on participation in these *other* types of activities among Ontario's North American tourists as a whole and among those who are motivated by arts/culture activities.

Ontario's North American Tourists

Over four fifths of Ontario's North American tourists claim to have included an **outdoor experience** on a trip to any destination over a two year period (84%). The popularity of the outdoors, including going to a nature park is equally evident among tourists motivated to travel by an arts or cultural activity (87%).

Shopping and **culinary** pursuits are also common travel experiences among Ontario's North American tourists, attracting three quarters of them. A slightly higher proportion of arts/culture tourists are drawn to shop for clothing and accessories, local arts and crafts, books, music and other goods (81%) than is the case within the market as a whole (76%). Culinary experiences are also more widely sought as one-of-many travel experiences by tourists motivated to take trips for arts/culture reasons (83%) than within Ontario's entire North American market (75%).

Less popular than the outdoors, shopping and culinary activities within the North American market in total, going to **theme parks** is included as a trip experience by about one half (46%) and approximately one third say they have attended a **spectator sporting event** (35%) while on a trip over the past two years. Tourists in the arts/culture sector are somewhat more likely to include these attractions and events in their roster of trip activities than is the typical North American tourist (theme parks, 55%; sporting events, 41%).

Table 17: Ontario's North American Tourists – Participation in Other Activity Groups on Trips

	Ontario's North American Tourists**		
	Total	With Arts and Culture Trip Driver*	Rate of Difference
	%	%	#
One-of-Many **Activities on Trips***			
Outdoors	84	87	1.0
Shopping	76	81	1.1
Culinary experiences	75	83	1.1
Theme parks	46	55	1.2
Spectator sports events	35	41	1.2

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. **Trip drivers* and *one-of-many* activities do not represent mutually exclusive groups. **Adult pleasure tourists who took an overnight trip to Ontario over a two year period. Percentages do not add to 100% because tourists may have different trip drivers/activities for different trips taken over a two year period.

VARIATIONS IN ONE-OF-MANY TOURISM ACTIVITIES IN TRIP DRIVER GROUPS

As with arts/culture tourists overall, tourists in each arts/culture activity group participate in a wide range of activities when they take trips.

VARIATIONS IN OTHER TRIP ACTIVITIES

As noted in the previous section, about 9-in-10 of all tourists motivated by arts/culture claim to have engaged in an outdoor activity and over 8-in-10 included shopping and/or culinary activities as one of the many things they did on a trip to any destination over a two year period. Just over half (55%) included visits to theme parks, and 41% attended sporting events.

While the overall pattern of activities is similar group-to-group, some activities appear to have special appeal to members of specific arts/culture trip driver groups, as described below.[28]

Compared to all Ontario North American tourists at 84%, at least 9-in-10 members of the following groups participated in activities associated with the **outdoors** on their trips: dance (91%); museums (91%); cultural festivals (91%); other cultural attractions (91%); other performing arts (90%); other arts (90%); and historic sites (90%).

Members of every arts/culture group are significantly more apt to have sought **culinary experiences** on trips than is the typical North American tourist who has travelled in Ontario (75%). Groups with a particularly strong participation rate – at least 90% – include the following: dance (94%); art galleries (94%); arts festivals (92%); and other performing arts (90%).

Shopping as a travel experience follows a pattern almost identical to that described above for culinary activities. Ranging from 85% to over 90%, significantly more members of each arts/culture group shop while on trips than is the case for Ontario's North American tourists as a whole (76%). Shopping's popularity is particularly evident in the following groups: dance (94%); art galleries (91%); and arts festivals (90%).

While about half of North American tourists who have travelled in Ontario included **theme parks** among their trip activities, two thirds to three quarters of most arts/culture group members make this claim. There is, however, considerable variation in the popularity of theme parks across the arts/culture groups. At the high end of the spectrum are tourists driven to take trips to go to: *other cultural attractions* (e.g., zoos, aquariums, botanical gardens, 78%); other performing arts (72%); dance (70%) and cultural festivals (70%). At the low end are members of the music performance, historic site (61% each) and theatre (57%) groups.

Spectator sporting events have wider audiences across arts/culture groups than they do in the Ontario North American market overall (35%). Like theme parks, these types of events have more appeal as trip activities for some arts/culture groups than others. Specifically, sporting events are especially popular in the other performance (e.g., free outdoor performances, circuses; 57%), dance (55%), music performance (53%) and arts festivals (53%) groups and are least popular in the historic site group (41%).

[28] See Table A-1 in the appendix for the complete figures for each arts/culture activity group.

VARIATIONS IN ARTS AND CULTURE TRIP ACTIVITIES

In this section, information about the other **arts and cultural activities** sought by those in each arts/culture group is provided (i.e., *any participation* in arts/culture activities among tourists in arts/culture *trip driver* groups[29]).

Some arts/culture activities appear to have special appeal to members of specific trip driver groups, as described below.

At least 2-in-3 members of the following arts/culture trip driver groups went to **music performances** as one of the many activities they participated in on trips over a two year period: arts festivals (71%); dance (70%); art galleries (67%); and other performing arts (66%). For example, 71% of the tourists who identify an arts festival as a trip driver say they attended a music performance as one of their trip activities in the past two years.

Live theatre as a trip activity attracts more than half of the tourists driven by the following activity groups: dance (72%); art galleries (60%); arts festivals (56%); and other performing arts (56%). For example, close to three quarters (72%) of those motivated to take trips in order to attend dance performances include live theatre as a trip activity whereas 60% of those who take trips to go to art galleries do so.

Dance as a travel experience has a relatively small following among Ontario's North American tourists. Going to a dance performance as a trip activity is included as one-of-many trip experiences by a minority of members of each arts/culture trip driver group, reaching a maximum of 30% within the art gallery trip driver group.

Going to **other arts performances** such as free outdoor concerts or circuses while on trips attracts more than half of those driven by the following arts/culture activities: dance (63%); arts festivals (60%); art galleries (58%); and cultural festivals (53%).

Art festivals are attended as one-of-many trip activities by about half the members of the following groups: dance (52%); art galleries (49%); and other performing arts (53%).

Going to an **art gallery** on trips is most characteristic of members of the theatre (59%) and arts festival (50%) trip driver groups.

In contrast, engaging in **other arts** activities including shopping for local arts and crafts and going to exhibitions/fairs while on trips, is widespread across all arts/culture trip driver groups.

