Today

- Setting the Stage
  - Purpose & Objectives
  - Methodology
  - Topline results

- Survey Respondents

- Overall Participation in Arts & Culture
  - Participation
  - Decision-Making
  - The Most Important Experience
  - Vibrant Communities

- Barrie’s Arts and Culture Scene
  - Participation
  - Thoughts

- Next Steps
  - What we have learned?
  - Where do we go from here?
Setting the Stage
Why?

To understand market opportunities for Barrie’s arts and cultural sector

More specifically...

To provide the City of Barrie Cultural Department with

- Understanding of Barrie’s positioning within the region
- Input to its Strategic & Business Plans
- Baseline research to measure growth of the A&C market
- Input to developing future cultural infrastructure projects
- Market information that can be shared with arts and cultural organizations and Tourism Barrie
Methodology

Phase 1: Barrie Arts Committee Input

Phase 2: Community Surveys
- Barrie Residents
  - 710 completed surveys
    - Half North of Tiffen
    - Half South of Tiffen
- Regional Residents
  - 693 completed surveys
    - Half North of Highway 90
    - Half South of Highway 90

Phase 3: Community Focus Groups
- Barrie Residents
  - 2 Focus Groups
  - Participants recruited from resident survey
Methodology

- Telephone Survey – Research House
  - Attempted 6,954 telephone numbers in Barrie and 12,287 in the region
  - Response rate 20% for Barrie residents and 13.8% for regional residents
  - For questions with choice lists, lists rotated to avoid positional bias

<table>
<thead>
<tr>
<th></th>
<th>Barrie Residents</th>
<th>Regional Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Numbers Attempted</td>
<td>6,954</td>
<td>12,287</td>
</tr>
<tr>
<td>Non-resident</td>
<td>1,080</td>
<td>1,966</td>
</tr>
<tr>
<td>Unresolved (U)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(bus, no answer, answering machine)</td>
<td>1,760</td>
<td>3,224</td>
</tr>
<tr>
<td>In-Scope - Non-responding (IS)</td>
<td>2,939</td>
<td>5,670</td>
</tr>
<tr>
<td>Language problem</td>
<td>72</td>
<td>121</td>
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<tr>
<td>Household refusal</td>
<td>2,540</td>
<td>121</td>
</tr>
<tr>
<td>Selected respondent not available</td>
<td>8</td>
<td>4,831</td>
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<tr>
<td>Respondent refusal</td>
<td>232</td>
<td>566</td>
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<tr>
<td>Qualified respondent breakoff</td>
<td>13</td>
<td>31</td>
</tr>
<tr>
<td>In-scope - Responding (R)</td>
<td>1,175</td>
<td>1,427</td>
</tr>
<tr>
<td>Disqualified</td>
<td>436</td>
<td>354</td>
</tr>
<tr>
<td>Quota full</td>
<td>79</td>
<td>380</td>
</tr>
<tr>
<td>Completed interviews</td>
<td>710</td>
<td>693</td>
</tr>
<tr>
<td>Response Rate = R/(U+IS+R)</td>
<td>20.0%</td>
<td>13.8%</td>
</tr>
</tbody>
</table>
Top-Line Results

✓ Barrie can claim the space as the “Regional A&C Hub”

✓ Market strong, room to grow
  ▪ ~ 2/3 of Barrie & regional residents participated in A&C in past 3 years
  ▪ ½ of Barrie residents & ~20% residents participated in Barrie A&C last year
  ▪ Annual resident A&C expenditure $40.5M

✓ As a regional centre, people appreciate
  ▪ Quality, variety, cultural diversity
  ▪ Accessibility
  ▪ Celebrating local talent
  ▪ Setting and “vacation” atmosphere

✓ Kempenfest put Barrie on the A&C map

✓ Growing pains
  ▪ Molson Park put Barrie on the map– now lost
  ▪ Waterfront – losing setting by overuse (vendor control)
Survey Respondents
“Respondents”

2/3 of Barrie & Regional residents had participated in A&C in past 3 years

Barrie & Regional respondents similar
- Young to senior (Region more seniors)
- Post-secondary educated
- Just over 1/3 with children at home

Barrie Respondents
- Lived in Barrie average of 18 years
- Range 0 to 40 years
Respondents only A&C participants

- Survey respondents represent only those who had participated in arts and culture in the past three years:
  - In the audience
  - As performers, artists or students
  - Members of organizations

- Arts and culture included
  - All kinds of music, performances and visual arts
  - Community events with arts or cultural component
  - History and cultural heritage celebrations

- 60% of Barrie residents and 66% of regional residents had participated in arts and culture in the past three years

<table>
<thead>
<tr>
<th>Had participated in A&amp;C in the past three years</th>
<th>Barrie Residents</th>
<th>Regional Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Percent</td>
</tr>
<tr>
<td>Had not participated in A&amp;C in the past three years</td>
<td>436</td>
<td>40%</td>
</tr>
<tr>
<td>Willing to answer survey and within regional quota</td>
<td>1,096</td>
<td>100%</td>
</tr>
</tbody>
</table>
Majority of respondents female

