

REMAI ART GALLERY OF SASKATCHEWAN
Business Plan Market Assessment

November 2011

Remai Art Gallery of Saskatchewan

Business Plan Market Assessment

Prepared for:

Remai Art Gallery of Saskatchewan
950 Spadina Crescent East
Saskatoon, Saskatchewan
S7K 3L6

Submitted by:



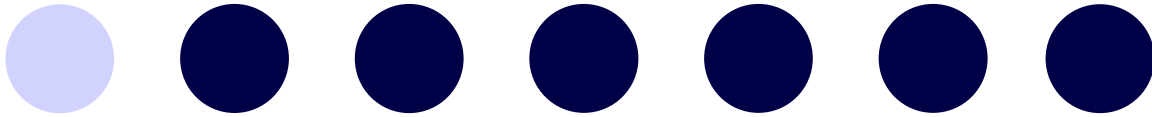
117 - 3rd Avenue South
Saskatoon, Saskatchewan
S7K 1L6

Tel: (306) 956-3070

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Contents

- Executive Summary 1**
 - Introduction 1
 - Highlights 1
- Methodology 6**
- Survey Results 8**
 - Visitation 8
 - Food Services 15
 - Facility Rentals 17
 - Admissions 19
 - Gift Shop 23
 - Programs 28
 - Community Support 30
- Appendices 35**
 - Demographics 35
 - Survey Instrument 37



Executive Summary

Introduction

In 2006, Fast Consulting conducted an extensive market assessment on potential options for strengthening the Mendel Art Gallery's financial self-sufficiency. The study was directly tied to proposed renovations at the current location. The environment has since changed, with the Rемаi Art Gallery of Saskatchewan offering benefits unforeseen in 2006.

This survey is designed to provide a market assessment to assist in the development of the Rемаi Art Gallery's business plan. A survey of Saskatoon adults aged 19+ was conducted to (i) verify the level of support for the Rемаi Art Gallery of Saskatchewan project amongst Saskatoon residents, (ii) assess residents' opinions and support for revenue generating activities (e.g. admissions, programs, rentals, food services, gift shop), and (iii) determine resident support for attendance and membership.

The survey sample size of 600 Saskatoon adults lets us say with a 95% level of certainty that the overall results of the survey are within plus or minus 3.9% of what they would be if the entire adult population of the city was polled. A portion of the responses (100) was sourced online via our Saskatoon panel, and constitutes a non-probability sample to which margins of error are not applicable.

This report is best understood as an estimator of current perceptions and an indicator of patterns. The survey asks respondents to predict their visitation to the new Rемаi Art Gallery and whether they would pay admission to visit, and patronize food services if available, gift shop, facility rentals and programs. The results, however, should not be taken as a precise predictor of these future behaviours. The survey asks respondents to estimate their likelihood of visiting the Art Gallery as a result of various amenities, but not necessarily within a given time frame: ie likelihood of visiting within the next year, which makes annual projections approximations only. Caution should always be used in applying the estimates, especially among sub-sets of the population, where smaller sample sizes imply wider margins of error.

Highlights

Visitation

- › Approximately six out of every ten Saskatoon residents (59%) visit the Mendel Art Gallery. Of these, four out of ten (42%) visited once or twice in the last year, two out of ten (20%) visited three to five times and one out of ten (12%) visited six or more times.

- › Eight out of 10 residents (80%) say they are likely to visit the Remai Art Gallery of Saskatchewan at some point when it opens at River Landing, including 22% who are *very likely* to visit.
- › Residents who are likely to visit the new location are asked how often they think they'll visit in a typical year. Most (68%) say once or twice a year, another 18% say three to five times and 8% say six or more times.
- › New features would encourage visitation. More exhibitions would be the biggest attraction: 73% would visit if there were more exhibitions of the gallery's collection and 71% would visit if there were more touring exhibitions.
- › Programmable, accessible space is another draw: 70% of residents would visit if the gallery offered a community studio, 68% if it had a lecture theatre capable of hosting film screenings and small performances and 44% if it had a large meeting space for special events.
- › Services would also draw visitors: 56% would visit the gallery if it had a bistro style counter-service café and 55% would visit if it had an expanded gift shop (55%). Finally, 38% would visit if there were more art classes and programs.

Food Services

- › Exploring residents' preferences regarding food services reveals that most (69%) would be interested in buying a non-alcoholic beverage at the gallery café, compared to 42% who would be interested in buying an alcoholic beverage.
- › Most (66%) would also be interested in buying lunch at the gallery café, 64% would be interested in buying snacks and 51% would be interested in buying dinner.
- › Roughly half (52%) of Saskatoon residents think they would visit a bistro style counter-service café at the gallery once or twice a year, while another 22% think they would visit three to five times and 12% think they would visit six or more times a year.

Facility Rentals

- › The large majority (80%) of residents agree that space for special events and meetings at the gallery is a good thing for Saskatoon, including 26% who *completely agree*.
- › Saskatoon residents say they would consider using rental space at the gallery for various events, including a catered reception (47%), catered lunch or dinner (41%), public event/presentation (44%) or meeting (40%).

Admissions

- › Roughly two-thirds (65%) of residents agree that the Remai Art Gallery of Saskatchewan should continue to offer free admission for all exhibitions at all times, compared to a third (33%) who disagree.

- The majority (73%) agree the gallery should continue with free admission to the permanent collection, but charge admission to special or significant exhibitions. This compares to 37% who agree the gallery should charge a standard, affordable admission for all exhibitions at all times.
- If the gallery does charge admission for special exhibitions, the majority (76%) agree that free admission should be made available at some time during the week, including 30% who *completely agree*. This is the strongest level of agreement recorded in the series of questions on admission fees.
- Even assuming the artist was of great interest to them, few residents (5%) are willing to pay more than \$25 for an individual adult admission to a special exhibition. Close to a third (31%) are willing to pay up to \$10, 13% are willing to pay up to \$15 and another 13% are willing to pay up to \$20.
- Three out of ten residents (30%) would be willing to pay \$50 for a yearly membership that gave them free admission plus reduced rates on special exhibition.
- While a third (33%) say the frequency of their visits to the gallery will depend on the admission cost, over a quarter (27%) say an admission fee for special exhibitions would not stop them from visiting. Another 19% say an admission fee for special exhibitions would reduce their visits and 18% say they would no longer visit.

Gift Shop

- Approximately 45% of Mendel visitors make a purchase in the gift shop on at least one visit a year, including 29% who make a purchase once or twice a year and 15% who make a purchase three to five times a year.¹
- Roughly four out of every ten Saskatoon residents (42%) say they would purchase items from a gift shop located at the Remai Art Gallery of Saskatchewan. These residents would like to see a variety of items in the gallery gift shop, including high quality craft products, art reproductions, art-related products aimed at children, handcrafted jewellery, art-related books, giftware (e.g. puzzles) and designer giftware and stationery.
- Among those who would visit a gift shop at the Remai Art Gallery, the largest percentage say they would visit once or twice a year (46%) or three to five times a year (35%). The summer and winter/Christmas seasons would be the most popular times to visit the gallery gift shop.

¹ Comparing respondent suggestions around visitation and purchasing at the Mendel gift shop to 2010 transaction sales data suggests that respondents overstate their purchasing. This is likely a combination of overestimating their visitation within the previous year (ie some visitation may have occurred longer than 12 months ago) and their perception of their frequency of purchasing something at the gift shop when they do visit (ie, purchasing may have occurred by a member of their group, but not necessarily by the respondents themselves).

- Among those who would visit a gift shop at the Remai Art Gallery, 32% think they would spend between \$50-\$99 on a typical visit to the gift shop, 30% think they would spend between \$25-\$49, and 10% think they would spend \$100 or more.

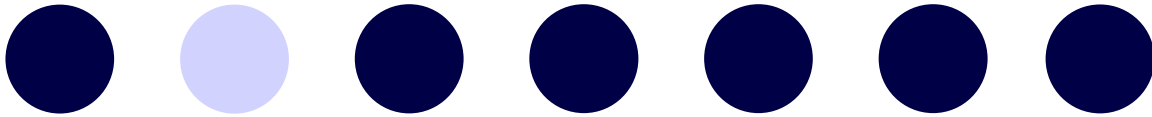
Programs

- Smaller percentages of Saskatoon residents are taking advantage of gallery programs. Close to a fifth say they or their children participate in School Art (18%) or school tours (17%), and 8% have participated in the Art for Life school program. Roughly a tenth have participated or had their children participate in guided tours (11%), Something on Sundays (10%) and Artist Talks (10%).
- Almost one quarter (24%) say will participate in programs offered at the Remai Art Gallery. Three out of ten (30%) residents say they would be willing to pay for an art class or workshop at the Remai Art Gallery. Of these, 31% would pay less than \$25 for a class, 14% would pay \$25-\$49, another 14% would pay \$50-\$99 and 9% would pay \$100 or more. A significant percentage (32%) are unsure how much they would be willing to pay, saying it would depend on the program.

Community Support

- The large majority (85%) of residents were at least slightly familiar with the Remai Art Gallery of Saskatchewan project before the survey, although only 9% describe themselves as *very familiar*.
- Roughly six out of ten (64%) residents agree that relocating the civic art gallery is good for Saskatoon.
- A significant percentage (56%) of residents are either unaware or only *slightly aware* of the cost sharing agreements in place to support construction of the Remai Art Gallery. After hearing more information, those who are unaware or less than *very aware* are again asked whether they think the gallery is good for Saskatoon: 55% agree.
- Residents who do not completely agree the gallery is good for Saskatoon and are less than *very aware* of cost sharing agreements are informed that funding was not available to expand the existing Mendel Art Gallery. After hearing this, they are asked if they now agree that relocating the gallery is good for the city. Few (2%) *completely agree*, 21% *agree* and 17% *moderately agree*. A significant percentage (26%) are *unsure*.
- The large majority (74%) of residents agree that our growing city needs a cultural facility of the calibre of the Remai Art Gallery of Saskatchewan, including 20% who *completely agree*.
- Eight out of ten (80%) residents agree that the gallery should be as financially self-sufficient as possible, almost seven out of 10 (68%) agree it will improve how our city is perceived and six out of 10 (61%) agree that relocating the gallery closer to downtown at River Landing will increase visitation.

- Roughly two out of ten (22%) Saskatoon residents do not think they have enough information about the Remai Art Gallery project, although most (78%) feel they do.



Methodology

Background

In 2006, Fast Consulting conducted a market assessment on potential options for strengthening the Mendel Art Gallery's financial self-sufficiency. The study explored various options for strengthening the financial performance of individual business units, and was directly tied to proposed renovations to the gallery in its current location.

The environment has since changed, with the new Remai Art Gallery of Saskatchewan offering benefits unforeseen in 2006. The purpose-built gallery will serve as a destination centre in the heart of River Landing. It will more than triple the space available for temporary and collection-related exhibitions, and will include a community gallery, studio classrooms, film and lecture theatre, meeting rooms, and spaces for receptions and other public events. There will be ample storage space for the growing permanent collection. As well, the building will meet rigorous modern gallery standards, making it possible to host national and international touring exhibitions previously unavailable to the city.

Project Scope

Given this, Fast Consulting and Creative Fire have teamed to provide a market assessment to assist in the development of the Remai Art Gallery's business plan. This includes:

- Verifying the level of support for the Remai Art Gallery of Saskatchewan project amongst Saskatoon residents, identifying values associated with the gallery as well as any potential concerns.
- Assessing residents' opinion on and support for a variety of revenue generating activities, including admissions, enhanced program offerings, facility rentals, food services and gift shop.
- Determining resident support for and participation in attendance and membership.

Survey Sample

The sample frame for the survey was constructed to obtain complete interviews with a random selection of Saskatoon adults. A total of 600 surveys were completed – 500 by telephone interview and 100 via online surveys.

The survey sample size of 600 Saskatoon adults lets us say with a 95% level of certainty that the overall results of the survey are within plus or minus 3.9% of what they would be if the entire adult population of the city was polled. The portion of the responses that was sourced

online via our Saskatoon panel (100), constitutes a non-probability sample to which margins of error are not applicable.

Surveying took place from November 17-28, 2011. Telephone interviews were conducted by our experienced team of interviewers using our in-house Computer Aided Interviewing (CATI) system. Surveys were done at times that were appropriate and convenient for respondents – between the hours of 5:00 p.m. and 9:00 p.m. on weekdays and between the hours of 10:00 a.m. and 4:00 p.m. on weekends.