Similarly, going to **historic sites** or strolling in cities to see architecture is a widely popular trip activity among members of all arts/culture trip driver groups.

Museums as one among other trip activities attract two thirds or more North American tourists in each of the following trip driver groups: art galleries (80%); dance (74%); arts festivals (66%); and other attractions (66%).

Approximately two thirds of other performing arts (66%) and arts festivals (64%) group members say they go to **cultural festivals** such as ethnic or food/drink festivals as one of the many activities in which they engage on trips.

Other cultural attractions such as zoos, aquariums and botanical gardens also attract two thirds or more of arts/culture trip driver group members as follows: art galleries (72%); museums (71%); and dance (69%).

[29] See Table A-1 in the appendix for the complete figures for each arts/culture activity group.

NARROWING THE FOCUS: ARTS/CULTURE ACTIVITIES AS TRIP DRIVERS

This section narrows the focus from *participation* in arts/culture activities to examine the extent to which specific arts/culture activities are a *motivation* for those tourists who engage in these activities. Of the 18.5 million North Americans who participated in an arts or culture activity, 9.1 million or 50% said that one of these activities was the *main reason* they took a trip.

Certain activity groups tend to be more strongly positioned as trip drivers than others (see examples below and in Table 18).

- 46% of 3.8 million tourists who go to an **arts festival** as one-of-many trip events indicate that they take trips in order to go to an arts festival (trip driver), yielding 1.8 million tourists.
- 44% of 6.5 million **music performance** audiences include these performances as a trip driver, yielding 2.9 million tourists for whom concerts motivate trips.
- Of the 12.6 million North American tourists who go to **historic sites/buildings** on their trips, 32% or 4.0 million consider this activity to be a trip driver.
- Similarly, of the 8.9 million **museum** visitors, 25% or 1.5 million took a trip in order to visit a museum.
- Going to an **art gallery** is a trip activity for 5.0 million, of which 22% or 1.1 million say they took a trip in order to visit an art gallery.
- **Other arts** activities such as shopping for local arts and crafts or going to exhibitions/fairs represent the largest group as *one-of-many* trip activities (13.2 million) but less than one fifth of this group's members regard these activities as trip motivations (2.6 million, 19%).

Table 18. Ontario's North American Tourists – Arts and Culture Activity Groups as Trip Drivers*

	Ontario's North American Tourists**		
	One-Of-Many	**Trip Driver**	**% of Participants for Whom Activity is Trip Driver**
Total (Weighted, in millions)	20.8 million	20.8 million	
	#	#	
Any Arts and Culture Activity	**18.5**	**9.1**	**50%**
Any Arts Activity	**16.2**	**8.4**	**52%**
Performing Arts	11.1	4.7	43%
Music performances (classical, jazz, opera, popular, country)	6.5	2.9	44%
Theatre/dinner theater	5.8	2.2	38%
Ballet/dance	1.7	0.5	32%
Other performing arts (e.g., free outdoor performances, circus)	6.4	1.5	24%
Arts festivals (e.g., film, literary, music)	3.8	1.8	46%
Art galleries	5.0	1.1	22%
Other arts (e.g., local arts/crafts, exhibitions/fairs)	13.2	2.6	19%
Any Other Cultural Activity	**16.1**	**6.6**	**41%**
Historic sites, buildings, architecture	12.6	4.0	32%
Museums	8.9	2.3	25%
Cultural festivals	7.4	2.4	33%
Other cultural attractions/experiences (e.g., zoos, aquariums, gardens)	8.9	2.6	29%
Aboriginal cultural activity***	2.9	0.9	31%

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. **Trip drivers* and *one-of-many* activities do not represent mutually exclusive groups. **Adult pleasure tourists who took an overnight trip to Ontario over a two year period. Percentages do not add to 100% because tourists may have different trip drivers/activities for different trips taken over a two year period. ****Aboriginal Culture* includes activities also included in museums, other cultural attractions, cultural festivals and other arts activities.

TRIP DRIVERS IN ARTS AND CULTURE TOURIST GROUPS

MULTIPLE MOTIVATIONS AMONG ALL ARTS AND CULTURE TOURISTS

North American tourists motivated to take trips by at least one arts or cultural event or attraction are particularly likely to take trips for *other* arts and culture reasons as well. In fact, they take trips driven by **other** arts/culture activities at about **twice the rate** as do Ontario-bound North American tourists as a whole (see Table 19 for figures). For example, 31% of tourists who took a trip driven by *any* arts/culture activity indicate that at least one of their trips was *motivated* by music performances. This proportion is more than twice (2.2 times) that of all Ontario's North American tourists who say a music performance was the main reason they took a trip (14%). Similarly, a tourist with an arts/culture trip driver is more than twice as likely as the typical traveller to take a trip motivated by live theatre (24% versus 11%, or 2.2 times the rate).

Arts/culture tourists' high levels of motivation relative to the travelling public at large are not restricted to arts and cultural activities. Indeed, they outstrip North American tourists in their arts/culture trip motivations but arts/culture tourists also travel for **culinary experiences** and to **shop** at twice the rate as the total market. Similarly, they take trips in order to go to **theme parks**, **spectator sporting events** and/or to have **outdoor experiences** at higher rates than do all Ontario's North American tourists.

Table 19. Trip Driver Rates of Total & Arts and Culture North American Tourists

	% of Ontario's North American Tourists	% of Arts and Culture Tourists	Rate of Difference
Arts and Culture Trip Driver Groups*			
Music performance	14	31	2.2
Theatre	11	24	2.2
Dance	3	6	2.0
Other performing arts	7	17	2.4
Arts festivals	8	19	2.4
Art galleries	5	12	2.4
Other arts	12	28	2.3
Historic sites/buildings	19	44	2.3
Museums	11	25	2.3
Cultural festivals	12	27	2.3
Other cultural attractions	12	28	2.3
Aboriginal culture	4	10	2.5
Other Trip Driver Groups**			
Outdoors	54	69	1.3
Nature Park	16	25	1.6
Theme parks	21	36	1.7
Culinary experiences	19	37	1.9
Spectator sports events	18	28	1.6
Shopping	12	23	1.9

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *Trip drivers do not represent mutually exclusive groups. Adult pleasure tourists who took an overnight trip to Ontario over a two year period and had an arts/culture trip driver. **Other Trip Driver Groups represent the unduplicated count of individual activities in the respective group.