- 2/3 of both Barrie and Regional respondents were female
- Barrie respondents were younger than regional respondents
  - The majority of Barrie respondents were within prime working age (25-55)
  - The majority of Regional respondents were 45+
- 70% of both Barrie & Regional respondents were college or university graduates

**Gender**

<table>
<thead>
<tr>
<th></th>
<th>Barrie</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>65%</td>
<td>64%</td>
</tr>
<tr>
<td>Male</td>
<td>35%</td>
<td>36%</td>
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</tbody>
</table>

**Respondent Age**

**Education**
Barrie & Regional households similar

- Most respondents lived in a household of two (31% Barrie, 37% region)
- Average household size was similar for Barrie and Regional respondents
  - 2.9 for Barrie and 2.8 for Regional residents
- Slightly more Barrie respondents had children living at home (39%) than Regional respondents (35%)
  - Consistent with younger respondents

![Household Size Diagram]

![Children Under 18 Diagram]

N=703/683
Barrie Respondents...

- Barrie sample was well-distributed across new and long-time residents
  - Average length of time living in Barrie = 18 years
- Overall, 37% of respondents commuted outside of Barrie to their jobs
  - Most commuted within Simcoe County (20%)
  - 15% commuted south of the county to the GTA and 2% went north
Overall Participation in Arts & Culture

Participation in the Past Year
Barrie respondents participate in A&C in Barrie
Regional residents, participate in region, skip over Barrie and go to Toronto

Barrie and Regional respondents
- High participation in Music, Drama/Dance, Visual Arts
- Almost all attended performances/shows/events
- Over 30% involved as performers/organizers/students

Barrie respondents have high arts & crafts participation (Kempenfest)

Most Barrie respondents’ children participate
2/3 of Barrie children involved in A&C
Music leads

- Similar participation patterns for Barrie and Regional respondents
  - Music was the most frequently identified activity type for both Barrie and Regional residents
  - The high arts and crafts participation for Barrie residents reflects Kempenfest

![Activities in Past Year](chart)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Barrie respondents</th>
<th>Regional respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arts &amp; Crafts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drama/Dance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visual arts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>History</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural heritage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poetry/literature</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

N=700/670
Barrie respondents participate in Barrie

- At least 75% of Barrie residents participated in Barrie for all activities, except history.
- Participation in the GTA ranged from 50% of respondents for music to 10% for arts and crafts.

**Activities in Past Year**

- Barrie
- Region

**Where Barrie Respondents Participated**

- Barrie
- Toronto/GTA
- Other

- Music
- Arts & Crafts
- Drama/Dance
- Visual arts
- History
- Cultural heritage
- Poetry/literature

N=85-551

N=700/670
Regional respondents skip Barrie

- Regional residents participation was focused on their own communities and GTA
- <15% went to Barrie for A&C, except for arts and crafts (40%)

**Activities in Past Year**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Barrie</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
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<tr>
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<tr>
<td>Drama/Dance</td>
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</tr>
<tr>
<td>Visual arts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>History</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural heritage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poetry/literature</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Where Regional Respondents Participated**

- Music
- Arts & Crafts
- Drama/Dance
- Visual arts
- History
- Cultural heritage
- Poetry/literature

N=700/670

N=86-565
Barrie and the region different

Where Regional Residents Participate

- Barrie
- Toronto/GTA
- Other

Poetry/literature
- Cultural heritage
- History
- Visual arts
- Drama/Dance
- Arts & Crafts
- Music

N=86-565

Where Barrie Respondents Participate

- Barrie
- Toronto/GTA
- Other

Music
- Arts & Crafts
- Drama/Dance
- Visual arts
- History
- Cultural heritage
- Poetry/literature

N=85-551
Involved beyond watching...

- Patterns very similar for Barrie & Regional respondents
  - Most as spectators/audience, followed by parents or supporters of artist
  - Approximately $\frac{1}{4}$ were students and the same proportion performers

### How They Participated

- Spectators/audience
- Parents/supports
- Students
- Performers/artists
- Org members
- Paid jobs
- Volunteer

#### Household Participation

<table>
<thead>
<tr>
<th></th>
<th>Barrie</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults</td>
<td>95%</td>
<td>96%</td>
</tr>
<tr>
<td>Teens</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Children</td>
<td>30%</td>
<td>22.3%</td>
</tr>
</tbody>
</table>

N=699/684

#### Average Household Spending

<table>
<thead>
<tr>
<th></th>
<th>Barrie</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment/Accessories</td>
<td>$946</td>
<td>$298</td>
</tr>
<tr>
<td>Attendance at events</td>
<td>$841</td>
<td>$725</td>
</tr>
<tr>
<td>Lessons</td>
<td>$367</td>
<td>$263</td>
</tr>
</tbody>
</table>

