

14A

November 27, 2003

EXHIBITION PLACE

To: The Board of Governors of Exhibition Place

From: Fatima Scagnol
Corporate Secretary

Subject: **2003 CNE – Food Building Research**

Recommendation:

It is recommended that this report be received for information.

Background:

At its meeting of November 27, 2003, the CNEA Board of Directors requested that a copy of the Food Building Research conducted during the 2003 CNE be appended to the Future Space Requirements of the CNE Report.

Discussion:

Attached is a copy of the 2003 CNE Research Report related to the Food Building compiled by Generations Research. A copy of this report has already been submitted to the Planning Team undertaking the review of the 1998 Exhibition Place Concept and Development Plan.

Conclusion:

This report relates to the 2003 CNE Research conducted on the Food Building and should be appended to Report No. 14 of the Board's agenda.

Contact:

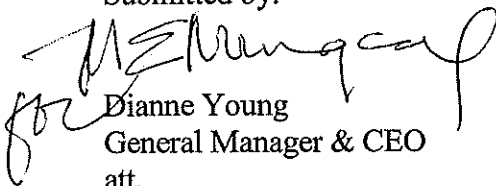
Fatima Scagnol, Corporate Secretary

Tel: 416-263-3620

Fax: 416-263-3690

Email: Fscagnol@explace.on.ca

Submitted by:


for Dianne Young
General Manager & CEO
att.

**CANADIAN NATIONAL EXHIBITION
2003 FOOD BUILDING RESEARCH**
Findings From On-Site Interviews
Summer 2003



Generations Research
2345 Yonge St. , Suite 710
Toronto, ON M4P 2E5
416-489-6282

BACKGROUND & METHOD

On-Site Interviews - Method

- 1,021 interviews were conducted with visitors in and around the Food Building to assess reaction to current issues facing this attraction (ie., being replaced by a soccer stadium).
- In addition, data from the 617 in-depth visitor exit interviews that shows the importance of the Food Building as part of the visitor experience is included in this report.
- Interviews were conducted for the duration of the 2003 season in order to achieve a representative cross section of all visitor types.

EXECUTIVE SUMMARY

Executive Summary

- Overall, data strongly suggests that the Food Building is an integral part of the CNE visitor experience. This extends across all visitor types, particularly those with greater visit history and frequency but also with newer visitors.

Executive Summary

- The Food Building is well liked by visitors for a number of reasons:
 - the unique mix of vendors (lack of well known chains & cultural mix) is fun, refreshing and different from typical food courts;
 - its convenient, central location on the grounds makes the eating experience easier, more accessible and part of the overall experience – it does not require visitors to go out of their way in search of food. And considering that the average visitor is on the grounds for just over 6 hours, a meal and a rest are imperative.
 - Visitors still say it's a good place to get a deal.

Executive Summary

- The overwhelming majority of visitors say “no visit to the CNE is complete without a visit to the Food Building”.
- The Food Building itself may be going through a slight renaissance. It's overall rating (out of 10) is on an increasing trend – 7.5 in 2001, 7.7 in 2002 and 7.9 this season. This is currently the highest rated pavilion on the grounds.

Executive Summary

- It is the most visited building or attraction on the grounds by far with 75% to 80%+ of all visitors passing through its doors.
- The Food Building accounts for a significant portion of on grounds spending – about 20% of all expenditure (not including parking and costs of admission) and an impressive 80% of all food spending on the grounds.

Executive Summary

- Respondents were asked to rate different options if the Food Building were torn down in terms of future visit likelihood. None of the options have the power to improve on the current Food Building and would, in fact, impact negatively on likelihood of future visits.

Executive Summary

- It becomes apparent that replicating The Food Building experience, and its positive associations, would be challenging.
- Research suggests that it would be in the CNE's best interests to maintain the Food Building as it is.