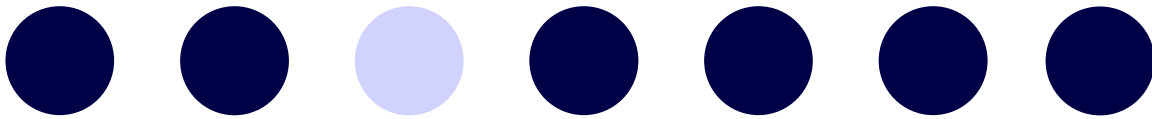
An invitation to complete the online survey was sent to a random sample of our community panel of potential respondents. These are respondents who have done a survey with Fast Consulting or who were previously recruited and qualified by our firm.

Quotas were managed by gender and age to ensure that the survey sample is reasonably representative of the adult population of Saskatoon. Data checking procedures were used at all times, and our firm conducted statistical analysis of the survey data using the industry standard SPSS computer program (Statistical Package for Social Sciences).

This report is best understood as an estimator of current perceptions and an indicator of patterns. The survey asks respondents to predict their visitation to the new Remai Art Gallery and whether they would pay admission to visit, and patronize food services if available, gift shop, facility rentals and programs. The results, however, should not be taken as a precise predictor of these future behaviours. The survey asks respondents to estimate their likelihood of visiting the Art Gallery as a result of various amenities, but not necessarily within a given time frame: ie likelihood of visiting within the next year, which makes annual projections approximations only. Caution should always be used in applying the estimates, especially among sub-sets of the population, where smaller sample sizes imply wider margins of error.

Privacy Policies

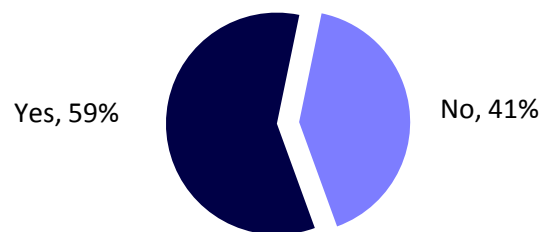
Fast Consulting protects personal and private information against such risks as loss, theft, unauthorized access, disclosure, copying, use, modification or destruction. Fast Consulting's consultants and employees with access to data and/or personal information are contractually required to respect the confidentiality of that information.



Survey Results

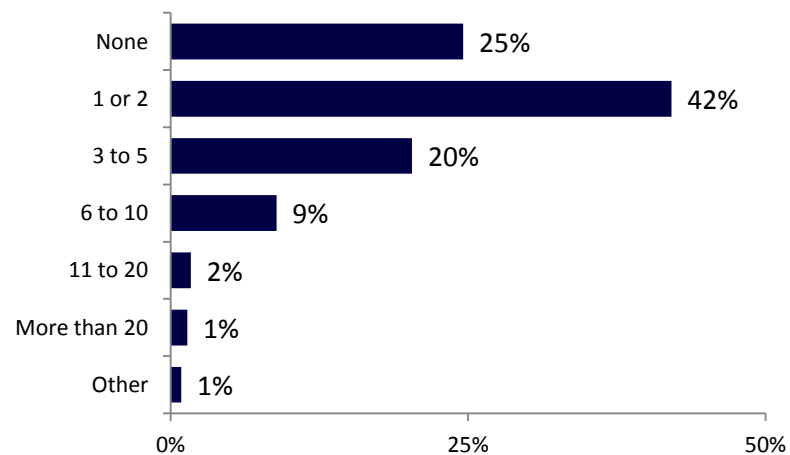
Visitation

Q. Do you visit the Mendel Art Gallery?



- Approximately six out of every 10 Saskatoon residents have visited the Mendel Art Gallery at some point.

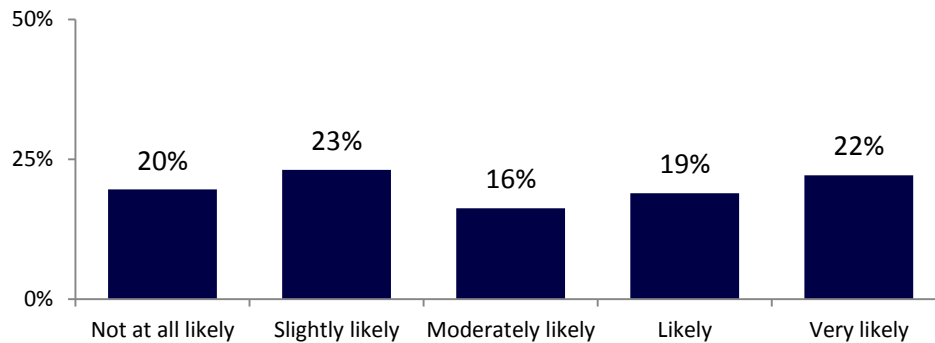
Q. How many visits have you made to the Mendel in the last year?



- Of those who visit the Mendel, 42% have visited once or twice in the last year, 20% have visited three to five times and 12% have visited six times or more.

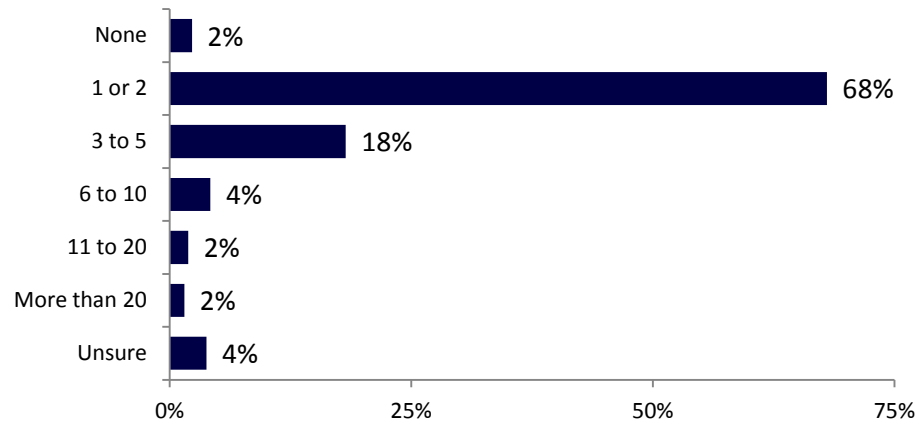
- 59% of residents say they have visited the Mendel at some point in the past and 75% of those residents say they have visited the Mendel in the last year. The adult population of Saskatoon is approximately 150,000, so $.59 \times .75 \times 150,000 = 66,375$ adult residents have visited the Mendel Art Gallery at least once in the previous 12 months; some visit multiple times. Mendel statistics measure visitation to the Gallery in 2010 at approximately 180,000.
- Although it seems reasonable that six of ten Saskatoon residents (59%) have visited the Gallery at some point over the years, visitation in the previous year may be overstated; some recall of visitation among participants may have been more than one year ago. Recall of multiple visits of 3 times or more in the previous year are likely relatively precise.

Q. *The move to the new location at River Landing will mean the Remai Art Gallery of Saskatchewan will expand from the Mendel's current size of 25,000 square feet to about 125,000 square feet. How likely are you to visit the gallery at its new location when it opens?*



- Eight out of 10 Saskatoon residents (80%) are likely to visit the Remai Art Gallery at some point when it opens at River Landing, including 22% who are *very likely* to visit.

Q. *How many visits do you think you will make to the gallery in a typical year after it opens? (Asked of respondents who are likely to visit the new location)*

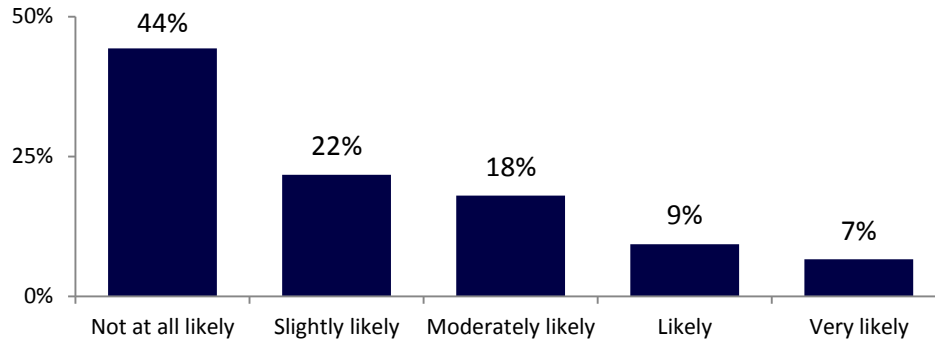


- Residents who suggest they are likely to visit the new location are asked how often they think they'll visit the Remai Art Gallery in a typical year. The majority (62%) say once or twice a year, another 18% say three to five times and 8% say six or more times.

Features

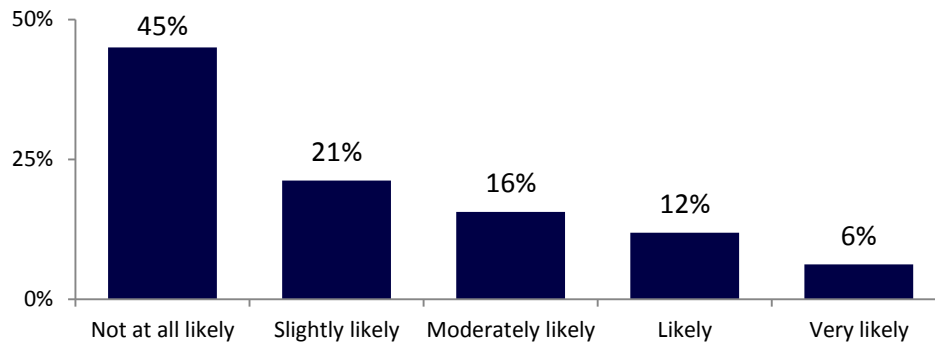
There will be new features at the Remai Art Gallery of Saskatchewan when it relocates to the expanded facility.

Q. *How likely is it that you would visit the gallery because it has a bistro style counter-service café?*



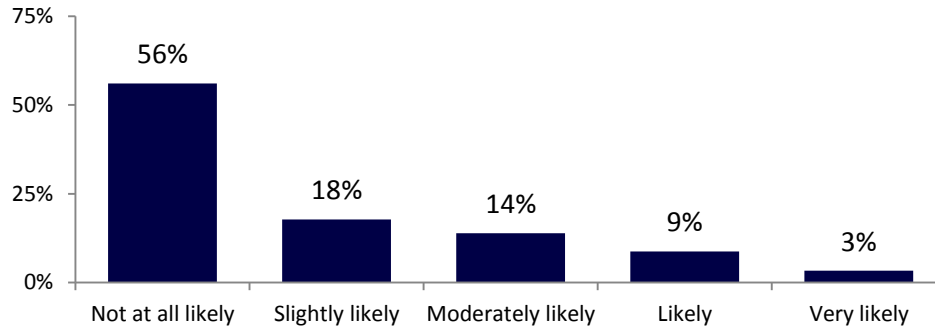
- A bistro style counter-service café would encourage more than half (56%) of residents to visit the gallery, including 16% who would be *likely to very likely* to visit.

Q. *How likely is it that you would visit the gallery because it has an expanded gift shop with more products?*



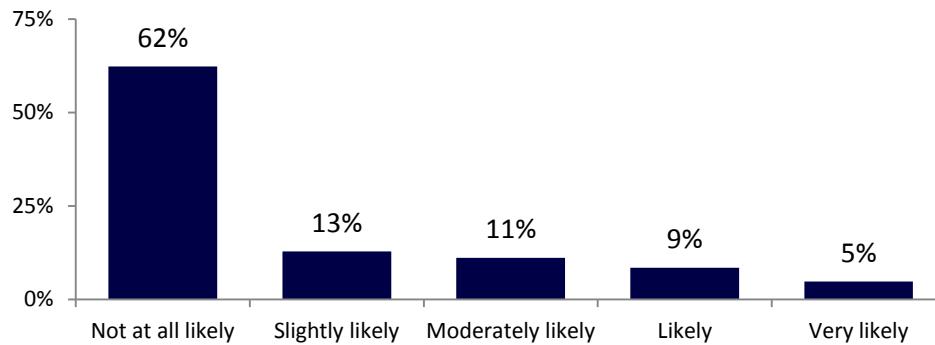
- Similarly, 55% say they would be likely to visit the gallery because of an expanded gift shop, including 18% who would be *likely to very likely* to visit.