N=577-665/574-637
Overall Participation in Arts & Culture

Decision-Making
Women lead family decisions

Traditional media still strong

Use of social media & internet growing
Traditional media still most used

- Traditional media (newspaper/radio) were the most important information sources to find out about arts and culture performances, exhibits, events
- Almost 50% used social media, making it more important than internet or e-mail
- Word of mouth was the most significant information source (as we find in almost all research projects)
Women lead family decision-making

- In both Barrie and the Region
  - Within families, decisions about participation in arts and culture were made primarily by adults,
  - Those with teens and children consider their input
  - Decisions regarding participation were made by women in 38% of households, by males in 8% of households and jointly in the majority of households (54%)

<table>
<thead>
<tr>
<th>Household Decision-Making</th>
<th>Barrie</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults</td>
<td>100%</td>
<td>99%</td>
</tr>
<tr>
<td>Teens</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Children</td>
<td>16%</td>
<td>12%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary Decision-Maker</th>
<th>Barrie</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Together</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Female</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Male</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

N=705/690
N=699/679
Overall Participation in Arts & Culture

The Most Important Experience
Barrie respondents cited Barrie experiences
Regional respondents cited Toronto/GTA, but Barrie cited as well

Kempenfest puts Barrie on the map

- **Gryphon, MacLaren & Theatre By The Bay** also important
- Some new events recognized....Caribfest, Film Festival
Respondents were asked to identify one A&C experience that was most important to them.

- **In Barrie**, Kempenfest was identified by the highest proportion of respondents (30%).
- **In Barrie & Region**
  - Kempenfest, Gryphon Theatre and MacLaren Art Centre were the most frequently identified named Barrie experiences.
  - Music concerts, theatre/musical and museums/galleries most frequently identified experience categories.

### Barrie Respondents

<table>
<thead>
<tr>
<th>Most Frequently Identified</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Kempenfest</td>
<td>30%</td>
</tr>
<tr>
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<td>Theatre/musicals</td>
<td>14%</td>
</tr>
<tr>
<td>Gryphon Theatre</td>
<td>5%</td>
</tr>
<tr>
<td>Museum/art gallery</td>
<td>4%</td>
</tr>
<tr>
<td>MacLaren</td>
<td>4%</td>
</tr>
<tr>
<td>Dance/ballet</td>
<td>3%</td>
</tr>
<tr>
<td>Theatre by the Bay</td>
<td>3%</td>
</tr>
<tr>
<td>Choir</td>
<td>3%</td>
</tr>
<tr>
<td>Caribfest</td>
<td>2%</td>
</tr>
<tr>
<td>Arts &amp; Crafts</td>
<td>2%</td>
</tr>
<tr>
<td>Film Festival</td>
<td>2%</td>
</tr>
<tr>
<td>Talk is Free Theatre</td>
<td>1%</td>
</tr>
<tr>
<td>Jazz/Blues Fest</td>
<td>1%</td>
</tr>
<tr>
<td>New Years Eve</td>
<td>1%</td>
</tr>
<tr>
<td>Celebrate Bar</td>
<td>1%</td>
</tr>
<tr>
<td>Historical Events</td>
<td>1%</td>
</tr>
<tr>
<td>Christmas events</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Least Frequently Identified</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N=617</td>
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</tbody>
</table>

### Regional Respondents

<table>
<thead>
<tr>
<th>Most Frequently Identified</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>Historical Events</td>
<td>2%</td>
</tr>
<tr>
<td>Film Festival</td>
<td>1%</td>
</tr>
<tr>
<td>Education/school</td>
<td>2%</td>
</tr>
<tr>
<td>Stratford/Shaw</td>
<td>1%</td>
</tr>
<tr>
<td>Gryphon Theatre</td>
<td>1%</td>
</tr>
<tr>
<td>MacLaren</td>
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<td>Choir</td>
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<td>Jazz and Blues</td>
<td>1%</td>
</tr>
<tr>
<td>Christmas Events</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Least Frequently Identified</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N=578</td>
<td></td>
</tr>
</tbody>
</table>
Arts & crafts dominates Barrie

- Arts and crafts dominates for Barrie residents
- After that, the order of categories is the same for Barrie residents and Regional respondents

**Name activities were included in the activity categories for the following graph**

### Barrie Respondents

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</tr>
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<td>Celebrate Bar</td>
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<tr>
<td>Historical Events</td>
<td>1%</td>
</tr>
<tr>
<td>Christmas events</td>
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</tr>
</tbody>
</table>

**Least Frequently Identified**

N=617

### Regional Respondents

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<tr>
<td>Christmas Events</td>
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</table>

**Least Frequently Identified**

N=578

The Most Important A&C Activity

N=617/578

- Arts & Crafts
- Theatre/musical/dance
- Music performance
- Museum/art gallery
- Other C of B Events
- Other Festivals
- Cultural/Ethnic