**FOOD BUILDING
DATA COMPILED
FROM EXIT
INTERVIEWS**

The Food Building is the Most Often Visited/Viewed Attraction

% of visitors who saw during visit:	2003	2002	2001
Food Building	76%	75%	84%
Arts, Crafts & Hobbies	55%	51%	51%
Midway Games	50%	47%	42%
Farm, Food & Fun	41%	49%	37%
- cooking show at Farm, Food & Fun	10%	na	na
Midway Rides	39%	37%	35%
International Pavilion Booths, Displays	34%	41%	na
Sportzone	25%	24%	29%
Midway For Kids	23%	26%	15%
Skywalker	23%	na	na
Kids Science	22%	26%	16%
"At Home" Pavilion	22%	26%	30%
Kids World	22%	23%	16%
Ontario Place	18%	20%	16%
Garden Show, Speakers	17%	22%	20%

* Top visited attractions shown only. Fewer visitors indicated they saw other attractions/pavilions not shown on list.






Top Rated Events/Attractions During Visit; Food Building Continues to See Increased Ratings Ratings out of 10 (10=excellent)

	<u>2003</u>	<u>2002</u>	<u>2001</u>
Skywalker	8.9	na	na
Super Dogs	8.8	9.3	8.9
Air Show	8.7	8.9	8.8
Fireworks (03); Inferno at the Ex (02/01)	8.9	8.8	8.5
Kids World	8.2	8.3	7.8
Kids Science	8.2	8.2	8.0
Park Entertainers & Strolling Bands	7.9	7.9	na
Food Building	7.9	7.7	7.5
Midway Rides	7.7	7.9	7.7

**Significant On Grounds Spending in Food Building;
Represents About 80% of Food Spending & 20% of
Total Spending**

	Food In Food Building	Other Food	Other Spending (ie., Take Home Items, Midway)
<u>Total</u>	\$21	\$5	\$82
Overall Rating of 8/9/10	\$22	\$5	\$82
Value Rating of 8/9/10	\$21	\$7	\$89
Loyal visitors	\$21	\$5	\$89
Visit with children	\$22	\$7	\$96
30-49 year olds	\$22	\$4	\$96
Reside outside GTA	\$22	\$5	\$103
\$65K+ household income	\$24	\$4	\$103

**Overall Value (out of 10) on a
Slight Improving Trend**

			<i>\$ Spent in Group Attended With:</i>
2003		7.4	\$109
2002		7.2	\$124
2001		7.1	\$100
2000		7.3	\$95
1999		7.5	\$70

Portion Saying They Will "Very Likely" Visit CNE Next Season Similar to Last Year



* There were a higher portion of visitors this season who had been last year & say they will very likely go next year.

FOOD BUILDING

* 1,021 interviews were conducted with visitors in and around the Food Building. Visitors were asked their impressions of issues facing the Food Building (ie., being replaced by a soccer stadium). Visitor profile data was also captured during this interview.

Reasons For Visiting the Food Building – Convenience, Integral to Visit, Fun

	10=Very Important	8/9/10 out of 10
1. Convenience – variety, something for everyone	8.4	76%
2. *No visit to CNE feels complete without a visit	8.2	74%
3. Fun - so many different foods to choose from	8.0	69%
4. Good place to stop - rest & eat	7.5	61%
5. Convenient, central location	7.5	59%
6. *Get a good deal	7.3	59%
7. Has foods unique to fairs, CNE	6.9	50%
8. The energy, excitement, sights & smells	6.5	46%
9. The building is an experience in itself	6.0	40%