MULTIPLE MOTIVATIONS WITHIN ARTS AND CULTURE TOURIST GROUPS

There is considerable variation across individual arts/culture groups with respect to *other* arts/culture activities that motivate trips, reinforcing the multi-dimensional character of arts/culture tourists. Some examples of the propensity of these tourists to take trips motivated by different arts/culture activities are described below and detailed in Table 20.

- Of those motivated to travel by *dance,* three-fifths also take trips in order to attend **music** performances (60%) and **theatre** (59%).

- Just over one quarter of those who take trips in order to see *historic sites/architecture* claim they also take trips to attend a **music performance** (28%).

- Those who go to *art galleries* as the main reason for a trip are also likely to take trips in order to see **historic sites/architecture** (71%) and museums (59%).

Variations are also evident for travel motivations other than those associated with arts and culture.

- **Culinary experiences**, for example, also motivate trips for at least 6-in-10 tourists who travel in order to visit *art galleries*, attend *other performing arts* events such as free outdoor concerts and/or *cultural festivals* (62% each).

- Half (50%) of those who take trips to visit art galleries are also motivated to travel in order to go shopping.

Table 20. Ontario's North American Tourists – Arts and Culture & Other Trip Drivers*

			Arts Trip Driver Groups							**Other Culture Trip Driver Groups**			
Trip Driver Activity Groups	**Total**	**Any Arts/ Culture**	Music Performance	Theatre	Dance	Other Performing Arts	Arts Festivals	Art Galleries	Other Arts	Historic Sites	Museums	Cultural Festivals	Other Attractions
Total (Weighted, in millions)	20.8	9.1	2.9	2.2	0.5	1.5	1.8	1.1	2.6	4.0	2.3	2.4	2.6
	%	%	%	%	%	%	%	%	%	%	%	%	%
Any *Arts* Trip Driver	**31**	**71**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**62**	**75**	**73**	**69**
Music Performance	14	31	100	41	60	57	54	47	36	28	35	37	34
Theatre	11	24	31	100	59	45	37	45	32	24	31	27	27
Dance	3	6	11	14	100	15	12	18	10	7	10	9	10
Other Performance	7	17	30	31	42	100	33	34	29	19	25	30	26
Arts Festivals	8	19	33	30	39	39	100	40	29	20	30	31	27
Art Galleries	5	12	18	22	37	25	24	100	23	19	28	18	21
Other Arts	12	28	32	37	46	49	43	55	100	35	48	44	43
Any *Other Culture* Trip Driver	**32**	**72**	**62**	**63**	**72**	**78**	**69**	**87**	**79**	**100**	**100**	**100**	**100**
Historic Sites/Buildings	19	44	38	43	54	50	46	71	54	100	66	46	51
Museums	11	25	28	32	44	38	39	59	42	38	100	34	44
Cultural Festivals	12	27	32	30	42	48	43	41	42	28	36	100	37
Other Cultural Attractions	12	28	31	32	48	45	40	50	43	33	50	39	100
Aboriginal Culture	4	10	13	12	21	16	26	20	20	13	28	15	22
Other Trip Driver Groups**													
Outdoors	54	69	76	70	79	80	76	80	80	75	81	80	80
Nature Park	16	25	28	25	37	35	31	38	33	32	37	32	36
Theme Parks	21	36	46	40	51	58	49	51	51	42	53	53	65
Culinary Experiences	19	37	45	47	59	62	55	62	66	47	55	62	54
Spectator Sports Events	18	28	41	34	41	43	39	37	38	31	37	38	39
Shopping	12	23	29	31	46	44	34	50	55	33	38	35	35

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *Trip drivers do not represent mutually exclusive groups. Adult pleasure tourists who took an overnight trip to Ontario over a two year period and had an arts/culture trip driver.
**Other Trip Driver Groups represent the unduplicated count of individual activities in the respective group.

COMMON INDIVIDUAL ARTS AND CULTURE TRIP DRIVERS

Each arts/culture activity group explored in this project represents a set of individual, but related, arts/culture activities. [30] (For example, the "music performance" group includes the following individual activities: classical/symphony concerts; jazz concerts; opera; rock & roll/popular concerts; and country/western music concerts.) In this section, individual arts/culture activities most likely to be trip drivers among Ontario's North American tourists are described, with a focus on the most salient activities *within* each arts/culture group (see Summary Table A-2, appended, for figures). [31]

Music Performance: Popular/rock 'n roll music concerts are a defining activity for this group and motivate trips for over half (52%). Other frequently cited arts/culture trip drivers for music performance group members include live theatre (31%), strolling in cities to see architecture (25%), going to historic sites (24%), to music festivals (22%) and/or to free outdoor performances (19%).

Theatre: In addition to the theatre, over one quarter of theatre group members are motivated to take trips to see historic sites (28%) or stroll in cities to see architecture (27%). Other trip drivers that attract about one fifth of these theatre goers are art galleries (22%), zoos (20%) and general history museums (19%).

Dance: While a comparatively small group, tourists motivated by dance include a wide variety of *other* arts/culture activities as trip drivers. In addition to dance, three fifths take trips in order to attend a theatre performance (59%) and approximately two fifths travel to stroll in cities to see architecture (41%) or to visit art galleries (37%). At least three-in-ten are also motivated to travel in order to see historic sites (36%), go to zoos (33%), free outdoor performances (31%) and/or botanical gardens (30%).

Other performing arts: Free outdoor performances are a defining activity for this group, named as a trip driver by three fifths of them (60%). Other popular travel motivations include theatre (45%), followed by strolls in cities to see architecture (33%), visiting well-known historic sites (32%) and attending popular or rock and roll concerts (30%).

Arts Festivals: Music festivals top these tourists' arts/culture trip drivers (54%). Apart from music festivals, theatre is the only arts/culture trip driver to attract at least one third of group members (37%).

Art Galleries: Members of the art gallery group have a diverse and extensive set of *other* arts/culture trip drivers. For example, about half of them are inclined to take trips in order to stroll in cities to see architecture (53%) or go to well-known historic sites (49%) while somewhat fewer include theatre performances (45%) and/or general history museums (44%) among their trip drivers. In addition to taking trips in order to go to art galleries, approximately one third of these tourists are motivated to travel to visit science/technology museums (33%), to shop for local arts and crafts (31%), go to zoos (30%) and/or botanical gardens (30%).