0% 10% 20% 30% 40%
Barrie respondents participate in Barrie

**Barrie Respondents**

**Most Frequently Identified**
- Kempenfest: 30%
- Music concerts: 16%
- Theatre/musicals: 14%
- Gryphon Theatre: 5%
- Museum/art gallery: 4%
- MacLaren: 4%
- Dance/ballet: 3%
- Theatre by the Bay: 3%
- Choir: 3%
- Caribfest: 2%
- Arts & Crafts: 2%
- Film Festival: 2%
- Talk is Free Theatre: 1%
- Jazz/Blues Fest: 1%
- New Years Eve: 1%
- Celebrate Bar: 1%
- Historical Events: 1%
- Christmas events: 1%

**Least Frequently Identified**

**Regional Respondents**

**Most Frequently Identified**
- Theatre/musicals: 33%
- Music concerts: 26%
- Museum/art gallery: 11%
- Kempenfest: 6%
- Dance/ballet: 5%
- Arts & Crafts: 3%
- Cultural/Ethnic: 2%
- Historical Events: 2%
- Film Festival: 1%
- Education/school: 2%
- Stratford/Shaw: 1%
- Gryphon Theatre: 1%
- MacLaren: 1%
- Choir: 1%
- Jazz and Blues: 1%
- Christmas Events: 1%

- **Where?**
  - **Barrie**: 89% of Barrie respondents participated in Barrie
  - **GTA**: 30%
  - **Orillia**: 16%
  - **Simcoe County**: 14%
  - **Ottawa**: 5%
  - **Midland/Penetang**: 4%
  - **Stratford**: 3%
  - **Rama**: 3%
  - **Niagara**: 3%
  - **Muskoka**: 3%
  - **Hamilton**: 3%

- **Least Frequently Identified**
  - **N=578**

- **89% of Barrie respondents participated in Barrie**
  - They also participated in GTA (27%), Orillia (24%) and other Simcoe County locations (20%)

- **57% of Regional respondents participated in Toronto**
  - 24% participated in Barrie
Almost everyone is a spectator...

### Barrie Respondents

#### Most Frequently Identified

- Kempenfest: 30%
- Music concerts: 16%
- Theatre/musicals: 14%
- Gryphon Theatre: 5%
- Museum/art gallery: 4%
- MacLaren: 4%
- Dance/ballet: 3%
- Theatre by the Bay: 3%
- Choir: 3%
- Caribfest: 2%
- Arts & Crafts: 2%
- Film Festival: 2%
- Talk is Free Theatre: 1%
- Jazz/Blues Fest: 1%
- New Years Eve: 1%
- Celebrate Bar: 1%
- Historical Events: 1%
- Christmas events: 1%

#### Least Frequently Identified

- N=617

### Regional Respondents

#### Most Frequently Identified

- Theatre/musicals: 33%
- Music concerts: 26%
- Museum/art gallery: 11%
- Kempenfest: 6%
- Dance/ballet: 5%
- Arts & Crafts: 3%
- Cultural/Ethnic: 2%
- Historical Events: 2%
- Film Festival: 1%
- Education/school: 2%
- Stratford/Shaw: 1%
- Gryphon Theatre: 1%
- MacLaren: 1%
- Choir: 1%
- Jazz and Blues: 1%
- Christmas Events: 1%

#### Least Frequently Identified

- N=578

### How?

- Spectator/audience: 75%
- Parent/supporter: 25%
- Organization member: 5%
- Performer/artist: 4%
- Student: 4%
- Your job: 3%

N=622/583

### Notes

- Barrie and Regional respondents had similar participation:
  - 97% spectators/audience members
  - 25% parents or supporters
  - 25% performers/artists or students
  - 12% members of organizations

- Almost everyone is a spectator...
Barrie Respondents

Most Frequently Identified
- Kempenfest: 30%
- Music concerts: 16%
- Theatre/musicals: 14%
- Gryphon Theatre: 5%
- Museum/art gallery: 4%
- MacLaren: 4%
- Dance/ballet: 3%
- Theatre by the Bay: 3%
- Choir: 3%
- Caribfest: 2%
- Arts & Crafts: 2%
- Film Festival: 2%
- Talk is Free Theatre: 1%
- Jazz/Blues Fest: 1%
- New Years Eve: 1%
- Celebrate Bar: 1%
- Historical Events: 1%
- Christmas events: 1%

Least Frequently Identified

Why?