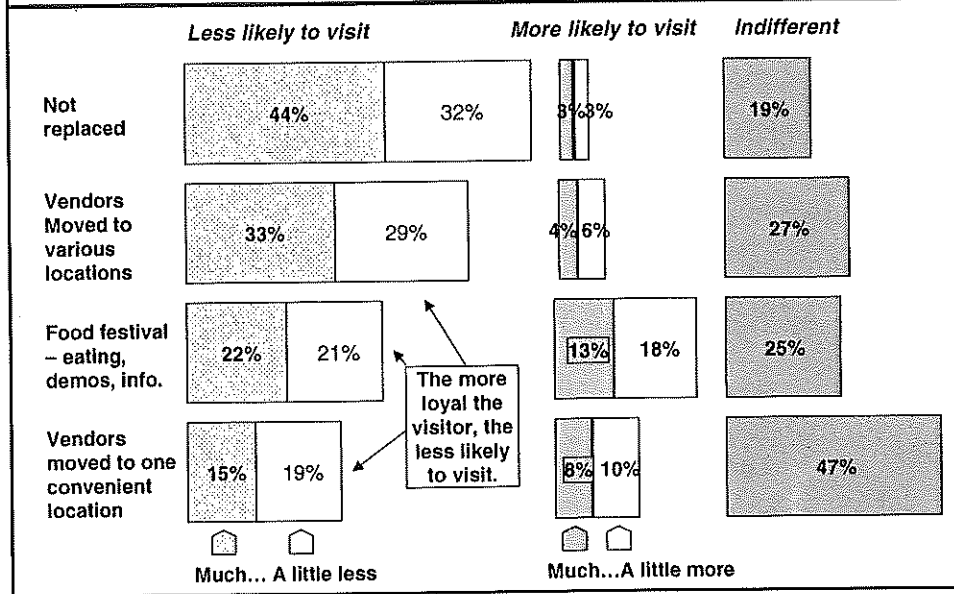
Key finding: #2 suggests existing Food Building is integral to the CNE experience & should not be lost!

* Rated higher by loyal (4-5 past 5 year) visitors 8.7 & 7.6.

Visitors With More CNE History Give Higher Ratings to Reasons For Visiting the Food Building, But Even Relatively New Visitors Agree that *“No visit to the CNE feels complete without a visit to the Food Building”*

10=very important reason for visiting Food Building	When First Visited CNE			Seasons Visited, Past 5 Years		
	1990s or later (333)	'70s- 80s (400)	Earlier (277)	4-5 (303)	1-3 (342)	None (164)
1. Convenience – something for everyone	8.2	8.3	8.6	8.5	8.2	8.3
2. Visit to CNE would not feel complete	7.1	8.4	9.3	8.7	8.0	7.2
3. Fun - many different food choices	7.9	8.0	8.1	8.1	7.8	8.2
4. Good place to stop - rest & eat	7.5	7.4	7.7	7.6	7.3	7.5
5. Convenient, central location	7.2	7.4	7.9	7.6	7.3	7.3
6. Get a good deal	7.2	7.3	7.6	7.6	7.0	7.0
7. Has foods unique to fairs, CNE	6.8	7.1	6.9	7.0	6.9	6.8
8. Energy, excitement, sights & smells	6.2	6.3	7.2	6.8	6.3	6.3
9. The building is an experience in itself	5.6	6.0	6.6	6.2	5.9	5.7

Impact Different Food Building Scenarios Would Have on CNE Visit Likelihood in Future – None of the Changes is an Improvement



No Alternative Food Options Would Increase the Likelihood of Visiting the CNE, Even Among More Recent/Less Frequent Visitors

If the Food Building were to be torn down & ...	When First Visited CNE			Seasons Visited, Past 5 Years		
	1990s or later (333)	'70s-80s (400)	Earlier (277)	4-5 (503)	1-3 (342)	None (164)
	% saying they would be <i>less likely to visit</i> the CNE					
Not replaced	67%	79%	82%	79%	74%	70%
Vendors moved to various locations	48%	67%	72%	67%	63%	48%
Food festival – eating, demos, info.	38%	46%	48%	51%	40%	30%
Vendors moved to one convenient location	24%	37%	43%	39%	33%	22%
% saying they would be <i>more likely to visit</i> the CNE						
Not replaced	11%	4%	1%	6%	6%	6%
Vendors moved to various locations	15%	9%	7%	10%	10%	10%
Food festival – eating, demos, info.	36%	30%	28%	27%	34%	37%
Vendors moved to one convenient location	22%	16%	18%	20%	16%	18%

Although Few Have Heard About It, Few Feel Replacing the Food Building With a Permanent Soccer Stadium Is a Good Idea

Whether have heard about this

Yes

No

Not sure

16%

80%

4%

Higher among loyal visitors (19% 4-5 past 5 year visitors)