Other Arts: In contrast to art gallery and dance group members, these North American tourists have a limited number of arts/culture trip drivers. Apart from shopping for local arts and crafts (36%) – an activity that contributes to the definition of the sector – the only *other* arts/culture activities to motivate trips for at least one

[30] Groups are based on mutually exclusive sets of allied activities included in the TAMS questionnaire. See Appendix B for the full list.

[31] This analysis covers individual trip drivers identified by at least ten per cent of the total arts/culture market for Ontario. Information on lower incidence activities is available in the detailed tabulations, under separate cover.

third of these tourists are strolling in cities to see architecture (36%), visiting historic sites (32%), and/or attending theatre performances (32%).

Historic Sites/Buildings/Architecture: Activities that define the group are, not surprisingly, the most common drivers among members of the history group: visiting well known (55%) or other historic sites (42%), strolling in cities to see buildings and architecture (55%) and, less frequently, historic city replicas/re-enactments (23%). Beyond these trip motivations, no *other* arts/culture activity is a trip driver for more than one quarter (theatre, 24%; general history museums, 23%).

Museums: General history (51%) and science/technology museums (43%) are defining activities for this group and are the most popular trip drivers among members. Other popular drivers include well-known historic sites (42%) and strolling in cities to see architecture (41%) followed at some distance by live theatre and/or zoos (31% each).

Cultural Festivals: Among those who take trips in order to attend cultural festivals, fireworks displays are frequently cited as a trip driver (41%). Few *other* arts/culture activities are trip drivers for more than one quarter. These include strolls in cities to see architecture (30%), theatre (27%), historic sites (26%) and zoos (25%).

Other Cultural Attractions: Of the attractions that define this group, zoos (55%) are more likely than aquariums (44%) or botanical gardens (34%) to be identified as trip drivers. Three tenths of these tourists also take trips in order to see architecture in cities (31%) and/or historic sites (30%).

Demographic Characteristics of North American Arts and Culture Tourists

Demographic Characteristics – All Arts and Culture Tourists

The demographic profile of all North Americans that travel to Ontario on pleasure trips is almost identical to that of the arts/culture subset of these tourists.

- The typical North American arts/culture tourist who visited Ontario over a two year period is as likely to be male as female.
- These tourists represent all age groups, with somewhat fewer in the 18 to 34 year age group (29%) than in the 35 to 54 year (36%) or 55+ years age group (34%). On average, Ontario's North American arts/culture tourist is 47 years of age (see note below regarding *outbound* American travellers).
- One fifth of those in the market have graduated from secondary school or have less formal education (20%), one third have some post-secondary education (34%) and close to one half are university graduates (45%) (see note below regarding *outbound* American travellers).
- The household composition of the province's North American arts/culture tourists also closely resembles that of the travelling public as a whole. As such, the target market is concentrated in families – those with at least one child under the age of 18 living at home (47%). Couples are also widely represented (38%) whereas adults living alone are a minority at about one eighth of the market (12%).
- All income levels are represented in the North American arts/culture market for Ontario.[32] Over one third of these tourists have household incomes under $60,000 (37%), one third fall in the $60,000 to $99,999 range (33%) and the remaining three in ten claim to have household incomes of $100,000 or more (30%). This income distribution is virtually identical to that of *all* North American tourists with recent travels in Ontario.

About the Outbound American Market: It is worth noting a fundamental difference between American travellers in general and those within Ontario's North American tourist population: Americans cross an international border to reach Ontario whereas most American tourists do not travel outside their own country. The U.S.A. *outbound* market to Ontario represents 11.9 million or only 7% of all 166.6 million American overnight pleasure travellers to any destination. Those in the niche market of Americans who cross an international border to reach Canada are older and more apt to be university-educated than is the typical American overnight tourist. And, because these Americans represent close to three fifths of the *North American* market for Ontario (62% or 5.6 million), they have a substantive impact on the age and education profile of Ontario's North American tourists and those in the arts/culture sector.

	American Overnight Pleasure Tourists	
	Total	**With Trips to Ontario**
	166.6 million	11.9 million
55+ years of age	30%	36%
Average age (18+)	45 years	48 years
University graduate	39%	47%

[32] Reported household income for calendar year 2005. Percentages are based on survey respondents who volunteered an income.

As displayed below, there is not a corresponding age difference between all Canadian overnight pleasure travellers and those who take trips to Ontario with respect to age. Ontario-bound Canadians are, however, somewhat more apt to be university educated than is the typical domestic tourist.

	Canadian Overnight Pleasure Tourists	
	Total	**With Trips to Ontario**
	18.7 million	8.9 million
55+ years of age	28%	28%
Average age (18+)	45 years	45 years
University graduate	30%	35%

Table 21: Ontario's North American Tourists - Demographics

	Ontario's North American Tourists*	**Any Arts/Culture**	**Any Arts**	**Any Other Culture**
Total (Weighted)	20.8 million	9.1 million	6.5 million	6.6 million
	%	%	%	%
Gender				
Male	51	51	52	51
Female	49	49	48	49
Age				
18 - 34	30	29	29	29
35 - 54	38	36	34	37
55+ years	33	34	36	34
65+ years	16	16	17	16
Average (18+ years)	**46**	**47**	**47**	**47**
Canadians	45	44	44	44
Americans	48	48	49	48
Education				
Secondary or less	22	20	21	18
Some Post-Secondary	35	34	32	35
University Graduate	42	45	44	45
Canadians	35	39	37	40
Americans	47	48	48	47
Household Composition				
Adult, living alone	11	12	13	12
Couples, no children/teens	37	38	39	37
Families (any children/teens)	49	47	45	48
Household Income				
Under $40,000	19	19	20	19
$40,000 to $59,999	18	18	18	18
$60,000 to $99,999	33	33	32	33
$100,000 or more	30	30	31	30

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *Adult pleasure tourists who took an overnight trip to Ontario over a two year period. Percentages do not add to 100% because of rounding. *Household income* is reported income for 2005 and percentages are based on those stating an income.

DEMOGRAPHIC CHARACTERISTICS – INDIVIDUAL ARTS AND CULTURE GROUPS

Generally, the demographic profiles of activity-based groups of North American arts/culture tourists are quite similar to one another. There are, however, some noteworthy differences among them. In some instances, the differences may be associated with the dominant activities used to define each arts/culture group, as described below.[33]

- The **Music Performance** group includes a higher proportion of younger tourists (18 – 34 years) than any other group. *Popular/rock 'n roll concerts* are the dominant arts/culture trip drivers for these tourists – an activity that might be expected to have a particular appeal to young tourists.