- Good entertainment
- Celebrate community
- Connect with friends
- Meet interesting people
- Community contribution
- Integral to family life
- Creative expression
- Your job

N=611-622

It’s about entertainment, community & people
It’s more about entertainment

**Regional Respondents**

<table>
<thead>
<tr>
<th>Most Frequently Identified</th>
<th>Why?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theatre/musicals</td>
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<tr>
<td>Music concerts</td>
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<td>Museum/art gallery</td>
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<td>Kempenfest</td>
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<tr>
<td>Dance/ballet</td>
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<tr>
<td>Arts &amp; Crafts</td>
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<td>Cultural/Ethnic</td>
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<tr>
<td>Film Festival</td>
<td><img src="https://via.placeholder.com/150" alt="Barrie" /></td>
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<tr>
<td>Education/school</td>
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<td>Stratford/Shaw</td>
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<td>Gryphon Theatre</td>
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<tr>
<td>MacLaren</td>
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<tr>
<td>Choir</td>
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<tr>
<td>Jazz and Blues</td>
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<tr>
<td>Christmas Events</td>
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<table>
<thead>
<tr>
<th>Least Frequently Identified</th>
<th><img src="https://via.placeholder.com/150" alt="Barrie" /></th>
</tr>
</thead>
</table>

N=578

Why?

- **Strongly disagree**
- **Disagree**
- **Agree**
- **Strongly Agree**

**Most Frequently Identified**

- Good entertainment
- Celebrate community
- Connect with friends
- Meet interesting people
- Community contribution
- Integral to family life
- Creative expression
- Your job

**Least Frequently Identified**

- N=578

- It's more about entertainment
- Regional Respondents
Barrie & Region same order, different emphasis

**Barrie Respondents**

**Why?**

- Strongly disagree
- Disagree
- Agree
- Strongly Agree

- **Good entertainment**
- **Celebrate community**
- **Connect with friends**
- **Meet interesting people**
- **Community contribution**
- **Integral to family life**
- **Creative expression**
- **Your job**

**N=574 - 584**

**Regional Respondents**

**Why?**

- Strongly disagree
- Disagree
- Agree
- Strongly Agree

- **Good entertainment**
- **Celebrate community**
- **Connect with friends**
- **Meet interesting people**
- **Community contribution**
- **Integral to family life**
- **Creative expression**
- **Your job**

**N=611 - 622**
Overall Participation in Arts & Culture

Vibrant Communities
Along with Toronto, Barrie seen as a vibrant community for arts & culture

Why?
- Diversity & quality
- Community participation
- Multicultural

Not running away from Barrie
- Intervening opportunities (vacation, friends, higher quality)
Ontario community with most vibrant A&C scene

- Most identified Toronto/GTA
  - Barrie respondents (56%) & regional respondents (60%)
- Barrie rated second
  - Barrie respondents (31%) & regional respondents (12%)

**Vibrant A&C Scene**

- Toronto/GTA
- Barrie
- Stratford
- Ottawa
- Niagara-on-the-Lake
- Orillia
- Muskoka
- Midland/Penetang
- Collingwood

Barrie respondents  Regional respondents

**Reasons for Vibrant A&C Scene**

- Variety/choice/diversity
- Funding/quality/production
- Multi-cultural
- Community participation
- Attendance/size
- Aesthetics/geography
- Facilities/venues
In their own words...

**Toronto**
- Because of the variety of venues, it gives you more choices
- Culturally diverse, open-minded
- Eclectic assortment of people
- Draws larger professional productions
- It’s got everything: sports, music, theatre, restaurants
- The caliber of performances
- The variety and the different venues and even the scope of who performs - just that there is so much variety

**Barrie**
- The excitement of people involved... they give 150% and we try support each other
- The lake and beauty of Barrie
- The city itself, not as big as Toronto, makes it feel like a gathering of friends
- It's a local happening and you don't have to travel for it and you support your community by doing it
- A lot of things to choose from, good quality and entertainment
- Because it comes up with new ideas and there’s always something to do there

**Stratford/Niagara-On-The-Lake**
- Stratford Festival/Shaw Festival
- High quality performance - restaurant facility combination at a reasonable price
- The plays and they have all kinds of things going on there
- The quality of the theatres, and the whole idea of the small community as a whole giving their heart and souls to these theatres

**Ottawa**
- The many events that occur. Its bilingual and it’s the capital.
- The atmosphere, the enthusiasm and support for the theatre
- The funds that are available to them to allow them to do what they need to do there.
In their own words...

- **Orillia**
  - Orillia Opera House, we don’t have one in Barrie
  - Availability of shows at a good price
  - Waterfront, always something going on
  - Folk Festival

- **Muskoka**
  - Everybody buys into and everyone shows up
  - There are a lot of artists who live and perform here
  - Broad-based community participation
  - They have all sort of things poetry, folk dance, orchestra, good literary scene there

- **Midland-Penetanguishene**
  - King’s Warf Theatre and historic sites
  - Dynamic artists group and lots of different performances and local theatre group puts on performances during winter and also in the summer.