How visitors feel about this

Very negative

Negative

Total negative

42%

25%

67%

Very positive

Positive

Total positive

6%

9%

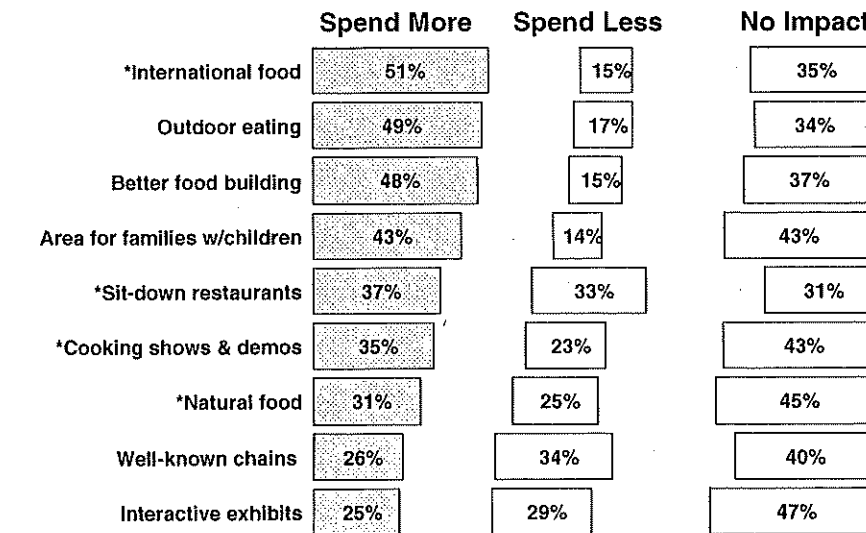
15%

• 74% - loyal visitors
• 63% - 1-3 past 5 year visitors
• 53% - visited past 5 years

Indifferent

18%

Impact On New Ideas On Food Spending - International Food & Outdoor Seating is Popular



*Those who haven't attended in past 5 years will spend more.

Age of Visitor Skewed Younger Than Overall Population

	Respondent Age <u>2003</u>	Age Distr. of Group*	Toronto CMA**
Under 7	na	6%	9%
7-12	na	7%	8%
13-18	12%	15%	7%
19-29	25%	<u>22%</u>	<u>15%</u>
<i>Total Under 30</i>		49%	39%
30-39	22%	16%	18%
40-49	23%	17%	16%
50-64	13%	10%	15%
65+	6%	<u>5%</u>	<u>11%</u>
<i>Total Over 30</i>		51%	61%
<i>Average # per group interviewed 3.5</i>			

* Interpretation: age distribution of respondents + those in their group.

** Estimated populations for Toronto Census Metropolitan Area as of 2001 Census (Statistics Canada). See Appendix A for boundaries.

Language First Learned & Spoken Most Often (2003)

	<u>1st Learned</u>	<u>Spoken Most Often</u>
English	87%	92%
Chinese (Cantonese/Mandarin)	2%	2%
French	2%	1%
German	1%	0%
Spanish	1%	1%
Italian	1%	1%
Portuguese	1%	0%
Philipino/Tagalog	0%	0%
Ukrainian	0%	0%
Indian/Pakastani	0%	0%
Polish	1%	0%
Other	3%	3%

Language First Learned at Home & Still Understood

Stats. Canada Data

	<u>City of Toronto</u>	<u>Toronto CMA</u>
Total Toronto Population	2,456,805	4,647,955
English only	52%	58%
French only	1%	1%
Other languages	47%	41%

Source: Statistics Canada, 2001 Census.