- **Other Cultural Attractions** including *zoos* and *aquariums* are more apt to attract families than is any other group.

- The prevalence of North American tourists with no more than a secondary school education and with lower household incomes among those in the **Other Arts** group might be explained by the prominence of *going to the movies* as a trip driver for the group.

Other key differences between Ontario's North American tourists as a whole and each arts/culture group are highlighted in the following paragraphs.

Music Performance: As noted above, members of this group are somewhat more concentrated at the young end of the age spectrum (36% between 18 and 34 years) than is the market as a whole (30%).

Theatre: These tourists are under-represented at the young end of the age spectrum and over-represented at the older end relative to the Ontario's North American tourists in total. In fact, close to half are at least 55 years of age (45%) and about one quarter are 65 years of age or older (24%). Likely as a function of their age, theatre-oriented tourists are less likely to be living in households with children than is the market overall.

Dance: Like theatre-goers, the dance market tends to be older and to live in adult-only households. Relative to the market overall, they are more likely to be women and to have higher household incomes.

Other performing arts: *A free outdoor performance* is the dominant trip driver for this group. The activity might contribute to members of this group being slightly less likely to be university-educated and more concentrated in the mid-to lower income bracket (under $60,000). In other respects, they closely resemble the Ontario's North American market as a whole.

Arts Festivals: Members of this group are more likely to live in adult-only households and to have university degrees than is the province's North American tourist market as a whole.

Art Galleries: Of all groups identified in this project, those who take trips in order to visit an art gallery are the most apt to be university graduates and to have high household incomes. Compared to the market as a whole, they are also somewhat older and less likely to be living in a household with children or teenagers.

[33] See Appendix C for listing of individual trip activities that define each group.

Other Arts: This group includes tourists who take trips to go to movies, exhibitions or fairs and/or to shop for local arts and crafts. Compared to all Ontario's North American tourists, group members are somewhat less likely to be university graduates and somewhat more likely to have an annual household income under $60,000.

Historic Sites/Buildings: As the largest arts/culture group, representing about one fifth of Ontario's North American travel market (19%), it is not surprising that the demographic profile of historic site/architecture members closely resembles the market as a whole. These history/architecture buffs are, however, slightly older, more likely to be university graduates and at the upper end of the income spectrum than is the typical tourist.

Museums: Ontario's North American market for museums is somewhat older and more likely to have completed university than tourists overall.

Cultural Festivals: A higher proportion of this group is men (56%) than is the case for the market as a whole (51%) or any other individual group. At 30%, the group captures a higher proportion of young people than other arts/culture groups, but is on par with all of Ontario's North American tourists. Possibly because of their relative youth, Cultural Festival tourists are slightly less likely to have completed university than those in most other arts/culture groups. Their education profile is, however, the same as that of all Ontario's North American tourists.

Other Cultural Attractions: With the exception of household composition, members of this group parallel the demographic profile of the market as a whole. As mentioned previously, their greater concentration among *families* may be explained by the prominence of zoos and aquariums as defining trip drivers for the group.

Table 22. Ontario's North American Tourists – Demographics

		Arts Trip Driver Groups*							**Other Culture Trip Driver Groups***			
	Total	Music Performance	Theatre	Dance	Other Performing Arts	Arts Festivals	Art Galleries	Other Arts	Historic Sites	Museums	Cultural Festivals	Other Attractions
Total (Weighted, in Millions)	20.8 %	2.9 %	2.2 %	0.5 %	1.5 %	1.8 %	1.1 %	2.6 %	4.0 %	2.3 %	2.4 %	2.6 %
Gender												
Male	51	53	48	46	49	54	52	53	49	53	56	52
Female	49	47	52	54	52	46	48	47	51	47	44	48
Age												
18 - 34	30	36	21	22	27	31	22	28	27	25	30	29
35 - 54	38	33	33	34	37	36	33	33	36	34	38	39
55+ years	33	31	45	45	37	33	45	39	37	41	32	32
65+ years	16	16	24	23	19	16	22	20	18	21	14	16
Average (18+ years)	**46**	**45**	**51**	**51**	**48**	**46**	**50**	**48**	**48**	**49**	**46**	**46**
Education												
Secondary or less	22	20	21	15	20	18	14	25	17	17	20	16
Some Post-Secondary	35	34	29	35	37	30	27	35	33	32	37	39
University Graduate	42	43	47	48	41	50	56	37	47	48	41	44
Household Composition												
Adult, living alone	11	14	15	16	13	15	13	11	12	11	13	11
Couples, no children/teens	37	36	41	41	36	40	43	41	41	41	36	34
Families (any children/teens)	49	47	41	41	49	41	40	46	45	46	48	53
Household Income												
Under $40,000	19	20	18	16	22	21	14	23	17	17	23	18
$40,000 to $59,999	18	19	19	17	21	17	15	19	17	18	18	20
$60,000 to $99,999	33	34	31	33	30	31	33	31	32	35	31	34
$100,000 or more	30	27	33	35	27	31	38	27	34	30	28	29

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *Trip drivers do not represent mutually exclusive groups. Percentages do not add to 100% because of rounding. *Household income* is reported income for 2005 and percentages are based on those stating an income.

TRAVEL BENEFITS

BENEFITS OF PLEASURE TRAVEL –ALL ARTS/CULTURE TOURISTS

TAMS travellers were presented with a list of benefits that might derive from pleasure travel and asked to indicate how important each was to them. The top five benefits for North American pleasure travellers with recent trips to Ontario as a whole and those in the arts/culture subset of this market are the same:

- a break from their everyday environment
- relaxation/stress reduction
- creating lasting memories
- seeing or doing something new and different
- enriching familial relationships

Each of these benefits is deemed to be *very important* for at least half of the market overall and those who take trips driven by an arts or culture activity.

At the same time, when compared to Ontario’s typical North American tourists, arts/culture tourists are noticeably more likely to accord importance to enriching perspectives on life, gaining knowledge of history, culture and places and being provided with mental stimulation. The comparatively prevalent endorsement of these knowledge-based benefits among arts/culture tourists is not surprising in light of the activities that motivate some of their trips.

