6TH TORONTO ENTERTAINMENT SURVEY
SELECTED HIGHLIGHTS

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CONDUCTED BY
fieldDAY

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INTRODUCTION

In February 2018, Field Day conducted its 6th Toronto Entertainment Survey to gauge the interest in, and attitudes towards, Toronto's live entertainment offerings.

The survey looked at nearly 100 GTA attractions in six categories: theatre & performing arts organizations; galleries & museums; festivals, fairs and events; destinations; sports; and concert or arts venues.

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

The survey asked respondents to identify which attractions they attended in the 2017 calendar year, how often they attended each attraction in 2017, 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 their motivations for attending live attractions.

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 4,500 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 a Grand Prize of $1,000 CDN cash, or one of four Second Place Prizes of $250 CDN cash. Respondents were required to complete the survey prior to entering the contest.

Field Day gathered over 1,800 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 4% with a confidence level of 95%.

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2018 SURVEY KEY FINDINGS

NO CHANGE AT THE TOP (SEE PAGE 4)

For the first time, the top three "All-Time Favourite" attractions remained the same as the previous survey, with the Toronto Blue Jays, Ripley's Aquarium and Canada's Wonderland retaining their top positions.

THE RESURGENCE OF THE LEAFS (SEE PAGE 4)

The popularity of the Toronto Maple Leafs rebounded in the 2018 survey. After falling in the "All-Time Favourite" list for 3 consecutive surveys, the team bounced back to 4th place overall this year.

2013: 1st place
2014: 3rd place
2015: 5th place
2016: 7th place
2018: 4th place

THE RISE OF THE RAPTORS (SEE PAGE 4)

The Toronto Raptors saw their popularity rise in the current survey, reflecting their performance on the court. The team rose from 13th place in the 2016 survey to 9th place in the current results.

URBAN, SUBURBAN & RURAL: HOW THEIR CHOICES VARY (SEE PAGE 6)

Depending on where you live, your entertainment choices vary. Some attractions are equally popular no matter where you live – particularly the Toronto Blue Jays, Ripley's Aquarium and Royal Ontario Museum.

However, the Toronto Raptors and Art Gallery of Ontario appeared in the top 10 All-Time Favourites of City of Toronto residents (postal code M) but they were not on the top 10 lists for suburban or rural respondents.

THE DECLINE OF PRINT MEDIA (SEE PAGES 15-17)

Audiences of all ages are less likely than ever to rely on newspapers for information on events and destinations. Reliance on both newspaper advertising and newspaper articles declined sharply with all age groups in the two years since the last survey.

THE SOCIAL ERA (SEE PAGES 15-17)

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, it is still the most popular source of information for those age 19-34.

Since the previous survey, Facebook use declined somewhat with younger respondents, but increased with those 55+ years of age.

Twitter use declined slightly with all age groups, while Instagram increased in popularity with all age groups.

2018 ALL-TIME FAVOURITE ATTRACTIONS

Respondents were provided with a list of nearly 100 GTA and several Southern Ontario attractions. They were then asked to select their top three All-Time Favourites. Attendance in 2017 – or at any other time – was not a criterion for selection.

ALL-TIME FAVOURITES REMAIN THE SAME

The Toronto Blue Jays remained Southern Ontarians' All-Time favourite attraction for the second straight survey. The Jays ranked #2 in the 2015 study, and #5 in 2014. Meanwhile, Ripley's Aquarium and Canada's Wonderland maintained their respective #2 and #3 positions.

THE RESURGENCE OF THE LEAFS AND THE RISE OF THE RAPTORS

The recent successes of Toronto's sports franchises was reflected in the survey results. Toronto Maple Leafs' popularity had steadily declined in the previous two surveys, slipping from #3 in 2014 to #5 in 2015, and finally landing at #7 in the 2016 survey.

This year the Leafs rebounded to the #4 position, and their rise mirrors their improvement on the ice.

Meanwhile, the Toronto Raptors climbed from #13 position to #9 in the most recent survey.

DESTINATION	2018 RANK	PERCENTAGE OF RESPONDENTS	CHANGE IN RANK FROM 2016
Toronto Blue Jays	1	18.83%	SAME
Ripley's Aquarium of Canada	2	17.18%	SAME
Canada's Wonderland	3	16.03%	SAME
Toronto Maple Leafs	4	14.14%	+3
Royal Ontario Museum	5	12.68%	–1
Toronto Zoo	6	11.29%	–1
Air Canada Centre (concerts only)	7	11.16%	–1
African Lion Safari	8	8.41%	SAME
Toronto Raptors	9	8.31%	+4
Distillery District	10	7.97%	+2
Art Gallery of Ontario	11	7.48%	–2
CN Tower	12	7.41%	–2
Canadian National Exhibition	13	7.23%	+1
Budweiser Stage	14	6.12%	+1
Mirvish Productions	15	5.96%	–4
Rogers Centre (concerts only)	16	5.50%	+3
Ontario Science Centre	17	5.22%	+1
TIFF (Toronto International Film Festival)	18	5.07%	–1
Massey Hall	19	4.90%	+1
Stratford Shakespeare Festival	20	4.31%	–4

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

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	Ripley's Aquarium of Canada	17.18%
2	Canada's Wonderland	16.03%
3	Toronto Zoo	11.29%
4	African Lion Safari	8.41%
5	Distillery District	7.97%
6	CN Tower	7.41%
7	Medieval Times	3.15%
8	Toronto Island/Centreville	2.49%
9	Harbourfront Centre	2.42%
10	Black Creek Pioneer Village	1.81%