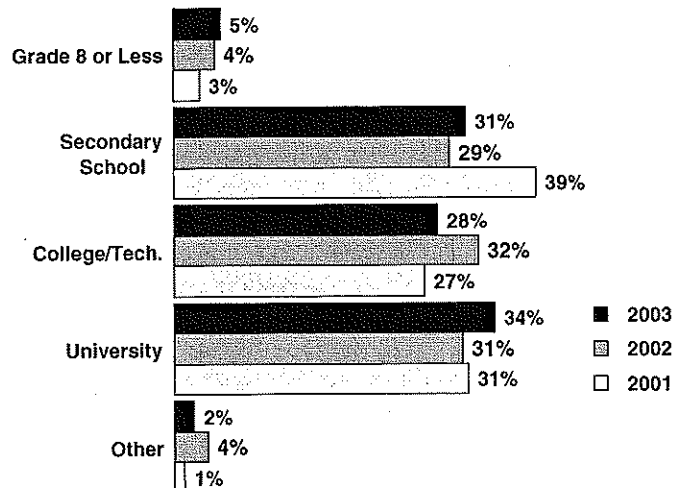
Visible Minorities in Primary Trade Area

Stats. Canada Data

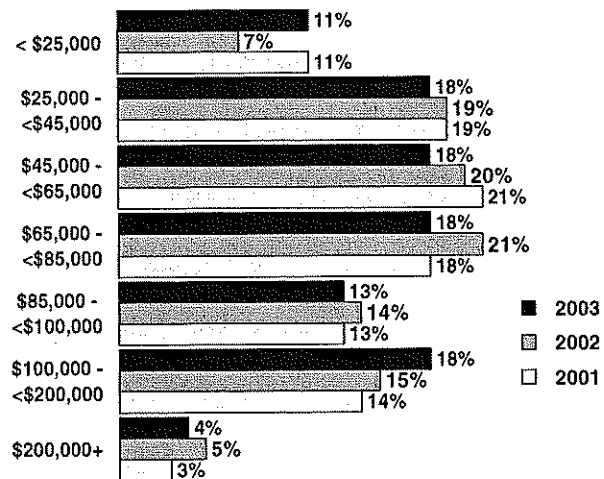
	<u>City of Toronto</u>	<u>Toronto CMA</u>
Total Toronto Population	2,456,805	4,647,955
Visible minority portion	43%	37%
<u>Distribution...</u>		
Chinese	11%	9%
South Asian	10%	10%
Black	8%	7%
Filipino	4%	3%
Latin American	2%	2%
Southeast Asian	1%	1%
Arab	1%	1%
West Asian	2%	1%
Korean	1%	1%
Japanese	0%	0%
Other	2%	1%
Multiple visible minorities	1%	1%

