

# TOURISM IN TORONTO

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## A MARKET ANALYSIS



PUBLISHED JUNE 2010

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## KEY FACTS 2009


- 9.63 million overnight visitors<sup>1</sup>
- All visitors spent \$3.9 billion<sup>1</sup>
- 65,000 jobs generated by visitor spending in Toronto<sup>3</sup>
- Top international markets were<sup>1</sup>

U.S.	2,010,000
UK	183,900
Germany	70,900
France	62,100
China	58,300
- Occupancy was 60.8% and ADR \$124.<sup>8</sup>
- Toronto remained 10<sup>th</sup> in occupancy and 8<sup>th</sup> in ADR among 28 North American destinations.<sup>7</sup>

# INTRODUCTION

Toronto welcomes 10 million overnight visitors, or over 22million visitors including same day trips, from more than 200 countries a year, enjoying the attractions, restaurants, festivals and meeting facilities in our region<sup>1</sup>. The tourism industry is integral to the region's economic development, with almost \$4 billion spent by visitors on accommodations, food and drink, entertainment and retail. There are approximately 154,000 people employed in Toronto's accommodation and food service sectors<sup>2</sup> with visitor spending supporting approximately 65,000 jobs.<sup>3</sup> Tourism is also a key stimulator for the cultural development of the city, with recent renovations at some of the major cultural institutions, new and revitalized festivals and events relying not only on local attendance but visitors also, adding to the breadth and quality of experiences available to all in the region.

The first section of this document provides Tourism Toronto's estimates for the core tourism numbers of 2009 with visitor numbers and visitor spending for domestic, U.S. and overseas visitors. Final numbers will be released by Statistics Canada towards the end of the year.

The second part of this report offers a more detailed breakdown of visitor behaviour by origin that looks at activities that visitors participate in, perceptions of Toronto as a destination and what aspects of the region interest potential visitors. The sources for this section include visitor numbers provided by Statistics Canada for 2008, the Travel Intentions Study conducted in February 2010, and the Tourism Toronto visitor survey conducted in partnership with Ryerson University and the GTAA. Information that is sourced from the Tourism Toronto Visitor Survey is referenced by this symbol . For more information on these resources please see the notes at the end of the report.

Finally, hotel performance is presented, looking at the monthly performance of Toronto hotels and comparisons with other North American cities.

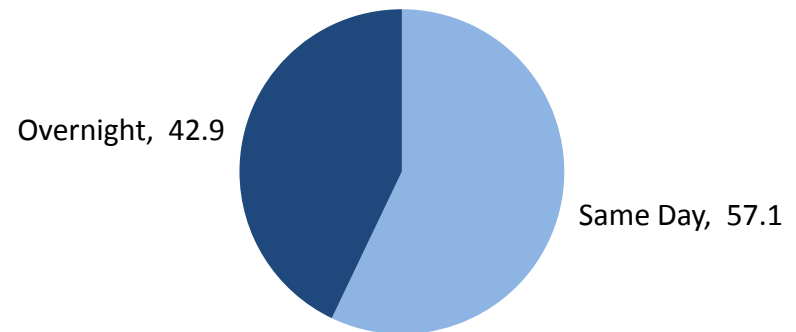
Remember, if you are a member of Tourism Toronto you can contact the Tourism Toronto team with further research enquires at [tgriffin@torcvb.com](mailto:tgriffin@torcvb.com).

## 2009 VISITORS

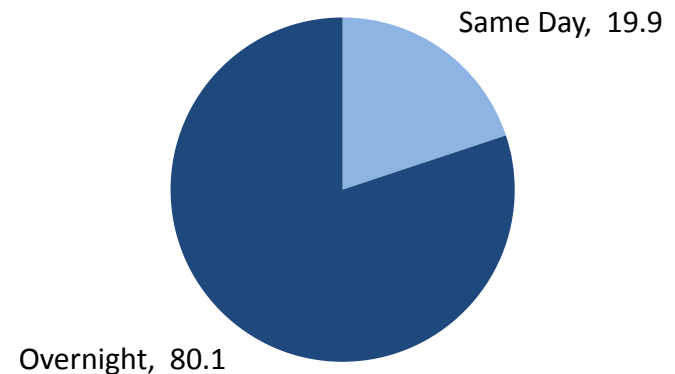
It is estimated that Toronto played host to 22.4 million visitors who spent \$3.9 billion in the region in 2009. Of these around 41% stayed overnight, but accounted for 77% of all spending. U.S. and overseas same-day visitors made up 18% of the total international visitors, but only 2% of the spend. Unless it is specifically stated this report will only talk about overnight visitors to the Toronto region.<sup>1</sup>

	Visitors in millions	Spend in billions
Same Day	12.82	\$ 0.78
Overnight	9.63	\$ 3.14
Total	22.45	\$ 3.92

**Visitors as %**



**Spending as %**



## 2009 OVERNIGHT VISITORS BY ORIGIN

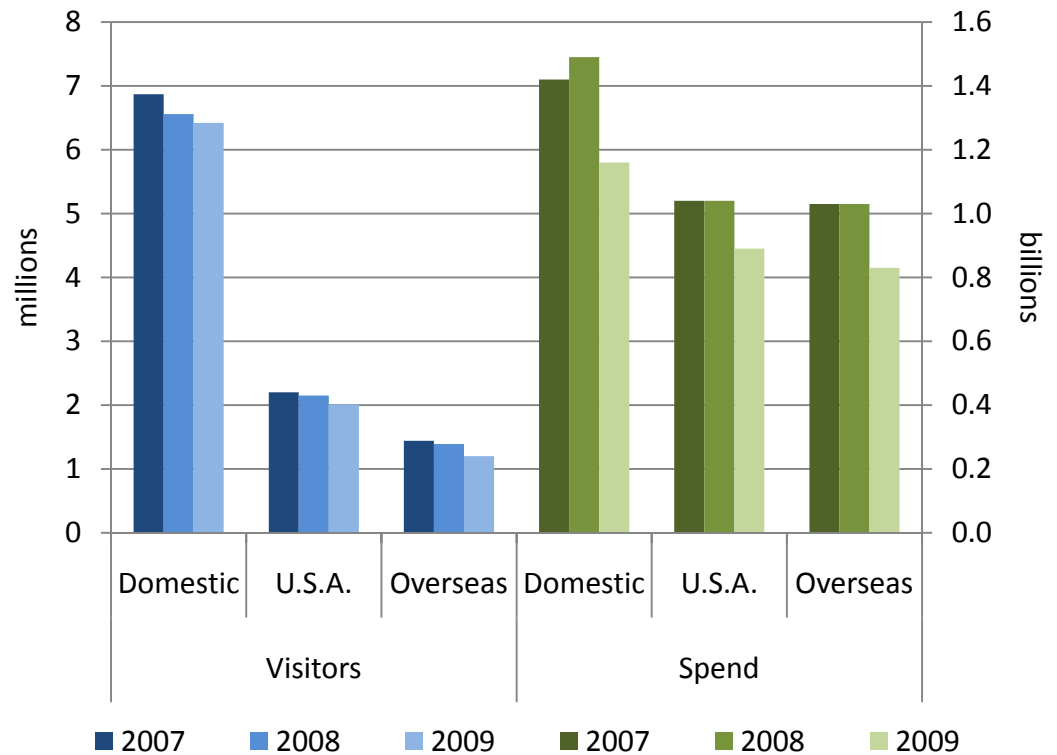
In 2009 there were an estimated 9.63 million overnight visitors to Toronto, spending \$3.14 billion in the region. 2009 was a difficult year for the tourism industry in Toronto and beyond. Not only did fewer people travel, but they travelled closer to home. The decline in overall overnight visits to Toronto was 4.6%, with the most significant declines from those who travel furthest to get here. Overall visitor spend was also down, partly due to the drop in hotel rates.<sup>1</sup>

Overnight Visitors to Toronto in millions

	2007 <sup>4</sup>	2008 <sup>4</sup>	2009 <sup>1</sup>	% Change
Domestic	6.87	6.56	6.42	-2.2
U.S.A.	2.20	2.15	2.01	-6.3
Overseas	1.44	1.39	1.20	-13.6
Total	10.51	10.10	9.63	-4.6

Overnight Visitor Spend in Toronto in billions

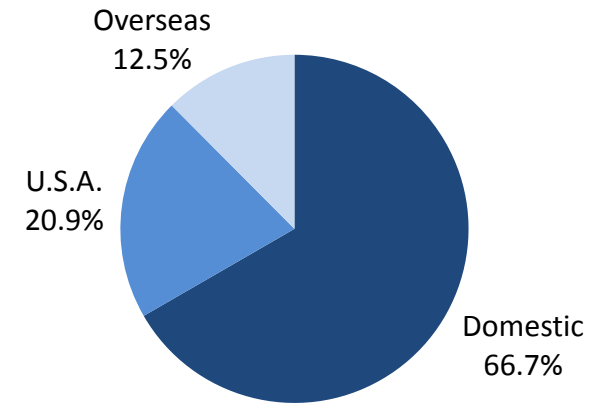
	2007 <sup>4</sup>	2008 <sup>4</sup>	2009 <sup>1</sup>	% Change
Domestic	\$ 1.42	\$ 1.49	\$ 1.16	-22.2
U.S.A.	\$ 1.04	\$ 1.04	\$ 0.89	-14.6
Overseas	\$ 1.03	\$ 1.03	\$ 0.83	-19.1
Total	\$ 3.50	\$ 3.56	\$ 2.88	-19.1



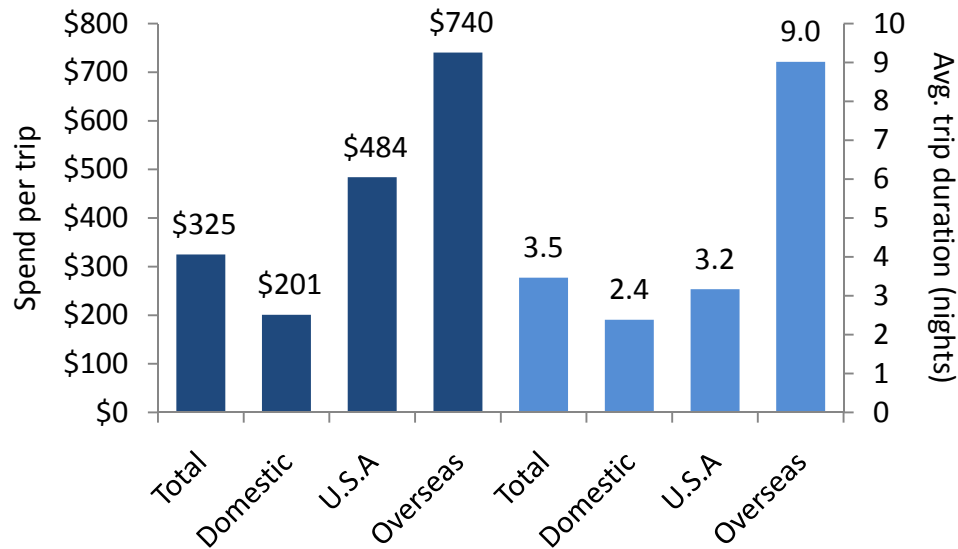
## OVERNIGHT VISITORS BY ORIGIN

In 2009 visitors from overseas make up 12.5% of Toronto's visitors yet they contribute almost 30% of all visitor spending.<sup>1</sup> On the other hand two in three visitors to Toronto are Canadian, but only two in every five dollars spent by a visitor to Toronto is spent by a Canadian. This pattern illustrates the different behaviours of Toronto's visitors and the need to communicate with them for their varying needs- whether it's a short weekend getaway, or a longer vacation.

