

4TH ANNUAL TORONTO ENTERTAINMENT SURVEY SELECTED HIGHLIGHTS

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FOR MORE INFORMATION PLEASE CONTACT
PATRICIA KELLY
PKELLY@FIELDDAY.COM
TEL 416-408-4446 EXT 264

INTRODUCTION

In February 2015, Field Day conducted its 4th annual Toronto Entertainment Survey to gauge the interest in, and attitudes towards, Toronto's live entertainment offerings.

The survey looked at over 120 GTA attractions in eight categories: theatre & performing arts organizations; galleries & museums; festivals, fairs and events; destinations; sports; concert or arts venues; music clubs; and consumer product shows.

In addition to Toronto attractions, the survey also included major Southern Ontario attractions including African Lion Safari, the Stratford Festival and Shaw Festival.

The survey asked respondents to identify which attractions they attended in the 2014 calendar year, how often they attended each attraction in 2014, and the average size of their group.

Respondents were also asked to identify their three "All-Time Favourite" attractions.

Finally, respondents were asked where they typically learned about attractions, and how far they would be willing to travel to see an attraction.

NEW FOR 2015: Respondents were asked if they planned to purchase tickets to the 2015 Pan Am/ Parapan Am Games, or if they had already purchased tickets.

This document contains selected highlights of the survey results and analysis.

METHODOLOGY

The survey was conducted online. Survey invitations were distributed via email to Field Day's database of 4,000 Southern Ontario residents who have opted in to receive survey and contesting information. The survey link was also promoted via social media (Facebook and Twitter) and on Canadian contesting websites. As an incentive to participate in the survey, Field Day offered a chance to win an iPad valued at \$650. Respondents were required to complete the survey prior to entering the contest.

Field Day gathered over 1,600 responses from adults living in Southern Ontario. Respondents provided basic demographic information including their FSA (the first three digits of their postal code), age, household income, education and gender. This demographic data was used to weight the responses to accurately reflect StatsCan demographics.

The survey has a margin of error of less than 5% with a confidence level of 95%.

For more information please contact Patricia Kelly at 416-408-4446 ext 264 or pkelly@fieldday.com.

2014 SURVEY KEY FINDINGS

CANADA'S WONDERLAND: "ALL-TIME FAVOURITE" FOR 2ND CONSECUTIVE YEAR (SEE PAGE 4)

Canada's Wonderland was selected as Southern Ontario residents' "All-Time Favourite Attraction" for the 2nd consecutive year.

THE DECLINE OF THE LEAFS (SEE PAGE 4)

For the first time, the Toronto Blue Jays surpassed the Toronto Maple Leafs on the All-Time Favourite list. The Jays moved up 3 places: from 5th place to 2nd place overall.

The Toronto Maple Leafs slipped from 3rd place to 5th and lost over 25% of their voters from the previous year (dropping from 17.04% of voters to 12.35%).

THE RISE OF RIPLEY'S (SEE PAGES 4 & 8)

In its first full year of operation, Ripley's Aquarium of Canada appeared in the Top 10 All-Time Favourite Attractions, landing in 9th place overall, with nearly 10% of respondents choosing it.

As well, Ripley's ranked 4th overall for unique visitors in 2014 - outdrawing other year-round museums and destinations such as the Royal Ontario Museum, the Toronto Zoo, the Art Gallery of Ontario, and Ontario Science Centre.

SELLING "HIGH CULTURE" (SEE PAGE 9)

With few exceptions, Toronto's performing arts and theatre companies draw their audience almost exclusively from within the City of Toronto. 60-90% of their audience comes from postal code M, while only 7-24% of their audience comes from the surrounding GTA.

PAN AM / PARAPAN AM GAMES: WHO WILL ATTEND? (SEE PAGE 12)

Less than 3% of Southern Ontario residents have already purchased tickets to the Pan Am Games. But nearly 23% of residents do plan to purchase tickets to at least one event. Interest in the Games is highest with City of Toronto residents (postal code M) and the 25-34 year-old age group.

THE DECLINE OF PRINT MEDIA (SEE PAGE 13)

The younger the audience, the less likely they are to rely on newspapers as sources of information. While nearly 50% of respondents age 55+ rely on newspaper advertising, that number declines steadily with each age category. Only 11% of respondents age 18-24 rely on newspaper advertising.

THE SOCIAL ERA (SEE PAGE 13)

Word of mouth and social media - especially Facebook - are the primary sources of information for all generations. While some reports claim that Facebook is no longer relevant with younger audiences, nearly two-thirds of respondents age 18-24 rely on it for information, along with Twitter and "other social media".