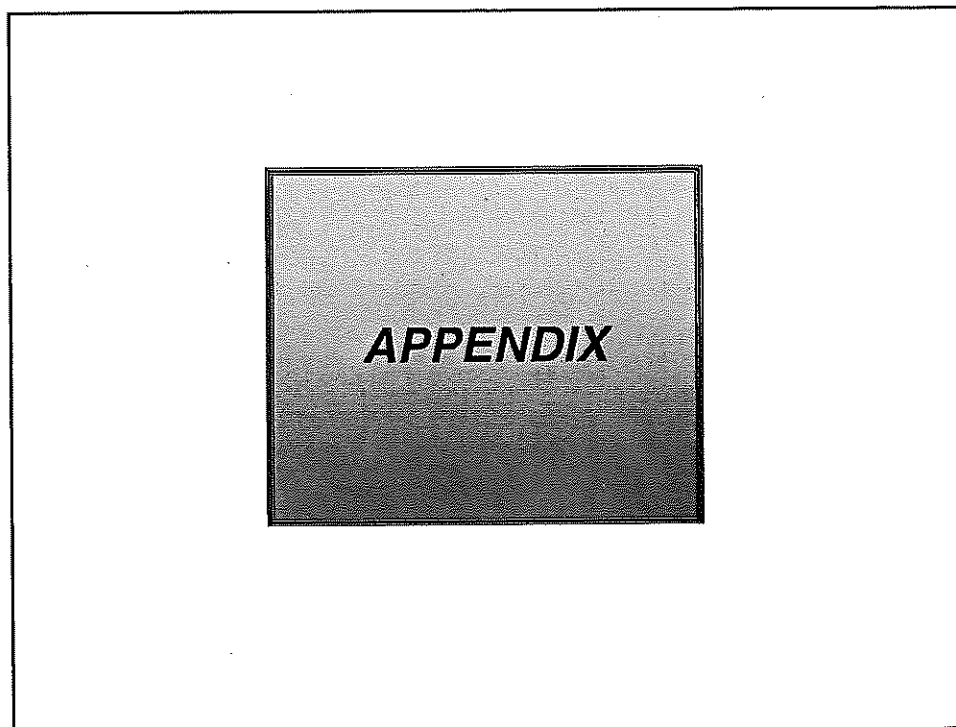
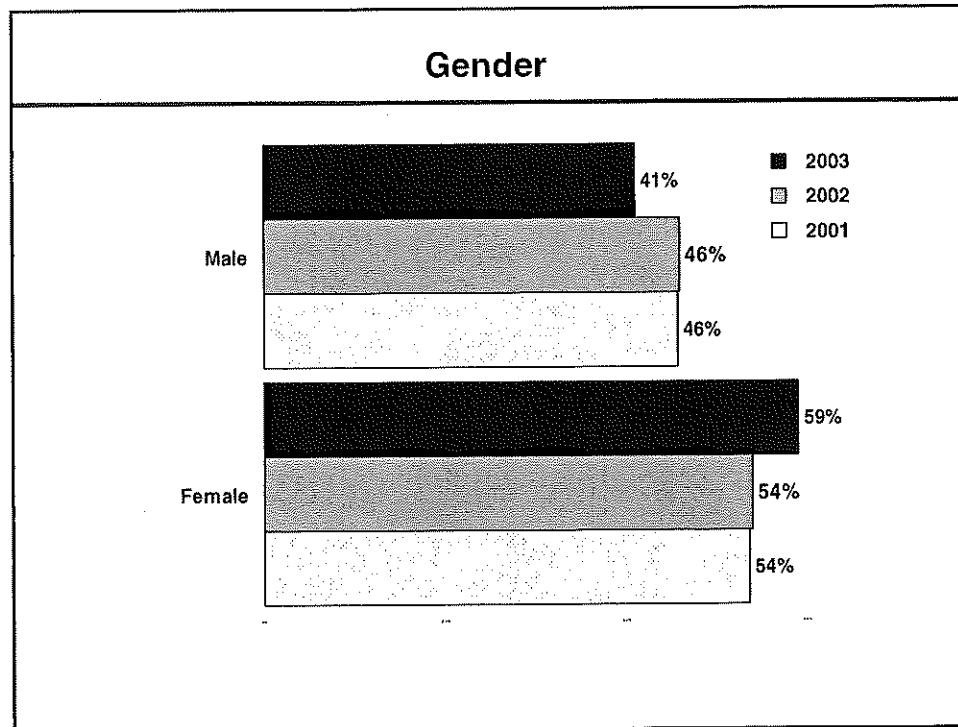
Source: Statistics Canada, 2001 Census.

Education



Household Income





Toronto Census Metropolitan Area



QUESTIONNAIRE

We would be very grateful if you would take a few minutes and answer the following questions that will help The CNE understand who is visiting this year. Please circle or write in the correct response.

1. Have you been to the CNE in previous years?

1 Yes → As best as you can remember, in what decade were you first here: (CIRCLE RESPONSE)

1	2000s	4	1970s
2	1990s	5	1960s
3	1980s	6	1950s or earlier

2 No → **PLEASE GO TO Q.5**

2. Did you visit the CNE last year?

1 No

2 Yes... how did this year's CNE compare to last year?

4	Much better	2	Somewhat worse
3	Somewhat better	1	Much worse

3. As best as you can remember, in how many of the last five years have you visited the CNE? (CIRCLE RESPONSE)

6	None	3	3 of the last 5 years
5	5 of the last 5 years	2	2 of the last 5 years
4	4 of the last 5 years	1	1 of the last 5 years

4. How would you rate this year's CNE overall where 10="Excellent" & 1="Poor" and using all the numbers in between? _____ → Rating from 1-10

5. Thinking about the group of people you came with today, about how much did your group spend at the CNE.

\$ _____ → Approximate total amount excluding parking & admission?