Table 23. Ontario's North American Tourists – Important Travel Benefits

	Ontario's North American Tourists*	**Any Arts/Culture**	**Any Arts**	**Any Other Culture**
Total (Weighted)	20.8 million	9.1 million	6.5 million	6.6 million
% Stating *Highly Important*	%	%	%	%
Break from daily environment	68	67	67	66
Relax/ relieve stress	67	67	66	66
Create lasting memories	56	59	58	62
Enrich relationship with partner/family	53	54	54	55
To see/do new & different things	50	56	56	59
No fixed schedule	47	46	47	46
Keep family ties alive	43	42	40	43
Enrich perspective on life	29	36	36	38
Gain knowledge of history, cultures	27	35	34	39
Stimulate your mind	22	28	29	31
Renew personal connections	20	21	22	22
Challenged physically	14	15	16	17
To be pampered	14	15	16	16
Stories to share	13	15	15	16
Find solitude and isolation	12	11	11	12

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *Adult pleasure tourists who took an overnight trip to Ontario over a two year period.

BENEFITS OF PLEASURE TRAVEL – INDIVIDUAL ARTS AND CULTURE GROUPS

With few exceptions, travel benefits deemed highly important to members of individual arts/culture tourist groups are the same as those among all Ontario's North American tourists. For several groups, however, there is a stronger emphasis on knowledge-based benefits such as enriching perspectives on life, gaining knowledge of history, culture and places and/or providing mental stimulation than is evident for the market as a whole. These benefits are especially prominent among members of the Dance, Art Galleries, Historic Sites/Buildings and Museums groups.

Table 24. Ontario's North American Tourists – Important Travel Benefits

		Arts Trip Driver Groups*							Other Culture Trip Driver Groups*			
	Total	Music Performance	Theatre	Dance	Other performing arts	Arts Festivals	Art Galleries	Other Arts	Historic Sites	Museums	Cultural Festivals	Other Attractions
Total** (Weighted, in millions)	20.8	2.9	2.2	0.5	1.5	1.8	1.1	2.6	4.0	2.3	2.4	2.6
% Stating *Highly Important*	%	%	%	%	%	%	%	%	%	%	%	%
Break from daily environment	68	68	63	67	69	64	60	66	66	63	69	66
Relax/ relieve stress	67	67	63	64	69	65	56	67	66	64	67	69
Create lasting memories	56	59	59	59	65	64	60	63	64	63	63	67
To see/do new & different things	53	57	58	69	59	65	67	61	65	62	58	62
Enrich relationship with partner/family	50	53	50	58	57	53	52	58	56	54	57	59
No fixed schedule	47	48	43	47	51	51	42	50	46	46	50	51
Keep family ties alive	43	40	38	43	45	42	42	45	44	44	44	45
Enrich perspective on life	29	36	34	46	39	44	51	39	41	41	39	40
Gain knowledge of history, cultures	27	32	36	50	35	43	56	37	49	49	35	37
Stimulate your mind	22	30	30	37	32	38	42	31	35	36	33	30
Renew personal connections	20	22	20	23	26	24	25	23	22	22	26	21
Stories to share	14	15	15	17	20	17	19	19	17	17	22	17
Challenged physically	14	16	15	21	20	21	20	17	18	18	20	18
To be pampered	13	17	19	20	22	20	16	20	17	17	20	20
Find solitude and isolation	12	11	10	13	13	13	13	12	12	13	12	14

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *Trip drivers do not represent mutually exclusive groups. **Adult pleasure tourists who took an overnight trip to Ontario over a two year period.

APPENDIX A: ABOUT THE SURVEYS

Four large-scale surveys form the basis of the findings presented in this report:

- Travel Survey of Residents of Canada (TSRC, Statistics Canada), 2010
- International Travel Survey, U.S. and Overseas (ITS US, OVS, Statistics Canada), 2010
- Travel Activity and Motivations Surveys – Canada (TAMS Canada, Statistics Canada), 2006
- Travel Activities and Motivations Surveys – USA (TAMS USA, TNS Canadian Facts), 2006

Estimates of economic impacts were generated using the Ontario Ministry of Tourism, Culture and Sport's TREIM model.

TSRC & ITS

The TSRC and ITS are designed to obtain details of individual tourism trips taken in Canada by residents of Canada (TSRC) and other countries (ITS). Their primary purpose is to capture volume, value and characteristics of each trip taken in the month preceding data collection (TSRC) or the calendar quarter in which the foreign tourist entered Canada (ITS). The studies also capture limited demographic information about the traveller and others in the travel party. As such, they provide no information on general travel behaviour or motivations.

International Travel Survey (ITS)

- Conducted by Statistics Canada, the ITS is a self-completion survey, distributed at ports of entry for completion by USA and Overseas visitors to Canada at the end of their trip or is administered by interviewers in the exit lounges of Canada's largest airports to increase the number of responses from overseas visitors.
- The survey excludes border workers, visitors travelling on military or diplomatic orders, and students. Questionnaire data are projected to Canada Border Services Agency information on total entries to Canada. For more details of the survey designs, please contact Statistics Canada.

Travel Survey of Residents of Canada (TSRC)

- The TSRC is a monthly telephone survey among Canadians 18 years of age or over, relying on a sample from the monthly Labour Force Survey. Monthly sample size is approximately 7,000. The study captures travel in the previous month by the respondent for all overnight trips and same-day trips of 40 km or more one way from home, for all purposes other than commuting to work or school, crews, moving to a new residence and routine chores or activities (e.g., household shopping, routine medical/dental appointments, religious observances, etc.).
- In order to increase the number of records available for sub-provincial and sector analysis, a pooled file, combining the 2009 and 2010 TSRC studies, was created by Statistics Canada. This pooled file is the basis of the Ontario Ministry of Tourism, Culture and Sport's (MTCS) official tourism estimates and is used for tabulations on behalf of OAC.

- The information provided in this report is based on special tabulations of Statistics Canada data, using data management principles developed by Research Resolutions & Consulting Ltd. in conjunction with provincial and regional partners including the MTCS. The estimates provided herein may differ from estimates provided by Statistics Canada. For more details about the data management principles used by Research Resolutions, please refer to the Technical Appendix, provided to MTCS.

TRAVEL ACTIVITIES AND MOTIVATIONS SURVEY (TAMS)

The 2006 TAMS studies examined the recreational activities and travel habits of Canadians and Americans over a two year period. The survey provides detailed information on travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

Unless otherwise specified, TAMS data in this report refer to the two year period including 2004 and 2005. It should also be noted that respondents were at least 18 years of age and that *trips* refer to overnight out-of-town travel.