FESTIVALS, FAIRS & EVENTS

1	Canadian National Exhibition	7.23%
2	TIFF (Toronto International Film Fest)	5.07%
3	Summerlicious / Winterlicious	3.14%
4	Toronto Christmas Market	2.58%
5	Taste of the Danforth Festival	2.55%
6	Royal Agricultural Winter Fair	1.99%
7	Pride Toronto Festival	1.88%
8	Beaches International Jazz Festival	1.76%
9	Toronto's Festival of Beer	1.58%
10	Taste of Toronto	1.32%

MUSEUMS & GALLERIES

1	Royal Ontario Museum	12.68%
2	Art Gallery of Ontario	7.48%
3	Ontario Science Centre	5.22%
4	Casa Loma	3.73%
5	McMichael Canadian Art Collection	1.23%
6	Aga Khan Museum	0.78%
7	Bata Shoe Museum	0.55%
8	Fort York	0.50%
9	Spadina Museum	0.11%
10	Gardiner Museum	0.06%

THEATRE & PERFORMING ARTS

1	Mirvish Productions	5.96%
2	Stratford Shakespeare Festival	4.31%
3	Yuk Yuk's Comedy Club	2.84%
4	Shaw Festival	2.78%
5	Second City	2.32%
6	National Ballet of Canada	1.34%
7	Toronto Symphony Orchestra	1.21%
8	Canadian Opera Company	0.73%
9	Canadian Stage	0.39%
10	Soulpepper Theatre	0.26%

CONCERT & ARTS VENUES

1	Air Canada Centre (concerts only)	11.16%
2	Budweiser Stage	6.12%
3	Rogers Centre (concerts only)	5.50%
4	Massey Hall	4.90%
5	Princess of Wales Theatre	3.51%
6	Danforth Music Hall	2.30%
7	Roy Thomson Hall (all events)	1.88%
8	Royal Alexandra Theatre	1.67%
9	Sony Centre for the Performing Arts	1.29%
10	Elgin and Winter Garden Theatres	1.14%

SPORTS

1	Toronto Blue Jays	18.83%
2	Toronto Maple Leafs	14.14%
3	Toronto Raptors	8.31%
4	Toronto FC	3.94%
5	Woodbine Racetrack	1.56%
6	Rogers Cup Tennis	1.52%
7	Honda Indy Toronto	1.41%
8	Toronto Argonauts	1.30%
9	Toronto Rock	0.95%
10	Toronto Marlies	0.76%

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.

The Toronto Blue Jays were equally popular across all regions, with 18-20% of respondents in each region selecting the team as a favourite.

Meanwhile, Ripley's Aquarium and Canada's Wonderland were more popular with GTA and Southern Ontario residents than with City residents. 8.68% of City residents selected Canada's Wonderland vs. 23.59% of residents outside the GTA.

The Art Gallery of Ontario was the second most popular attraction with City residents, but didn't appear in the top 10 list of GTA residents.

The AGO, Distillery District, Toronto Raptors, and TIFF appear in the top 10 list of City residents, but only the AGO made the top 10 lists of GTA and Southern Ontario residents.

CITY OF TORONTO TOP 10

1	Toronto Blue Jays	14.20%
2	Toronto Raptors	14.02%
3	Ripley's Aquarium of Canada	13.45%
4	Art Gallery of Ontario	12.50%
5	Royal Ontario Museum	11.36%
6	Distillery District	9.47%
7	Toronto Maple Leafs	9.28%
8	Canadian National Exhibition	9.09%
9	Air Canada Centre (concerts only)	8.90%
10	Canada's Wonderland	7.95%

GTA TOP 10

1	Toronto Blue Jays	20.86%
2	Canada's Wonderland	17.94%
3	Ripley's Aquarium of Canada	17.39%
4	Toronto Maple Leafs	16.27%
5	Royal Ontario Museum	12.10%
6	Air Canada Centre (concerts only)	11.82%
7	Toronto Zoo	11.27%
8	African Lion Safari	9.04%
9	Toronto Raptors	7.65%
10	Distillery District	7.09%

SOUTHERN ONTARIO TOP 10

1	Ripley's Aquarium of Canada	21.46%
2	Canada's Wonderland	21.08%
3	Toronto Blue Jays	19.22%
4	Toronto Zoo	16.60%
5	Royal Ontario Museum	14.18%
6	Toronto Maple Leafs	13.99%
7	Air Canada Centre (concerts only)	12.50%
8	African Lion Safari	11.57%
9	CN Tower	10.07%
10	Distillery District	8.40%

ALL-TIME FAVOURITE ATTRACTION BY AGE

The Toronto Raptors' popularity skews the youngest of all of the city's major sports teams: their highest popularity is with the 25-34 age group.

Meanwhile the Toronto Maple Leafs are most popular with those age 45+.

The Toronto Blue Jays have relatively consistent appeal across all age groups.