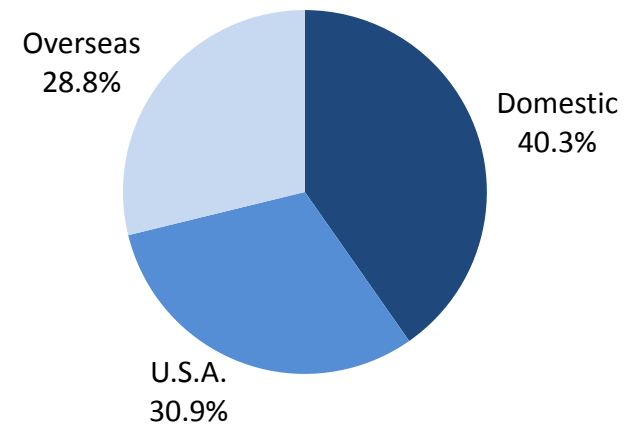
Overnight Visitor Origin 2009<sup>1</sup>



2008<sup>4</sup> Overnight Visitors



Overnight Visitor Spend 2009<sup>1</sup>



## 2009 OVERNIGHT VISITORS BY TRIP PURPOSE

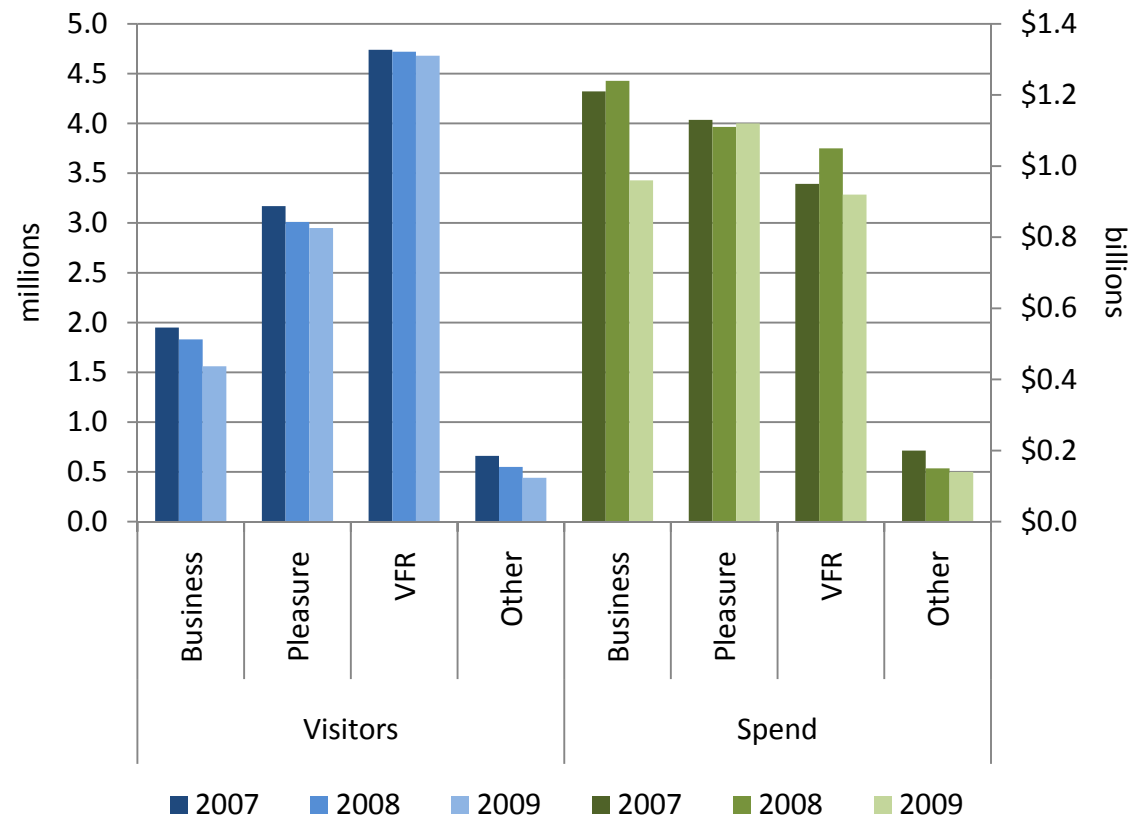
There are three main reasons why people visit Toronto: business, for a vacation (pleasure) and to visit friends or relatives (VFR)\*. In 2009 the number of people travelling for business reasons declined at a greater rate compared with other trip purposes. Pleasure and VFR visitors remained comparatively stable in numbers.<sup>1</sup>

Overnight visitors in millions

	2007 <sup>3</sup>	2008 <sup>3</sup>	2009 <sup>1</sup>	Change %
Business	1.95	1.83	1.56	-14.3
Pleasure	3.17	3.01	2.95	-2.1
VFR	4.74	4.72	4.68	-0.7
Other	0.66	0.55	0.44	-19.8
Total	10.51	10.10	9.63	-4.6

Overnight visitor spend in billions

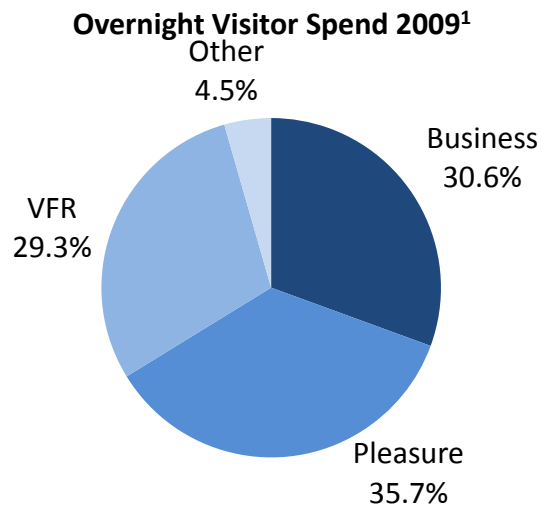
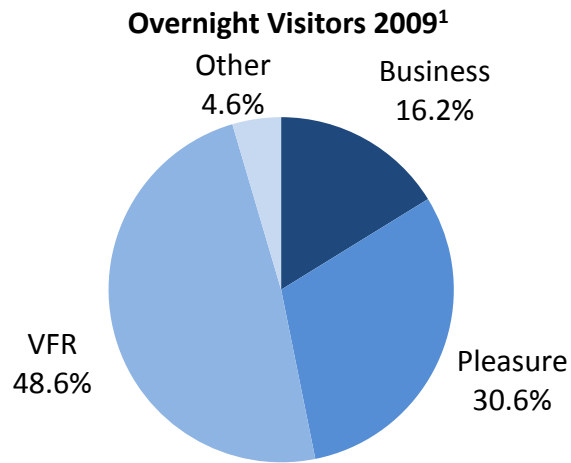
	2007 <sup>3</sup>	2008 <sup>3</sup>	2009 <sup>1</sup>	Change %
Business	\$ 1.21	\$ 1.24	\$ 0.96	-22.6
Pleasure	\$ 1.13	\$ 1.11	\$ 1.12	0.7
VFR	\$ 0.95	\$ 1.05	\$ 0.92	-12.3
Other	\$ 0.20	\$ 0.15	\$ 0.14	-8.0
Total	\$ 3.50	\$ 3.56	\$ 3.14	-11.7



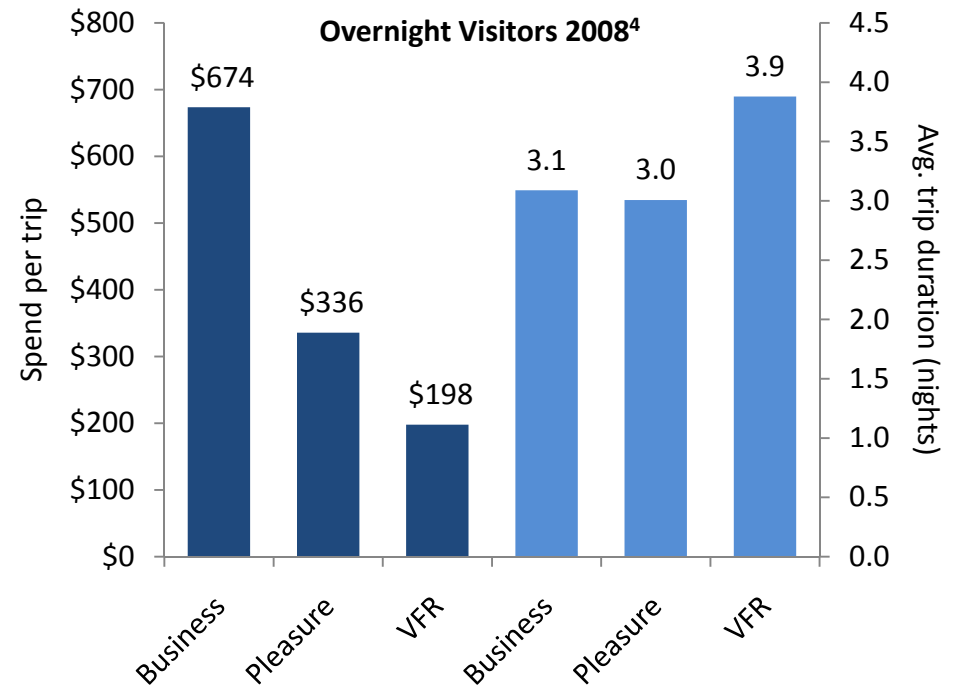
\*Visitors self select which type of trip they are making. The trip purpose reflects the main reason the trip was taken and does not indicate the type of accommodation used.



# OVERNIGHT VISITOR CHARACTERISTICS BY TRIP PURPOSE



The average VFR visitor spends four nights in Toronto, but has the lowest spend compared with pleasure and business visitors. This reflects the use of hotels by each group, with only 10% of VFR visitors using hotels, compared to almost 60% of Pleasure visitors, and almost 90% of Business visitors.<sup>1</sup>

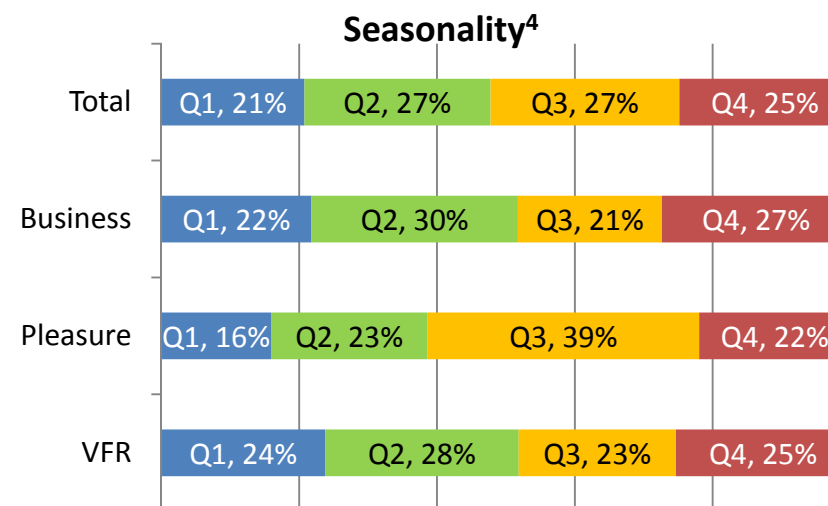


## OVERNIGHT VISITOR CHARACTERISTICS BY TRIP PURPOSE

Activities as % <sup>4</sup>	Total	Business	Pleasure	VFR
Play/Concert	13.6	6.8	23.4	10.7
Historic Site	13.2	8.2	23.2	9.4
Nature Park	12.5	5.4	21.1	10.7
Museum/Art Gallery	12.5	7.4	19.8	10.4
Festival or Fair	7.8	3.1	10.2	8.5
Spectator Sports	7.1	4.2	11.3	4.9
Zoo/Aquarium/Botanical Garden	5.8	2.3	11.2	4.0
Amusement Park	4.5	1.4	9.5	2.8
Casino	4.0	1.7	5.5	4.0
Boating/Kayaking/Canoeing	3.3	0.9	7.2	2.1
Golfing	2.1	0.7	3.3	2.1
Camping	1.8	0.1	4.6	0.9

Party Composition <sup>4</sup>	Total	Business	Pleasure	VFR
Adults Only %	89.0	96.1	84.4	89.0
Adults with Children %	9.3	0.9	13.4	10.1
Not Stated %	1.8	3.0	2.1	0.9

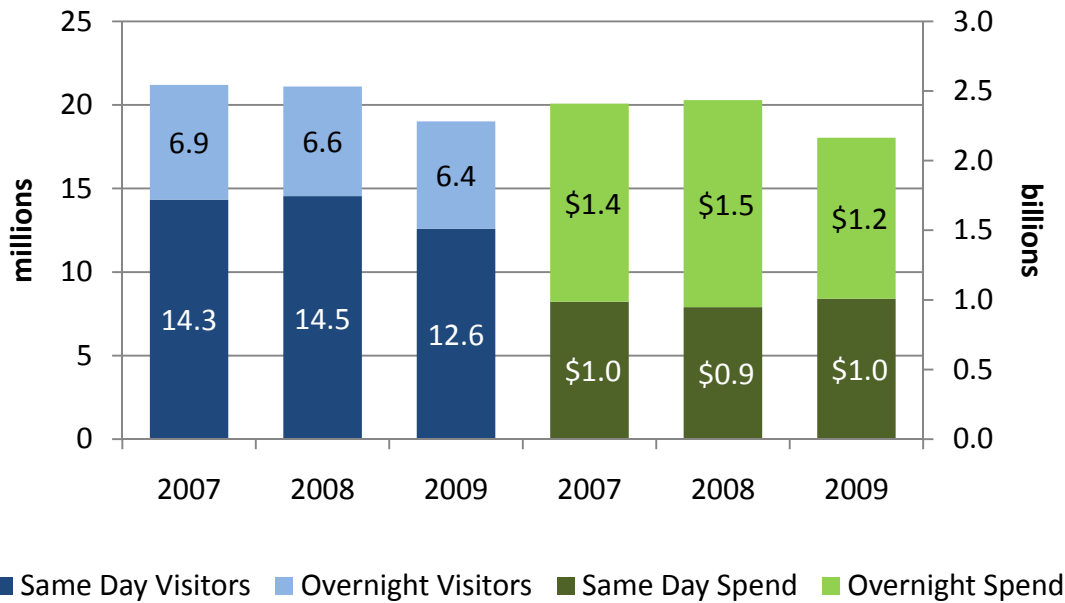
Accommodation Use (by person nights) <sup>4</sup>	Total	Business	Pleasure	VFR
All paid roofed accommodation %	30.1	78.7	45.5	7.0
All unpaid accommodation %	63.3	11.3	44.1	89.3
Other/Not Stated %	5.8	9.9	7.6	3.4



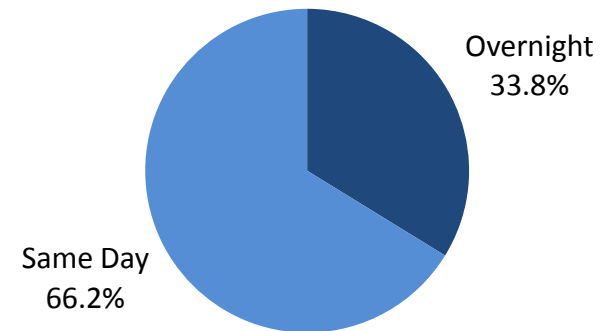
The activities listed refer to 2008 and took place at some point on the visitor's entire trip, which may have included other destinations; this is why some of the activities not typically associated with Toronto are listed. Pleasure visitors are the most active on their travels, with over 20% visiting an historic site, a nature park, a museum or art gallery, and attending a play or concert during their trip. Four in five nights spent by business visitors in Toronto are in paid accommodations, compared with almost half of pleasure visitor nights. Pleasure visitors are the most likely to be travelling with children. Overall visitor numbers to Toronto are relatively stable throughout the year, helped by the number of business and VFR visitors who arrive outside of the peak summer months.