TAMS was sponsored by the following organizations[34]:

- Ontario Ministry of Tourism
- Quebec Ministry of Tourism
- Ontario Tourism Marketing Partnership
- Tourism Manitoba
- The Canadian Tourism Commission
- Tourism Saskatchewan
- The Atlantic Canada Opportunities Agency
- Alberta Economic Development
- Department of Canadian Heritage
- Tourism BC
- Parks Canada
- The Government of Yukon
- Statistics Canada
- The Government of Northwest Territories

The Canadian survey consisted of a telephone and a mail back survey:

- The household response rate on the telephone was 65.4%.
- Among those who qualified to receive the paper questionnaire the response rate was 53.5%.

The Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires.

The U.S. survey consisted of a mail back survey only as it used an existing mail panel. The panel's response rate for this survey was 71.3%. The U.S. database consists of 60,649 completed responses.

[34] Names of organizations are those in place when the study was commissioned.

DEFINITIONS OF ARTS AND CULTURE TOURISTS

TSRC/ITS

Identifying *Arts and Culture Tourists* in this secondary analysis was limited by the objectives of each of the four studies and the array of variables available for analysis in each.

Arts and other cultural activities included in the TSRC and ITS questionnaires are limited to the following:

- Performance such as a play or concert
- Aboriginal event (pow wow, performance, other)
- Festival or fair
- Historic site
- Museum or art gallery
- Zoo or aquarium (plus botanical gardens in ITS only)

Participation in one or more of these activities is the operational definition used to identify an *Arts and Culture tourist* from the TSRC and ITS. Only trips in which the tourist spent one or more nights away from home within Ontario (*Ontario overnight trips*) are included in the analysis. Note that activities could have taken place in any of the locations visited by the tourist. Thus, for those who travelled to more than one province on the same trip, the activity may or may not have been *in Ontario.*

TAMS

In TAMS, pleasure tourists were asked to identify which of over 160 different activities they engaged in on at least one of their trips to any destination over a two year period. The options included many arts/culture activities as well as those focused on the outdoors, sporting events, shopping, food and wine. For each activity sought, respondents were asked if it was the *main reason* for the trip (*trip driver*).

To operationalize *arts/culture* tourism, TAMS activities were selected that are consistent with the core set of activities used by other cultural research organizations.[35] Individual *main reasons* for travel were grouped into two major categories, each containing several arts/culture groups.

TAMS ARTS/CULTURAL TRIP DRIVERS[36]

ARTS	**OTHER CULTURAL ACTIVITIES**
Music Performances	Historic Sites/Buildings/Architecture
Theatre	Museums
Ballet or Other Dance Performances	Cultural Festivals
Other Performing Arts (e.g., outdoor performances, circuses)	Other Cultural Attractions/Experiences (e.g., zoos, aquariums)
Arts Festivals	
Art Galleries	
Other Arts (e.g., local arts and crafts, exhibitions/fairs)	

[35] Contact the Ontario Arts Council for more information about core activities used by other cultural organizations to operationalize arts/*cultural* tourism.
[36] A list of the individual activities included in each group is provided in Appendix B.

For a TAMS traveller to be included in the arts/culture tourist sector, the following requirements had to be met:

- Identify one or more of the arts/culture activities as a main reason for an overnight trip in the past two years (*trip drivers*);
- Claim to have taken an overnight trip in Ontario over a two year period.[37]

Because people are likely to have had multiple destinations over the two year time span covered in TAMS and may have taken different trips with different motivations, it cannot be assumed that their arts/culture trip drivers motivated one or more of their trip(s) *to Ontario* destinations.

[37] The survey was conducted in 2006. The reference period for the *past two years* is 2004, 2005.

APPENDIX B: ARTS AND CULTURE ACTIVITIES – TAMS

TAMS Activities Used to Define Arts and Culture Tourists as *Trip Drivers* and *Any* Trip Activities

ALL CULTURAL ACTIVITIES (ARTS/OTHER CULTURE) (NET)

ARTS (NET) (A-G)

Performing Arts (Any) (A - D)

Music Performances (A)

Classical or symphony concert

Jazz concert

Opera

Rock & roll/popular concerts

Country /western music concerts

Theatre (B)

Live Theatre

Live Theatre with dinner

Ballet or other dance performances (C)

Other Performing Arts (D)

Free outdoor performances (theatre/concerts, etc.)

Circus

Stand-up comedy clubs and other variety shows

Arts Festivals (E)

International film festivals

Literary festivals or events

Music festivals

Theatre festivals

Aboriginal festivals and events (e.g., Pow Wows)*

Comedy festivals

Other Arts (F)

Aboriginal arts and crafts shows*

Shop or browse local arts & crafts studios or exhibitions

Exhibitions or fairs

Went to the movies/cinema

Went to IMAX movie theatres

Art galleries (G)

OTHER CULTURAL ACTIVITIES (NET) (H - K)

Historic Sites/Buildings/Architecture (H)

Historical replicas of cities or towns with historic re-enactments

Paleontological/archaeological sites

Well-known historic sites/buildings

Other historic sites, monuments and buildings

Strolling around a city to observe buildings/architecture

Archaeological digs

Historical re-enactments (as an actor)

Interpretive program at a historic site or national/provincial park

Museums (Any) (I)

Aboriginal heritage attractions (e.g., museums, interpretive centres)*

Museum - Children's

Museum - Science or technology

Museum - General history or heritage

Museum - Military/war

Curatorial tours

Cultural Festivals (J)

Religious festivals

Food/drink festivals

Ethnic festivals

Gay Pride parades

Fireworks displays

Hot air balloon festivals

Other Cultural Attractions/Experiences (K)

Aboriginal cultural experiences in remote/rural setting (1+ nights)*

Planetarium

Botanical gardens

Aquariums

Zoos

Aboriginal cultural activities (unduplicated count of *ed activities, above)

APPENDIX C: MTCS GLOSSARY: ECONOMIC IMPACT TERMS[38]

Gross domestic product (GDP): value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership. This GDP is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travellers.

Direct impact: refers to the impact generated in businesses or sectors that produce or provide goods and services directly to travellers, e.g. accommodations, restaurants, recreation providers, travel agents, transportation, and retail enterprises. Direct impact on GDP, employment, and tax revenues is also called tourism GDP, tourism employment, and tourism tax revenues.