Q. How likely is it that you would visit the gallery because it has a large meeting space for special events?



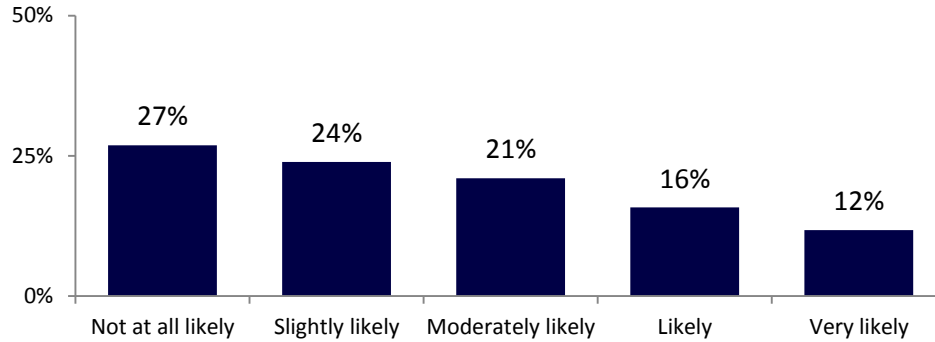
- Approximately 44% of residents would be likely to visit the gallery because of a large meeting space for special events, with 12% saying they would be *likely to very likely* to visit.

Q. How likely is it that you would visit the gallery because it has more art classes and art programs?



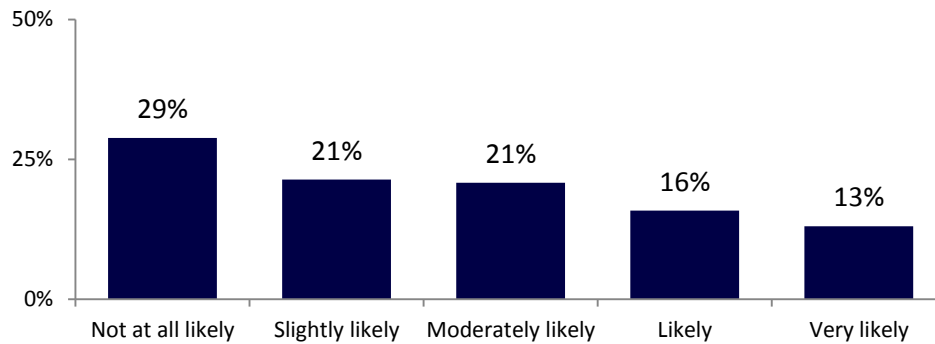
- More art classes and art programs prompt over a third (38%) to say they would likely visit the gallery, including 14% who would be *likely to very likely* to visit.

Q. How likely is it that you would visit the gallery because it has more exhibitions of the collection?



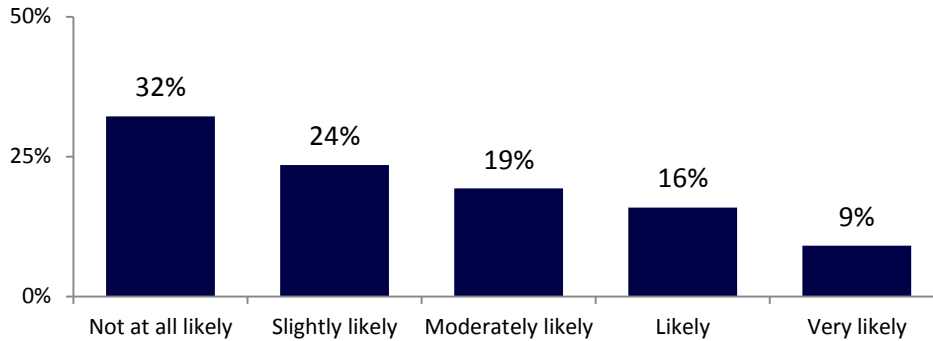
- Close to three quarters (73%) of residents say more exhibitions of the collection would make them likely to visit, with over a quarter (28%) saying this would make them *likely to very likely* to visit the gallery.

Q. How likely is it that you would visit the gallery because it has more touring exhibitions?



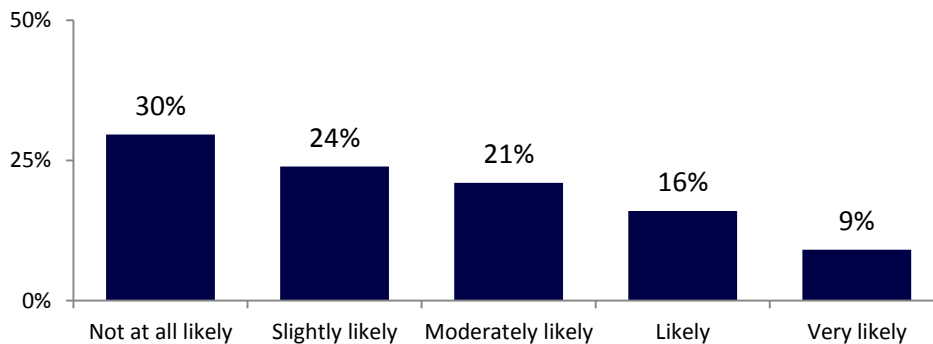
- More touring exhibitions would prompt 71% of residents to visit the gallery, with 29% saying they would be *likely to very likely* to visit.

Q. How likely is it that you would visit the gallery because it has a lecture theatre that can also host film screenings and small performances?



- More than two-thirds (68%) of residents would be likely to visit the gallery – including a quarter (25%) who would be *likely* to *very likely* to visit – because of a lecture theatre capable of hosting film screenings and small performances.

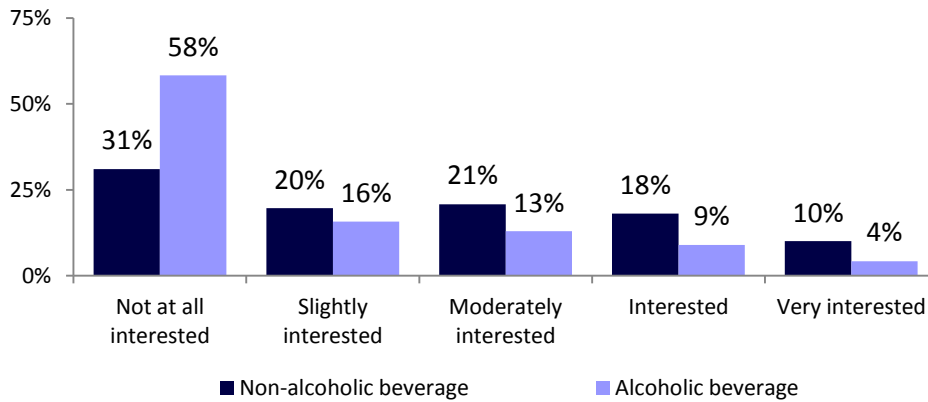
Q. How likely is it that you would visit the gallery because it has a community studio to exhibit the work of community groups and guilds, or host special events?



- A community studio would prompt 70% of residents to visit the gallery, including a quarter (25%) who would be *likely* to *very likely* to visit because of access to such a facility.

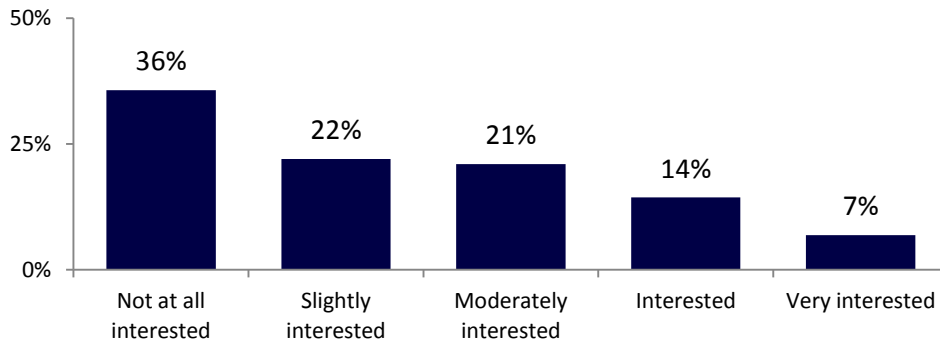
Food Services

Q. How interested would you be in purchasing a non-alcoholic or alcoholic beverage from the bistro style counter-service café at the gallery?



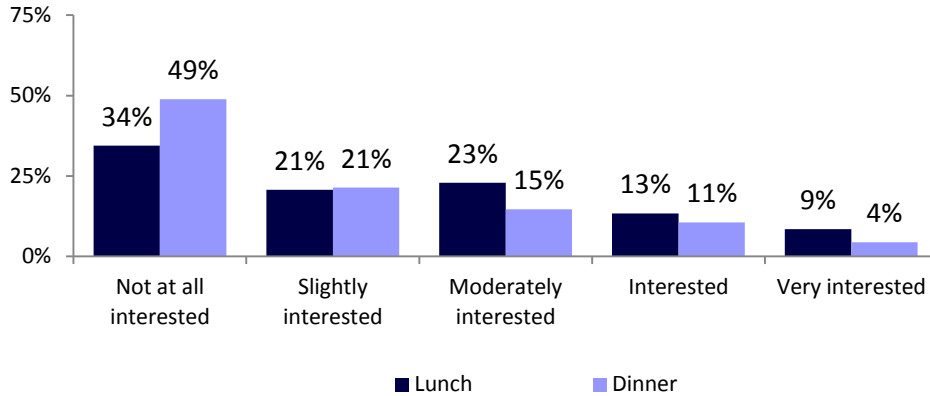
- The majority (69%) of residents would be interested in buying a non-alcoholic beverage at the gallery café, while 42% of residents would be interested in purchasing an alcoholic beverage.

Q. How interested would you be in purchasing snacks from the bistro style counter-service café at the gallery?



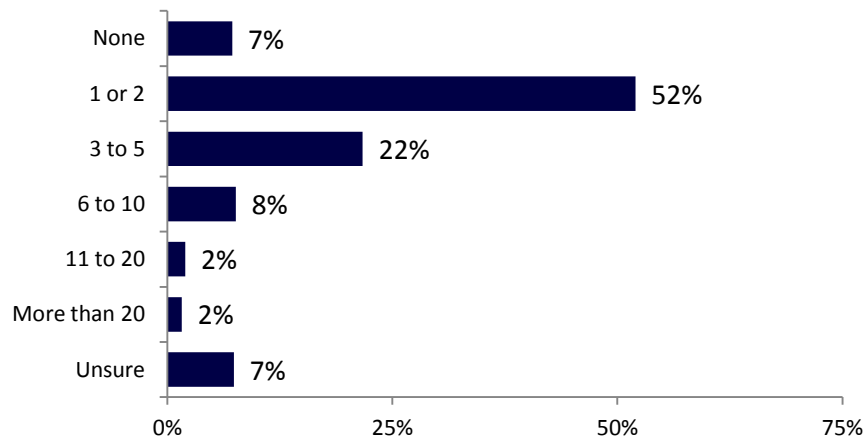
- The majority (64%) of residents would also be interested in buying snacks at the gallery café, including 21% who would be *interested* to *very interested* in buying snacks.

Q. *How interested would you be in purchasing lunch or dinner from the bistro style counter-service café at the gallery?*



- Two thirds (66%) of residents would be interested in buying lunch at the gallery café compared to 51% who would be interested in buying dinner at the café.

Q. *How many times a year do you think you would go to the bistro style counter-service café at the Remai Art Gallery of Saskatchewan?*

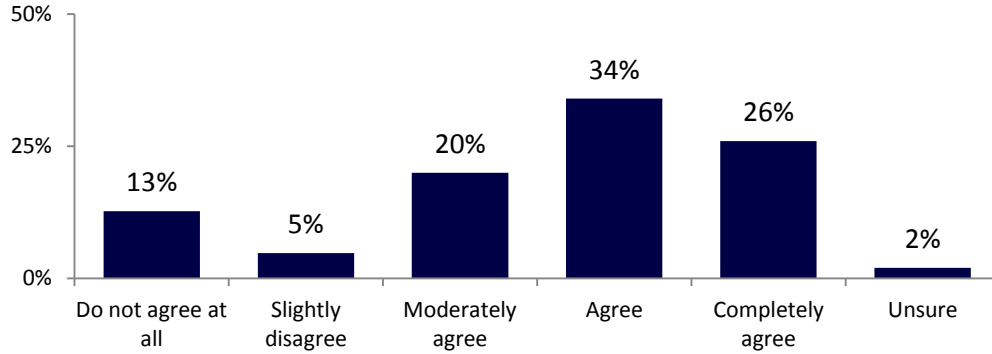


- Just over half (52%) of residents think they would visit the bistro style gallery café once or twice a year, another 22% think they would visit three to five times and 12% think they would visit six or more times a year.