# DOMESTIC VISITORS

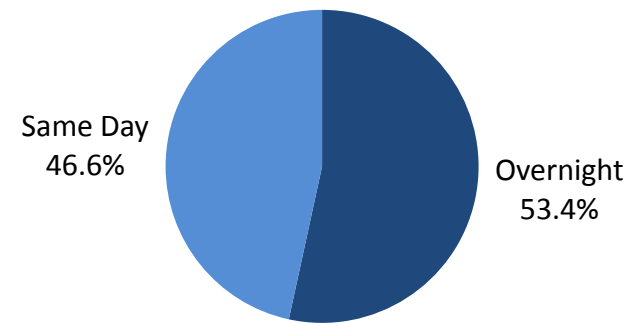
Two thirds of Canadian visitors to Toronto are same-day visitors, or day trippers. As would be expected, the level of spending by same-day visitors is less than overnight visitors. It is estimated that more than 12 million Canadians visited Toronto for a day trip in 2009 with a further 6.4 million Canadians staying at least one night.<sup>1</sup>



Domestic Visitors 2009<sup>1</sup>



Domestic Visitor Spend<sup>1</sup>

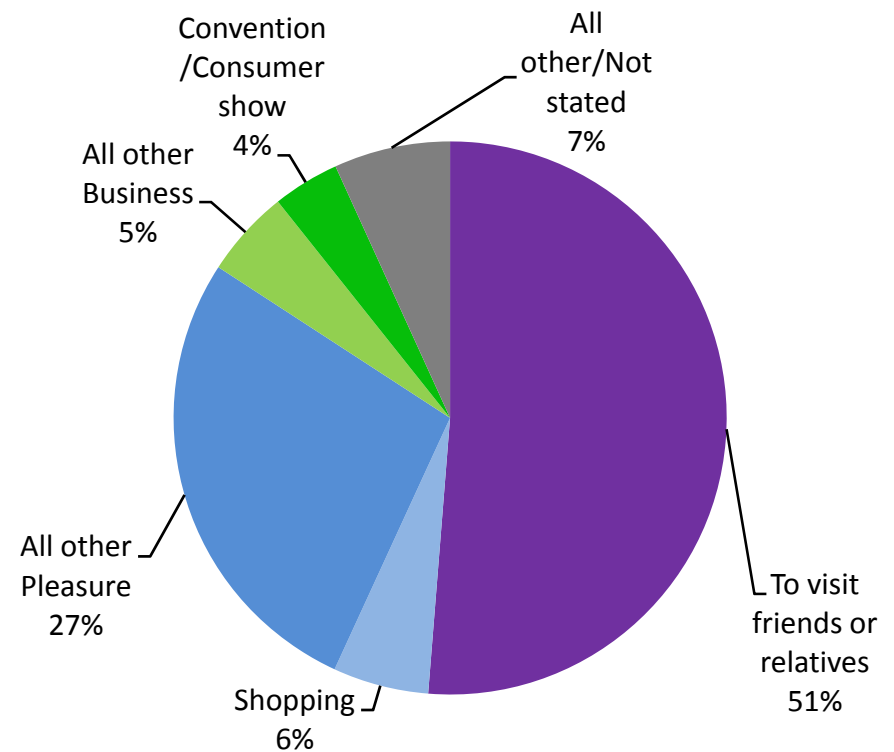


Sources: 2007 and 2008<sup>4</sup>, 2009<sup>1</sup>

## SAME-DAY DOMESTIC VISITORS

Virtually all Canadian same-day visitors are from Ontario and almost 40% from the Toronto region itself\*. Fully half of same-day visits are for visiting friends and relatives, with a further third visiting for pleasure and shopping.<sup>4</sup>

	Same-day visitors in millions 2008 <sup>4</sup>	%
TOTAL	14.54	100.0
Ontario	14.47	99.5
<i>Toronto</i>	5.52	38.0
<i>Niagara</i>	0.64	4.4
<i>Windsor</i>	0.05	0.3
<i>Ottawa</i>	0.07	0.5
<i>Other Ontario</i>	8.19	56.3
Other Canada	0.07	0.5



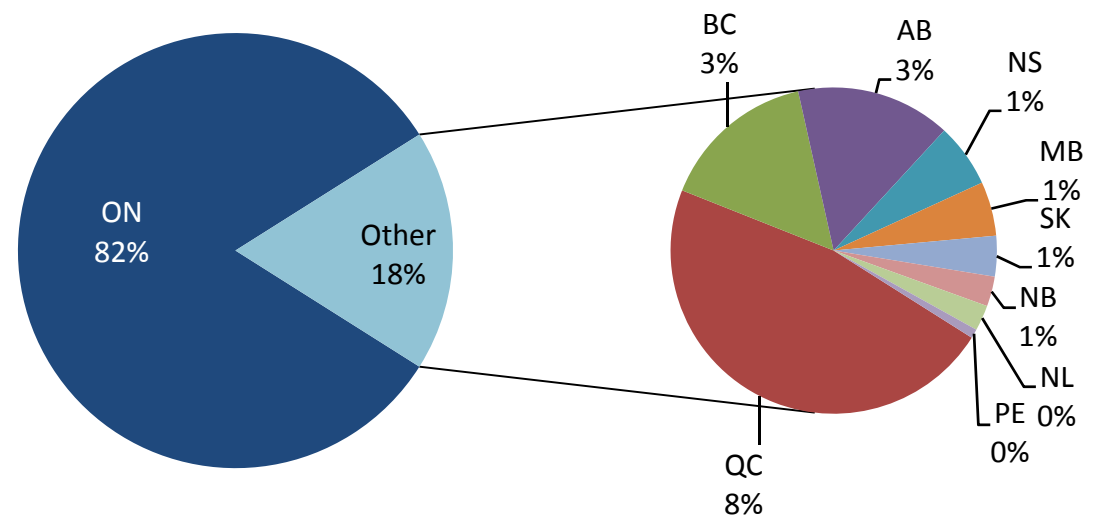
\* The 'Toronto region' refers to the Toronto Census Metropolitan Area (CMA), an area that reaches from Oakville to Lake Simcoe to Ajax. A visitor is someone who takes a non-routine trip of 40km or more; therefore someone who lives in the Toronto CMA can also be reported as a visitor to the Toronto CMA.

# OVERNIGHT DOMESTIC VISITORS BY ORIGIN

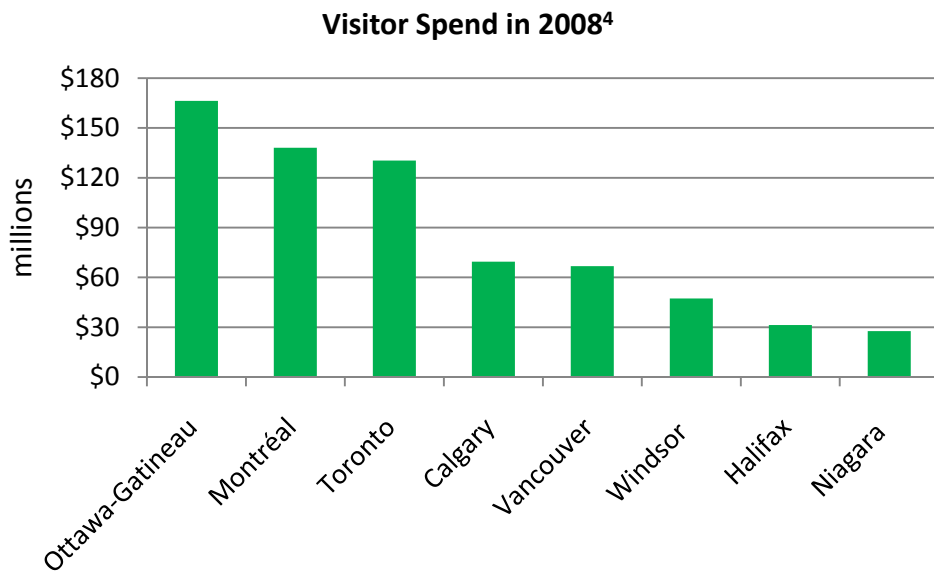
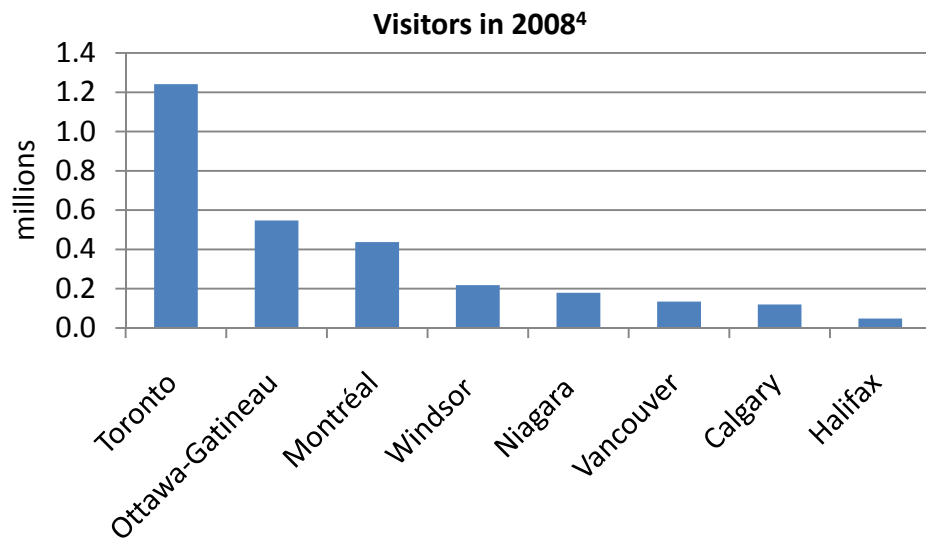
82% of all Canadian overnight visitors to Toronto are from Ontario, accounting for 66% of all domestic spend. Typically, the further visitors travel the longer they stay, with Ontario visitors staying two nights, visitors from Quebec just under three nights, and visitors from other Provinces staying between four and eight nights.

Domestic Overnight Visitors to Toronto in 2008<sup>4</sup>

	Visitors	Spend in millions	Trip Duration
Total	6,562,990	\$1,422.80	2.4
ON	5,387,030	\$944.60	2.0
QC	553,433	\$185.66	2.8
BC	182,092	\$97.12	5.0
AB	180,252	\$115.61	4.4
NS	74,445	\$48.86	4.4
MB	63,137	\$32.23	4.8
SK	47,450	\$18.88	4.2
NB	34,801	\$21.06	7.6
NL	29,713	\$18.60	7.8
PE	10,635	\$4.16	6.2



# OVERNIGHT DOMESTIC VISITOR BY CITY ORIGIN



Almost one in five Canadian overnight visitors to Toronto come from the Toronto region itself (see footnote on previous page). Montreal and Ottawa combined account for similar volume or around 15% of total Canadian visitors combined. The further visitors travel from, the more money they spend and the longer they stay. Although there are fewer visitors from Calgary and Vancouver than Niagara and Windsor, they spend more in Toronto while they are here.

**Domestic Overnight Visitors to Toronto in 2008<sup>4</sup>**

	Visitors	Spend in m's	Trip Duration
Toronto	1,240,846	\$ 130.4	1.8
Ottawa-Gatineau	547,114	\$ 166.3	2.4
Montréal	437,266	\$ 138.1	2.7
Windsor	218,465	\$ 47.3	2.6
Niagara	179,536	\$ 27.7	1.8
Vancouver	134,077	\$ 66.8	4.8
Calgary	119,508	\$ 69.5	4.2
Halifax	48,185	\$ 31.3	4.6
Winnipeg	47,789	\$ 22.5	5.0
Edmonton	33,881	\$ 25.8	4.8
Saskatoon	23,592	\$ 7.0	3.3
Québec City	18,921	\$ 13.3	6.8

## OVERNIGHT DOMESTIC VISITOR TRIP CHARACTERISTICS

Party Composition as % <sup>4</sup>	Total	Ontario	Rest of CAN
Adults Only	89.6	88.8	93.0
Adults with Children	10.4	11.2	7.0

Accommodation Use (person nights %) <sup>4</sup>	Total	Ontario	Rest of CAN
All paid roofed accommodation	28.6	26.4	33.9
All unpaid accommodation	70.1	71.9	65.8
Other/Not Stated	1.2	1.7	0.3

The activities listed refer to 2008 and took place at some point on the visitor's entire trip, which may have included other destinations; this is why some of the activities not typically associated with Toronto are listed.

Visitors from Ontario are more likely to be travelling with children and stay in unpaid accommodation than visitors from other provinces in Canada.