19-24 YEAR OLD TOP 10

1	Canada's Wonderland	19.44%
2	Toronto Blue Jays	17.36%
tie	Toronto Maple Leafs	17.36%
4	Air Canada Centre (concerts only)	16.67%
5	Ripley's Aquarium of Canada	13.89%
tie	Distillery District	13.89%
7	Toronto Raptors	12.50%
8	Rogers Centre (concerts only)	11.11%
9	Budweiser Stage	10.42%
10	CN Tower	9.03%

25-34 YEAR OLD TOP 10

1	Toronto Blue Jays	19.29%
2	Canada's Wonderland	17.07%
3	Ripley's Aquarium of Canada	16.85%
4	Toronto Raptors	14.41%
5	Toronto Maple Leafs	13.30%
6	Toronto Zoo	12.42%
7	Air Canada Centre (concerts only)	11.53%
8	Royal Ontario Museum	10.86%
9	Distillery District	10.20%
10	TIFF (Toronto International Film Fest)	8.20%

35-44 YEAR OLD TOP 10

1	Canada's Wonderland	21.60%
2	Ripley's Aquarium of Canada	20.12%
3	Toronto Blue Jays	18.64%
4	Royal Ontario Museum	14.50%
5	Toronto Zoo	13.02%
	Toronto Maple Leafs	12.13%
7	Air Canada Centre (concerts only)	11.83%
8	Toronto Raptors	8.88%
9	African Lion Safari	8.58%
10	Distillery District	7.99%

45-54 YEAR OLD TOP 10

1	Toronto Maple Leafs	17.80%
2	Ripley's Aquarium of Canada	17.51%
3	Canada's Wonderland	16.10%
4	Toronto Blue Jays	15.82%
5	Royal Ontario Museum	12.15%
6	Air Canada Centre (concerts only)	10.17%
7	Toronto Zoo	9.89%
8	African Lion Safari	9.04%
tie	CN Tower	9.04%
10	Canadian National Exhibition	7.63%

55-64 YEAR OLD TOP 10

1	Ripley's Aquarium of Canada	19.46%
	Toronto Blue Jays	18.26%
3	Royal Ontario Museum	13.77%
4	Toronto Zoo	12.87%
5	Toronto Maple Leafs	11.68%
6	Air Canada Centre (concerts only)	11.38%
7	Mirvish Productions	10.48%
8	Canada's Wonderland	9.88%
9	African Lion Safari	8.68%
	Stratford Shakespeare Festival	7.49%

65+ YEAR OLD TOP 10

1	Toronto Blue Jays	23.53%
2	Royal Ontario Museum	16.18%
3	Art Gallery of Ontario	14.71%
4	African Lion Safari	13.24%
5	Ripley's Aquarium of Canada	10.29%
6	Mirvish Productions	9.56%
7	Canadian National Exhibition	8.82%
8	Toronto Zoo	8.09%
tie	Toronto Maple Leafs	8.09%
10	Canada's Wonderland	7.35%

2017 UNIQUE VISITORS

WHICH ATTRACTIONS DID YOU ATTEND AT LEAST ONCE IN 2017?

The survey determined which attractions had the most unique visitors during the calendar year 2017. The results shown here do not take into account repeat visits by the same person.

The results are compared to the responses from the previous survey, covering calendar year 2015.

The Toronto Blue Jays dropped from 1st place in 2015 to 2nd place in 2017. Meanwhile, the relative rankings of three attractions improved this year: Harbourfront Centre, the CN Tower and Ontario Science Centre.

DECLINING ATTENDANCE

Overall, the number of unique visitors was slightly lower for most attractions in 2017 than in 2015. The only attraction that saw a slight rise was Harbourfront Centre.

DESTINATION	2017 RANK	PERCENTAGE OF RESPONDENTS	CHANGE IN RANK FROM 2015	2015 PERCENTAGE
Distillery District	1	22.69%	+1	23.49%
Toronto Blue Jays	2	21.09%	–1	23.57%
Ripley's Aquarium of Canada	3	16.26%	SAME	20.22%
Air Canada Centre (concerts only)	4	15.93%	SAME	17.13%
Canada's Wonderland	5	14.91%	SAME	16.37%
Harbourfront Centre	6	14.00%	+2	13.78%
Royal Ontario Museum	7	13.52%	SAME	14.56%
Canadian National Exhibition	8	13.34%	–2	15.09%
Mirvish Productions	9	11.37%	SAME	13.63%
CN Tower	10	11.12%	+3	11.98%
Art Gallery of Ontario	11	10.98%	–1	12.84%
Toronto Christmas Market	12	10.55%	NEW	N/A
Yonge-Dundas Square (events/concerts)	13	10.42%	–2	12.53%
Toronto Zoo	14	10.37%	–2	12.17%
Toronto Maple Leafs	15	10.02%	–1	11.38%
Ontario Science Centre	16	8.92%	+2	9.21%
Budweiser Stage	17	8.12%	–2	9.69%
Toronto Raptors	18	8.02%	–2	9.67%
Summerlicious / Winterlicious	19	6.81%	–2	9.67%
African Lion Safari	20	6.75%	+1	8.53%

The percentage of respondents who attended each attraction at least one during the 2017 calendar year, compared to attendance during 2015. Responses are weighted using Statistics Canada demographic data.

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?

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

Among Toronto performing arts organizations, the anomaly is Mirvish Productions which draws a larger audiences from the suburbs (postal code L).

Other organizations that draw well from either suburban or rural areas are Canadian Stage, the National Ballet of Canada, Second City, Soulpepper, the Toronto Symphony Orchestra and Young People's Theatre.

Out-of-town organizations like the Shaw Festival and the Stratford Festival draw well from all geographic areas. Shaw is more likely to attract audiences from postal code L than Stratford.

Lessons can also be learned from the audience breakdown by age. Many smaller 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.