Facility Rentals

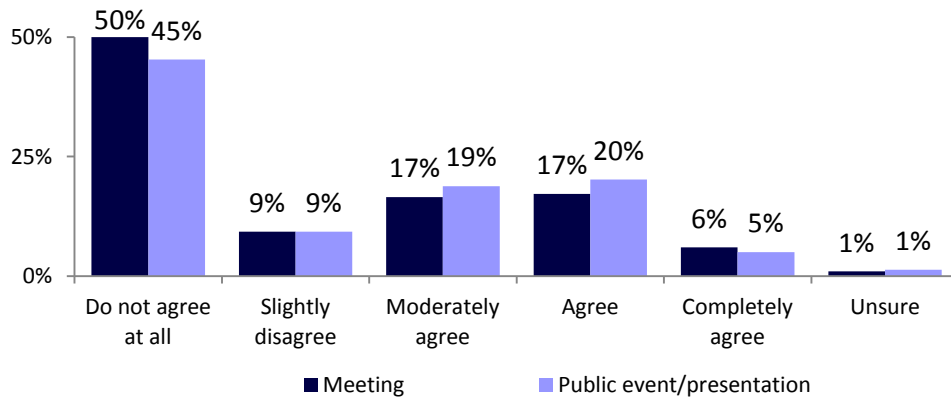
Like most public galleries and museums, the Remai Art Gallery of Saskatchewan will offer space that is available for booking special events like weddings and meeting space for community groups at reduced rates.

Q. Do you agree that a space at the gallery to hold special events and meetings is a good addition to Saskatoon?



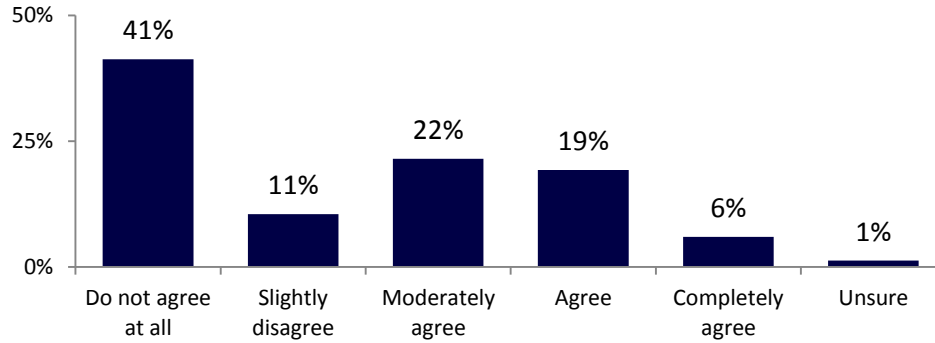
- The large majority (80%) of residents agree that space to hold special events and meetings at the gallery is a good thing for Saskatoon, including roughly a quarter (26%) who *completely agree*.

Q. Would you consider using the rental spaces at the gallery for a meeting or public event/presentation?



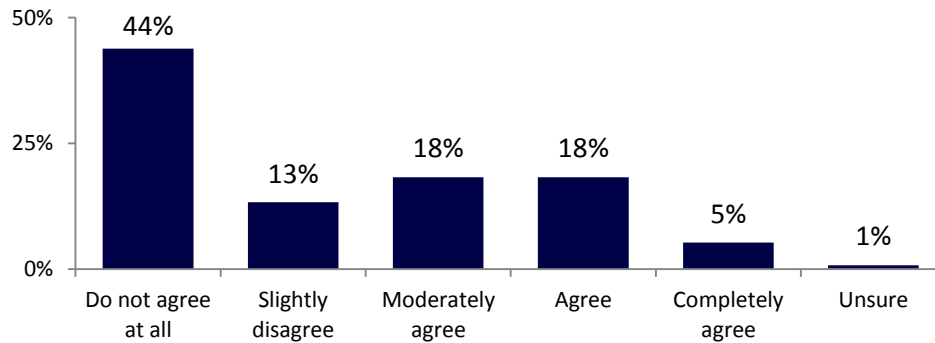
- Around 40% of residents agree that they would consider using rental space at the gallery for a public event/presentation (44%) or a meeting (40%).

Q. *Would you consider using the rental spaces at the gallery for a catered reception?*



- Almost half (47%) would consider using rental space at the gallery for a catered reception.

Q. *Would you consider using the rental spaces at the gallery for a catered lunch or dinner?*

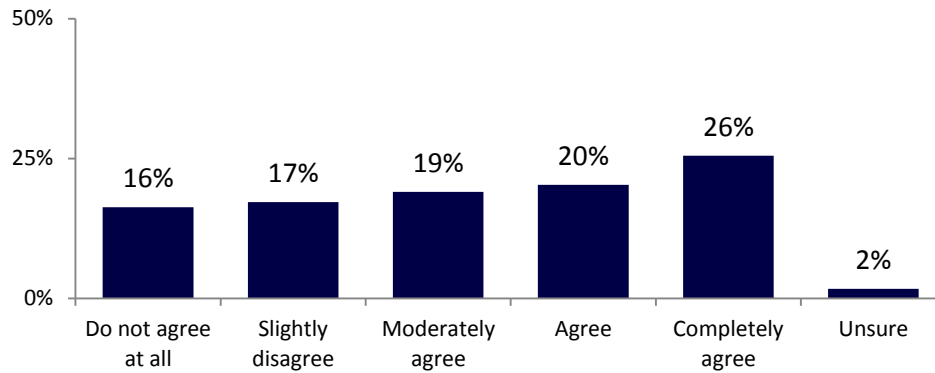


- Similarly, 41% of residents would consider using rental space at the gallery for a catered lunch or dinner.

Admissions

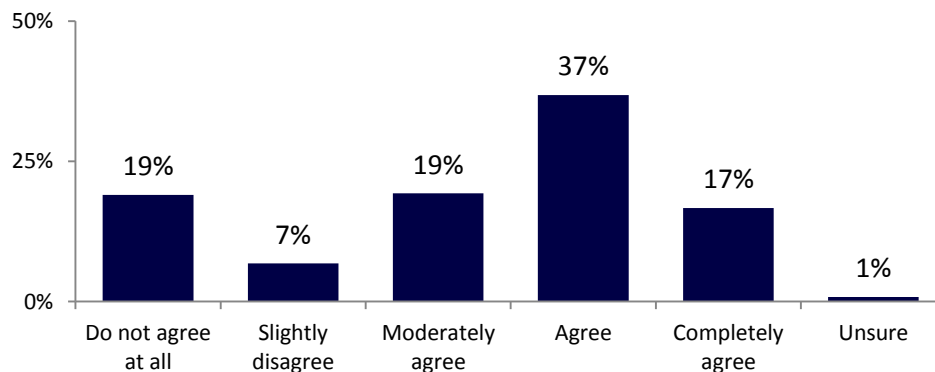
The Mendel Art Gallery at present offers free admission to the public. With the move to River Landing, a much larger exhibition space and significantly enhanced program offerings, an admission charge for special or significant exhibitions may be necessary. (Note that the new larger gallery at River Landing will be known as the Remai Art Gallery of Saskatchewan in honour of the major donor.)

Q. *Do you agree the gallery should continue to offer free admission to the public for all exhibitions at all times?*



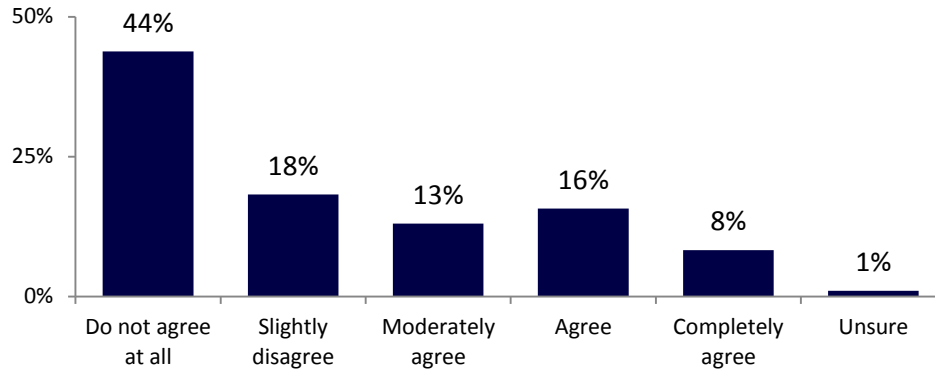
- Roughly two-thirds (65%) of residents agree that the Remai Art Gallery of Saskatchewan should continue to offer free admission for all exhibitions at all times, compared to a third (33%) who disagree.

Q. *Do you agree the gallery should continue with free admission to the permanent collection, but charge admission to special or significant exhibitions?*



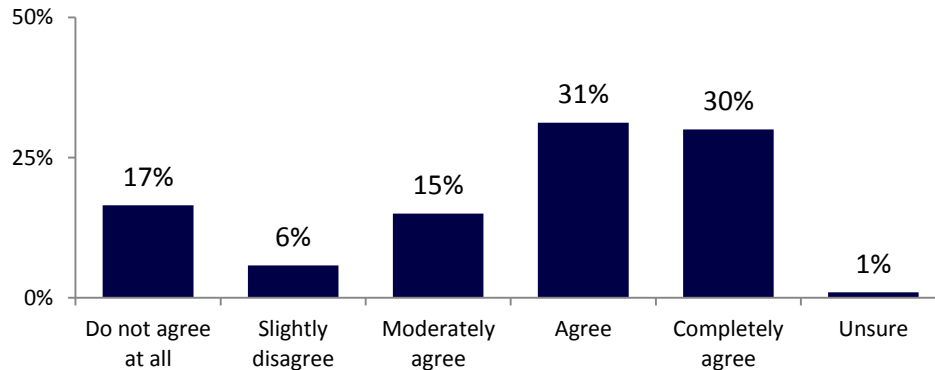
- The majority (73%) agree the gallery should continue with free admission to the permanent collection but charge admission to special or significant exhibitions.

Q. *Do you agree that there should be a standard, affordable admission fee at all times, for the permanent collection as well as special exhibits?*



- Just over a third (37%) agree the gallery should charge a standard, affordable admission for all exhibitions at all times.

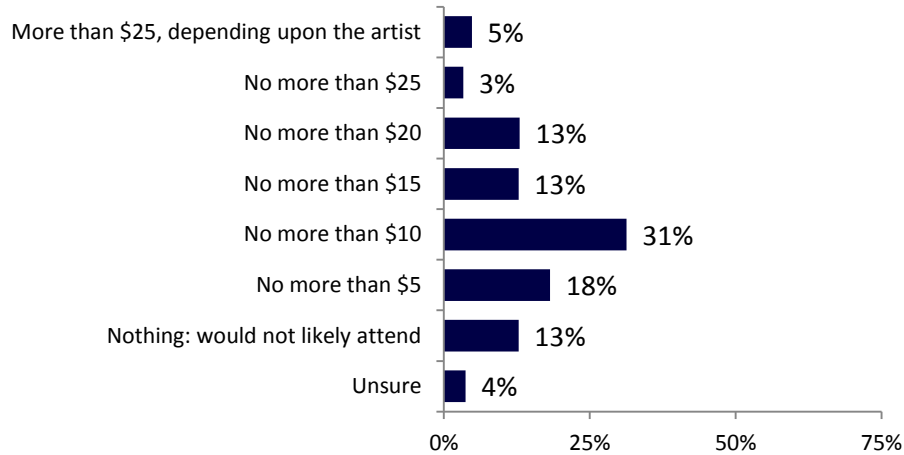
Q. *If there were an admission fee for special exhibitions, do you agree there should be one time during the week when free admission is available to the public?*



- If the gallery does charge admission for special exhibitions, the large majority (76%) of residents agree that free admission should be made available at one period during the week, including 30% who *completely* agree. This is the strongest level of agreement recorded in the series of questions on admission fees.

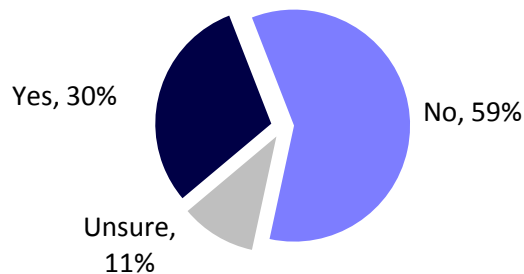
Even if access to the permanent collection is free, there may be occasions when a major special exhibition of an artist(s) of international renown (e.g., Picasso) or national stature (e.g., Group of Seven) needs to charge a special admission fee in order to cover the costs of bringing the exhibition to Saskatoon.