As would be expected visitors from outside of Ontario are more likely to visit another Canadian city on the same trip and they participate in more activities. Please note that the activities listed could have taken place at any point on the entire trip and may not have necessarily happened in Toronto. Ontarians have a relatively high propensity to visit historic sites and attend festivals.

Other Cities Visited on same trip (as %)<sup>4</sup>

	Total	Ontario	Rest of CAN
Niagara	1.2	0.7	3.7
Ottawa	0.6	0.2	2.3
Winnipeg	0.4	0.0	2.2
Montreal	0.4	0.0	2.1
Edmonton	0.3	0.0	1.5

Activities as % <sup>4</sup>	Total	Ontario	Rest of CAN
Play/Concert	12.3	11.1	17.6
Historic site	6.7	6.6	7.4
Museum or art gallery	6.6	5.7	10.7
Nature Park	5.6	3.8	13.9
Festival	5.2	5.2	5.3
Spectator Sports	4.4	3.8	7.1
Zoo/Aquarium/Botanical Garden	4.3	2.9	10.4
Amusement park	3.9	3.5	5.8
Casino	2.7	2.3	4.8
Boating/canoeing/kayaking	2.5	2.1	4.4
Golfing	2.5	2.1	4.1
Camping	2.2	2.0	3.3
Fishing	2.1	2.0	2.3
Skiing or snowboarding	1.9	2.1	1.1

## CANADIAN IMPRESSIONS OF TORONTO

In the 'Travel Intentions'<sup>5</sup> study all respondents are asked to rate Toronto out of ten on different attributes whether they have visited Toronto, intend to visit Toronto or are interested in visiting Toronto or not. Respondents from the smaller cities and non-urban Ontario are generally more impressed with Toronto and rate it higher, perhaps reflecting their greater awareness of the region as a destination and the different nature of Toronto to their own towns. A common characteristic across the board is that when asked to rate Toronto as an overall destination the scores are typically lower than when asked to rate Toronto for a specific attribute. This suggests that when relating Toronto to a particular activity or type of trip that Canadians respond better than to an overall image of the region. Toronto is rated higher than Chicago by all markets.

### Impressions of Toronto rated out of 10 by residents of...

	Total*	Ottawa	L/G/ K/W**	Other Ont.	Montreal	Quebec City	Winnipeg
Overall Destination	7.3	6.8	7.8	7.4	6.6	7.0	6.4
Lots Of Things For Adults To See And Do	8.2	7.8	8.8	8.7	7.0	7.4	7.5
A Place With Great Restaurants	8.2	7.8	8.8	8.7	6.8	7.1	7.6
A Great Place For Theatre And Other entertainment	8.2	7.8	8.5	8.7	6.7	7.0	7.6
A Great Place To Visit Art Galleries And Museums	8.1	7.7	8.6	8.5	6.8	7.1	7.4
A Great Place For Strolling Around The Neighborhoods	8.1	7.8	8.6	8.6	6.8	7.2	7.4
A Great Place For Attending Pro Sports Events	8.0	7.6	8.7	8.6	6.7	7.3	7.3
A Place with Great Nightlife	7.9	7.7	8.7	8.6	6.0	6.3	7.5
A Great Place With Great Festivals	7.9	7.4	8.1	8.3	6.4	6.7	6.9
Lots Of Things For Kids To See And Do	7.8	7.5	8.1	8.1	6.4	6.9	6.8
Great For An Urban Getaway	7.7	7.3	8.1	8.0	6.8	7.4	6.9
A Great Place For Shopping	7.7	7.0	7.8	7.8	6.9	7.5	6.8
Has Friendly And Welcoming People	7.1	6.3	7.4	7.3	6.2	6.5	6.3
Chicago (for comparison)	6.3	6.1	6.6	6.0	6.1	6.1	5.9

\*Total refers to population who responded and does not refer to all Canadians. \*\*L/G/K/W refers to London, Guelph, Kitchener and Waterloo.



## CANADIAN INTEREST IN VISITING TORONTO

Respondents in the Travel Intentions survey<sup>5</sup> who do not intend to visit Toronto in the next six months, but were interested in visiting in the next two years were asked to list what interested them about visiting the region. For the smaller cities and towns in Ontario general and specific mentions of culture and art were extremely popular. For Ottawa there is a strong friends and family connection. Respondents from Montreal and Quebec City listed specific tourism sites rather than activities.

What is it specifically that interests you about Toronto?

As %	Total*	Ottawa	L/G/ K/W**	Other Ont.	Montreal	Quebec City	Winnipeg
Culture/Arts	23.6	21.1	29.4	29.6	10.2	9.7	12.1
Shop	20.1	16.1	27.0	27.1	2.9	3.9	16.3
Specific Sites	19.5	15.3	18.7	22.1	14.3	23.1	17.6
Visit Family	11.0	19.4	6.3	14.5	4.4	2.9	11.8
Sports	10.9	10.8	13.7	13.8	2.6	3.9	12.7
Museums	10.5	9.0	17.7	11.6	3.8	9.1	8.1
Restaurants	9.9	8.0	18.1	10.6	5.0	1.5	9.3
Theatre/Show	9.2	12.6	16.8	10.8	1.9	0.0	4.9
CN Tower	7.2	3.8	5.1	5.3	12.0	18.8	6.9
Misc. Trade Events	5.6	7.0	4.3	5.9	6.9	2.9	1.4
Downtown/China Town	5.3	2.9	5.9	7.1	1.4	3.9	4.0
Visit Friends	4.8	10.3	7.0	4.2	3.6	0.6	8.3
Lots To Do	4.4	5.5	2.6	3.8	7.3	3.8	2.0
Nightlife	4.4	3.7	1.1	7.5	0.0	0.0	3.3
Zoo	4.2	5.7	2.3	6.6	0.4	0.0	1.4

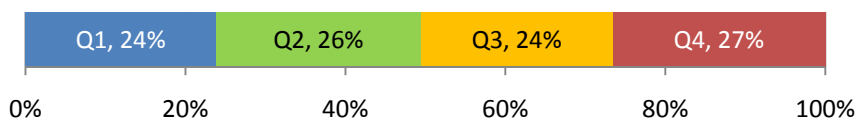
\*Total refers to population who responded and does not refer to all Canadians.

\*\*L/G/K/W refers to London, Guelph, Kitchener and Waterloo.

## OVERNIGHT DOMESTIC VISITORS: A MARKET COMPARISON

### All Domestic<sup>4</sup>

	Visitors in millions	Spend in billions	Nights in millions	Avg. Nights	Trip Spend
Total	6.56	\$1.49	15.64	2.4	\$201
Business	13%	26%	13%	2.4	\$433
Pleasure	27%	35%	24%	2.2	\$252
VFR	54%	33%	56%	2.5	\$124
Other	6%	5%	7%	3.7	N/A



### Ontario<sup>4</sup>

	Visitors in millions	Spend in billions	Nights in millions	Avg. Nights	Trip Spend
Total	5.36	\$0.94	10.96	2.0	\$154
Business	11%	22%	11%	2.1	N/A
Pleasure	27%	37%	23%	1.8	N/A
VFR	56%	35%	59%	2.1	N/A
Other	6%	7%	7%	2.3	N/A

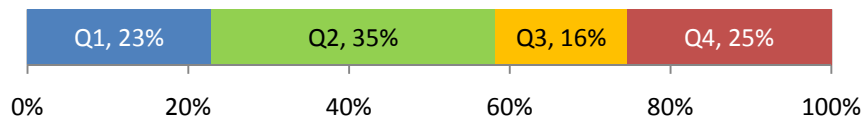
In 2008 Domestic visitors spent an average of 2.4 nights in Toronto, spending \$201 per person. Over half were visiting friends and relatives and over a quarter were on a pleasure trip. Domestic visitors are evenly spread over the year.

Ontario visitors make up 82% of all domestic visitors. Their trip spend and duration is less than other Canadians, reflecting the reduced distance required to travel to Toronto. People from Ontario are interested in the cultural and arts offerings, shopping and other big city activities that Toronto can provide. Their propensity to actually participate in activities is lower than other Canadians, perhaps reflecting the shorter trip duration and higher VFR component.

Ontarians rate Toronto as an overall destination lower than they do specific aspects, suggesting that when Toronto is thought of for specific activities and types of trip it resonates more positively with people than the overall city experience. For example, the London, Guelph, Kitchener, Waterloo area rates Toronto at 7.8 as an overall destination, but when asked to rate Toronto on 10 attributes including shopping, cultural and nightlife they rate many of them much higher<sup>5</sup>(see table on previous page).

## Toronto<sup>4</sup>

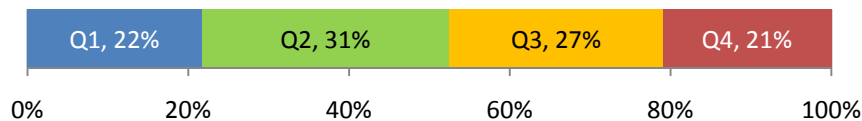
	Visitors in millions	Spend in millions	Nights in millions	Avg. Nights
Total	1.24	\$130.44	2.29	1.8
Business	4%	20%	3%	1.3
Pleasure	31%	43%	29%	1.7
VFR	64%	36%	68%	2.0
Other	1%	0%	1%	1.5



Residents of the Toronto region are a large overnight market, representing 1.2m visits annually. Almost two thirds of these visits represent VFR trips, however there are around 380,000 pleasure visits by Torontonians to their own region each year, accounting for around 660,000 person nights. The spring and holiday season are the most popular for local visitors, reflecting the high VFR component for this market. (See footnote on p.12 for an explanation of 'Toronto').

## Ottawa-Gatineau<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	547,114	\$166.26	1.34	2.4
Business	27%	38%	27%	2.4
Pleasure	27%	35%	25%	2.3
VFR	39%	23%	39%	2.5
Other	7%	4%	9%	3.0



The Ottawa-Gatineau area provides Toronto with over half a million visitors annually. The average visitor from Ottawa stays 2.4 nights and is more likely to visit in spring or summer than other times.

Potential visitors from Ottawa are most interested in culture, arts, shopping, visiting friends and relatives and theatre.<sup>5</sup>

## Ottawa<sup>6</sup>

### Do you intend to return to Toronto in the next two years?

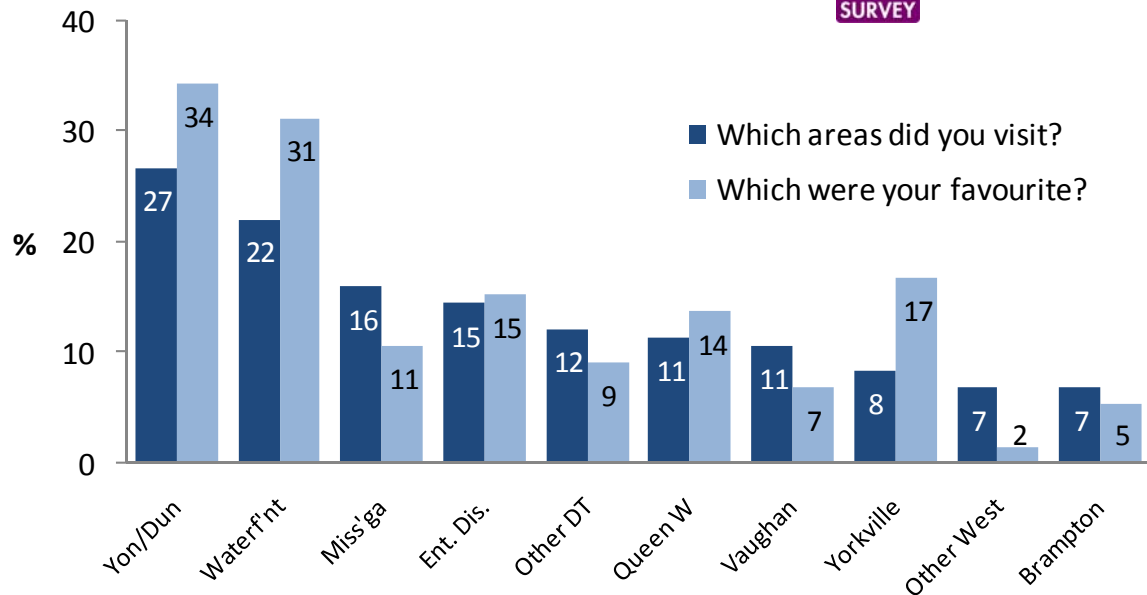


	%
For business	11.5
For pleasure	67.2
To visit friends or relatives	7.6
For another reason	1.5
For ANY Reason	75.6

More than two thirds of respondents from Ottawa to the Tourism Toronto Visitor Survey stated that they intend to return to Toronto for a pleasure trip within the next two years.

Their most frequented areas were Yonge and Dundas and the Waterfront, and these two were also their favourites. Yorkville, the Entertainment District and Queen West were also popular. Canada's Wonderland features high on the list of activities compared with many other Canadian visitors.