However, some organizations are increasing successful in drawing the 35-44 age group, including Canadian Opera Company, the National Ballet of Canada, Soulpepper, and smaller organizations such as Factory Theatre, Opera Atelier, Tafelmusik and Tarragon Theatre.

PERFORMING ARTS AUDIENCE BASE BY REGION

ORGANIZATION	POSTAL CODE M	POSTAL CODE L	POSTAL CODES K+N
Buddies in Bad Times	83.73%	16.27%	0.00%
Canadian Opera Company	73.80%	26.20%	0.00%
Canadian Stage	57.58%	26.12%	16.31%
Factory Theatre	79.67%	20.33%	0.00%
Mirvish Productions	34.15%	49.47%	16.38%
National Ballet of Canada	51.39%	34.96%	13.64%
Opera Atelier	81.51%	18.49%	0.00%
Second City	44.56%	39.96%	15.49%
Shaw Festival	26.11%	59.69%	14.20%
Soulpepper Theatre	63.59%	13.66%	22.75%
Stratford Festival	25.96%	34.19%	39.85%
Tafelmusik	80.47%	0.00%	19.53%
Tarragon Theatre	66.22%	25.74%	8.04%
Theatre Passe Muraille	62.04%	16.88%	21.08%
Toronto Symphony Orchestra	53.94%	40.44%	5.61%
Young People's Theatre	46.49%	29.20%	24.31%
Yuk Yuk's Comedy Club	19.83%	45.28%	34.89%

PERFORMING ARTS AUDIENCE BASE BY AGE

ORGANIZATION	AGE 19-24	AGE 25-34	AGE 35-44	AGE 45-54	AGE 55-64	AGE 65+
Buddies in Bad Times	11.39%	51.24%	21.30%	16.07%	0.00%	0.00%
Canadian Opera Company	10.09%	11.35%	18.87%	28.48%	6.21%	25.00%
Canadian Stage	12.52%	30.98%	23.41%	17.67%	15.42%	0.00%
Factory Theatre	18.49%	29.10%	28.81%	6.52%	17.08%	0.00%
Mirvish Productions	5.76%	17.43%	16.32%	21.06%	22.57%	16.86%
National Ballet of Canada	11.75%	22.46%	23.80%	16.58%	10.85%	14.56%
Opera Atelier	0.00%	10.55%	58.46%	16.55%	14.44%	0.00%
Second City	10.50%	34.00%	17.01%	17.78%	15.52%	5.20%
Shaw Festival	3.61%	7.30%	9.00%	25.46%	23.34%	31.29%
Soulpepper	11.94%	18.80%	29.77%	21.06%	11.03%	7.40%
Stratford Festival	3.12%	7.03%	15.57%	23.14%	24.05%	27.09%
Tafelmusik	0.00%	9.23%	38.37%	14.48%	37.92%	0.00%
Tarragon Theatre	8.83%	27.80%	33.02%	24.92%	5.44%	0.00%
Theatre Passe Muraille	23.29%	31.42%	14.51%	16.43%	14.34%	0.00%
Toronto Symphony Orchestra	13.80%	16.84%	19.65%	27.81%	12.14%	9.77%
Young People's Theatre	0.00%	6.82%	37.78%	32.07%	23.33%	0.00%
Yuk Yuk's Comedy Club	12.19%	24.66%	16.14%	22.57%	15.01%	9.43%

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 performing arts venues attract few attendees from the 905 or beyond.

GTA (EXCLUDING CITY RESIDENTS)

Family activities, auto racing, and football 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 Toronto 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

Family and tourist-oriented 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 between 2/3rds and half of their audience base.

LARGEST CITY-BASED AUDIENCE (POSTAL CODE M)

ORGANIZATION	**POSTAL CODE M**	POSTAL CODE L	POSTAL CODES K+N
Toronto Music Garden	**88.99%**	11.01%	0.00%
Buddies in Bad Times	**83.73%**	16.27%	0.00%
Opera Atelier	**81.51%**	18.49%	0.00%
Tafelmusik	**80.47%**	0.00%	19.53%
Factory Theatre	**79.67%**	20.33%	0.00%
Glenn Gould Studio	**78.61%**	21.39%	0.00%
Spadina Museum	**74.62%**	25.38%	0.00%
Canadian Opera Company	**73.80%**	26.20%	0.00%
Hart House Theatre	**68.80%**	31.20%	0.00%
Koerner Hall	**68.04%**	26.45%	5.51%

LARGEST GTA-BASED AUDIENCE (POSTAL CODE L)

ORGANIZATION	POSTAL CODE M	**POSTAL CODE L**	POSTAL CODES K+N
Carassauga Festival	8.66%	**86.43%**	4.91%
Wet'n'Wild Toronto	21.95%	**67.88%**	10.17%
Shaw Festival	26.11%	**59.69%**	14.20%
Woodbine Racetrack	29.74%	**57.97%**	12.29%
Black Creek Pioneer Village	30.63%	**57.04%**	12.33%
McMichael Can. Art Collection	31.15%	**55.62%**	13.23%
NASCAR Pinty's Series	8.79%	**53.85%**	37.36%
Toronto Argonauts	31.09%	**53.26%**	15.65%
Medieval Times	19.99%	**52.84%**	27.17%
Toronto FC	29.71%	**52.73%**	17.56%