Q. *What is the maximum you would be willing to pay for an individual adult admission to the gallery in such a scenario (assuming the artist was of great interest to you)?*



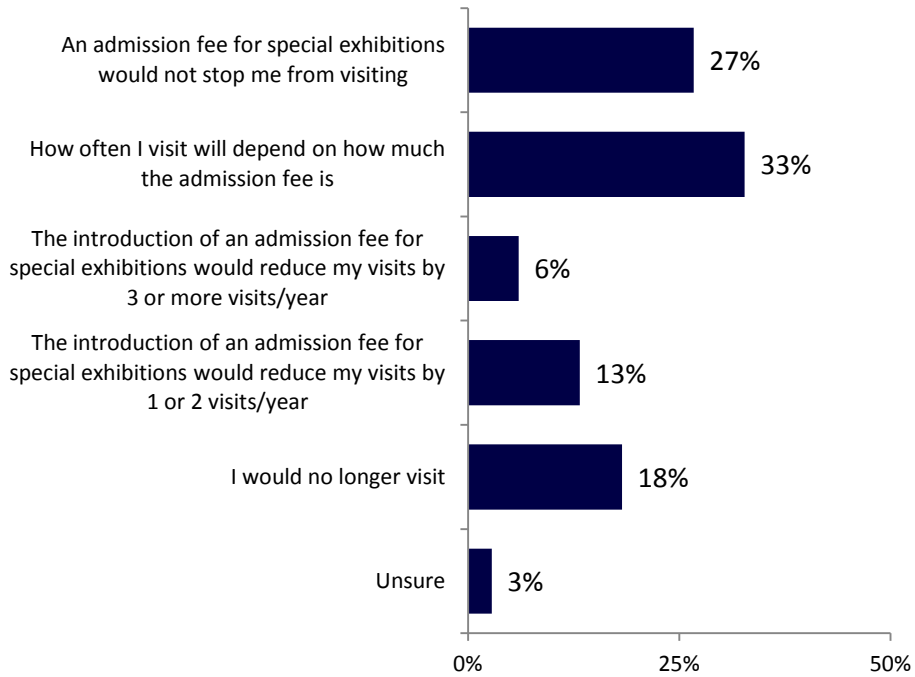
- Even assuming the artist was of great interest to them, few residents (5%) are willing to pay more than \$25 for an individual adult admission to a special exhibition. Close to a third (31%) are willing to pay up to \$10 for admission, while 13% are willing to pay up to \$15 and 13% up to \$20.

Q. *Would you be willing to pay \$50 for a yearly membership to the Remai Art Gallery if it gave you free admission for as many visits as you want and offered reduced rates for special exhibitions?*



- Three out of ten residents (30%) would be willing to pay \$50 for a yearly membership that gave them free admission plus reduced rates on special exhibitions at the Remai Art Gallery.

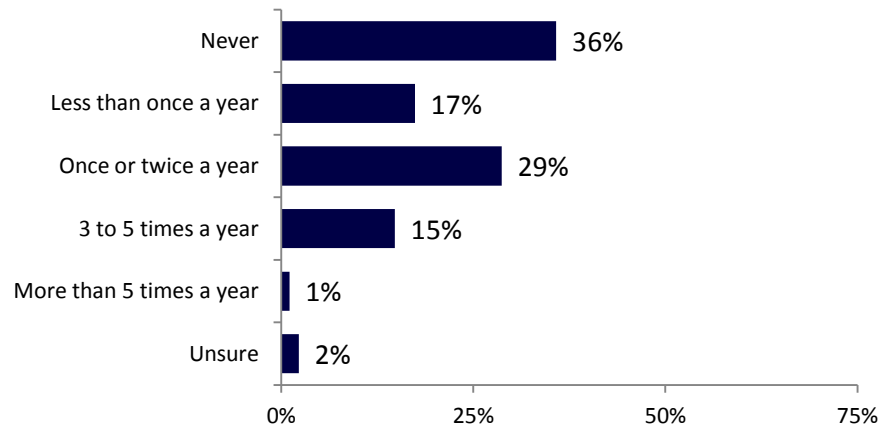
Q. Which statement describes how often you would visit the gallery if it were to introduce an admission fee for special exhibitions?



- While a third (33%) say the frequency of their visits to the gallery will depend on how much the admission costs, just over a quarter (27%) say an admission fee for special exhibitions would not stop them from visiting the gallery.
- Another 6% say an admission fee for special exhibitions would reduce their visits by three or more visits a year, 13% say it would reduce their visits by 1 or 2 visits a year and 18% say they would no longer visit.

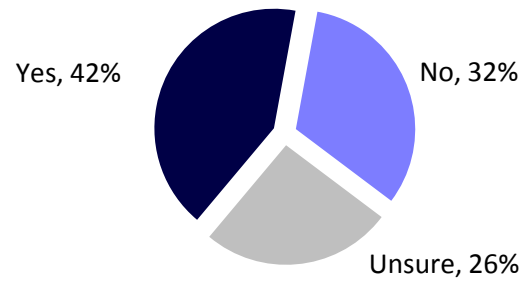
Gift Shop

Q. *How often do you make purchases in the gift shop when you visit the Mendel Art Gallery? (Asked of respondents who have visited the Mendel)*



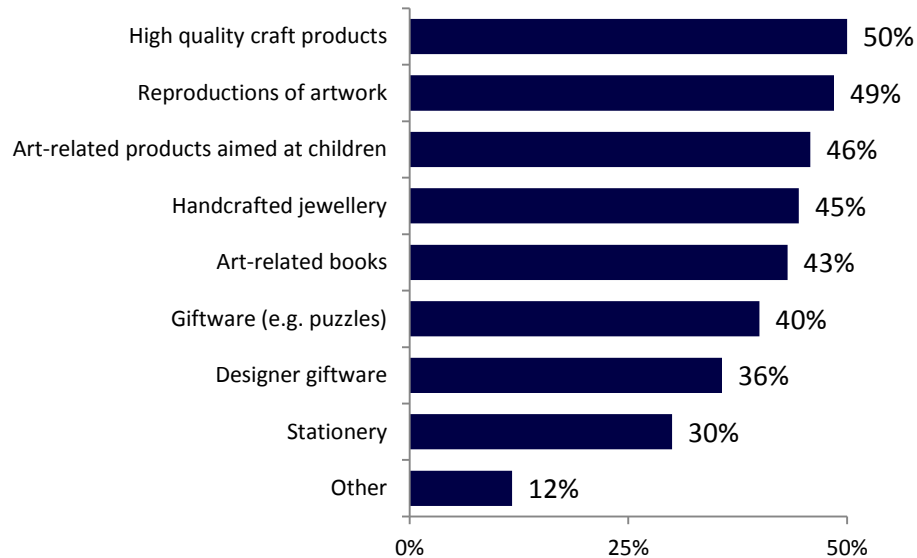
- Approximately 45% of Mendel visitors make a purchase in the gift shop on at least one visit a year, including 29% who make a purchase once or twice a year and 15% who make a purchase three to five times a year.
- Comparing respondent suggestions around visitation and purchasing at the Mendel gift shop to 2010 transaction sales data suggests that respondents overstate their purchasing. This is likely a combination of overestimating their visitation within the previous year (ie some visitation may have occurred longer than 12 months ago) and their frequency of purchasing something at the gift shop when they do visit (ie, purchasing may have occurred by a member of their group, but not necessarily by the respondents themselves).

Q. *Would you purchase items from a gift shop located at the Remai Art Gallery of Saskatchewan?*



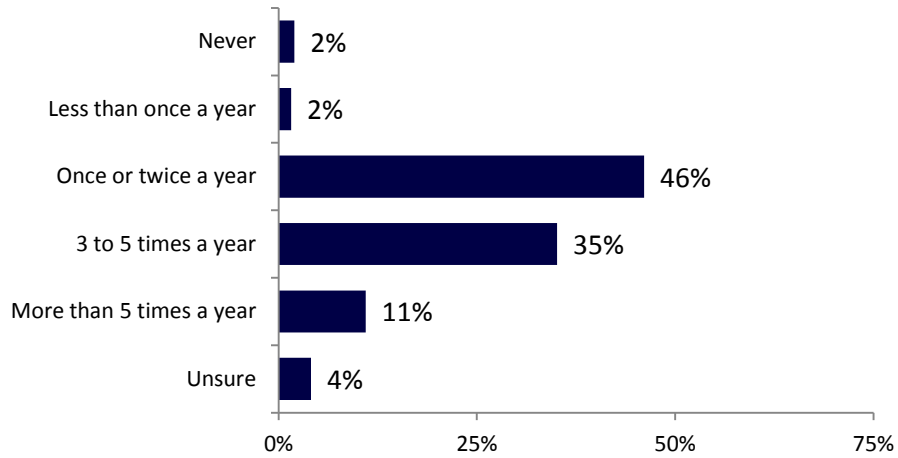
- Roughly four out of every ten residents (42%) would purchase items from a gift shop located at the Remai Art Gallery of Saskatchewan.

Q. *What types of things would you like to see the gift shop sell?*



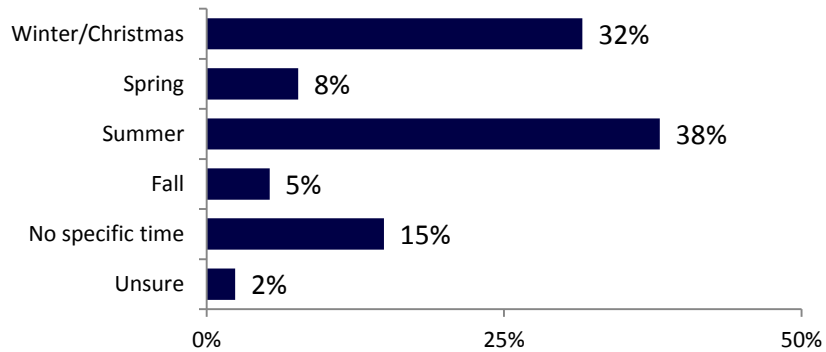
- Residents who would purchase items in a gift shop at the Remai Art Gallery would like to see a variety of items in the shop. Roughly half would like high quality craft products (50%), art reproductions (49%), art-related products aimed at children (46%) and handcrafted jewellery (45%).
- A significant percentage would also like to see art-related books (43%), giftware (e.g. puzzles - 40%), designer giftware (36%) and stationery (30%).
- 'Other' suggestions included local artwork and local products/souvenirs (6%).

Q. *How many times a year would you visit the Remai Art Gallery of Saskatchewan gift shop?*



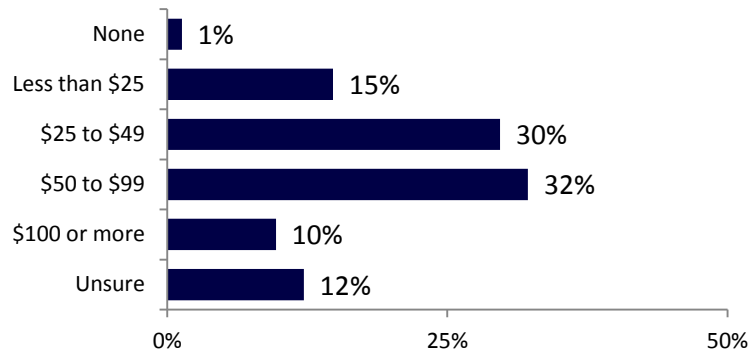
- Among those who would visit a gift shop at the Remai Art Gallery, the largest percentage say they would visit once or twice a year (46%) or three to five times a year (35%).

Q. *What time of year would you visit the most?*



- The summer and winter/Christmas seasons would be the most popular seasons for visiting the gift shop, with 38% saying they would visit most often in the summer and 32% saying they would visit most often in the winter.

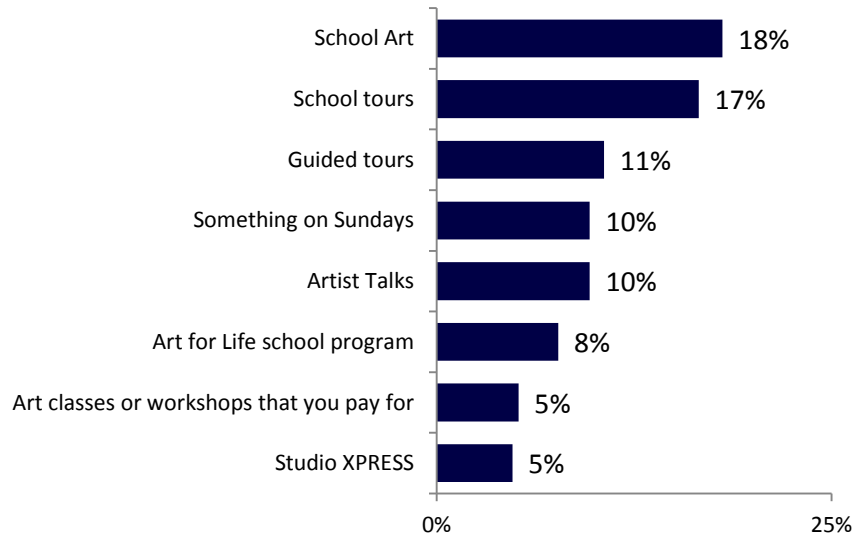
Q. *Approximately how much do you think you would spend on a typical visit to the gift shop?*



- Among those who would visit a gift shop at the Remai Art Gallery, 32% think they would spend between \$50 and \$99 on a typical visit to the gift shop, 30% think they would spend between \$25 and \$49, and 10% think they would spend \$100 or more.