### Top 10 Visited Neighbourhoods

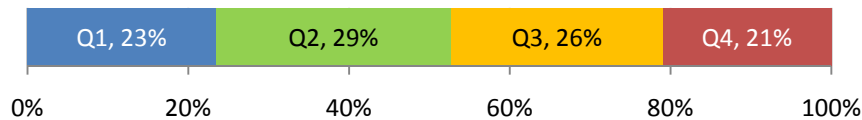


Top individual mentions	%
Restaurant	69.5
Bar	14.5
Nightclub	9.9
CN Tower	8.4
Canada's Wonderland	7.6
Any Spectator Sport	5.3
Blue Jays (MLB)	4.6
Independent sightseeing	4.6
Ontario Place	3.8
Other Attraction	3.1
Theatre	2.3
Other Festival	2.3
Canadian National Exhibition	2.3
Medieval Times	2.3
Royal Ontario Museum	2.3



## Windsor<sup>4</sup>

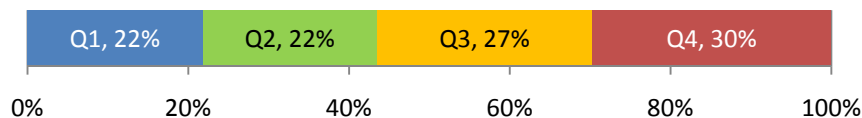
	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	218,465	\$47.30	0.57	2.6
Business	15%	20%	13%	2.3
Pleasure	37%	43%	31%	2.1
VFR	41%	25%	51%	3.2
Other	7%	12%	5%	2.0



Over 218,000 visitors from Windsor spent at least one night in Toronto in 2008. Two in five of these visits were to visit friends and relatives and another two in five were for a pleasure trip. Visitors from Windsor are evenly distributed throughout the year.

## Niagara<sup>4</sup>

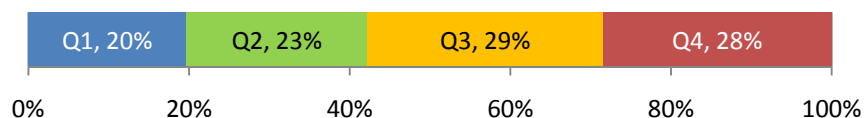
	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	179,536	\$27.71	0.32	1.8
Business	13%	18%	15%	2.0
Pleasure	23%	44%	21%	1.6
VFR	56%	35%	56%	1.8
Other	8%	3%	8%	1.7



Pleasure visitors from Niagara are high yield, accounting for only 23% of visits but 44% of spend. They appear to spend a lot of money in a short period of time, staying on average only 1.6 nights. The winter months are the most popular for Niagara visitors with over half of all visitors coming in the months of October-March.

Rest of Canada (not including Ontario)<sup>4</sup>

	Visitors in millions	Spend in millions	Nights	Avg. Nights	Trip Spend
Total	1.20	\$550.19	4.67	3.9	\$419
Business	24%	33%	18%	3.0	N/A
Pleasure	28%	33%	27%	3.7	N/A
VFR	43%	31%	49%	4.4	N/A
Other	5%	3%	6%	4.3	N/A



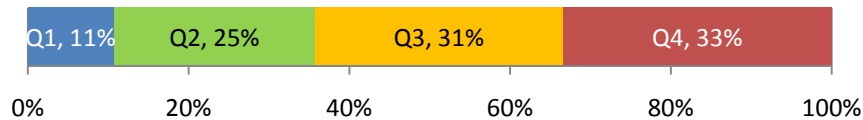
Canadian visitors from outside of Ontario represent 18% of all domestic visitors to Toronto, but around a third of all domestic visitor spending. Their average spend per trip is \$419, compared to Ontarians’ \$154, as they stay twice as long in the Toronto region. Over 40% of visits are to see friends and family, with the summer and fall being more popular than winter and spring.

A third of person nights spent by non-Ontarian Canadians in Toronto are in paid accommodations, compared with a quarter for visitors from Ontario.

They are more active in the region than their Ontarian counterparts, with 7% attending a sports event and 11% attending a museum and/or art gallery. Around 4% of non-Ontarian visitors also go to Niagara and 14% visit a nature park on the same trip.

### Quebec (including Montreal)<sup>4</sup>

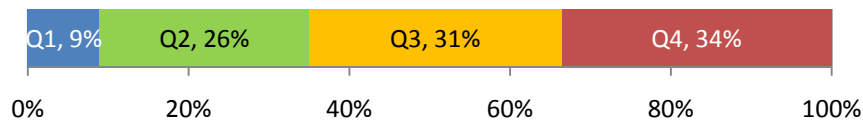
	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	553,433	\$185.66	1.54	2.8
Business	16%	30%	15%	2.6
Pleasure	26%	26%	23%	2.5
VFR	52%	40%	58%	3.1
Other	6%	5%	4%	1.8



Compared with visitors from Ontario, Quebecois visitors are more likely to be travelling for business, and to stay a little longer. The most popular season is the last part of the year with a third of all visits happening between October and December.

### Montreal<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	437,266	\$138.13	1.17	2.7
Business	14%	28%	13%	2.5
Pleasure	25%	26%	26%	2.7
VFR	55%	42%	58%	2.8
Other	6%	4%	3%	1.7



Almost 80% of Quebecois visitors are from Montreal. Montrealers typically rate Toronto less favourably than other Canadians, but rate aspects such as shopping and lots of adult things to do relatively high. .

## Montreal<sup>6</sup>

### Do you intend to return to Toronto in the next two years?



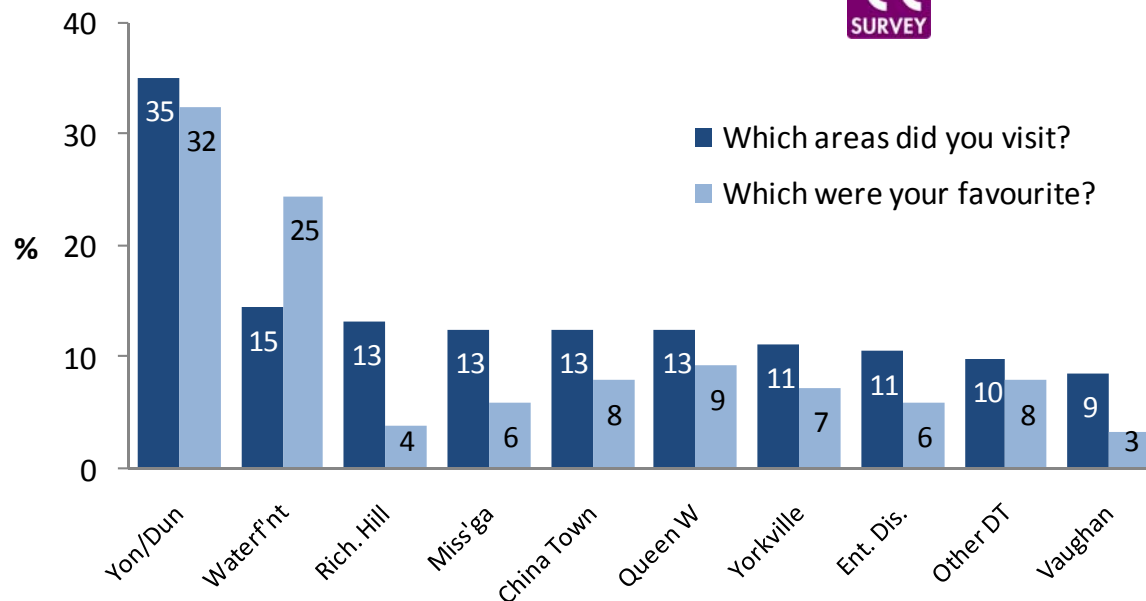
	%
For business	23.2
For pleasure	49.0
To visit friends or relatives	15.2
For another reason	4.0
For ANY Reason	74.2

Half of Montreal respondents to Tourism Toronto's Visitor Survey said that they intend to return to Toronto in the next two years for a pleasure trip, with three quarters saying that they will return for any reason.

A third of visitors visited Yonge and Dundas, with a third also saying it is one of their favourite areas. The waterfront was also very popular (respondents are asked for their favourite areas from this or other trips, therefore more people can list a neighborhood as their favourite than actually visited it).

Montrealers are slightly more likely to go to a night club than visitors from other Canadian cities, with 13% compared to 8%.

### Top 10 Visited Neighbourhoods



Top individual mentions	%
Restaurant	75.5
Bar	21.2
Nightclub	12.6
CN Tower	10.6
Any Spectator Sport	5.3
Blue Jays (MLB)	4.6
Eaton Centre	3.3
Canada's Wonderland	3.3
Other Festival	2.6
Hockey Hall of Fame	2.6





Alberta (including Calgary)<sup>4</sup>

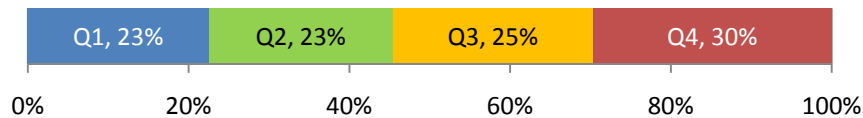
	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	180,252	\$115.61	0.78	4.4
Business	27%	34%	20%	3.3
Pleasure	34%	42%	39%	5.0
VFR	37%	23%	39%	4.5
Other	2%	1%	2%	4.8



Visitors from Alberta represent 2.7% of all Canadian visitors to Toronto, but 8.1% of visitor spend. Around a quarter of Albertans who visit Toronto do so for business reasons, and two thirds for either pleasure or to visit friends or relatives. The pleasure segment is a high yield with 34% of the people spending 42% of the total spend, and with a comparatively high trip duration.

Calgary<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	119,508	\$69.54	0.51	4.2
Business	36%	43%	26%	3.1
Pleasure	33%	36%	44%	5.6
VFR	31%	20%	29%	4.1
Other	1%	1%	1%	5.0



Two of every three Albertans who visit Toronto are from Calgary, with an almost equal number of business, pleasure and VFR visitors. The most popular time to visit is the last period of the year. Pleasure visitors have the highest trip duration at over 5 nights.

## Calgary<sup>6</sup>

### Do you intend to return to Toronto in the next two years?

	%
For business	33.1
For pleasure	28.2
To visit friends or relatives	34.7
For another reason	5.6
For ANY Reason	65.3

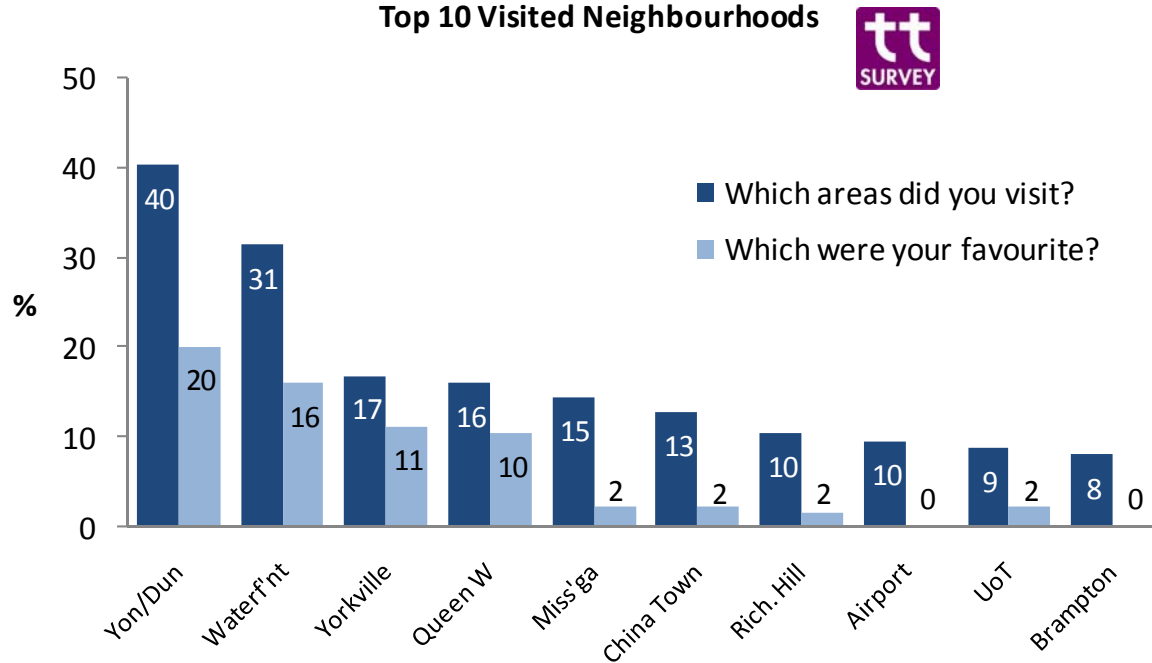


Visitors from Calgary who responded to the Tourism Toronto visitor survey were more likely to return in the next two years for business and to visit friends and relatives than pleasure. Almost 30% of people interviewed however said that they would return for a pleasure visit.

Again, the most visited neighbourhoods were the Yonge and Dundas area and the waterfront and their most cited favourite areas were also Yonge and Dundas and the Waterfront as well as Yorkville and Queen West.

Sightseeing, the Hockey Hall of Fame and the Eaton Centre are well visited by visitors from Calgary compared with many other Canadian visitors.