2014 ALL-TIME FAVOURITE ATTRACTIONS

Respondents were provided with a list of over 120 GTA and several Southern Ontario attractions. They were then asked to select their top three All-Time Favourites. Attendance in 2014 – or at any other time – was not a criterion for selection.

ALL-TIME FAVOURITES: 2014 VS. 2013

Canada’s Wonderland maintained its position at the top of the list for the 2nd year, although the number of respondents who selected it decreased by nearly 10% from the previous year (dropping from 19.59% of all voters to 17.85%).

THE DECLINE OF THE LEAFS

For the first time, the Toronto Blue Jays surpassed the Toronto Maple Leafs in popularity.

The Jays moved from 5th place to 2nd place overall, while, the Toronto Maple Leafs slipped from 3rd place to 5th and lost over 25% of their voters from the previous year (dropping from 17.04% of voters to 12.35%).

Meanwhile the Toronto Raptors also saw a sizeable increase in popularity, jumping from 13th place to 10th, with a 34% increase in voters over the previous year (from 6.98% to 9.36%).

THE RISE OF RIPLEY’S

Ripley’s Aquarium of Canada has found its way into the hearts of Southern Ontario residents. In its first full year of operation, it appears in the Top 10 All-Time Favourite Attractions, landing in 9th place overall, with nearly 10% of respondents choosing it.

2014 ALL-TIME FAVOURITES

Percentage of ALL respondents who selected each attraction as one of their three “All-Time Favourites”.

2014 RANK	DESTINATION	2014 PERCENT	2013 RANK	2013 PERCENT	+ / -
1	Canada’s Wonderland	17.85%	1	19.59%	--
2	Toronto Blue Jays	13.37%	5	14.75%	+3
3	Ontario Science Centre	12.54%	8	8.72%	+5
4	Air Canada Centre (concerts)	12.37%	4	15.57%	--
5	Toronto Maple Leafs	12.35%	3	17.04%	-2
6	Toronto Zoo	12.23%	2	18.21%	-4
7	Royal Ontario Museum	10.60%	6	11.52%	-1
8	CN Tower	9.69%	9	7.88%	+1
9	Ripley’s Aquarium of Canada	9.43%	--	--	--
10	Toronto Raptors	9.36%	13	6.98%	+3
11	Distillery District	7.71%	18	5.28%	+7
12	African Lion Safari	7.64%	10	7.86%	-2
13	Art Gallery of Ontario	7.64%	7	8.82%	-6
14	Toronto International Film Festival	7.48%	14	6.96%	--
15	Mirvish Productions	6.07%	11	7.76%	-4
16	Rogers Centre (concerts)	6.00%	15	6.30%	-1
17	Canadian National Exhibition	5.64%	12	7.17%	-5
18	Massey Hall	5.23%	16	5.70%	-2
19	Molson Canadian Amphitheatre	5.22%	17	5.57%	-2
20	Stratford Shakespearean Festival	4.25%	20	3.92%	--



ALL-TIME FAVOURITE ATTRACTION BY TYPE

The percentage of respondents who selected each attraction as one of their three “All-Time Favourites”. Responses are weighted using Statistics Canada demographic data.

DESTINATIONS

1	Canada’s Wonderland	17.85%
2	Toronto Zoo	12.23%
3	CN Tower	9.69%
4	Ripley’s Aquarium of Canada	9.43%
5	Distillery District	7.71%
6	African Lion Safari	7.64%
7	Medieval Times	3.16%
8	Hockey Hall of Fame	2.55%
9	LEGOLAND Discovery Centre	1.90%
10	Marineland	1.86%

FESTIVALS, FAIRS & EVENTS

1	Toronto International Film Festival	7.48%
2	Canadian National Exhibition	5.64%
3	Summerlicious / Winterlicious	3.58%
4	Festival of Beer	2.71%
5	Royal Agricultural Winter Fair	2.47%
6	Taste of the Danforth Festival	2.30%
7	Scotiabank Nuit Blanche	2.11%
8	Beaches International Jazz Festival	1.84%
9	Scotiabank Caribbean Carnival Toronto	1.54%
10	Woofstock	1.50%

MUSEUMS & GALLERIES

1	Ontario Science Centre	12.54%
2	Royal Ontario Museum	10.60%
3	Art Gallery of Ontario	7.64%
4	Casa Loma	2.74%
5	Aga Khan Museum	0.68%
6	McMichael Canadian Art Collection	0.45%
7	Bata Shoe Museum	0.31%
8	Fort York	0.18%