- **Collingwood**
  - It has a lovely historic downtown, many artists, great music scene, good arts council. Great volunteer community
  - There are lots of cultural events, and activities regularly, and there is a museum, and active art community, there is a theatre
  - Theatre, gatherings on Main St. - celebrations
Visits to other communities for A&C in past year

**Barrie Respondents**

<table>
<thead>
<tr>
<th>Most Frequent Activities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Performing Arts</td>
<td>34%</td>
</tr>
<tr>
<td>Music Performance</td>
<td>32%</td>
</tr>
<tr>
<td>Cultural/Heritage</td>
<td>9%</td>
</tr>
<tr>
<td>Festivals/Events</td>
<td>8%</td>
</tr>
<tr>
<td>Visual Arts</td>
<td>7%</td>
</tr>
<tr>
<td>Poetry/Lit</td>
<td>1%</td>
</tr>
</tbody>
</table>

Other destinations spread across >20 communities, including:
- Midland
- Muskoka
- Penetanguishene
- Rama
- Hamilton
- Cookstown

**Why?**

- Similar performance, exhibit or event not in Barrie: 66%
- Higher quality than available in Barrie: 57%
- Part of visit with friends/relatives: 56%
- Part of vacation: 20%

**Most Frequent Destination**

- Barrie respondents
- Regional respondents

- **Toronto/GTA**
  - Barrie respondents: 60%
  - Regional respondents: 70%

- **Orillia**
  - Barrie respondents: 5%
  - Regional respondents: 10%

- **Ottawa**
  - Barrie respondents: 5%
  - Regional respondents: 10%

- **Stratford**
  - Barrie respondents: 5%
  - Regional respondents: 10%

- **Niagara**
  - Barrie respondents: 5%
  - Regional respondents: 10%

- **Other**
  - Barrie respondents: 20%
  - Regional respondents: 20%
Recent visits to other communities for A&C

Regional Respondents

Most Frequent Activities
- Music Performance: 30%
- Performing Arts: 27%
- Art Galleries: 9%
- Festivals/Events: 8%

Other destinations spread across >20 communities, including:
- Newmarket
- Alliston
- Hamilton
- Midland/Penetang
- Rama
- Gravenhurst
- Bracebridge
- Huntsville
- etc.

Most Frequent Destination

- Toronto/GTA
- Orillia
- Ottawa
- Stratford
- Niagara
- Other

Why?
- Part of visit with friends/relatives: 56%
- Similar performance, exhibit or event not in Barrie: 50%
- Higher quality than available in Barrie: 47%
- Part of vacation: 17%
Barrie’s Arts and Culture Scene

Participation
Project 2009 A&C participation to population

50% of Barrie & 20% of regional residents participated

Festivals & events are Barrie’s mainstay
- Almost all Barrie respondents participated
- High proportion of regional respondents participated
Barrie A&C Activities & Events in Past Year

**Barrie Respondents**
- 82% participated in Barrie A&C during the past year

This is 82% of the 60% who participated in A&C in the past 3 years. Projecting to the Barrie population, **half of Barrie residents attended a Barrie A&C attraction/event in the past year.**

- 48% Barrie respondents brought out-of-town guests to at least one activity or event

**Regional Respondents**
- 30% participated in Barrie A&C during the past year

This is 30% of the 66% who participated in A&C in the past 3 years. Projecting to the regional population, **20% of Regional residents attended a Barrie A&C attraction/event in the past year.**

### Attendance at Barrie A & C Attractions

<table>
<thead>
<tr>
<th>Category</th>
<th>Barrie Respondents</th>
<th>Regional Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Festivals &amp; Events</td>
<td></td>
<td></td>
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<tr>
<td>Music Performance</td>
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<tr>
<td>Performing Arts</td>
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</tr>
<tr>
<td>Visual Arts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poetry or lit reading</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

N=710/693
Barrie Respondents Attendance (past year)

- 2/3 of respondents went to Kempenfest
- Celebrate Barrie, Gryphon theatre and rock performances drew over 30% of respondents

### Attendance at Barrie A&C Attractions

- Kempenfest: [Bar Graph]
- Celebrate Barrie: [Bar Graph]
- Gryphon theatre: [Bar Graph]
- Rock: [Bar Graph]
- Downtown Countdown: [Bar Graph]
- MacLaren: [Bar Graph]
- Jazz: [Bar Graph]
- Choir: [Bar Graph]
- Theatre by the Bay: [Bar Graph]
- Caribfest: [Bar Graph]
- Orchestra: [Bar Graph]
- Folk: [Bar Graph]
- Talk is Free: [Bar Graph]
- Kempenfelt Players: [Bar Graph]
- Barrie Concert Assoc: [Bar Graph]
- Barrie Film Festival: [Bar Graph]
- Lawn Chair Luminata: [Bar Graph]
- Poetry/lit: [Bar Graph]
- Barrie Art Club: [Bar Graph]

**Barrie Respondents**

**Attendance at Barrie A&C Attractions**

<table>
<thead>
<tr>
<th>Category</th>
<th>N=710/693</th>
</tr>
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<tbody>
<tr>
<td>Festivals &amp; Events</td>
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</tr>
<tr>
<td>Music Performance</td>
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<tr>
<td>Performing Arts</td>
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<tr>
<td>Visual arts</td>
<td></td>
</tr>
<tr>
<td>Poetry or lit reading</td>
<td></td>
</tr>
</tbody>
</table>
- The highest regional attendance was for Kempefest.
- The Gryphon Theatre, rock performances and MacLaren were the only other Barrie attractions that drew greater than 5% of respondents.