### Top 10 Visited Neighbourhoods

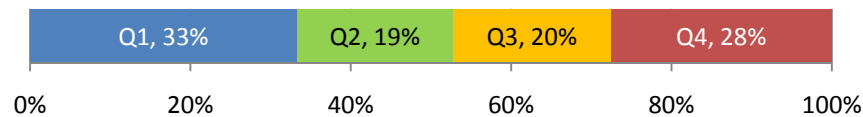


Top individual mentions	%
Restaurant	83.1
Bar	24.2
CN Tower	15.3
Independent sightseeing	9.7
Hockey Hall of Fame	8.9
Eaton Centre	8.1
Royal Ontario Museum	8.1
Nightclub	6.5
Blue Jays (MLB)	6.5
Any Spectator Sport	6.5



### British Columbia (including Vancouver)<sup>4</sup>

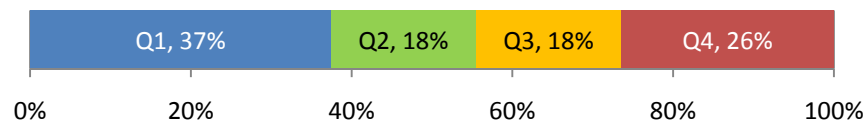
	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	182,092	\$97.12	0.92	5.0
Business	38%	41%	26%	3.4
Pleasure	18%	18%	23%	6.4
VFR	38%	37%	46%	6.0
Other	6%	4%	6%	4.9



Toronto’s visitors from British Columbia travel the furthest of any Canadians. This is reflected in the longer trip durations. The average pleasure visitor from B.C. stays 5 nights, in comparison to Alberta’s who stay 4.4 nights, and Quebec’s who stay 2.8. Three in four visitors from British Columbia visit for business or to visit friends or relatives. The VFR visitors are relatively high yield with a similar spend as business and pleasure visitors. The winter is the most popular time for visitors from British Columbia.

### Vancouver<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights
Total	134,077	\$66.82	0.65	4.8
Business	44%	51%	30%	3.3
Pleasure	16%	20%	22%	6.5
VFR	33%	23%	40%	6.0
Other	8%	6%	8%	5.0



Three-quarters of visitors to Toronto from B.C. are from Vancouver. The duration of their stay is a little less than their provincial counterparts. VFR visitors from Vancouver have a noticeably lower spend than other visitors from British Columbia. Almost 2 in 5 Vancouver visitors arrive in the first three months of the year, possibly reflecting the high number of business visitors.

## Vancouver<sup>6</sup>

### Do you intend to return to Toronto in the next two years?



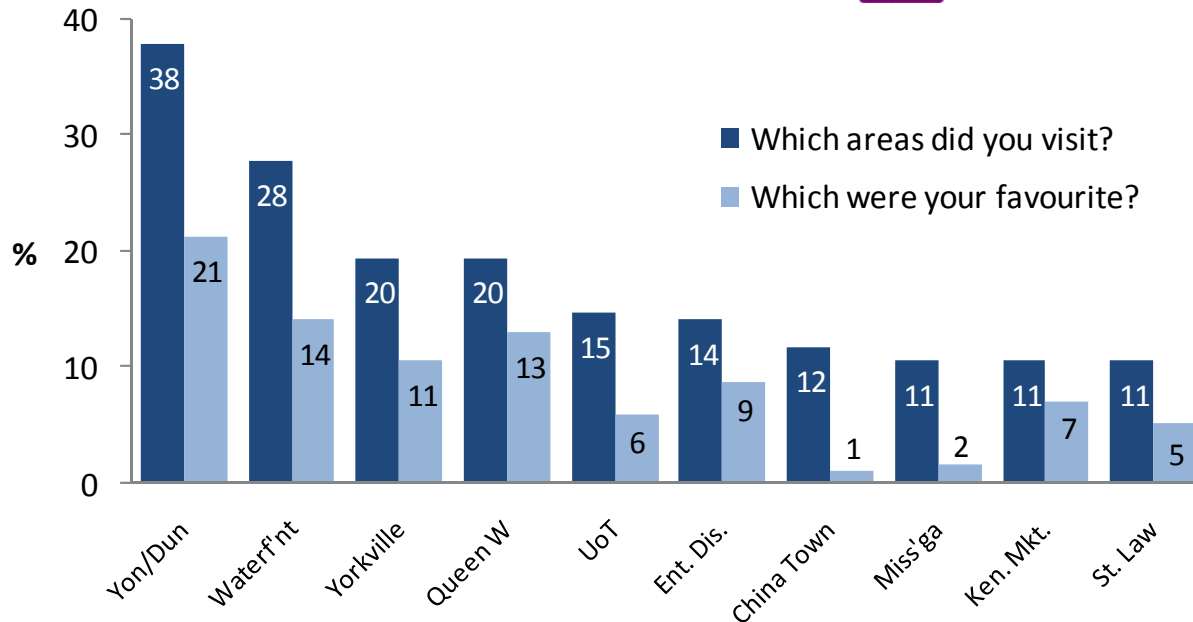
	%
For business	33.7
For pleasure	24.3
To visit friends or relatives	41.4
For another reason	5.9
For ANY Reason	69.2

Visitors from Vancouver who responded to the Tourism Toronto visitor survey are most likely to return to Toronto for to visit friends or relatives, although a quarter did say that they intend to return for a pleasure trip.

After the usual favourites of Yonge and Dundas and the waterfront visitors from Vancouver visited Yorkville, Queen West and other central areas (except for Mississauga). After the top two their favourites were Queen West, Yorkville and the Entertainment District.

Visitors from Vancouver had a high rate of going to restaurants and bars compared with many other Canadian visitors.

### Top 10 Visited Neighbourhoods



Top individual mentions	%
Restaurant	84.0
Bar	30.2
CN Tower	11.2
Nightclub	8.9
Independent sightseeing	7.7
Canada's Wonderland	7.7
Any Spectator Sport	7.1
Royal Ontario Museum	6.5
Blue Jays (MLB)	5.9
Theatre	4.7

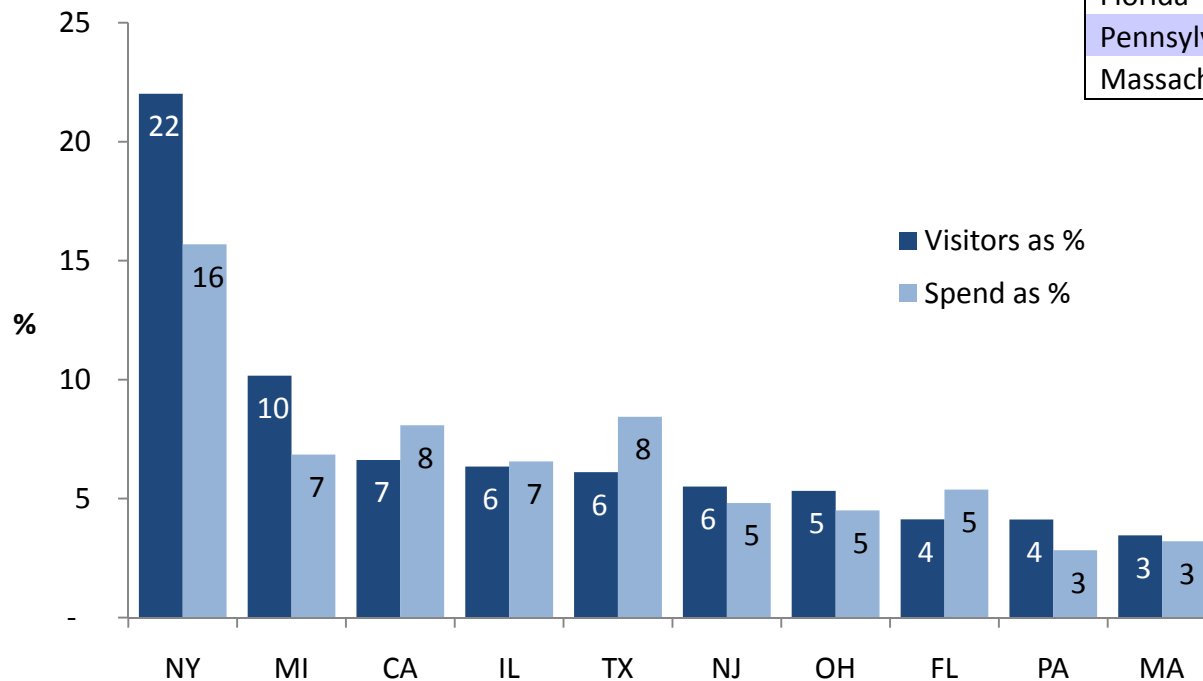


## OVERNIGHT U.S. VISITORS BY ORIGIN

In 2008 U.S. visitors represent around 21% of all overnight visitors and 29% of visitor spend in Toronto, making it a significant market for our region.<sup>4</sup> However, the U.S. is a vast market and there are many differences between the states and regions.

The two states that provide most of Toronto’s overnight U.S. visitors are New York and Michigan. Around one in three visitors from the U.S. live in these two states accounting for more than 20% of U.S. visitor spend. The top ten states provide around three quarters of all U.S. visitors and two thirds of all U.S. visitor spend.

2008 <sup>4</sup>	Visitors	Spend in millions	Trip Spend	Trip Duration
U.S.A. (Total)	2,146,327	\$ 1,038.9	\$ 484	3.2
New York	472,432	\$ 163.0	\$ 345	2.8
Michigan	218,262	\$ 71.2	\$ 326	2.2
California	142,161	\$ 84.0	\$ 591	4.3
Illinois	136,169	\$ 68.2	\$ 501	3.7
Texas	131,187	\$ 87.7	\$ 668	3.8
New Jersey	118,185	\$ 50.0	\$ 423	3.0
Ohio	114,356	\$ 46.8	\$ 409	2.6
Florida	88,661	\$ 55.9	\$ 630	4.9
Pennsylvania	88,504	\$ 29.4	\$ 332	2.3
Massachusetts	74,138	\$ 33.3	\$ 449	2.7



Generally speaking, the closer the state is to Toronto the lower the spend per visitor. California and Texas rank high in source markets for Toronto, providing more business than some border states.

## OVERNIGHT U.S. VISITOR TRIP CHARACTERISTICS

As % <sup>4</sup>	Total	NY	CA	NJ+PA	New England
Shopping	53.7	53.7	61.5	57.8	52.2
Sightseeing	41.2	35.1	41.0	46.1	34.6
Visit friends or relatives	40.7	35.4	67.6	36.4	48.5
Bar/Nightclub/Restaurant	27.7	25.6	18.3	31.0	23.5
Historic site	17.3	10.0	27.2	17.8	16.8
Play/Concert	16.4	27.4	12.5	16.7	10.1
Museum or art gallery	16.3	12.3	20.5	15.7	16.1
Nature Park	10.8	6.6	14.2	8.5	13.5
Zoo/Aquarium/Botanical Garden	8.6	10.7	4.2	5.3	11.4
Spectator Sports	7.9	7.6	6.0	7.5	13.3
Festival	7.8	8.7	10.7	9.3	5.3
Amusement park	4.6	10.3	2.8	3.7	2.0
Casino	3.7	2.0	5.6	5.9	2.1
Boating/canoeing/kayaking	3.2	0.4	7.3	10.0	1.8

Party Composition (as %) <sup>4</sup>	Total	NY	CA	NJ+PA	New England
Adults Only	85.4	80.0	84.7	85.0	90.5
Adults with Children	7.1	10.9	6.6	10.5	5.6
Not Stated	7.5	9.2	8.7	4.4	4.0

Accommodation Use (by person nights, as %) <sup>4</sup>	Total	NY	CA	NJ+PA	New England
All paid roofed accommodation %	55.9	65.8	34.3	51.5	41.1
All unpaid accommodation %	33.9	27.9	56.0	36.9	51.6
Other/Not Stated %	10.2	1.7	1.7	1.7	1.7

The tables on this page are adapted from Statistics Canada's International travel survey. The most recent year available at this time is 2008<sup>4</sup>. The breakdown available allows comparison of the average American visitor to Toronto, to the average visitor from New York State, California, New Jersey and Pennsylvania combined, and New England (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont). The activities listed could have been participated in at any point on the entire trip, and the trip could have included a visit to another destination, which is why there may be some activities that are not normally associated with Toronto.

As with the domestic tables, some characteristics hold true for most visitors regardless of their origin, but some activities show quite different levels of participation.

Discussion on individual destinations follows.

Other Destinations Visited (as %) <sup>4</sup>	Total	NY	CA	NJ+PA	New England
Niagara	13.4	12.3	11.0	25.1	11.4
Montreal	3.4	2.3	6.1	2.0	9.4
Ottawa	2.6	0.5	7.3	4.0	4.2
Quebec City	0.8	0.8	2.6	1.0	0.5
Vancouver	0.8	0.0	1.3	0.0	2.4

## U.S. IMPRESSIONS OF TORONTO

The information on the next two pages is from the Travel Intentions Study<sup>5</sup>. All respondents are asked to rate Toronto out of ten on different attributes whether they have visited Toronto, intend to visit Toronto or are interested in visiting Toronto or not.

Respondents from our traditional markets of upstate New York scored Toronto in a similar way to Ontario respondents as mentioned before, with higher ratings for specific attributes rather than the overall destination, suggesting an awareness of what Toronto offers. Other markets such as Boston, New York and Chicago score Toronto well, but with little variation, perhaps indicating less familiarity with what Toronto has to offer. All markets rated Toronto as a better overall destination than Chicago (except for Chicago respondents).