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

ORGANIZATION	POSTAL CODE M	POSTAL CODE L	**POSTAL CODES K+N**
African Lion Safari	10.31%	47.35%	**42.34%**
Stratford Festival	25.96%	34.19%	**39.85%**
NASCAR Pinty's Series	8.79%	53.85%	**37.36%**
Marineland	11.50%	51.20%	**37.30%**
Hockey Hall of Fame	18.23%	44.80%	**36.97%**
Yuk Yuk's Comedy Club	19.83%	45.28%	**34.89%**
Ripley's Aquarium of Canada	25.16%	40.32%	**34.52%**
CN Tower	27.92%	40.62%	**31.47%**
Ontario Science Centre	26.47%	43.12%	**30.41%**
Canada's Wonderland	20.34%	49.88%	**29.78%**

AVERAGE NUMBER OF VISITS IN 2017

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 2017 calendar year. Only respondents who attended the attraction at least once were included in the "average number of visits" calculation (so as not to skew the results with those who attended "0" time).

Attractions on this list typically host multiple events throughout the year – often on a subscription basis – including sports teams (Toronto FC and Toronto Blue Jays) and performing arts organizations & venues.

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 2015 by adults age 18+ who live in Southern Ontario,

1	Toronto FC	2.58
2	TIFF (Toronto International Film Fest)	2.55
3	Toronto Fringe Festival	2.54
4	Roy Thomson Hall (all events)	2.51
5	Buddies in Bad Times	2.29
6	Yonge-Dundas Square (events/concerts)	2.28
7	Toronto Blue Jays	2.25
8	Woodbine Racetrack	2.24
9	Rogers Cup Tennis	2.23
10	Tarragon Theatre	2.19
11	Toronto Raptors	2.19
12	Toronto Argonauts	2.16
13	Harbourfront Centre	2.15
tie	Danforth Music Hall	2.13
15	TIFF Bell Lightbox (excluding Film Fest)	2.12
16	Hot Docs Film Festival	2.12
17	Factory Theatre	2.08
18	Theatre Passe Muraille	2.04
19	Mirvish Productions	2.01
20	Toronto Centre for the Arts	2.00

AVERAGE GROUP SIZE IN 2017

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 2017 calendar year. Only respondents who attended the attraction at least once were included in the "group size" calculation (so as not to skew the results with those who attended "0" time).

The top attractions are skewed towards those that are highly social activites, 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 2015 by adults age 18+ who live in Southern Ontario,

1	Toronto's Festival of Beer	4.62
2	Toronto Caribbean Carnival (Caribana)	4.43
3	Medieval Times	4.32
4	Marineland	4.29
5	NASCAR Pinty's Series	4.22
6	African Lion Safari	4.08
7	Canada's Wonderland	4.02
8	Black Creek Pioneer Village	3.82
9	Toronto Zoo	3.77
10	LEGOLAND Discovery Centre	3.77
11	Toronto Santa Claus Parade	3.76
12	Ontario Science Centre	3.70
13	Wet'n'Wild Toronto	3.69
14	Toronto Island/Centreville	3.66
15	Casa Loma	3.53
tie	Ripley's Aquarium of Canada	3.49
17	Toronto Blue Jays	3.46
18	Carassauga Festival	3.40
tie	Royal Agricultural Winter Fair	3.40
20	CN Tower	3.39

CONSUMER MOTIVATIONS

PLEASE INDICATE HOW MUCH EACH STATEMENT DESCRIBES YOU.

We asked respondents to rank each statement from "Not at all" to "Quite a lot". Scores from 1–4 were assigned to each of the four options (see below), and then the average response was determined, weighted against StatsCan data.

The chart below shows the overall average ranking, as well as the average rankings by gender, location and age.

1 = NOT AT ALL | 2 = A LITTLE | 3 = SOMEWHAT | 4 = QUITE A LOT

The numbers below represent the average ranking of all respondents.

STATEMENT	OVERALL	MALE	FEMALE	POSTAL CODE M	POSTAL CODE L	POSTAL CODE K+N	AGE 19-24	AGE 25-34	AGE 35-44	AGE 45-54	AGE 55-64	AGE 65+
I make most of my own arts/sports/ entertainment attendance decisions.	2.82	2.75	2.83	2.84	2.73	2.85	2.78	2.93	2.86	2.79	2.65	2.64
I am highly interested in attending live music experiences.	2.80	2.64	2.86	2.77	2.75	2.85	2.95	2.95	2.78	2.69	2.76	2.39
I enjoy easy, escapist arts/ entertainment experiences.	2.58	2.42	2.64	2.59	2.54	2.55	2.79	2.71	2.57	2.48	2.43	2.38
My arts/sports/entertainment attendance choices are numerous and very diverse.	2.57	2.51	2.58	2.63	2.52	2.54	2.68	2.75	2.57	2.46	2.44	2.28
I am highly interested in attending art or cultural experiences.	2.47	2.27	2.58	2.61	2.38	2.45	2.63	2.62	2.50	2.36	2.35	2.28
I enjoy challenging arts/ entertainment experiences.	2.42	2.33	2.45	2.47	2.39	2.38	2.58	2.57	2.36	2.34	2.27	2.27
I often attend new or unfamiliar arts/sports/entertainment experiences.	2.14	2.05	2.18	2.22	2.08	2.12	2.29	2.38	2.16	2.01	1.96	1.79
If I can't find a family member or friend to attend with me, will attend an event or destination by myself.	2.06	2.19	1.97	2.26	1.91	2.00	1.96	2.17	2.11	1.99	1.93	1.91
Another family member or friend usually makes my arts/sports/entertainment attendance decisions.	1.66	1.69	1.63	1.62	1.69	1.63	1.81	1.88	1.60	1.56	1.47	1.42

WHAT TYPE OF EXPERIENCES ARE RESPONDENTS MOST INTERESTED IN?