**Regional Respondents Attendance (past year)**

### Attendence at Barrie A&C Attractions

- Kempenfest
- Celebrate Barrie
- Gryphon theatre
- Rock
- Downtown
- MacLaren
- Jazz
- Choir
- Theatre by the... 
- Caribfest
- Orchestra
- Folk
- Talk is Free
- Kempenfelt.. 
- Barrie Concert.. 
- Barrie Film.. 
- Lawn Chair...
- Poetry/lit
- Barrie Art Club

**Regional Respondents**

**Attendance at Barrie A&C Attractions**

- Festivals & Events
- Music Performance
- Performing Arts
- Visual arts
- Poetry or lit reading

N=710/693

N=693
The residents of **Money & Brains** seem to have it all: high incomes, advanced degrees and sophisticated tastes to match their credentials. Many of these Canadians are empty-nesters or married couples with university-aged children who live in older, fashionable homes in urban and suburban neighbourhoods. With 45 percent holding university degrees, Money & Brains consumers exhibit cultured sensibilities in the marketplace. They have high rates for going to the **theatre**, **symphony**, **art galleries and the ballet**. At home, they listen to **radio stations and subscribe to business, news and travel magazines**. A politically active cluster, residents here rank high for working on **community projects**, serving as **volunteers** and writing letters to public officials. They also support a long list of **philanthropic causes**, exercising their well-developed social conscience with both their time and money.
Barrie’s Arts and Culture Scene

Thoughts
Overall ratings for Barrie’s A&C scene: mediocre

Some Solid Strengths
- People
- Variety
- Location

Can improve positioning
- Variety
- Venues
- Advertising
Mediocre ratings

Overall Average Ratings

<table>
<thead>
<tr>
<th>Activity</th>
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<th>Region</th>
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<tbody>
<tr>
<td>Festivals &amp; events</td>
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<td>6.8</td>
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<tr>
<td>Getting involved</td>
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<tr>
<td>Variety</td>
<td>6.3</td>
<td>6.1</td>
</tr>
<tr>
<td>Facilities/Venues/Places</td>
<td>5.8</td>
<td>6.2</td>
</tr>
</tbody>
</table>

Festivals & Events

Getting Involved

Facilities/Venues/Places

Variety of A&C Activities
What makes Barrie a good community for A&C?

**Barrie Respondents**
1. Community/people/talent
2. Variety & choice
3. Location

**Regional Respondents**
1. Location
2. Growing community
3. Variety/choice

### What's Good

<table>
<thead>
<tr>
<th></th>
<th>Barrie Residents</th>
<th>Regional Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community/people/talent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variety/choice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diversity/culture</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intimate community</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growing community</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Waterfront</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affordability/accessibility</td>
<td></td>
<td></td>
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<tr>
<td>Municipal Effort</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Venues</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

N=533/377
In their own words...

What makes Barrie a good community for A&C?

**Barrie Respondents**

Community participation/people/talent
- A lot of talented & dedicated people
- People are friendly, it’s easy to get into the scene
- Good talent pool, variety and reasonable audience for it
- A mix of younger and older, plus the college

Variety and choice
- It has a good variety of events for the size of the city
- There is a good variety of music and live plays, theatres, arts, gardens
- There’s always something happening, festival or art show, community-oriented

Location
- Its location - close to the GTA
- Its location on route to cottage country
- Location it is ideal for Ontario and beautiful

N=556

**Regional Respondents**

Location
- Far enough from Toronto to have its own cultural base
- It’s close to where we live
- There is a vacation atmosphere to it because of its geographical location

Growing community
- Because of the population base can bring quality outside performers as well as local performers
- The size, it’s growing, it’s vibrant
- It’s growing so more different cultures, to contribute to different expression

Variety/choice
- The multitude and variety of activities and events with easy access
- They have more plays, more cultural events than other towns in the area

N=377
In their own words....

What makes Barrie a good community for A&C?

1. Active groups in lots of disciplines
   - Theatre is growing
   - Fantastic artists – studio tour, Martin House
   - Phenomenal music instructors
   - Good opportunities for children
   - Excellent quality, need more exposure

2. Regional hub

3. Waterfront/nature

4. Georgian College (young people, art programs)
Ways to improve A&C in Barrie

**Barrie Respondents**
1. More/improved venues
2. Better advertising
3. Variety of events, performances, activities

**Regional Respondents**
1. Better advertising
2. More/improved venues
3. Variety of events, performances, activities

### Suggested Improvements

- **Barrie Residents**
  - More/improved venues
  - Better advertising
  - Variety of events
  - More funding
  - Improved accessibility
  - For all incomes
  - Better quality...
  - Target younger
  - Downtown cleanup
  - Packages/promotions
  - Weatherproofed...

