



Toronto Arts Advocacy Council Survey

January 22, 2013



Marketing Intelligence

Leger

THE RESEARCH INTELLIGENCE GROUP

- Leger Marketing is the leading Canadian-owned market research and polling firm with more than 600 professionals working from its Canadian and American offices.
- Leger Marketing is the North American partner of WIN - the Worldwide Independent Network (WIN) of Market Research - the largest independent global network of market research.



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Canada

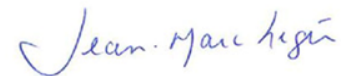
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**The largest
Canadian-owned
marketing research
and polling firm**

We are proud to present you with this research report, which was produced under the stringent quality standards of our company and those of the Marketing Research and Intelligence Association (MRIA). We are confident that this report will address your concerns and we hope to have the privilege of serving you again in the near future.



Jean-Marc Léger
President



RESEARCH METHODS



RESEARCH METHODS

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INSTRUMENT

A survey of 798 Ontarians who live, work in or visit Toronto was completed online between January 15 and January 17, 2013 using Leger Marketing's online panel, *LegerWeb*.

A probability sample of the same size would yield a margin of error of +/- 3.5%, 19 times out of 20.

ONLINE PANEL

Leger Marketing's online panel has approximately 400,000 members nationally – with between 10,000 and 20,000 new members added each month, and has a retention rate of 90%.

Panel members are randomly selected to receive email invitations to the individual surveys.

We ensure the protection of privacy via the usage of unique URLs and respondent IDs in combination with survey IDs.

QUALITY CONTROL

Stringent quality assurance measures allow Leger Marketing to achieve the high-quality standards set by the company. As a result, its methods of data collection and storage outperform the norms set by WAPOR (The World Association for Public Opinion Research). These measures are applied at every stage of the project: from data collection to processing, through to analysis. We aim to answer our clients' needs with honesty, total confidentiality, and integrity.

| | |
|------|-----|
| 2005 | 25% |
| 2006 | 35% |
| 2007 | 36% |
| 2008 | 48% |
| 2009 | 55% |
| 2010 | 80% |
| 2011 | 85% |