Live music is the most popular form of entertainment. Younger respondents are more interested in live music experiences. As well, younger respondents are more likely to be interested in “easy, escapist” experiences.

Respondents of all ages are not likely to attend an event or destination by themselves.

WHO MAKES THEIR ENTERTAINMENT DECISIONS?

On average, most respondents make their own attendance decisions.

Younger respondents age 19-24 are slightly more likely to let a family member or friend make their entertainment decisions.

WHICH GROUPS ARE THE MOST ADVENTUROUS?

Overall, all demographic groups prefer escapist experiences to challenging experiences.

Repondents age 25-34 are most likely to try new or unfamiliar experiences. Respondents age 19-34 have the most diverse interests, and they enjoy both challenging and escapist experiences.

As respondents age, they are less likely to attend unfamiliar experiences and to have diverse interests. They are also less likely to enjoy both challenging AND escapist experiences.

Urban respondents are slightly more interested in attending unfamiliar experiences and they have more diverse interests than their suburban and rural counterparts. Urban respondents are also more likely to enjoy challenging experiences AND escapist experiences.

Females are more likely than males to enjoy both challenging and escapist experiences.

CONSUMER MOTIVATIONS

IF YOU DIDN'T ATTEND IN 2017, WHY NOT?

If respondents indicated that they didn't attend any attractions or events in 2017, we asked why not. The chart below shows the overall average ranking, as well as the average rankings by gender, location and age.

Over half of respondents cited cost as a reason for lack of attendance. Cost was particularly important for the youngest respondents, and less of an issue for older respondents. It was also more important for rural respondents than urban ones.

Lack of free time was more of a concern for younger respondents – especially those age 25-34 – than for older respondents.

Travel distance an issue for rural respondents.

Males were more likely than females to cite "lack of interest" and preferences for home entertainment or other leisure activities. Females were more likes to cite "lack of free time", travel distance, lack of awareness and lack of transportation

Lack of transportation was more important for those age 19-24 than other age groups.

Crowding was mentioned by respondents age 25-44 and for respondents age 65+.

REASON	OVERALL	MALE	FEMALE	POSTAL CODE M	POSTAL CODE L	POSTAL CODE K+N	AGE 19-24	AGE 25-34	AGE 35-44	AGE 45-54	AGE 55-64	AGE 65+
Too expensive	55.91%	49.59%	51.83%	48.65%	49.57%	53.55%	65.38%	44.16%	56.45%	55.93%	52.00%	42.50%
Lack of free time	38.71%	30.58%	41.28%	35.14%	43.48%	32.90%	46.15%	50.65%	38.71%	35.59%	32.00%	15.00%
Too far to travel	27.66%	19.83%	27.98%	13.51%	17.39%	35.48%	30.77%	24.68%	16.13%	22.03%	28.00%	32.50%
Lack of awareness of events	23.18%	19.83%	22.94%	24.32%	28.70%	14.84%	61.54%	28.57%	20.97%	15.25%	13.33%	10.00%
Lack of interest	19.29%	20.66%	15.60%	17.57%	16.52%	18.06%	19.23%	19.48%	19.35%	15.25%	10.67%	22.50%
Too crowded	17.84%	17.36%	16.06%	16.22%	23.48%	10.97%	11.54%	19.48%	20.97%	11.86%	12.00%	22.50%
Prefer home entertainment	14.73%	15.70%	12.84%	16.22%	15.65%	10.97%	11.54%	12.99%	17.74%	15.25%	12.00%	10.00%
Lack of transportation	12.16%	8.26%	13.30%	13.51%	10.43%	10.97%	34.62%	12.99%	8.06%	11.86%	9.33%	2.50%
Prefer other leisure activities	11.95%	14.05%	9.63%	8.11%	15.65%	9.03%	11.54%	15.58%	9.68%	10.17%	9.33%	7.50%

SOURCES OF INFORMATION

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 statistically insignificant and not included here.)

SHARING THE EXPERIENCE

Nearly half of all respondents selected “Facebook” and “word of mouth” as sources of information. Word of mouth was relatively equally important across all demographic categories: gender, location and age. Friends and family are viewed as reliable information sources, so it is increasingly important for attractions to develop advocates and encourage them to share their positive experiences with others.

DIGITAL VS TRADITIONAL MARKETING

The chart on the following pages show the marked swings in media use by different age groups, and how it has changed since our previous survey in February 2016.

Facebook is still the top source of information for all respondents – and dramatically so for those age 34 or younger. Facebook use declines with older respondents, but it is still a viable source even for those age 65+... and usage has increase with those age 55+ since the previous survey.

Conversely, newspaper advertising and newspaper articles have declined sharply with all age groups since the previous survey.

Online advertising and online news articles emails from attractions were highly ranked by all demographic groups.

Emails from attractions were popular, especially with middle aged respondents.

Instagram has also increased in popularity with all age groups since the previous survey.