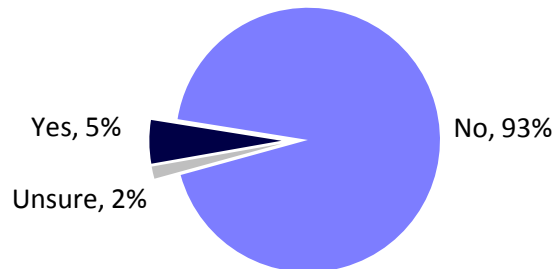
Programs

Q. In the last two years, have you or your children participated in any of the following programs at the Mendel Art Gallery?



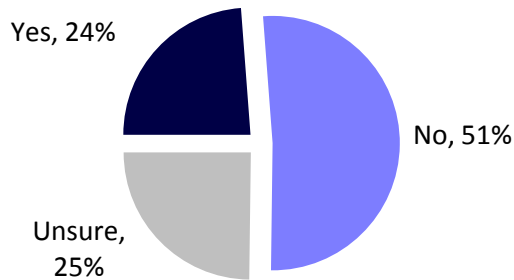
- Close to a fifth of residents have participated or had their children participate in School Art (18%) or school tours (17%) at the Mendel, and 8% have participated in the Art for Life school program.
- Roughly a tenth have participated or had their children participate in guided tours (11%), Something on Sundays (10%) and Artist Talks (10%).

Q. In the last two years, have you or your children participated in any other programs at the Mendel Art Gallery?



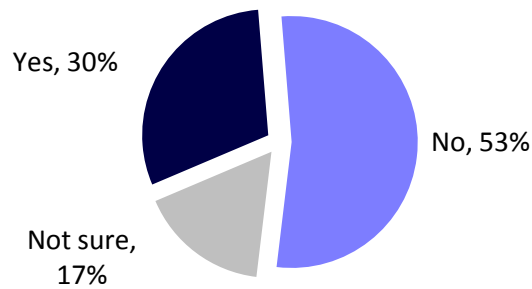
- Few residents (5%) have participated or had their children participate in other programs at the Mendel over the last few years.

Q. *Do you think you or your children would participate in these programs at the Remai Art Gallery of Saskatchewan?*



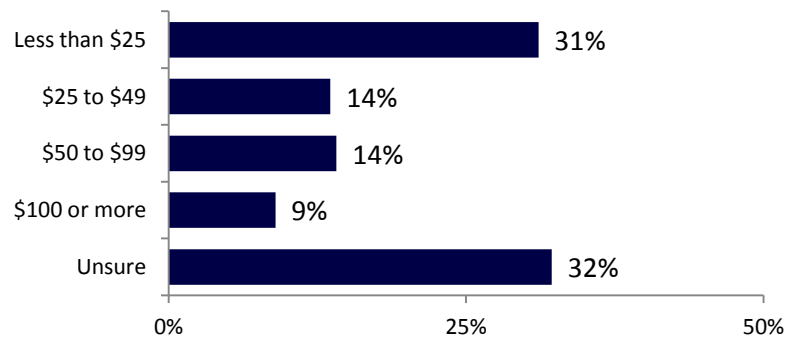
- Roughly a quarter (24%) of residents think they, or their children, would participate in programs at the Remai Art Gallery – an increase over current participation rates.

Q. *Would you be willing to pay for an art class or workshop at the Remai Art Gallery?*



- Close to a third (30%) of residents say they would be willing to pay for an art class or workshop at the Remai Art Gallery.

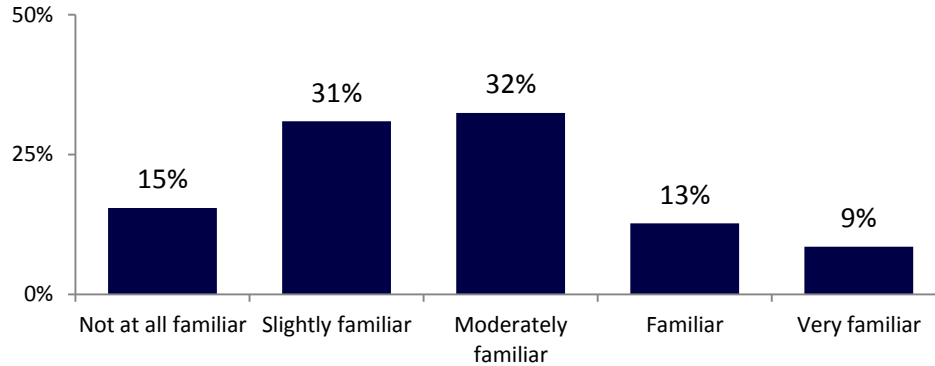
Q. *Approximately how much would you be willing to pay for one class?*



- Close to a third (31%) of residents would pay less than \$25 for a class, while 14% would pay between \$25 and \$49 or \$50 and \$99, and 9% \$100 or more. Close to a third (32%) are unsure.

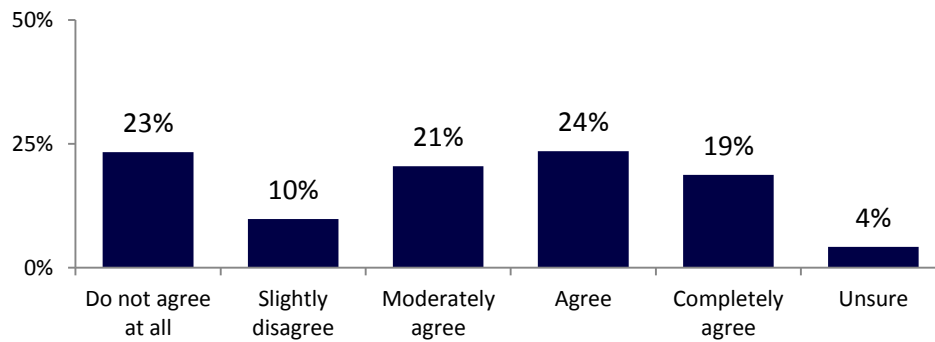
Community Support

Q. Before this survey, how familiar were you with the Remai Art Gallery of Saskatchewan project?



- The large majority (85%) of residents were at least slightly familiar with the Remai Art Gallery of Saskatchewan project before the survey, with 9% describing themselves as *very familiar*.

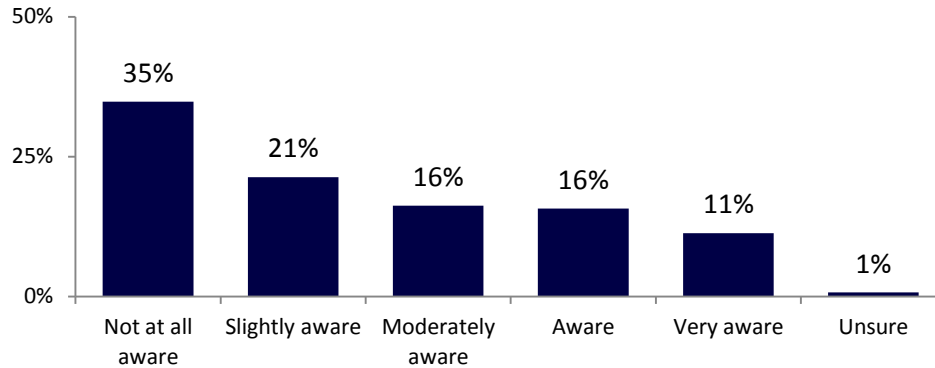
Q. Do you agree that relocating the civic gallery from the Mendel building to the expanded Remai Art Gallery of Saskatchewan is good for Saskatoon?



* Exceeds 100% due to rounding

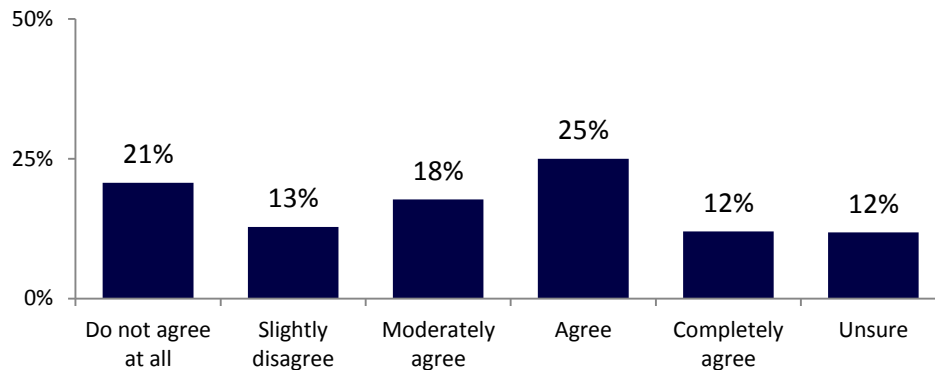
- Close to two-thirds (64%) of residents agree that relocating the civic art gallery is good for Saskatoon, including roughly a fifth (19%) who *completely agree*.

Q. Are you aware of the government cost sharing agreements in place to support the capital development (or construction) of the Remai Art Gallery of Saskatchewan?



- A significant percentage (35%) of residents are not aware of the cost sharing agreements in place to support construction of the Remai Art Gallery, and another 21% are only *slightly aware* of the agreements.

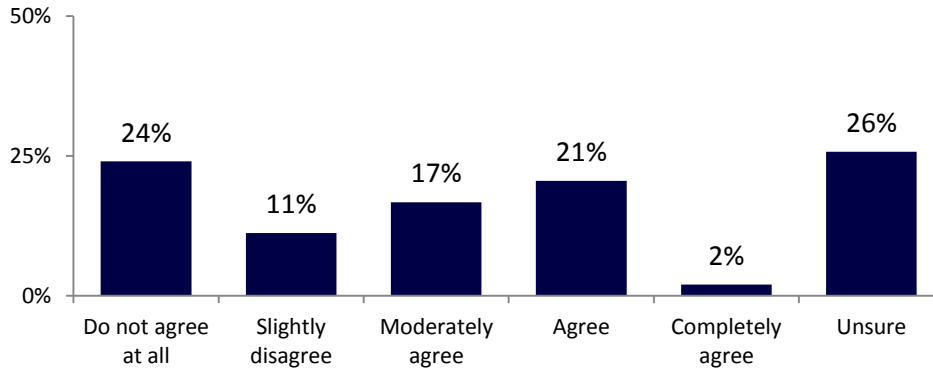
Q. The Remai Art Gallery will cost \$71M to build, of which the City of Saskatoon will contribute \$21M after federal, provincial and private sector funding and support. Knowing this, do you agree that the Remai Art Gallery of Saskatchewan is good for Saskatoon? (Asked of respondents not 'very aware' of cost sharing agreements)



* Exceeds 100% due to rounding

- Residents who are unaware or less than *very aware* of cost sharing agreements are given more information and asked whether they now agree the gallery is good for Saskatoon. Approximately 12% *completely agree*, 25% *agree* and 18% *moderately agree*.