\$ _____ → Approximate amount spent on food throughout the grounds

\$ _____ → Approximate amount spent on food in Food Building

6. Using 10 point scale where **10 is very important** and **1 not important at all**, please tell me how important each of the following are as reasons for you choosing to visit the Food Building today?

_____ To get a good deal on food

_____ It's a good place to stop for a while to rest and eat

_____ Has foods unique to fairs and/or the CNE specifically

_____ It's in a convenient, central location

_____ It's fun having so many different foods to choose from and try

_____ It's convenient having such a wide variety of foods in one place, something for everyone

_____ No visit to the CNE feels complete without a visit to the Food Building

_____ The energy, excitement, sights and smells of the Food Building

_____ The building is an experience in itself, it's not just about the food

7. Here are four different possibilities for the Food Building in the future. If the Food Building was torn down, please tell me what impact, if any, you think each one would have on your decision to attend the CNE using the following scale...

5	Much more likely to attend	2	A little less likely to attend
4	A little more likely to attend	1	Much less likely to attend
3	Would make no difference		

_____ Food Building was torn down to make room for something else, and not replaced

_____ Food Building was torn down and the current food kiosks and vendors moved to another convenient building on the CNE grounds

_____ the current food kiosks and vendors moved to various locations spread throughout the CNE grounds

_____ a food show or festival replaced the Food Building with food to eat, food demonstrations, displays and product information

8. Have you heard about plans to replace the Food Building with a permanent soccer stadium? (CIRCLE RESPONSE)

1	Yes	2	No	3	Not sure
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9. What are your own personal feelings about the general idea of having the Food Building replaced with a permanent soccer stadium? (CIRCLE RESPONSE)

5	Very positive
4	Positive
3	Indifferent
2	Negative
1	Very negative



Why do you say that? Please write in a few words...

10. If the Food Building was gone, here are ideas the CNE has for the future. What impact do you think each of the following changes to the food experience would have on the amount of food you consume & the \$ you spend on food while at the CNE?

	Will spend more	Will spend less	No impact on how much I consume or spend on food
More natural food options	1	2	3
More sit-down restaurants with table service	1	2	3
More well-known food service chains	1	2	3
A better building or area in which to consume CNE food	1	2	3
More outdoor eating spaces	1	2	3
More international food options	1	2	3
Cooking shows and demonstrations while you eat	1	2	3
Opportunity to learn about the science of food while you eat through interactive exhibits & displays	1	2	3
A special area for families with children	1	2	3

11. Which method of payment did you use to enter the CNE today? (CIRCLE RESPONSE)

1. \$10 General Admission (No Rides)
2. \$7 Regular Admission for those 60 yrs & better or 13 yrs and under

Tickets available only if purchased in advance (ie., can't buy on the grounds):

3. \$7 Fun Pass (for any age)
4. \$23 Magic Pass –Combo Pass for admission & unlimited Conklin Midway rides for any age
5. \$1.25 advance ticket (originally good for opening day)
- Other → Please Describe _____

If you used the \$1.25 advance ticket:

12. How did you hear about this advance ticket? _____

13. If you hadn't purchased this advance ticket, how likely would you have been to attend The CNE this season? (CIRCLE RESPONSE)

- | | | | |
|---|-----------------|---|-------------------|
| 4 | Very likely | 2 | Not that likely |
| 3 | Somewhat likely | 1 | Not at all likely |

If you did not use the \$1.25 advance ticket:

14. Were you aware that there was a special \$1.25 advance ticket originally good for opening day? It is now being honoured for any day of the CNE. (CIRCLE RESPONSE)

- | | | | |
|---|----|---|-----|
| 1 | No | 2 | Yes |
|---|----|---|-----|

Remaining questions for everyone:

15. How appealing is the idea of a low cost advance ticket good for The CNE's opening day or other specially selected days? (CIRCLE RESPONSE)