RESPONSE	OVERALL	MALE	FEMALE	POSTAL CODE M	POSTAL CODE L	POSTAL CODE K+N	AGE 19-24	AGE 25-34	AGE 35-44	AGE 45-54	AGE 55-64	AGE 65+
Facebook	48.55%	42.33%	53.20%	48.48%	48.54%	50.93%	61.81%	59.20%	52.07%	44.92%	36.83%	38.24%
Word of mouth recommendation	47.08%	43.62%	49.52%	46.21%	48.96%	46.08%	47.22%	48.12%	51.18%	46.05%	47.01%	44.12%
Online advertising	38.03%	36.83%	38.91%	36.17%	38.25%	40.30%	48.61%	41.69%	43.20%	36.16%	32.93%	24.26%
Email from attraction	37.17%	34.73%	38.48%	38.26%	38.94%	33.40%	23.61%	28.38%	44.08%	40.11%	40.42%	49.26%
Online news articles/reviews	31.22%	31.34%	31.20%	30.87%	29.90%	33.40%	29.86%	33.26%	34.32%	30.23%	29.34%	27.94%
TV advertising	31.05%	29.89%	30.67%	23.48%	34.91%	30.41%	25.00%	18.63%	25.15%	37.57%	40.72%	44.85%
Radio advertising	28.47%	27.30%	29.27%	22.54%	35.88%	24.25%	24.31%	23.06%	29.59%	32.49%	36.83%	21.32%
Print newspaper advertising	21.67%	22.46%	20.33%	21.40%	21.56%	20.34%	9.72%	11.09%	18.93%	22.32%	33.53%	38.97%
Instagram	17.69%	14.38%	21.21%	24.62%	17.39%	14.55%	40.28%	35.03%	16.57%	9.89%	4.19%	4.41%
Online blogs/vlogs	17.12%	15.99%	18.84%	23.30%	16.83%	14.37%	25.69%	27.94%	21.01%	14.41%	8.38%	2.94%
Print newspaper articles/reviews	16.11%	16.48%	15.43%	17.23%	15.86%	14.37%	4.17%	9.09%	14.50%	16.67%	24.85%	30.15%
Other social media	15.46%	12.92%	17.53%	15.34%	16.41%	15.30%	20.83%	18.18%	18.34%	15.25%	11.08%	8.82%
Twitter	13.61%	15.83%	12.88%	18.75%	12.93%	10.26%	25.00%	18.85%	17.46%	11.86%	4.49%	4.41%
Brochure/flyer from display rack	13.42%	12.28%	13.94%	12.12%	13.21%	14.93%	6.25%	8.87%	14.79%	14.69%	17.66%	16.91%
Brochure/flyer from mail	12.84%	12.12%	13.15%	12.88%	12.38%	13.06%	4.86%	7.54%	12.72%	13.84%	19.76%	18.38%

SOURCES OF INFORMATION: 2018 vs 2016

How has media use changed since 2016?

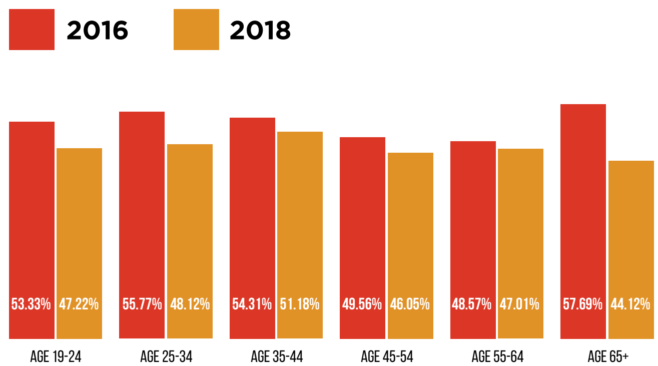
We've compared the responses from our February 2016 study to the current February 2018 study.

> **Word of mouth** and **Facebook** are still by far the most popular sources of information for all age groups.

> **Facebook** still outperforms other social platforms, and even though use by younger demographics has declined since 2016, it has increased for those age 55+.

> **Email from an attraction** is still an effective tool, especially for those age 35+.

> Reliance on **newspapers** (both advertising & articles) has declined significantly since 2016 across all age groups.



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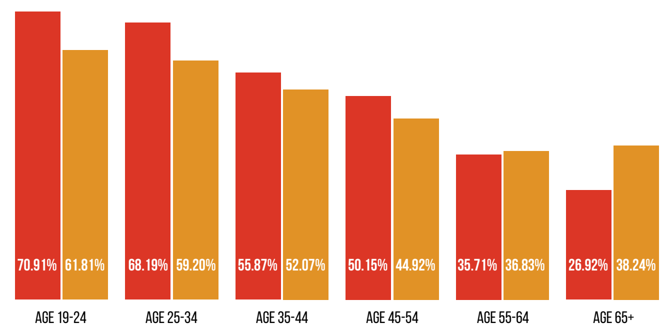
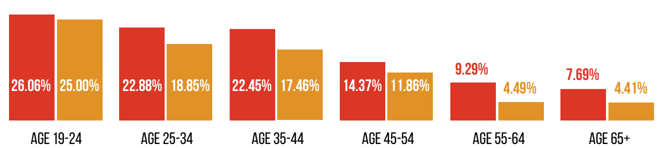


FACEBOOK



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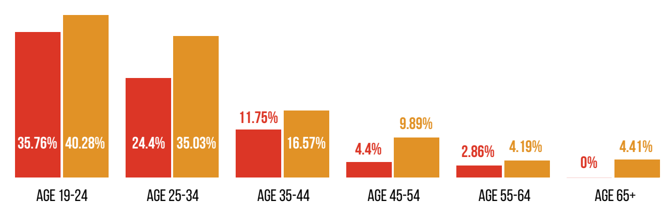