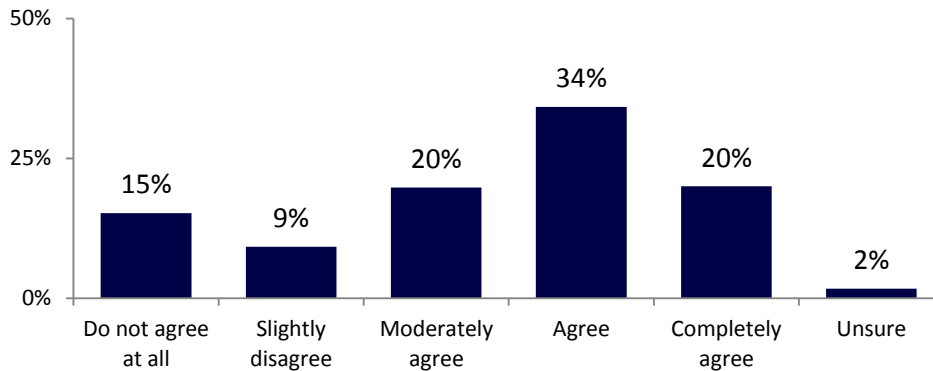
Q. *Federal funding and private sector support was not available for expanding the existing Mendel Art Gallery. Knowing this, do you agree that relocating the civic gallery from the Mendel building to the Remai Art Gallery of Saskatchewan is good for Saskatoon? (Asked of respondents not 'very aware' of cost sharing agreements and not 'completely agree' the gallery is good for Saskatoon)*



* Exceeds 100% due to rounding

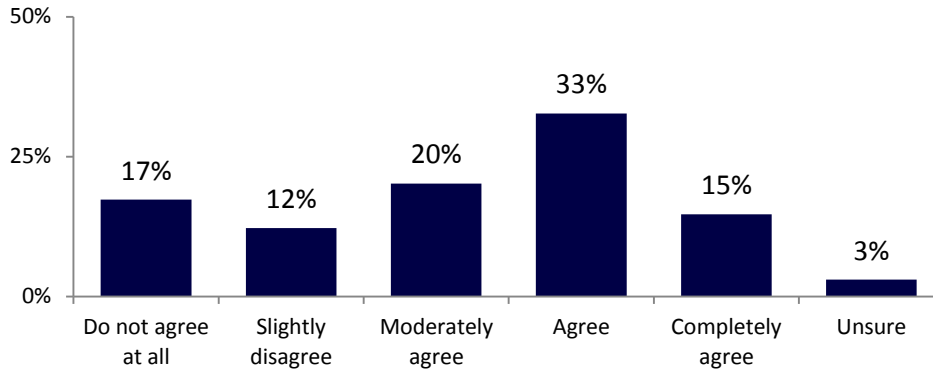
- Residents who do not completely agree the gallery is good for Saskatoon and are less than *very aware* of cost sharing agreements are informed that funding was not available to expand the existing Mendel Art Gallery, then asked if they now agree that relocating the gallery is good for the city. Few (2%) *completely agree*, 21% *agree* and 17% *moderately agree*. A significant percentage (26%) are *unsure*.

Q. *Do you agree that a growing city like Saskatoon needs a cultural facility of the calibre of the Remai Art Gallery of Saskatchewan for residents and businesses?*



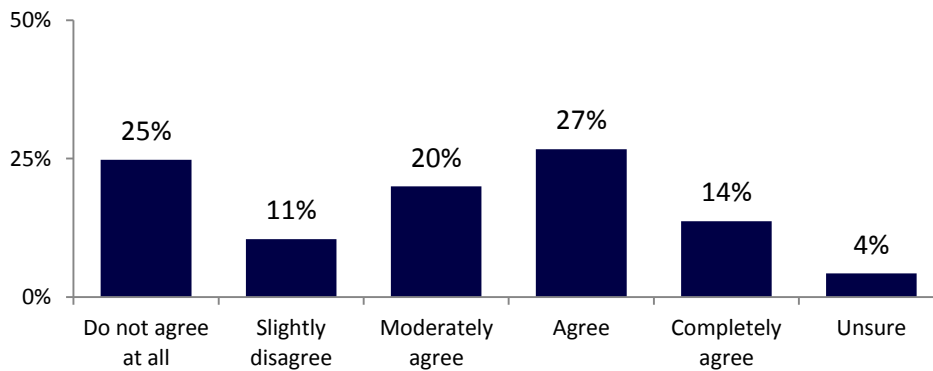
- The large majority (74%) of residents agree that our growing city needs a cultural facility of the calibre of the Remai Art Gallery of Saskatchewan, including 20% who *completely agree* and 34% who *agree*.

Q. Do you agree with that the Remai Art Gallery of Saskatchewan will improve how our city is perceived by others in Canada?



- Almost 7 out of 10 residents (68%) agree that the Remai Art Gallery of Saskatchewan will improve how our city is perceived, including 15% who *completely agree* and 53% who *agree/moderately agree*.

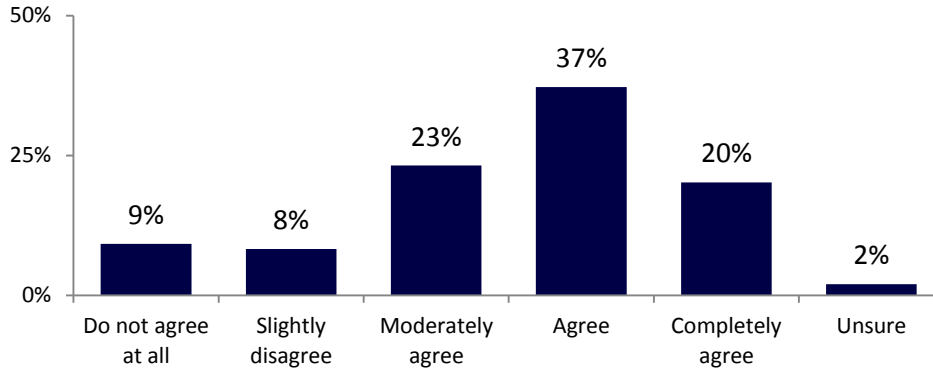
Q. Do you agree that relocating the art gallery closer to downtown at River Landing will increase gallery visitation?



* Exceeds 100% due to rounding

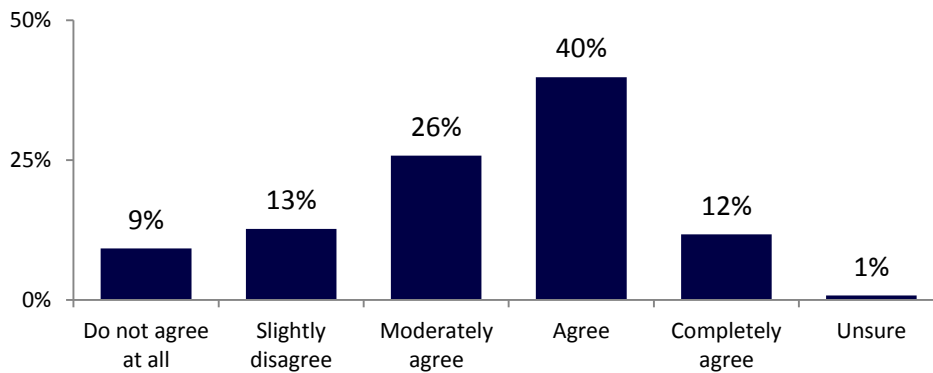
- Roughly six out of 10 residents (61%) agree that relocating the gallery closer to downtown at River Landing will increase visitation, including 14% who *completely agree* and 47% who *agree/moderately agree*.

Q. Do you agree that the gallery should be as financially self-sufficient as possible by generating as much self-generated revenue as it can from admissions, food service leases and rentals?

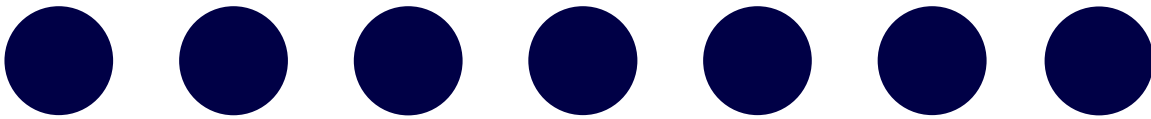


- Almost all (80%) residents agree that the gallery should be as financially self-sufficient as possible. One fifth (20%) completely agree and 60% agree/moderately agree.

Q. Do you agree that you have enough information about the Remai Art Gallery of Saskatchewan project?



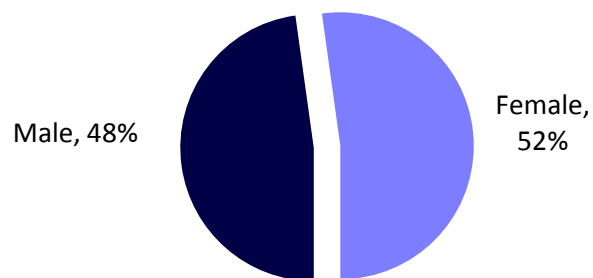
- Most people (78%) agree that they have enough information about the Remai Art Gallery project, but 22% disagree.



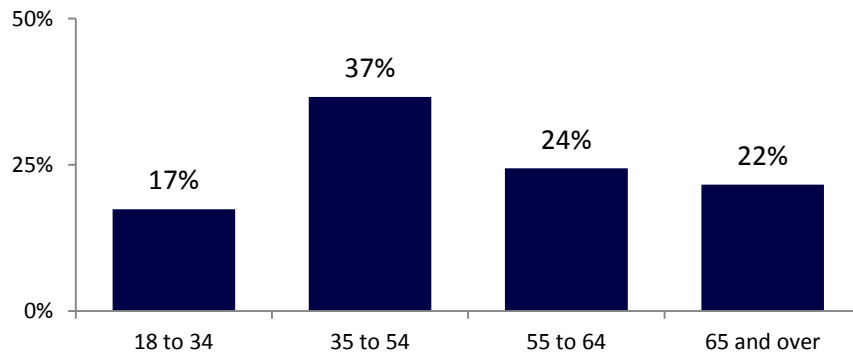
Appendices

Demographics

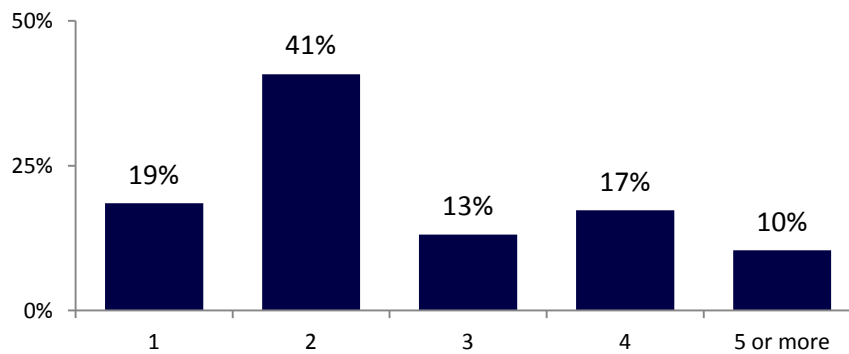
Gender



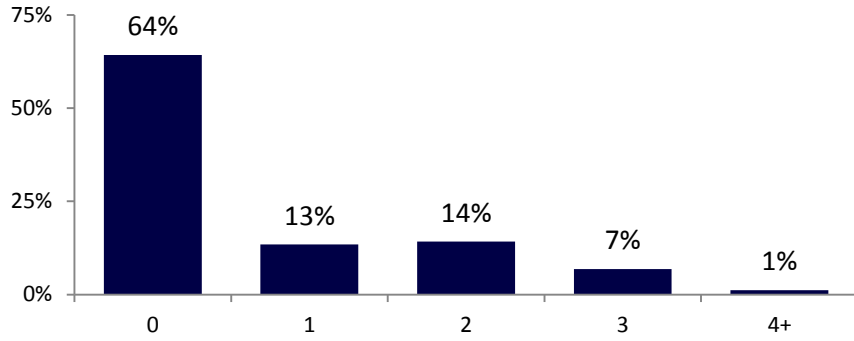
Age



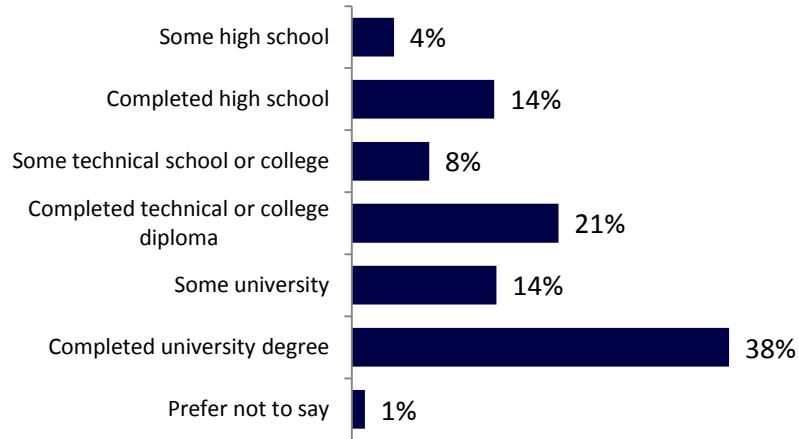
Household Size (number of people living in household)



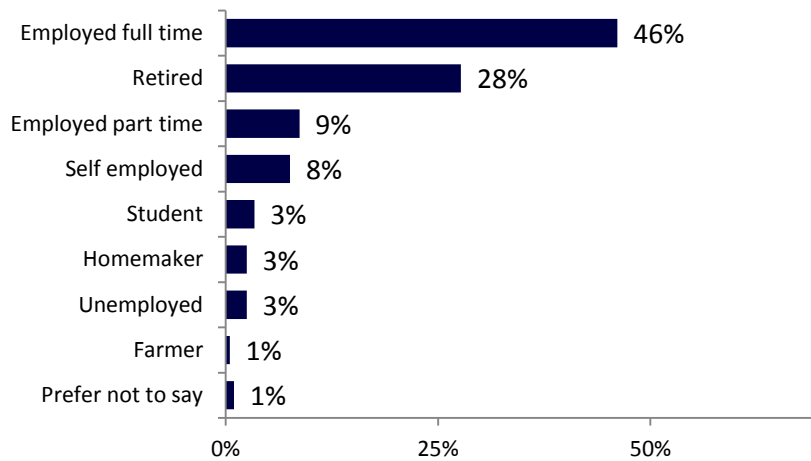
Children in Household (number of children under 18 living in household)



Education



Employment



Survey Instrument

Hello, my name is _____ and I'm calling from Fast Consulting, a professional opinion research firm. Tonight, we're conducting a short survey to ask people about their opinions regarding the Mendel Art Gallery and new Remai Art Gallery of Saskatchewan. It takes about 8 to 10 minutes to complete and responses are completely confidential.