+10%

+10%

+40%

DETAILED ANALYSIS OF RESULTS





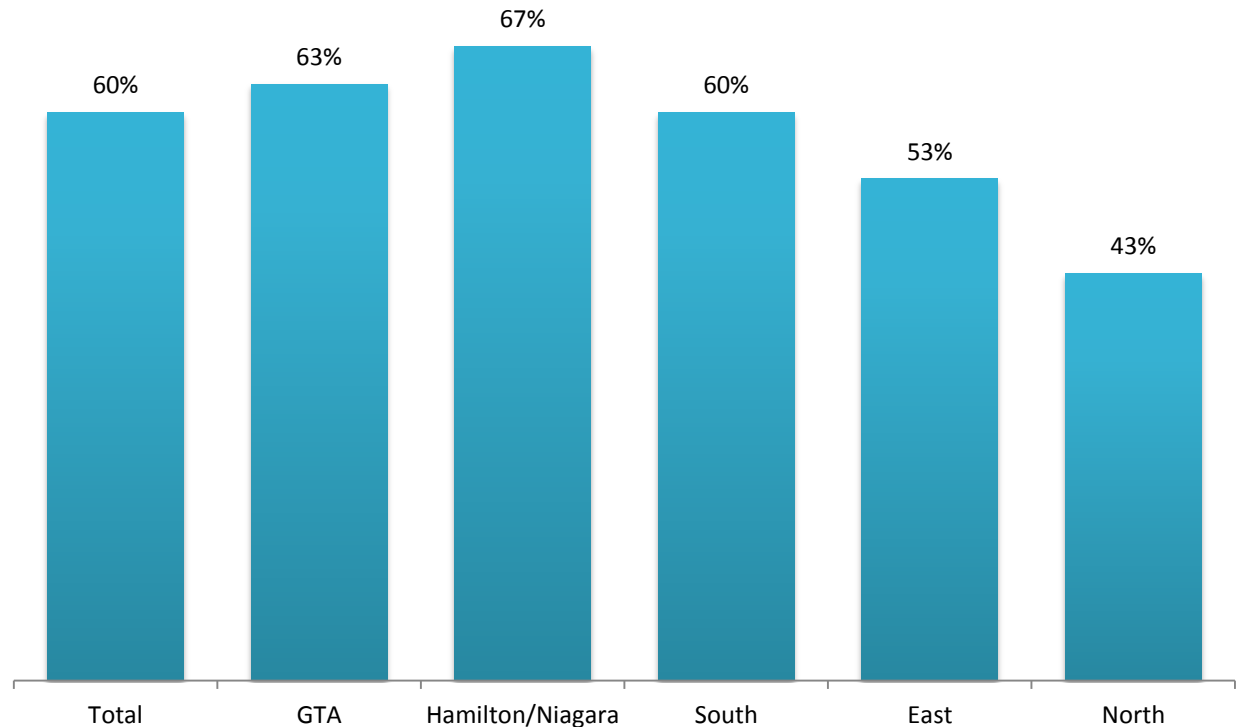
DETAILED ANALYSIS OF RESULTS

IMPACT OF ART AND CULTURE ON LIVE/WORK/VISIT

Six in ten Ontarians who live, work in, or visit Toronto say that the city's arts and cultural activities are important in their decision to do so. Respondents who live in Northern or Eastern Ontario are more likely to disagree (50% vs. 33% of the GTA, Hamilton/Niagara, and Southern Ontario). Sixty-nine percent of those who live in Toronto agree, as do 78% of people who own a condo in the city.

60% of Ontarians surveyed live, work, or visit Toronto because of its arts and culture

How strongly do you agree or disagree: "Toronto's arts and cultural activities are important in my decision to live, work in or visit Toronto"?





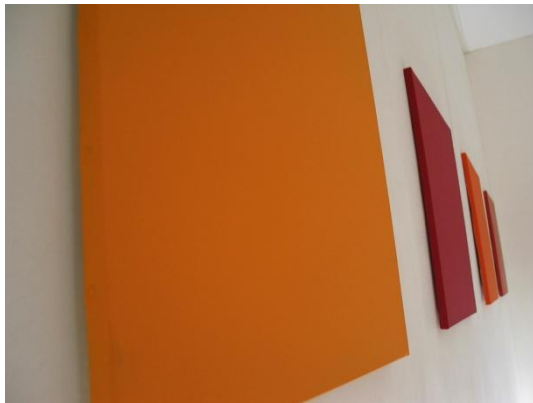
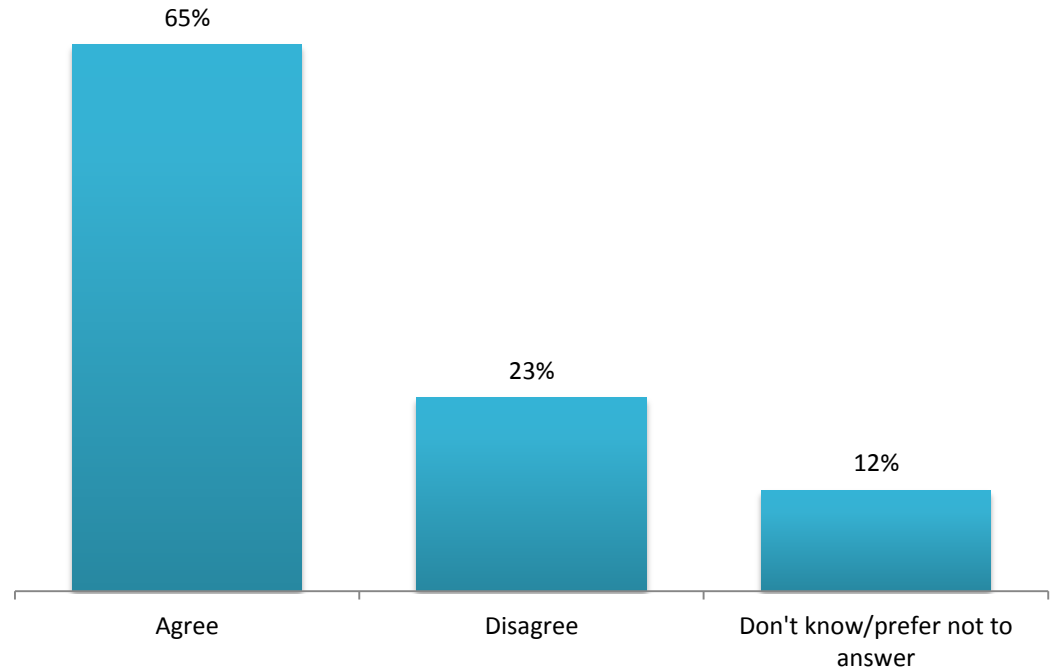
DETAILED ANALYSIS OF RESULTS

IMPACT OF ARTS AND CULTURE ON BUSINESS

65% of Ontarians who have experience working or doing business in Toronto think that the city's arts and culture help attract and retain good employees

Among those with experience working or doing business in Toronto, 65% agree that the city's arts and cultural activities help companies attract and retain good employees. Men are more likely to disagree than women (28% vs. 19%).