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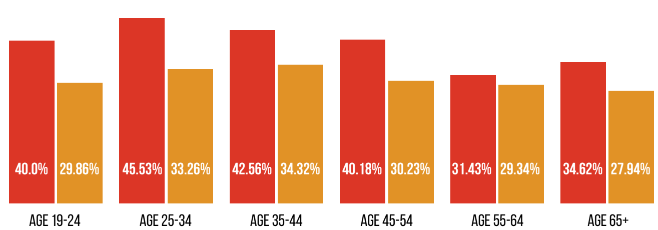
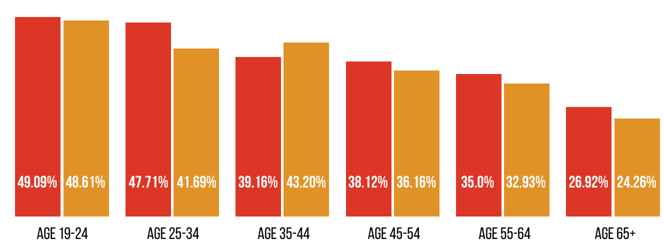
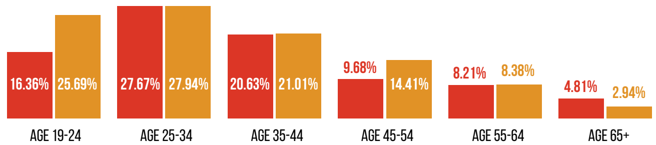


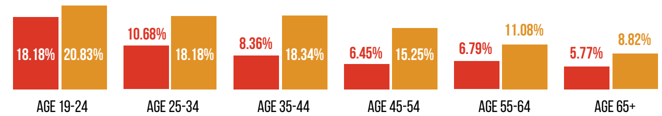
ONLINE NEWS ARTICLES



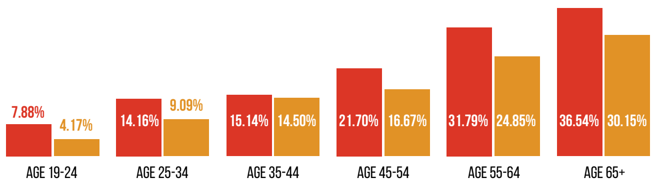
ONLINE ADVERTISING



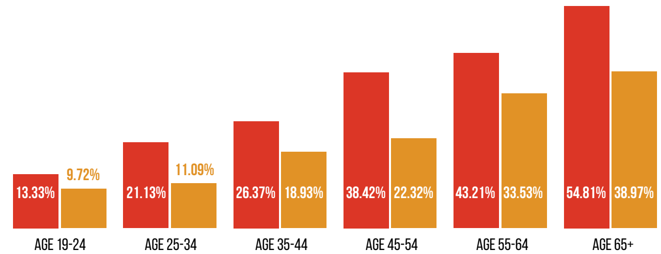
ONLINE BLOGS / VLOGS



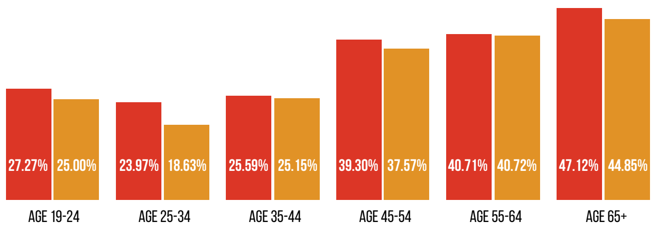
OTHER SOCIAL MEDIA



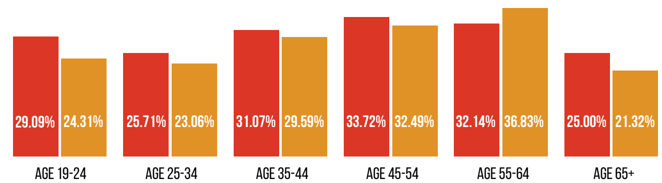
NEWSPAPER ARTICLES



NEWSPAPER ADVERTISING



TV ADVERTISING



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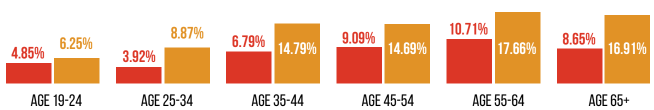
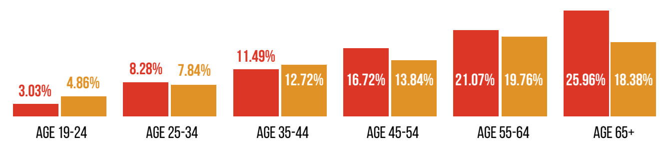
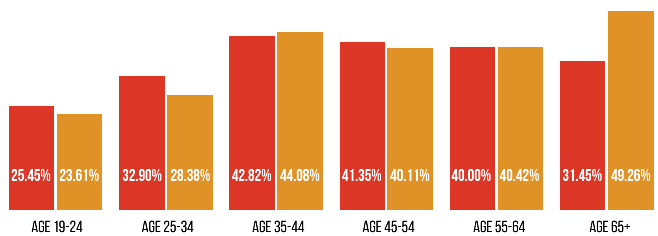


BROCHURE IN DISPLAY RACK



DIRECT MAIL FROM ATTRACTION



EMAIL FROM ATTRACTION

WE PUT YOU IN PLAY.

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