Visitation

1. Do you visit the Mendel Art Gallery?
 - 1) Yes
 - 2) No
 - 3) Unsure

2. [If yes] How many visits have you made to the Mendel in the last year? [RECORD RESPONSE]
 - 1) None
 - 2) 1 or 2
 - 3) 3 to 5
 - 4) 6 to 10
 - 5) 11 to 20
 - 6) More than 20
 - 7) Unsure

3. The move to the new location at River Landing will mean the Remai Art Gallery of Saskatchewan will expand from the Mendel's current size of 25,000 square feet to about 125,000 square feet. How likely is it that you will visit the gallery at its new location at River Landing when it opens?
 - 1) Not at all likely
 - 2) Slightly likely
 - 3) Moderately likely
 - 4) Likely
 - 5) Very Likely
 - 6) Unsure

4. [If yes] How many visits do you think you will make to the gallery in a typical year after it opens?
 - 1) None
 - 2) 1 or 2
 - 3) 3 to 5
 - 4) 6 to 10
 - 5) 11 to 20
 - 6) More than 20
 - 7) Unsure/dk

5. There will be new features at the Remai Art Gallery of Saskatchewan when it relocates to its expanded facility. How likely is it that you would visit the gallery because it has...
 - a. A bistro style counter-service café
 - b. An expanded gift shop with more products
 - c. A large meeting space for special events
 - d. More art classes and art programs
 - e. More exhibitions of the collection
 - f. More touring exhibitions
 - g. A lecture theatre that can also host film screenings and small performances

h. A community studio to exhibit the work of community groups and guilds, or host special events

- 1) Not at all likely
- 2) Slightly likely
- 3) Moderately likely
- 4) Likely
- 5) Very Likely
- 6) Unsure

Food Services

6. How interested would you be in purchasing the following from the bistro style counter-service café at the gallery?

- a. Non-alcoholic beverage
- b. Snack
- c. Lunch
- d. Dinner
- e. Alcoholic beverage

- 1) Not at all interested
- 2) Slightly interested
- 3) Moderately interested
- 4) Interested
- 5) Very interested
- 6) Unsure

7. How many times a year do you think you would go to the bistro style counter-service café at the Remai Art Gallery of Saskatchewan.

- 1) None
- 2) 1 or 2
- 3) 3 to 5
- 4) 6 to 10
- 5) 11 to 20
- 6) More than 20
- 7) Unsure/dk

Facility Rentals

8. Like most public galleries and museums, the Remai Art Gallery of Saskatchewan will offer space that is available for booking special events like weddings, and meeting space for community groups at reduced rates. Do you agree or disagree that...

- a. A space at the Gallery to hold special events and meetings is a good addition to Saskatoon;
- b. You would consider using the rental spaces at the Gallery for a meeting;
- c. You would consider using the rental spaces at the gallery for a public event/presentation;
- d. You would consider using the rental spaces at the gallery for a catered reception;
- e. You would consider using the rental spaces at the gallery for a catered lunch or dinner.

- 1) Do not at all agree
- 2) Slightly disagree
- 3) Moderately agree
- 4) Agree

- 5) Completely agree
- 6) Unsure

Admissions

As you likely already know, the Mendel Art Gallery at present offers free admission to the public. With the move to River Landing, a much larger exhibition space and significantly enhanced program offerings, an admission charge for special or significant exhibitions may be necessary. (Note that the new larger gallery at River Landing will be known as the **Remai Art Gallery of Saskatchewan** in honour of the major donor.)

9. Do you agree or disagree that...
- a. The gallery should continue to offer free admission to the public for all exhibitions at all times.
 - b. The gallery should continue with free admission to the permanent collection, but charge an admission fee to special or significant exhibitions.
 - c. There should be a standard and affordable admission fee at all times, for the permanent collection as well as special exhibits.
 - d. If there were an admission fee for special exhibitions, there should be one period of time during the week (e.g. Wednesdays) where free admission is made available to the public.

- 1) Do not at all agree
- 2) Slightly disagree
- 3) Moderately agree
- 4) Agree
- 5) Completely agree
- 6) Unsure

10. Even if access to the permanent collection exhibits is free, there may be occasions when a major special exhibition of an artist of international renown (e.g. Picasso) or national stature (e.g. Group of Seven exhibit) needs to charge a special admission fee in order to cover costs of bringing the exhibition to Saskatoon. What is the **maximum** amount you would be willing to pay for an individual adult admission to the Gallery under such a scenario (assuming the artist was of great interest to you)? [READ ALL]

- a.
- b. Nothing: would not likely attend
- c. No more than \$5
- d. No more than \$10
- e. No more than \$15
- f. No more than \$20
- g. No more than \$25
- h. More than \$25, depending upon the artist

11. Would you be willing to pay \$50 for a yearly membership to the Remai Art Gallery if it enabled you to have free admission for as many visits as you would want and reduced rates for special exhibitions?

- 1) Yes
- 2) No
- 3) Unsure

12. Which statement describes how often you would visit the gallery if it were to introduce an admission fee for special exhibitions? [READ ALL]

- a. An admission fee for special exhibitions would not stop me from visiting the gallery.
- b. How often I visit will depend on how much the admission fee is.
- c. The introduction of an admission fee for special exhibitions would reduce my visits by 3 or more visits per year.
- d. The introduction of an admission fee for special exhibitions would reduce my visits by 1 or 2 visits per year.
- e. I would no longer visit.

Gift Shop

13. [IF VISIT MENDEL – Q1-Q2] How often do you make purchases at the gift shop when you visit the Mendel Art Gallery?

- 1) Never
- 2) Less than once a year
- 3) 1 or 2 a year
- 4) 3 to 5 times a year
- 5) More than 5 times a year
- 6) Unsure

14. Would you purchase items from a gift shop located at the Remai Art Gallery of Saskatchewan?

- 1) Yes
- 2) No
- 3) Unsure

15. What types of things would you like to see the gift shop sell? [READ ALL]

- a. Stationery
- b. High quality craft products
- c. Handcrafted jewellery
- d. Designer giftware (e.g. Georg Jensen)
- e. Art-related books
- f. Art-related products aimed at children
- g. Giftware (e.g. puzzles)
- h. Reproductions of artwork
- i. Other (please specify)?

16. How many times a year would you visit the Remai Art Gallery of Saskatchewan gift shop?

- 1) Never
- 2) Less than once a year
- 3) 1 or 2 a year
- 4) 3 to 5 times a year
- 5) More than 5 times a year
- 6) Unsure

16b. What time of year would you visit the most?

- 1) Summer
- 2) Winter/Christmas
- 3) Spring
- 4) Fall
- 5) Year-round
- 6) No specific time/other
- 7) Unsure

17. Approximately how much do you think you would spend on a typical visit to the gift shop?
- None
 - Less than \$25
 - \$25 to \$49
 - \$50 to \$99
 - \$100 or more
 - Other
 - Unsure

Programs

18. In the last 2 years, have you or your children participated in any of the following programs at the Mendel Art Gallery?
- Something on Sundays
 - Studio XPRESS
 - Art classes or workshops that you pay for
 - Art for Life school program
 - School tours
 - Guided tours
 - Artist Talks
 - School Art
 - Other (please specify)
19. Do you think you or your children would participate in these programs at the Remai Art Gallery of Saskatchewan?
- 1) Yes
 - 2) No
 - 3) Unsure
20. Would you be willing to pay for an art class or workshop at the Remai Art Gallery?
- Yes - approximately how much would you be willing to pay for one class?
 - No
 - Not sure

Community Support

21. Before this survey, how familiar were you with the Remai Art Gallery of Saskatchewan project?
- 1) Not at all familiar
 - 2) Slightly familiar
 - 3) Moderately familiar
 - 4) Familiar
 - 5) Very familiar
 - 6) Unsure
22. Do you agree or disagree that relocating the civic gallery from the Mendel building to the expanded Remai Art Gallery of Saskatchewan is good for Saskatoon?
- 1) Do not at all agree
 - 2) Slightly disagree
 - 3) Moderately agree
 - 4) Agree
 - 5) Completely agree

- 6) Unsure
23. Are you aware of the government cost sharing agreements that are in place to support the capital development (or construction) of the Remai Art Gallery of Saskatchewan? [Very to not at all]
- 1) Not at all aware
 - 2) Slightly aware
 - 3) Moderately aware
 - 4) Aware
 - 5) Very aware
 - 6) Unsure
24. [If not *strongly aware* to Q23] The Remai Art Gallery will cost \$71M to build, of which the City of Saskatoon will contribute \$21M after federal, provincial and private sector funding and support. Knowing this do you agree or disagree that the Remai Art Gallery of Saskatchewan is good for Saskatoon?
- 1) Do not at all agree
 - 2) Slightly disagree
 - 3) Moderately agree
 - 4) Agree
 - 5) Completely agree
 - 6) Unsure
25. [If not *strongly agree* to Q23 and Q24] Federal funding and private sector support was not available for expanding the existing Mendel Art Gallery. Knowing this do you agree or disagree that relocating the civic gallery from the Mendel building to the Remai Art Gallery of Saskatchewan is good for Saskatoon?
- 1) Do not at all agree
 - 2) Slightly disagree
 - 3) Moderately agree
 - 4) Agree
 - 5) Completely agree
 - 6) Unsure
26. Do you agree or disagree with the following statements?
- a. A growing city like Saskatoon needs a cultural facility of the caliber of the Remai Art Gallery of Saskatchewan for residents and businesses.
 - b. The Remai Art Gallery of Saskatchewan will improve how our city is perceived by others in Canada.
 - c. Relocating the art gallery closer to downtown at River Landing will increase visitation at the gallery.
 - f. The gallery should be as financially self-sufficient as possible by generating as much self-generated revenue as it can from admissions, food service leases, and rentals.
 - g. I have enough information about the Remai Art Gallery of Saskatchewan project.
- 1) Do not at all agree
 - 2) Slightly disagree
 - 3) Moderately agree
 - 4) Agree
 - 5) Completely agree
 - 6) Unsure

27. What concerns, if any, do you have about the new Remai Art Gallery of Saskatchewan? [OPEN
END]

28. Would do you like most, or what are you most looking forward to, about the new art gallery in
Saskatoon?

Demographics

We have a few remaining questions left to help classify your responses. Please be assured your answers
will remain confidential.

D-1. Including yourself, how many people live in your household?

- 1) One
- 2) Two
- 3) Three
- 4) Four
- 5) Five or more
- 6) Prefer not to say

D-2. How many children under the age of 18 live in your household?

- 1) One
- 2) Two
- 3) Three
- 4) Four or more
- 5) Prefer not to say

D-3. Please select the category in which your age falls:

- 1) 18 to 34
- 2) 35 to 54
- 3) 55 to 64
- 4) 65 and older
- 5) Prefer not to say

D-4. What is your highest level of education?

- 1) Some high school
- 2) Completed high school
- 3) Some technical school or college
- 4) Completed technical or college diploma
- 5) Some university
- 6) Completed university degree
- 7) Prefer not to say

D-5. Which of the following describes your current employment situation?

- 1) Employed full time
- 2) Employed part time
- 3) Self employed
- 4) Unemployed
- 5) Farmer
- 6) Homemaker
- 7) Retired
- 8) Student
- 9) Prefer not to say

This is the end of our survey interview. We'd like to thank you very much for your time and your opinions. They are important and appreciated.