- | | | | |
|---|--------------------|---|----------------------|
| 4 | Very appealing | 2 | Not that appealing |
| 3 | Somewhat appealing | 1 | Not at all appealing |

16. If knew about them, how likely would be to purchase low cost advance admission tickets good for special days at The CNE in the future? (CIRCLE RESPONSE)

- | | |
|---|-------------------|
| 4 | Very likely |
| 3 | Somewhat likely |
| 2 | Not that likely |
| 1 | Not at all likely |

17. How did you travel to the CNE today? (CIRCLE RESPONSE)

- | | | | |
|---|------------|---|--------------------|
| 1 | Street car | 4 | Bus |
| 2 | Go Train | 5 | Walk |
| 3 | Car | 6 | Other → How: _____ |

18. In which age range do you belong? (CIRCLE RESPONSE)

- 1 13-15
- 2 16-18
- 3 19-29
- 4 30-39
- 5 40-49
- 6 50-64
- 7 65+

Please record the # of people you came with today in each age group (not including yourself)

- _____ Under 7 → SPECIFY AGES: _____
- _____ 7-12 → SPECIFY AGES: _____
- _____ 13-18
- _____ 19-29
- _____ 30-39
- _____ 40-49
- _____ 50-64
- _____ 65+

19. Where do you live? Please include your area code. (CIRCLE RESPONSE)

- | | | | |
|---|-------------|----|---------------|
| 1 | Toronto | 7 | Rexdale |
| 2 | Brampton | 8 | Richmond Hill |
| 3 | East York | 9 | Scarborough |
| 4 | Etobicoke | 10 | Thornhill |
| 5 | Mississauga | 11 | Willowdale |
| 6 | North York | 12 | York |

Other Ontario _____

Other Canada _____

USA _____

Other _____

← Please write
the name of
your city/town.

If you are from the United States...otherwise go to next question

20. How did you hear about the CNE?

- 1 Been before
- 2 Found out about it once in Toronto
- 3 From advertising... please describe as best as you can recall

If you are from the anywhere other than the Greater Toronto Area...otherwise go to Q.22

21. Which of the following statements best describes how you planned your visit today to the CNE? (CIRCLE RESPONSE)

- 1 Planned to see the CNE specifically in advance
- 2 Planned to see the CNE along with other things in advance
- 3 Decided once in Toronto

22. How long did it take you to get here today, from the time you left your home to the time you entered the grounds?

_____ RECORD IN MINUTES

23. What is the one language...

You first learned that you still understand?

Spoken most often in your home?

- 1 English
- 2 French
- 3 Other, please specify: _____

- 1 English
- 2 French
- 3 Other, please specify: _____

24. Do you consider yourself part of any particular ethnic or cultural group?

- 1 No
- 2 Yes → Which one? _____

25. What is the highest level of formal education you have completed? (CIRCLE RESPONSE)

- 1 Grade 8
- 2 High School
- 3 College/Technical School
- 4 University
- 5 Other

26. Into which of the following categories does your total household income fall, before taxes? This would include income for all members of your household combined. Please check one response only. (CIRCLE RESPONSE)

- 1. Under \$25,000
- 2. \$25,000 to under \$45,000
- 3. \$45,000 to under \$65,000
- 4. \$65,000 to under \$85,000
- 5. \$85,000 to under \$100,000
- 6. \$100,000 to under \$200,000
- 7. \$200,000 or more
- 8. Don't Know

27. Are you...(CIRCLE RESPONSE)

- 1 Male
- 2 Female

THANK YOU! YOUR ASSISTANCE IS GREATLY APPRECIATED.

**SINCE WE VERIFY SOME OF THESE INTERVIEWS, CAN I PLEASE HAVE
YOUR NAME & TELEPHONE # AND A CONVENIENT TIME TO CALL.**

**YOUR NAME WILL BE KEPT STRICTLY CONFIDENTIAL AND WILL NOT BE
ADDED TO A MAILING LIST OR USED FOR ANY OTHER PURPOSE OTHER
THAN TO VERIFY THE SURVEY:**

Name: _____ Phone #: _____ Calling Time: _____