THEATRE & PERFORMING ARTS

1	Mirvish Productions	6.07%
2	Stratford Shakespearean Festival	4.25%
3	Yuk Yuk’s Comedy Club	3.39%
4	Shaw Festival	2.13%
5	Second City	2.13%
6	National Ballet of Canada	1.72%
7	Toronto Symphony Orchestra	1.12%
8	Soulpepper	0.57%
9	Canadian Opera Company	0.56%
10	Canadian Stage	0.54%

CONCERT & ARTS VENUES

1	Air Canada Centre (concerts)	12.37%
2	Rogers Centre (concerts)	6.00%
3	Massey Hall	5.23%
4	Molson Canadian Amphitheatre	5.22%
5	Sony Centre	1.77%
6	Roy Thomson Hall (all events)	1.15%
7	St. Lawrence Centre	1.01%
8	Koerner Hall	0.77%
9	Queen Elizabeth Theatre	0.69%
10	Toronto Centre for the Arts	0.41%

MUSIC CLUBS

1	Opera House	1.38%
2	Horseshoe Tavern	1.12%
3	Phoenix Concert Theatre	1.00%
4	Sound Academy	0.82%
5	Kool Haus	0.78%
6	Lee’s Palace	0.77%
7	MOD CLUB Theatre	0.57%
8	Rivoli	0.53%
9	Hugh’s Room	0.28%
10	Adelaide Hall	0.26%

SPORTS

1	Toronto Blue Jays	13.37%
2	Toronto Maple Leafs	12.35%
3	Toronto Raptors	9.36%
4	Toronto FC	2.23%
5	Honda Indy	1.69%
6	Rogers Cup Tennis	1.35%
7	Woodbine Racetrack	1.29%
8	Toronto Argonauts	1.25%
9	Toronto Rock	0.80%
10	Canadian Tire Racing Series (NASCAR)	0.61%

CONSUMER SHOWS

1	One of a Kind Show	3.49%
2	FanExpo	3.24%
3	Canadian International AutoShow	2.96%
4	Gourmet Food & Wine Expo	2.17%
5	Canada Blooms	1.60%
6	Toronto International Boat Show	1.07%
7	Interior Design Show	0.92%
8	Toronto Motorcycle Show	0.82%
9	National Home Show	0.81%
10	The Delicious Food Show	0.71%

ALL-TIME FAVOURITE ATTRACTION BY REGION

THE CITY VS. THE REST OF SOUTHERN ONTARIO

When it comes to favourite attractions, City of Toronto residents have markedly different opinions than the rest of Southern Ontario.

GTA and Southern Ontario residents selected Canada's Wonderland as their All-Time Favourite attraction.

Wonderland had the greatest popularity with Southern Ontario residents: nearly 25% of all Southern Ontario respondents chose Wonderland as one of their three All-Time Favourites.

Meanwhile, City residents selected TIFF as their All-Time Favourite attraction. Wonderland ranked 8th with City residents, with only 8.66% of respondents selecting it.

The 2nd place attraction with City of Toronto residents was the Art Gallery of Ontario.

Neither TIFF nor the AGO appear on the Top 10 lists of GTA and Southern Ontario residents.

CITY OF TORONTO TOP 10

1	Toronto International Film Festival	15.22%
2	Art Gallery of Ontario	14.17%
3	Toronto Raptors	12.86%
4	Distillery District	12.60%
5	Air Canada Centre (concerts)	10.24%
6	Toronto Blue Jays	9.71%
7	Toronto Maple Leafs	8.92%
8	Canada's Wonderland	8.66%
tie	Royal Ontario Museum	8.66%
10	Toronto Zoo	7.61%

GTA TOP 10

1	Canada's Wonderland	18.98%
2	Toronto Maple Leafs	16.33%
3	Air Canada Centre (concerts)	15.92%
4	Toronto Blue Jays	13.27%
5	Toronto Zoo	12.65%
6	Royal Ontario Museum	12.45%
7	Toronto Raptors	12.24%
8	Ontario Science Centre	11.22%
9	Ripley's Aquarium of Canada	8.98%
10	CN Tower	7.96%

SOUTHERN ONTARIO TOP 10

1	Canada's Wonderland	24.93%
2	Ontario Science Centre	18.84%
3	Toronto Blue Jays	16.34%
4	Ripley's Aquarium of Canada	14.68%
5	Toronto Zoo	14.40%
6	CN Tower	13.85%
7	African Lion Safari	12.19%
8	Toronto Maple Leafs	11.63%
9	Air Canada Centre (concerts)	10.80%
tie	Royal Ontario Museum	10.80%



ALL-TIME FAVOURITE ATTRACTION BY AGE

CROSS REFERENCING AGE & LOCATION

Canada's Wonderland was the top pick for respondents age 18-44. In each of these three age categories, Wonderland led by a wide margin over the 2nd place choice. The appeal of Wonderland drops off with older respondents.