How strongly do you agree or disagree: "Based on my experience working or doing business in Toronto, Toronto's arts and cultural activities help companies/organizations attract and retain good employees in the city"?





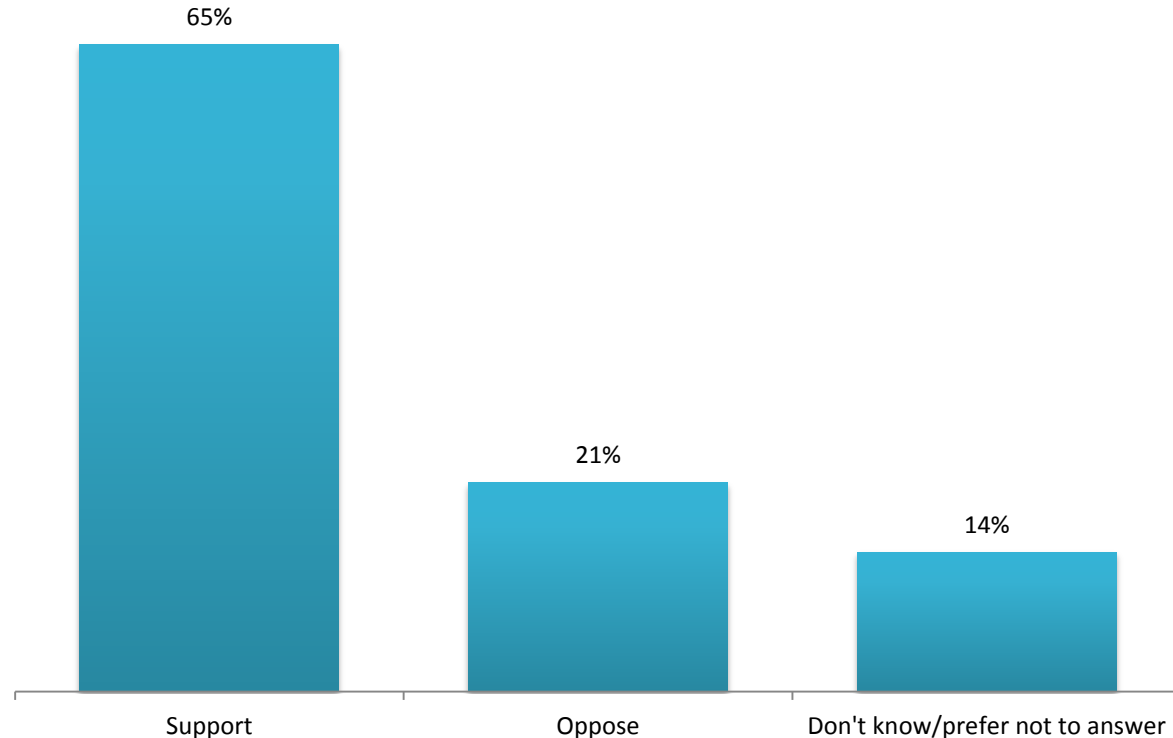
DETAILED ANALYSIS OF RESULTS

ARTS INVESTMENT MOTION

Most Ontarians surveyed support the arts motion

Considering the importance placed on Toronto's arts and cultural activities, it is not surprising that approximately two thirds of Ontarians who live in, work in, or visit Toronto support the direct arts investment motion, with only 21% opposing. Of those who live in Toronto, 73% support the motion, as do 82% of those considering purchasing a condo in Toronto within the next five years.

How strongly do you support or oppose the motion passed by City Council?





APPENDIX



APPENDIX

CONDO OWNERSHIP

Younger Ontarians are more likely to say they're planning to purchase a Toronto condo within the next five years

Eight in ten Ontarians surveyed do not own a condo in Toronto and are not considering purchasing one. Eighteen percent of GTA residents are considering purchasing a condo within the next five years, compared to 12% of all Ontarians surveyed.

Ontarians who live in, work in, or visit Toronto and are under the age of 35 are more likely to say they are planning to purchase a condo soon (24% vs. 6% of 35+), while those aged 65+ are more likely to already own a condo in Toronto (9% vs. 3% of 18-64).

Do you own a condo in Toronto, or are you considering purchasing one within the next five years?