- **Regional Residents**
  - More/improved venues
  - Better advertising
  - Variety of events
  - More funding
  - Improved accessibility
  - For all incomes
  - Better quality...
  - Target younger
  - Downtown cleanup
  - Packages/promotions
  - Weatherproofed...

N=556/379
In their own words...

**Barrie Respondents**

**More/improved venues**
- A better venue or building (we only have Georgian College as a theatre)
- Build a proper performing arts venue downtown
- Having a building in the city where all things are under one roof (culture centre)

**Better advertising**
- More lead advertising so people know ahead of time to plan
- Web/paper/magazine page what’s on Barrie for all art & culture, a weekly listing
- Having a centralized place that would advertise all of these things

**Variety of events, performances/activities**
- Additional types of festivals/music festivals, a little more worldly
- Involve more of the newer ethnic groups in town in different cultural events
- They can offer more outdoor concerts and bring in the larger groups they used to have

**Regional Respondents**

**Better advertising**
- I’m an out of towner. I am a half hour away and don’t know what’s going on.
- Earlier and wider geographical promotion
- Notification in the community papers in the surrounding area

**Increased variety of events/diversity**
- It has to have more variety and imagination, not the same as other communities
- I think more cultural diversity
- More festivals/different cultural festivals

**Improved/increased facilities/venues**
- Appropriate arts center. More all the arts including workshops and studios
- Downtown theatre
- Re-create atmosphere at Molson park
The Future

If Barrie was as an important A&C centre, what would it be like?

**Barrie Focus Group Participants**

- Sustainable cultural centre
  - Performing house
  - Space for studios, teaching, mentoring
- Distinctly Canadian
- Excellence
  - Recognized on provincial/national scale (event?)
  - Not an ordinary place
- Outdoor concert venue (Molson Park)
- Outdoor environment
  - Water and forests
  - Outdoor arts
  - Gardens
- Multiculturalism/local identity
- Youth involvement
- Accessible
- Enough to attract visitors for more than a day
Next Steps
What have we learned?

✓ Barrie can claim the space as the “Regional A&C Hub”
✓ Market strong, room to grow
  ▪ ~ 2/3 of Barrie & regional residents participated in A&C in past 3 years
  ▪ ½ of Barrie residents & ~20% residents participated in Barrie A&C last year
  ▪ Annual resident A&C expenditure $40.5M

✓ As a regional centre, people appreciate
  ▪ Quality, variety, cultural diversity
  ▪ Accessibility
  ▪ Celebrating local talent
  ▪ Setting and “vacation” atmosphere

✓ Kempenfest put Barrie on the A&C map
✓ Growing pains
  ▪ Molson Park put Barrie on the map—now lost
  ▪ Waterfront – losing setting by overuse (vendor control)
Where do we go from here?
Where can we go from here?

Barrie can claim the space as the “regional A&C hub”
- Draws regional residents
- 2/3 of residents participate in A&C in Barrie
- Kempenfest put Barrie on the A&C map
- Diversity of experiences
- Our reputation is growing
- Appropriate setting

Opportunities
1. Improve A&C Communication & Awareness
2. Festival & Events Strategy & Action Plan
3. Improve A&C Spaces
1. Communication & Awareness

→ Brand Barrie Arts & Culture

→ Share market insight with A&C groups
  ▪ Highlights at A&C Annual Update
  ▪ Custom analysis of 2009 survey for business decisions

→ Residents & participants should know...
  ▪ What is Arts & Culture?
  ▪ Role of Department of Culture?
  ▪ What is happening when, where?

→ Use the media of the future
  ▪ Internet, web sites, social media
  ▪ Strategic marketing using market research
  ▪ One group responsible for communicating A&C
    ▪ Logical, visible
    ▪ Collaborative, consistent
    ▪ Budget to keep up-to-date
2. Festival & Events Strategy & Action Plan

→ Based on the research, recognize different events attract different markets
  ▪ Local vs visitors
  ▪ Market recognition
  ▪ Competing festivals/events
  ▪ Fit with Barrie & region

→ Nurture festivals & events uniquely Barrie (authenticity)

→ Cross-fertilize to build awareness, interest & participation in other A&C opportunities

→ Encourage accessibility for all

→ Evaluation and tracking - integrated across all events
Barrie is the regional A&C hub for Central Ontario, but ratings are mediocre. Respondents identified what could be done...

- Waterfront is the jewel, but concern about overuse
  - Do all events have to be at the waterfront?
  - Sensitive use & design of waterfront for appropriate events
  - Recognize limited capacity, functionality, parking, access

- Need sustainable Arts & Culture Centre
  - More than a performing arts centre
  - Support local artists - artisans studios, practice spaces
  - Incorporate outdoor spaces in the community

- Upgrade the Georgian College theatre

- Outdoor performance space
  - Can we recapture what we’ve …Molson Park
Questions/Comments