A cross reference between the age and location charts indicates that Wonderland's strongest appeal is with younger respondents in the GTA and beyond.

The Toronto International Film Festival appears in the Top 10 in only one age category: 25-34 year-olds. And yet, TIFF appears as the top selection of City residents (see previous page). Even though TIFF only appears in the Top 10 of one age category, it has relatively consistent appeal across all age categories. TIFF appears at #13 (age 18-24), #16 (age 35-44), #15 (age 45-54), #18 (age 55-64), and #36 (age 65+). This indicates that TIFF received votes from City residents across all age categories.

18-24 YEAR OLD TOP 10

1	Canada's Wonderland	24.44%
2	Toronto Zoo	15.00%
3	CN Tower	13.89%
4	Air Canada Centre (concerts)	13.33%
5	Toronto Maple Leafs	12.78%
tie	Toronto Raptors	12.78%
7	Toronto Blue Jays	11.11%
tie	Royal Ontario Museum	11.11%
9	Ontario Science Centre	10.00%
10	African Lion Safari	8.33%

25-34 YEAR OLD TOP 10

1	Canada's Wonderland	16.98%
2	Toronto Zoo	13.21%
3	Toronto Raptors	12.67%
4	Air Canada Centre (concerts)	12.13%
5	Toronto International Film Festival	11.86%
6	Toronto Blue Jays	11.05%
7	Toronto Maple Leafs	10.78%
8	Distillery District	10.24%
9	CN Tower	9.97%
10	Ontario Science Centre	9.43%

35-44 YEAR OLD TOP 10

1	Canada's Wonderland	21.36%
2	Toronto Blue Jays	14.86%
3	Toronto Zoo	13.62%
tie	Ontario Science Centre	13.62%
5	Toronto Maple Leafs	12.69%
6	Toronto Raptors	12.07%
7	CN Tower	11.15%
8	Air Canada Centre (concerts)	10.53%
9	Ripley's Aquarium of Canada	9.91%
10	Royal Ontario Museum	9.29%

45-54 YEAR OLD TOP 10

1	Air Canada Centre (concerts)	17.20%
2	Toronto Maple Leafs	16.85%
3	Canada's Wonderland	15.41%
4	Ontario Science Centre	12.54%
5	Toronto Blue Jays	11.11%
6	Royal Ontario Museum	10.39%
tie	Mirvish Productions	10.39%
8	Toronto Zoo	10.04%
9	Ripley's Aquarium of Canada	9.68%
10	Canadian National Exhibition	8.96%

55-64 YEAR OLD TOP 10

1	Ontario Science Centre	15.06%
2	Toronto Blue Jays	14.46%
tie	Royal Ontario Museum	14.46%
4	Air Canada Centre (concerts)	13.25%
5	Mirvish Productions	11.45%
tie	Ripley's Aquarium of Canada	11.45%
7	Canada's Wonderland	10.84%
tie	Toronto Zoo	10.84%
9	Stratford Shakespearean Festival	10.24%
10	Art Gallery of Ontario	9.64%

65+ YEAR OLD TOP 10

1	Toronto Blue Jays	15.52%
2	Royal Ontario Museum	12.07%
tie	Stratford Shakespearean Festival	12.07%
tie	Art Gallery of Ontario	12.07%
5	One of a Kind Show	10.34%
tie	Woodbine Racetrack	10.34%
7	Ontario Science Centre	8.62%
tie	Toronto Zoo	8.62%
9	Air Canada Centre (concerts)	6.90%
tie	Toronto Maple Leafs	6.90%

2014 UNIQUE VISITORS

WHICH ATTRACTIONS DID YOU ATTEND AT LEAST ONCE IN 2014?

The survey determined which attractions had the most unique visitors in 2014. The results shown here do not take into account repeat visits by the same person.

The Toronto Blue Jays topped the list in 2013, buoyed by major roster changes prior to the 2013 season, but dropped to 3rd place in 2014.

FAMILY & FREE ENTERTAINMENT

Canada's Wonderland and the Distillery District saw the biggest increases in unique visitors, landing them in the first two places.