	Total*	Buff- alo	Roch- ester	Syra- cuse	NYC	Chic- ago	Boston	Detroit	Cleve- land	Pitts- burgh	Philad- elphia
Overall Destination	7.2	7.9	7.9	7.9	7.5	7.2	7.1	8.1	7.6	7.4	7.1
Lots Of Things For Adults To See And Do	7.7	8.4	8.7	8.1	7.7	7.7	7.4	8.6	8.1	8.1	7.7
A Place With Great Restaurants	7.7	8.3	8.4	8.1	7.6	7.6	7.4	8.6	8.0	8.0	7.7
Has Friendly And Welcoming People	7.6	7.8	8.1	7.9	7.8	7.7	7.5	8.3	7.9	7.9	7.7
A Great Place For Shopping	7.5	8.1	8.0	8.1	7.6	7.5	7.3	8.4	7.8	7.7	7.6
A Great Place For Theatre And Other entertainment	7.5	8.5	8.5	8.3	7.4	7.3	7.2	8.5	8.1	7.8	7.3
A Place with Great Nightlife	7.4	8.1	8.4	8.0	7.4	7.2	7.2	8.4	7.9	7.8	7.2
Great For An Urban Getaway	7.4	8.0	8.4	7.9	7.5	7.4	7.2	8.2	7.9	7.5	7.3
A Great Place To Visit Art Galleries And Museums	7.4	8.2	8.3	8.1	7.4	7.4	7.1	8.4	7.9	7.5	7.3
A Great Place For Strolling Around The Neighborhoods	7.4	8.3	8.3	8.1	7.4	7.5	7.2	8.3	7.9	7.6	7.4
A Great Place With Great Festivals	7.2	8.1	8.0	7.8	7.4	7.0	7.2	8.1	7.6	7.4	7.2
A Great Place For Attending Pro Sports Events	7.1	7.9	7.9	7.4	7.3	7.2	7.2	7.8	7.2	7.1	7.2
Lots Of Things For Kids To See And Do	7.1	7.8	8.0	8.0	7.4	7.0	6.8	8.2	7.5	7.3	7.1
Chicago (for comparison)	6.3	6.0	6.1	6.5	6.2	7.8	6.5	7.5	6.1	5.7	6.2

\*Total equals total population covered in the Travel Intentions Study, not total U.S. population.

## U.S. INTEREST IN VISITING TORONTO

What is it specifically that interests you about Toronto?

As %	Total*	Buff- alo	Roch- ester	Syra- cuse	NYC	Chic- ago	Boston	Detroit	Cleve- land	Pitts- burgh	Philad- elphia
Culture/Arts	13.7	31.2	39.8	40.0	4.2	9.6	11.6	19.7	17.6	24.8	14.7
Restaurants	8.2	13.3	12.2	23.6	4.4	18.8	4.9	12.8	12.9	5.3	4.6
Sightsee	6.8	3.4	7.4	9.6	3.8	17.7	1.4	4.4	10.3	6.3	8.8
Sports	6.7	14.5	10.2	10.9	8.4	11.4	6.4	8.3	4.4	9.6	0.0
Shop	6.6	15.5	10.7	16.7	4.0	8.8	10.5	14.9	14.6	12.5	3.1
Museums	5.9	9.7	15.1	6.3	3.2	3.3	9.4	12.4	5.4	5.9	4.9
Something Different	5.3	6.9	3.8	1.0	2.8	3.7	5.0	0.4	3.7	2.2	3.4
Theatre/Show	4.6	19.5	25.0	24.1	0.3	0.9	3.9	11.6	10.6	12.3	3.0
Lots To Do	4.4	17.1	2.1	4.5	2.2	1.9	3.6	5.6	4.9	3.7	2.0
Close to Niagara	4.2	0.0	5.4	5.8	5.1	2.4	3.8	4.6	4.6	4.3	8.7
Nightlife	4.2	6.8	6.6	10.1	5.0	1.6	2.0	5.3	8.3	3.0	1.0
Not Far	3.7	12.6	3.3	1.8	6.0	2.4	1.6	3.0	2.4	1.1	3.5
Never Been	3.6	0.0	2.6	1.8	3.1	0.3	4.2	1.0	0.4	2.0	6.1
Specific Sites	3.6	9.9	8.9	7.4	1.1	4.0	2.9	5.9	4.5	1.5	3.7
I'm Curious	3.5	2.8	5.1	0.0	5.9	1.9	4.7	1.6	2.3	2.2	1.5

\*Total equals total population covered in the Travel Intentions Study, not total U.S. population.

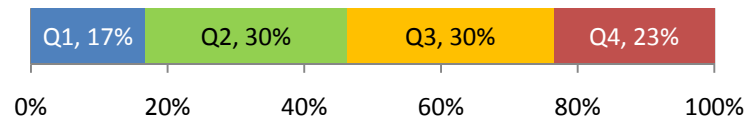
Respondents who do not intend to visit Toronto but are interested in the idea of visiting in the next two years are asked what it is about the region that interests them. There are noticeable differences in respondents in different cities. Culture and arts, sports events, shopping and theatre are of significant interest to upstate New York respondents. Restaurants, sightseeing and sports events are popular amongst Chicago respondents. For New York City respondents no one attribute stands out, perhaps signifying a lack of awareness of what is available in Toronto.<sup>5</sup>



# OVERNIGHT U.S. VISITORS: A MARKET COMPARISON

## All U.S.<sup>4</sup>

	Visitors in millions	Spend in billions	Nights in millions	Avg. Nights	Trip Spend
Total	2.15	\$1.04	6.80	3.2	\$484
Business	32%	52%	28%	2.8	\$781
Pleasure	34%	27%	32%	3.0	\$385
VFR	26%	16%	33%	4.0	\$294
Other	6%	5%	7%	3.7	\$309



## New York State<sup>3</sup>

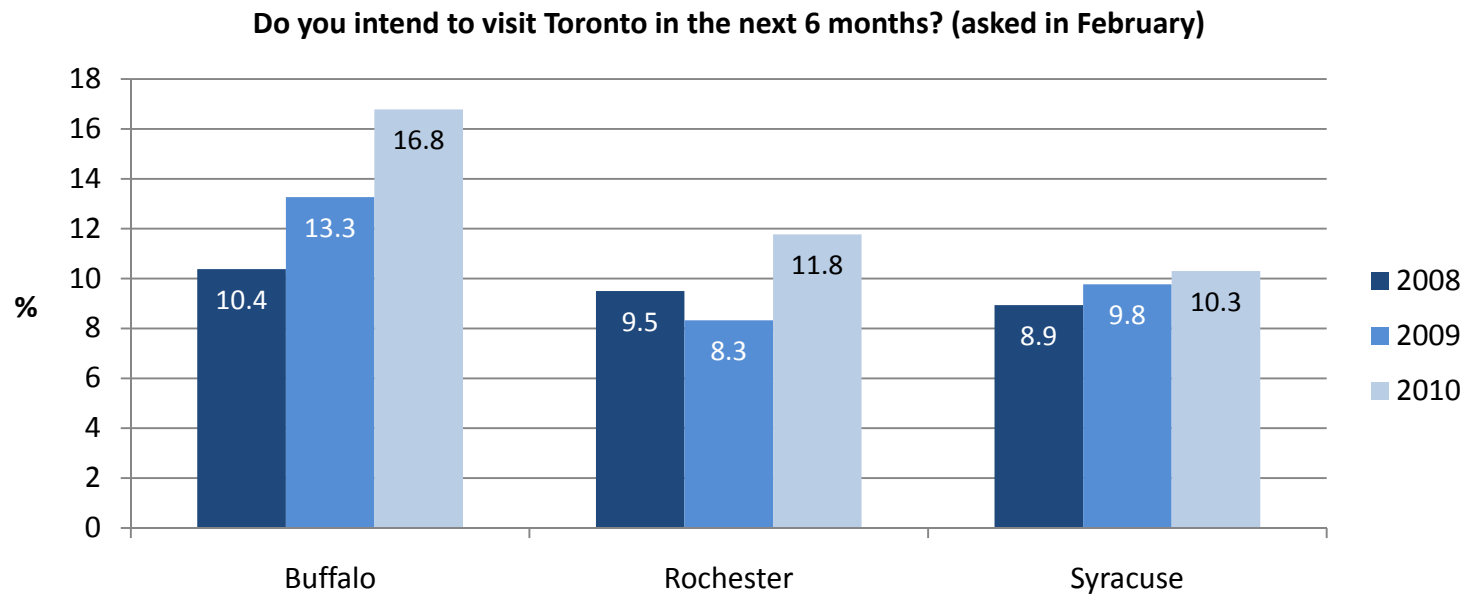
	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	472,432	\$163.03	1.30	2.8	\$345
Business	15%	27%	14%	2.5	\$614
Pleasure	51%	54%	51%	2.7	\$359
VFR	23%	15%	24%	2.9	\$222
Other	6%	5%	7%	3.7	\$309

In 2008 the average U.S. visitor spends three nights and \$484 in Toronto. Business visitors spend a little less time, but more money than the average, with VFR visitors spending the least money and most time here. Quarters two and three are the most popular, attracting 60% of visitors and spending, with Jan-Mar being the least popular period. Around 13% of Toronto’s U.S. visitors also visit Niagara, and 3% visit both Montreal and Ottawa on the same trip. Over half go shopping and over 40% go sightseeing and visit friends or relatives.

One in five overnight visitors and one in six dollars spent by overnight visitors from the U.S. is from New York State. The visitors from the state are very diverse, with the border cities of Buffalo, Rochester and Syracuse being very familiar with Toronto. On the other hand, NYC is an emerging market for the region as they discover all that Toronto has to offer. Fully half of all New York State visitors to Toronto are here for pleasure, with summer being the most popular season. NY state visitors also have a relatively high incidence of using paid accommodation, with over 60% of all person nights being spent in hotels or motels. They have a high rate of attending the theatre and to some extent amusements parks.

## Buffalo, Rochester and Syracuse<sup>5</sup>

Visitors from the border cities in New York State are fairly familiar with Toronto, with 72% of adults in Syracuse, 87% in Rochester and 94% in Buffalo having visited Toronto at some point. Respondents to the Travel Intentions survey who stated an interest in visiting Toronto put cultural and arts activities and attractions high on the list, with between 30% and 40% saying this was a key attractor for them. Theatre, sports, restaurants and shows are of interest for respondents these cities. The trend showing intent to travel over spring and summer has shown steady increases for most of these markets over the last three years.



## New York City

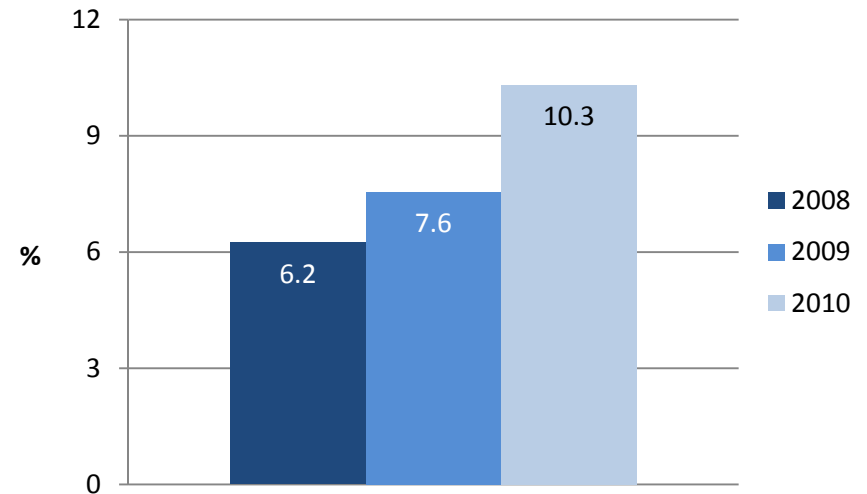
New York City represents a good opportunity for growth for Toronto, with a large population only a short distance away, there are good signs of increasing traffic from NYC. New Yorkers do have some experience with Toronto with more than 80% of adults stating they have visited before at some point in the past. Their awareness of Toronto is somewhat limited compared to other upstate New York cities, but the ratings show that although they may not feel aware of the specifics Toronto has to offer that they are warm to the city. Since 2008 the number of New Yorkers who have stated intent to visit Toronto has risen from 6.2% to 10.3%.<sup>5</sup>

Of those who are visiting Toronto almost 30% say that they intend to return for a pleasure trip in the next two years, with 69% saying that will return for any reason. There is a slightly higher intent to return to visit friends or relatives than for many other U.S. cities perhaps suggesting a stronger personal connection between Toronto and New York.<sup>6</sup>

Those New Yorkers who do visit Toronto are often alone (71%), one in eight are travelling as a couple and one in 12 are travelling with children.<sup>6</sup>

Please note that 'New York City' may include residents of states other than New York.