Indirect impact: refers to the impact resulting from the expansion of demand from businesses or sectors that directly produce or provide goods and services to travellers, to other businesses or sectors.

Induced impact: refers to the impact associated with the re-spending of labour income and/or profits earned in the industries that serve travellers directly and indirectly.

Employment: refers to number of jobs, including full-time, part-time, and seasonal employment, as well as both employed and self-employed.

Federal tax revenues: include personal income tax, corporate income tax, commodity tax (GST/HST, gas tax, excise tax, excise duty, air tax and trading profits) and payroll deduction that collected by the federal government.

Provincial tax revenues: include personal income tax, corporate income tax, commodity tax (PST/HST, gas tax, liquor gallonage tax, amusement tax and trading profits) and employer health tax that collected by Ontario provincial government.

Municipal tax revenues: include business and personal property taxes that collected by the municipalities. Collection, however, does not follow immediately the consumption or production of goods and services in a municipality by visitors (as is the case with HST or personal income taxes). Rather, these taxes show the percent of the total property taxes collected by a municipality that can be attributed to tourism because of tourism's contribution to the economic activity of the municipality and hence its tax base.

Industry: The industry follows Statistics Canada's 2007 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.

[38]MCTS glossary, from website (http://www.mtr-treim.com/webtreim/data_out/NP1/EconomicImpact.pdf), July 2012.

APPENDIX D: SUMMARY TABLES

Table A-1. Ontario's North American Tourists – Arts and Culture & Other Trip Activities (*One-of-Many*)

			Arts Trip Driver Groups							Other Culture Trip Driver Groups			
***One-of-Many* Activities**	**Total**	**Any Arts/Culture**	Music Performance	Theatre	Dance	Other performing arts	Arts Festivals	Art Galleries	Other Arts	Historic Sites	Museums	Cultural Festivals	Other Attractions
Total (Weighted, in millions)	20.8	9.1	2.9	2.2	0.5	1.5	1.8	1.1	2.6	4.0	2.3	2.4	2.6
	%	%	%	%	%	%	%	%	%	%	%	%	%
Any *Arts* Trip Activities	78	92	100	100	100	100	100	100	100	91	93	92	90
Music Performance	31	47	100	54	70	66	71	67	50	45	49	53	49
Theatre	28	39	45	100	72	56	56	60	44	42	44	43	41
Dance	8	13	18	20	100	23	23	30	16	16	18	18	19
Other performing arts	31	40	50	49	63	100	60	58	50	45	46	53	50
Arts Festivals	18	29	42	37	52	48	100	49	38	32	39	41	37
Art Galleries	24	32	37	44	59	40	50	100	37	41	43	37	37
Other Arts	64	73	76	79	85	82	83	86	100	78	83	79	80
Any *Other Culture* Trip Activities	78	91	89	89	94	93	93	98	91	100	100	100	100
Historic Sites/Buildings	61	73	71	75	84	76	78	88	75	100	83	73	74
Museums	43	54	54	62	74	61	66	80	60	67	100	58	66
Cultural Festivals	36	48	51	47	62	66	64	58	58	51	56	100	59
Other Cultural Attractions	43	54	56	56	69	63	64	72	60	60	71	60	100
Other Trip Activity Groups*													
Outdoors	84	87	89	86	91	90	89	89	90	90	91	91	91
Nature Park	36	42	44	40	51	47	46	49	44	48	52	47	51
Theme Parks	46	55	61	57	70	72	65	66	63	61	68	70	78
Culinary Experiences	75	83	86	88	94	90	92	94	88	88	86	89	86
Spectator Sports Events	35	41	53	47	55	57	53	49	48	41	47	50	51
Shopping	76	81	85	86	94	87	90	91	88	86	86	85	85

Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *Trip drivers do not represent mutually exclusive groups. Adult pleasure tourists who took an overnight trip to Ontario over a two year period and had an arts/culture trip driver. *Other Trip Activity Groups represent the unduplicated count of individual activities in the respective group.

Table A-2. Ontario's North American Tourists – Individual Arts and Culture Trip Drivers*

	Arts Trip Driver Groups							Other Culture Trip Driver Groups			
Individual Arts/Culture Activities as Trip Drivers[39]	Music Performance	Theatre	Dance	Other Performing Arts	Arts Festivals	Art Galleries	Other Arts	Historic Sites	Museums	Cultural Festivals	Other Attractions
Total (Weighted, in millions)	2.9	2.2	0.5	1.5	1.8	1.1	2.6	4.0	2.3	2.4	2.6
	%	%	%	%	%	%	%	%	%	%	%
Aquariums	15	16	22	23	20	26	22	15	24	20	44
Theatre	31	100	59	45	37	45	32	24	31	27	27
Well-known historic sites	24	28	36	32	27	49	32	55	42	26	30
Strolling in cities to see architecture	25	27	41	33	29	53	36	59	41	30	31
Other historic sites	18	22	37	28	21	42	29	42	37	23	27
Popular/Rock 'n Roll Concerts	52	18	25	30	28	20	17	12	15	21	16
Zoos	18	20	33	28	23	30	26	19	31	25	55
General history museums	15	19	27	19	20	44	24	23	51	18	22
Music festivals	22	15	24	24	54	22	15	11	14	17	14
Art galleries	18	22	37	25	24	100	23	19	28	18	21
Science & technology museums	14	15	26	19	20	33	21	18	43	18	24
Fireworks displays	16	17	25	27	24	23	23	14	21	41	21
Free outdoor performances	19	18	31	60	22	22	19	12	16	20	16
Shop – local arts & crafts	12	16	22	21	17	31	36	16	20	16	17
Historic city replicas/re-enactments	12	14	24	19	16	28	17	23	23	15	17
Botanical gardens	14	17	30	22	20	30	21	15	23	17	34

*Source: TAMS Canada/US 2006 – customized tabulations by Research Resolutions & Consulting Ltd. *Trip drivers do not represent mutually exclusive groups. Adult pleasure tourists who took an overnight trip to Ontario over a two year period and had an arts/culture trip driver. Highlighted cells for individual activities are those used to define the respective arts/culture group (column).*

[39] Table A-2 displays individual trip drivers for at least ten per cent of the total arts/culture market for Ontario. Lower incidence activities are provided in detailed tabulations, under separate cover.