Yonge Dundas Square also saw a marked increase in unique visitors, jumping from 20th place to 7th overall.

In its first full year of operation, the success of Ripley's Aquarium of Canada is evident, landing in 4th place on the unique visitors ranking.

DECLINING ATTENDANCE

The Art Gallery of Ontario dropped from 5th place overall in 2013 to 11th place in 2014 (18.02% of respondents in 2013 vs. 14.25% in 2014). The AGO had a number of high profile exhibitions in 2013, including Ai Weiwei "According to What?", "David Bowie Is", and "Frida & Diego", and it may be that their 2014 exhibition schedule didn't have the same mass appeal.

Losses were also seen by Mirvish Productions and the Toronto Maple Leafs.

2014 UNIQUE VISITORS

Percentage of ALL respondents who attended each attraction at least once in 2014.

2014 RANK	DESTINATION	2014 PERCENT	2013 RANK	2013 PERCENT	+ / -
1	Canada's Wonderland	23.35%	8	17.09%	+7
2	Distillery District	22.54%	6	17.88%	+4
3	Toronto Blue Jays	22.34%	1	25.94%	-2
4	Ripley's Aquarium of Canada	21.24%	--	6.59%	--
5	Air Canada Centre (concerts)	18.84%	2	20.88%	-3
6	Royal Ontario Museum	17.14%	3	20.10%	-3
7	Yonge Dundas Square (events only)	15.40%	20	8.94%	+13
8	Toronto Zoo	15.22%	10	14.72%	+2
9	CN Tower	14.53%	15	11.36%	+6
10	Harbourfront Centre	14.30%	19	9.02%	+9
11	Art Gallery of Ontario	14.25%	5	18.02%	-6
12	Canadian National Exhibition	14.13%	12	13.46%	--
13	Mirvish Productions	13.66%	4	18.89%	-9
14	Toronto Maple Leafs	12.71%	7	17.84%	-7
15	Toronto Raptors	12.27%	14	12.42%	-1
16	Ontario Science Centre	11.62%	11	13.61%	-5
17	Molson Canadian Amphitheatre	9.83%	13	12.43%	-4
18	Summerlicious / Winterlicious	9.54%	22	8.19%	+4
19	TIFF Bell Lightbox (excluding Film Fest)	9.47%	30	6.09%	+11
20	African Lion Safari	8.68%	32	5.82%	+12

UNIQUE VISITORS: SOME KEY FINDINGS

WHERE IS TOMORROW'S AUDIENCE FOR PERFORMING ARTS?

Many performing arts organizations have seen declines in attendance as their audience ages, and they are examining both their product and marketing with an eye to building an audience for the future. But where are their audience gaps?

Most of Toronto's performing arts and theatre organizations share the same challenges: **their greatest appeal is with residents of the City of Toronto proper (postal code M).**

The anomalies are Mirvish Productions and the National Ballet of Canada, who draw relatively equally from across Southern Ontario.

Mirvish's product offering is designed to have broad demographic appeal. However, the National Ballet's product is "high culture", in the same vein as the Canadian Opera Company and the Toronto Symphony Orchestra. And yet,

the National Ballet has been nearly twice as successful as the opera and symphony at drawing an audience from outside the City of Toronto. This may in part be due to supply and demand: the National Ballet of Canada is the only ballet in Southern Ontario, while there are numerous regional symphonies and theatre companies that serve GTA and Southern Ontario residents.

Lessons can also be learned from the audience breakdown by age. Many performing arts organizations see a decline in attendance with the 35-44 year old age group, when their priorities are often focused on their children. Those customers will often return once their children have grown.

However, the Canadian Opera Company has been successful at drawing equally from all age groups. And Canadian Stage's largest audience segment by far is age 35-44.

AUDIENCE BASE BY REGION

ORGANIZATION	POSTAL CODE M	POSTAL CODE L	POSTAL CODES K+N
Buddies in Bad Times	66.36%	24.07%	9.56%
Canadian Opera Company	61.62%	20.27%	18.12%
Canadian Stage	52.99%	18.16%	28.85%
Factory Theatre	62.64%	23.41%	13.95%
Mirvish Productions	36.55%	37.56%	25.89%
National Ballet of Canada	38.42%	35.90%	25.67%
Second City	56.23%	29.64%	14.13%
Soulpepper	81.61%	8.39%	10.00%
Tafelmusik	87.20%	12.80%	0.00%
Tarragon Theatre	93.16%	6.84%	0.00%
Theatre Passe Muraille	57.11%	19.57%	23.32%
Toronto Symphony Orchestra	61.26%	21.59%	17.15%

AUDIENCE BASE BY AGE

ORGANIZATION	AGE 18-24	AGE 25-34	AGE 35-44	AGE 45-54	AGE 55-64	AGE 65+
Buddies in Bad Times	12.73%	29.57%	16.46%	12.28%	8.55%	20.40%
Canadian Opera Company	10.94%	17.16%	21.22%	23.76%	13.78%	13.15%
Canadian Stage	3.61%	17.60%	41.97%	20.89%	7.27%	8.67%
Factory Theatre	5.58%	7.78%	21.64%	26.92%	11.25%	26.83%
Mirvish Productions	8.60%	16.57%	19.62%	23.92%	14.28%	17.03%
National Ballet of Canada	11.10%	26.32%	15.08%	27.87%	8.96%	10.68%
Second City	13.04%	32.96%	20.56%	15.74%	9.86%	7.84%
Soulpepper	13.61%	22.13%	8.80%	26.27%	18.29%	10.91%
Tafelmusik	14.37%	30.06%	13.94%	41.62%	0.00%	0.00%
Tarragon Theatre	6.78%	23.63%	13.15%	19.63%	20.50%	16.30%
Theatre Passe Muraille	0.00%	14.39%	20.03%	19.93%	20.82%	24.83%
Toronto Symphony Orchestra	10.11%	26.77%	15.68%	11.70%	16.30%	19.44%

GEOGRAPHY MATTERS

CITY OF TORONTO

Many attractions draw their audience almost exclusively from City residents (postal code M), while other attractions have strong appeal with those outside the city.

Toronto's smaller theatre and performing arts organizations and music clubs attract few attendees from the 905 or beyond.

Luminato, which recently had its annual provincial funding of \$2.5 million extended for three more years, appeals almost exclusively to City residents. Only 20% of its audience comes from beyond postal code M.

GTA (EXCLUDING CITY RESIDENTS)

Consumer shows, family activities, football and lacrosse draw heavily from the postal code L – the Greater Toronto Area surrounding the City of Toronto.

The attractions on this list get their largest audience from the GTA, but they also draw well across all three regions. Only the Scotiabank Caribbean Carnival failed to draw an audience from Southern Ontario outside the GTA – although it regularly attracts tourists from outside of Ontario.

THE REST OF SOUTHERN ONTARIO

Sports-oriented consumer shows, family entertainment and regional attractions drew the majority of their audience from beyond the GTA. The attractions on this list count on Southern Ontario residents for approximately half of their audience base.

LARGEST CITY-BASED AUDIENCE (POSTAL CODE M)

ORGANIZATION	POSTAL CODE M	POSTAL CODE L	POSTAL CODES K+N
Tarragon Theatre	93.16%	6.84%	0.00%
Opera Atelier	87.20%	12.80%	0.00%
Tafelmusik	87.20%	12.80%	0.00%
Word on the Street	85.37%	14.63%	0.00%
Soulpepper	81.61%	8.39%	10.00%
Koerner Hall	81.55%	11.56%	6.89%
Orbit Room	81.41%	18.59%	0.00%
Luminato Festival	79.83%	13.19%	6.99%
Toronto Jewish Film Festival	77.30%	22.70%	0.00%
Hugh's Room	76.19%	14.92%	8.89%

LARGEST GTA-BASED AUDIENCE (POSTAL CODE L)

ORGANIZATION	POSTAL CODE M	POSTAL CODE L	POSTAL CODES K+N
Scotiabank Caribbean Carnival	40.08%	59.92%	0.00%
Toronto Rock	34.01%	50.84%	15.15%
Wild Water Kingdom	18.05%	50.36%	31.59%
National Home Show	32.76%	49.78%	17.45%
Black Creek Pioneer Village	26.72%	49.15%	24.12%
Buffalo Bills Toronto Series	31.70%	48.88%	19.42%
Tor. Star Golf & Travel Show	23.36%	48.02%	28.62%
Toronto Argonauts	35.87%	47.40%	16.74%
Playdium	22.23%	47.13%	30.64%
Toronto Santa Claus Parade	34.33%	46.67%	18.99%

LARGEST SOUTHERN ONTARIO-BASED AUDIENCE (POSTAL CODES K+N)

ORGANIZATION	POSTAL CODE M	POSTAL CODE L	POSTAL CODES K+N
Toronto Ski, Snowboard & Travel Show	8.02%	32.99%	58.98%
Marineland	10.10%	31.14%	58.76%
African Lion Safari	10.80%	33.31%	55.88%
Toronto Sportsmen's Show	17.52%	33.44%	49.05%
Stratford Festival	24.45%	27.64%	47.92%
Toronto Int. Boat Show	24.24%	28.24%	47.52%
Yuk Yuk's Comedy Club	24.25%	29.54%	46.21%
CN Tower	23.96%	30.59%	45.45%
Casa Loma	25.28%	30.14%	44.59%
Hockey Hall of Fame	18.39%	38.70%	42.91%

AVERAGE NUMBER OF VISITS IN 2014

When a respondent identified that they had attended a specific attraction, they were then asked to identify how often they attended that attraction in the 2014 calendar year. Only those who attended the attraction at least once were included in the “average number of visits” calculation.

Attractions on this list have multiple events throughout the year – often on a subscription basis – including sports teams (Toronto FC and Toronto Blue Jays) and music venues such the Orbit Room, Lee’s Palace and the Horseshoe Tavern.

NOTE: This ranking is NOT related to overall attendance. An attraction may have low overall attendance, but a high average number of visits per person.

AVERAGE # OF VISITS

Average number of visits to each attraction in 2014 by adults age 18+ who live in Southern Ontario,

1	Toronto FC	2.87
2	TIFF Bell Lightbox	2.74
3	Toronto International Film Festival	2.64
4	Orbit Room	2.60
5	Toronto Blue Jays	2.59
6	Yonge Dundas Square (events/concerts)	2.56
7	Playdium	2.52
8	Lee’s Palace	2.48
9	St. Lawrence Centre	2.44
10	Harbourfront Centre	2.41
11	Downsview Park	2.36
12	Woodbine Racetrack	2.35
13	Distillery District	2.22
14	Canada’s Wonderland	2.14
tie	Wild Water Kingdom	2.14
16	Horseshoe Tavern	2.12
17	Mirvish Productions	2.09
18	Toronto Raptors	2.08
19	Air Canada Centre (concerts)	2.06
20	Art Gallery of Ontario	2.05

AVERAGE GROUP SIZE IN 2014

When a respondent identified that they had attended a specific attraction, they were then asked to identify the average size of the group with whom they attended the attraction in the 2014 calendar year. Only those who attended the attraction at least once were included in the “group size” calculation.

The top attractions are skewed towards those that encourage socializing, or that offer family, school or corporate group sales.

NOTE: This ranking is NOT related to overall attendance. An attraction may have low overall attendance, but a high average group size.

AVERAGE GROUP SIZE

Average size of group visiting each attraction in 2014 by adults age 18+ who live in Southern Ontario,

1	Toronto Pride Festival	5.61
2	African Lion Safari	4.94
3	LEGOLAND Discovery Centre	4.79
tie	Aga Khan Museum	4.79
5	Scotiabank Caribbean Carnival (Caribana)	4.63
tie	Black Creek Pioneer Village	4.63
7	Centreville Amusement Park	4.62
8	Wild Water Kingdom	4.60
9	Canada’s Wonderland	4.53
10	Marineland	4.45
11	Medieval Times	4.43
12	Young People’s Theatre	4.23
13	Playdium	4.17
14	Casa Loma	4.14
15	Toronto Blue Jays	4.13
16	Toronto Zoo	4.04
17	Toronto Marlies	4.02
18	Festival of Beer	3.98
19	Ontario Science Centre	3.90
tie	Ripley’s Aquarium of Canada	3.90

PAN AM / PARAPAN AM GAMES ATTENDANCE

DO YOU PLAN TO PURCHASE TICKETS TO ANY OF THE 2015 PAN AM & PARAPAN AM GAMES EVENTS?

While less than 3% of respondents have already purchased tickets to the Pan Am / Parapan Am Games, nearly 23% of Southern Ontario adults says they plan to purchase tickets. Nearly two-thirds of respondents have no plans to purchase tickets to the Games.

Geographically, interest in the Games was highest amongst City of Toronto residents (postal code M), and declined beyond the GTA (postal codes K and N).

Interest was highest with the 25-34 year old age group (30.73% have already purchased or plan to purchase tickets), and lowest with those age 45-54.

RESPONSE	OVERALL	MALE	FEMALE	POSTAL CODE M	POSTAL CODE L	POSTAL CODE K+N	AGE 18-24	AGE 25-34	AGE 35-44	AGE 45-54	AGE 55+
YES , I plan to purchase tickets	22.87%	23.49%	23.83%	29.92%	27.35%	18.01%	27.78%	25.61%	25.39%	18.28%	25.90%
NO , I do not plan to purchase tickets	65.03%	66.01%	67.54%	58.27%	63.88%	75.62%	62.78%	61.99%	67.18%	71.33%	70.48%
I have ALREADY purchased tickets	2.93%	3.38%	3.23%	4.72%	4.29%	0.83%	2.78%	5.12%	1.86%	4.30%	1.20%
No answer	9.17%	7.12%	5.40%	7.09%	4.48%	5.54%	6.66%	7.28%	5.57%	6.09%	2.42%

SOURCE OF INFO

WHERE DO YOU LEARN ABOUT EVENTS?

Where do customers learn about events and attractions, and do their sources of information vary by age, location or gender?

The survey asked respondents to identify their sources of information. Respondents could select all choices that apply and could write in additional sources. (Write-in responses were too statistically insignificant to include here.)

IT'S A SOCIAL WORLD

As in our previous survey, nearly half of all respondents selected Facebook and “word of mouth” as sources of information.

Word of mouth was equally important for all age groups. And while some research claims that Facebook is being abandoned by younger users in favour of platforms like Instagram and Snapchat, Facebook still has the greatest appeal for respondents age 18-24, with nearly two-thirds of respondents saying that they rely on it for attraction information.

It's imperative for attractions to develop strategies to regularly engage their target audiences with social content.

But effective social content is not focused on sales promotion. The key is to understand the psychological reason for content sharing: the need for esteem, the desire to be part of community, and the cultivation of image. The most effective social content fulfills these needs and desires. It is meaningful and relevant to its audience. It is unique, exclusive, surprising, and it enhances the sharer's self-image.

THE DECLINE OF PRINT MEDIA

The survey makes it crystal clear: print media are increasingly irrelevant to younger generations. While nearly 50% of respondents age 55+ still rely on newspaper advertising as a source of information, that number declines rapidly as respondents get younger. Of respondents age 18-24, only 11% rely on newspaper advertising and 8% read newspaper articles.

THE GENERATION GAP

Younger respondents are far less likely to get information via television and email than older respondents.

They are far MORE likely to rely on all social media platforms and online advertising.

RESPONSE	OVERALL	MALE	FEMALE	POSTAL CODE M	POSTAL CODE L	POSTAL CODE K+N	AGE 18-24	AGE 25-34	AGE 35-44	AGE 45-54	AGE 55+
Facebook	48.43%	41.99%	55.45%	54.07%	45.31%	52.08%	65.56%	58.22%	54.49%	38.71%	39.76%
Word of mouth	44.56%	40.57%	51.62%	54.33%	51.63%	38.50%	47.78%	49.33%	47.99%	43.37%	45.18%
TV	35.48%	36.65%	36.65%	30.97%	44.69%	34.35%	29.44%	27.49%	34.98%	43.01%	54.82%
Online advertising	35.34%	34.88%	37.25%	33.60%	37.14%	37.95%	41.67%	34.77%	37.46%	35.48%	37.35%
Online articles	33.15%	36.12%	33.41%	42.26%	33.06%	29.92%	30.00%	34.77%	33.75%	35.48%	41.57%
Radio	29.47%	27.05%	32.69%	28.87%	37.55%	27.70%	26.67%	27.22%	30.34%	33.33%	39.16%
Email from attraction	29.13%	25.09%	33.53%	30.18%	34.29%	28.81%	17.78%	20.22%	35.60%	38.35%	38.55%
Newspaper advertising	24.28%	27.22%	23.47%	25.20%	28.78%	22.71%	11.11%	16.98%	21.05%	32.97%	48.19%
Twitter	20.18%	20.64%	20.96%	23.36%	22.24%	18.28%	26.11%	22.91%	25.70%	16.49%	14.46%
Newspaper articles	17.00%	17.44%	17.49%	22.31%	16.94%	16.34%	8.33%	12.40%	15.48%	19.00%	37.35%
Other Social Media	16.56%	16.90%	17.72%	22.05%	17.55%	13.85%	28.33%	18.60%	18.27%	11.83%	12.05%





FIELD DAY INC., 107 ATLANTIC AVENUE, SUITE 204, TORONTO, ONTARIO M6K 1Y2 TEL 416.408.4446 WWW.FIELDDAY.COM
FOR MORE INFORMATION PLEASE CONTACT PATRICIA KELLY EMAIL PKELLY@FIELDDAY.COM TEL 416-408-4446 EXT 264