**Do you intend to visit Toronto in the next 6 months?  
(asked in February)<sup>5</sup>**



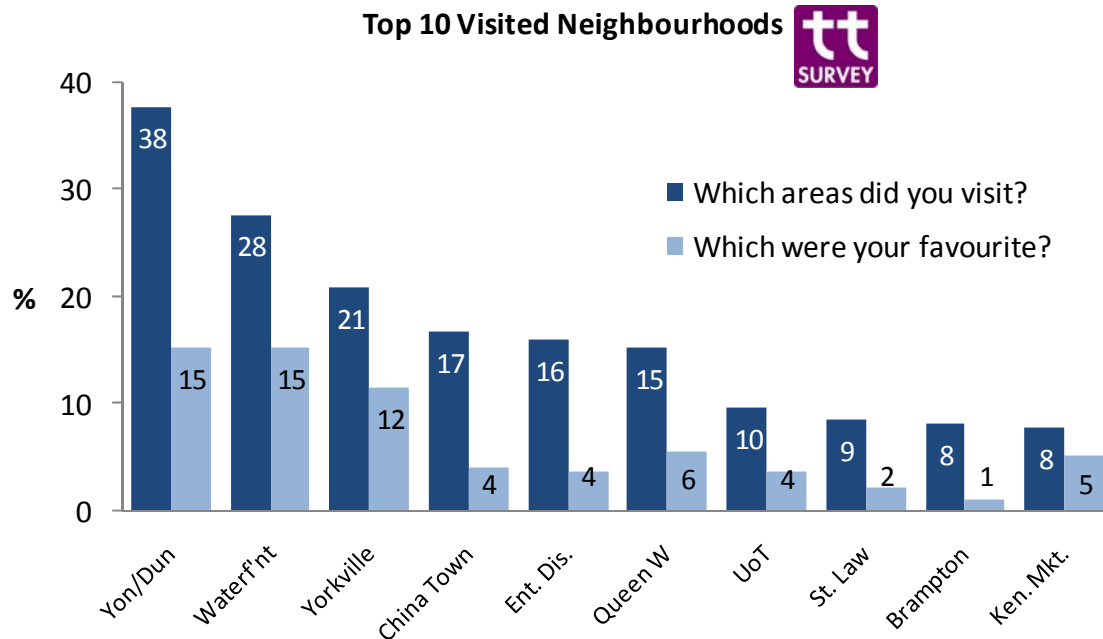
Party Composition	
Travel Alone (%)	71.2
Party Size	1.4
Party Size (exc. those travelling alone)	2.4
Travelling with spouse only (%)	11.6
With Children (%)	8.2



## New York City<sup>6</sup>

Of those New Yorkers who have visited Toronto they seem to like Yonge and Dundas, the Waterfront and Yorkville, with other eclectic neighbourhoods scoring well as favourite areas. Eating out and other entertainment is the most popular activity, with over a half also visiting friends or relatives.

Caribana is the most popular festival for New Yorkers, with 3% all 2009 respondents visiting (although main event is only one weekend long).



Did you visit any attractions or participate in the following activities?

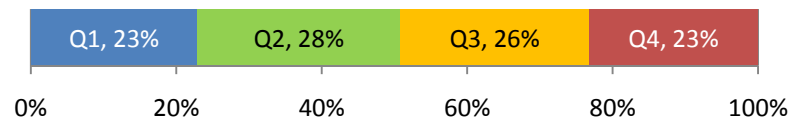


Summary	%
Any Restaurant, Bar or Entertainment	80.5
Any Visit with Friends or Family	56.6
Any Shopping	46.1
Any Attraction	28.1
Any Museum or Gallery	14.2
Any Festival	12.0
Any Sports Event	9.0

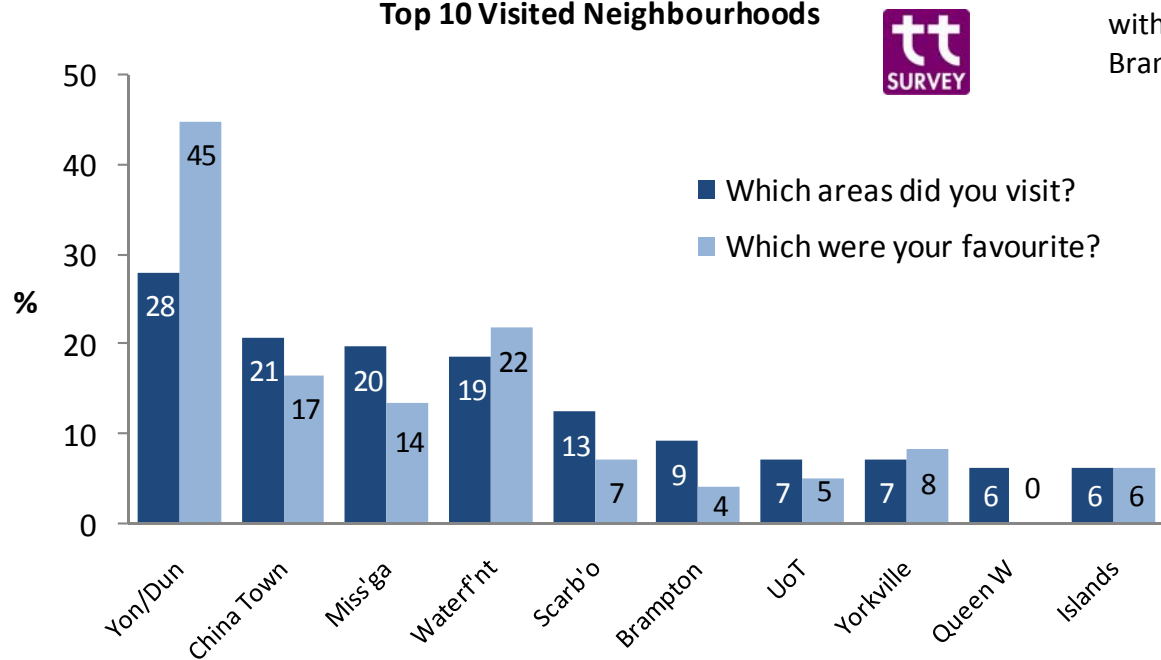
Top individual mentions	%
Restaurant	77.2
Bar	31.5
CN Tower	14.6
Nightclub	10.1
Independent sightseeing	6.7
Art Gallery of Ontario	6.4
Any Spectator Sport	6.0
Royal Ontario Museum	5.6
Blue Jays (MLB)	4.5
Hockey Hall of Fame	4.5
Other Festival	3.0
Caribana	3.0
Eaton Centre	3.0
Centreville Toronto Islands	2.2
Theatre	1.9

## Michigan

2008 <sup>4</sup>	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	218,262	\$71.16	0.49	2.2	\$326
Business	19%	34%	22%	2.6	\$580
Pleasure	50%	46%	49%	2.2	\$300
VFR	27%	18%	26%	2.1	\$214
Other	4%	3%	3%	1.6	\$212



### Top 10 Visited Neighbourhoods



Michigan represents 10% of overnight visitors from the United States, and 7% of visitor spend. Pleasure is the most popular trip purpose representing fully half of all Michigan visitors. There is a fairly even distribution of visitors across the four quarters also.<sup>4</sup>

Around 30% of Michigan respondents to the TT Visitor Survey were travelling alone, and another 30% were with children. Almost one in five were travelling with a partner only.<sup>6</sup>

With 85% of respondents being repeat visitors they were able to name more favourite areas than they visited. A few non-Downtown areas are in the top 10 visited and favourites with VFR visitors listing Mississauga, Scarborough and Brampton as their most visited neighbourhoods.<sup>6</sup>

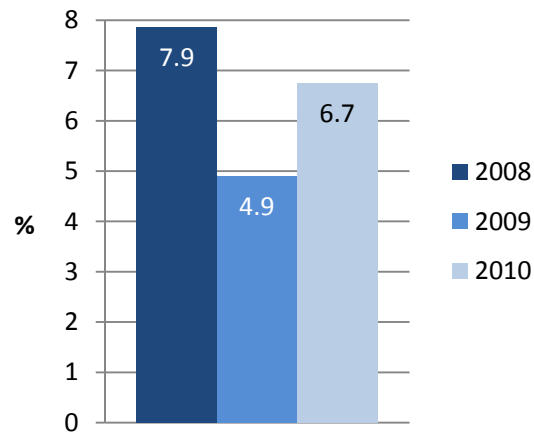
Party Composition <sup>6</sup>	
Travel Alone (%)	30.2
Party Size (exc those travelling alone)	3.2
Travelling with partner only (%)	17.7
With Children (%)	30.2



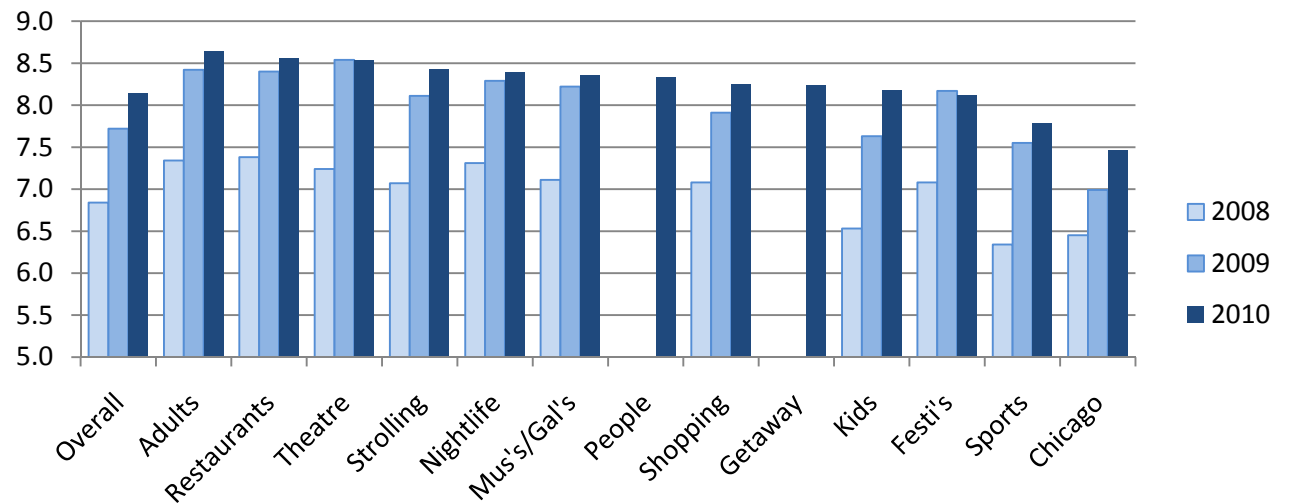
## Detroit<sup>5</sup>

Potential visitors from Detroit rate Toronto well with 12 of the 13 attributes being scored at 8 out of 10 or more. They are interested in Toronto for the culture and arts, the shopping, restaurants, museums and theatre. Their intent to visit Toronto has fallen since 2008 but is up from 5% in 2009 to almost 7% in 2010 indicating signs of recovery.

### Do you intend to visit Toronto in the next 6 months?

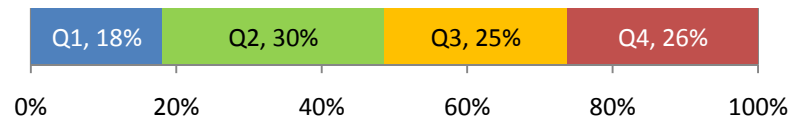


Perceptions of Toronto out of 10	2008	2009	2010
Overall	6.8	7.7	8.1
Lots of things for adults to see and do	7.3	8.4	8.6
A place with great restaurants	7.4	8.4	8.6
A great place for theatre and other cultural performances	7.2	8.5	8.5
A great place for strolling around to see the buildings and neighbourhoods	7.1	8.1	8.4
A place with great nightlife	7.3	8.3	8.4
A great place to visit art galleries and museums	7.1	8.2	8.4
Has friendly and welcoming people	N/A	N/A	8.3
A great place for shopping	7.1	7.9	8.3
A great place for an urban getaway	N/A	N/A	8.2
Lots of things for kids to see and do	6.5	7.6	8.2
A great place for cultural and arts festivals	7.1	8.2	8.1
A great place for attending pro sports events	6.3	7.6	7.8
Chicago	6.5	7.0	7.5



## California

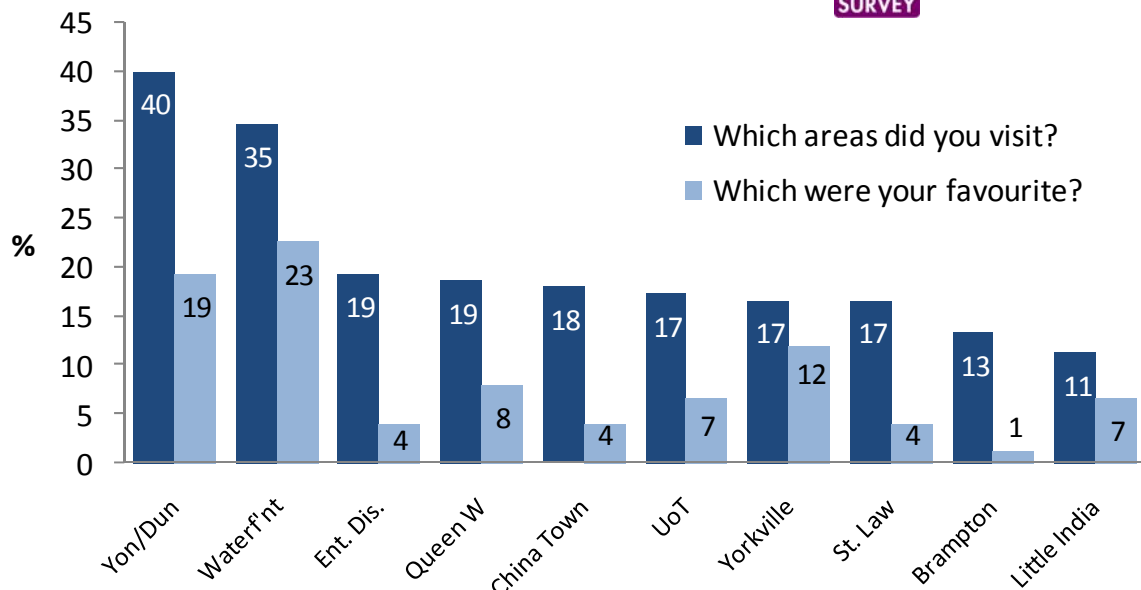
2008 <sup>4</sup>	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	142,161	\$49.96	0.36	4.3	\$591
Business	28%	44%	25%	3.7	\$1,167
Pleasure	18%	23%	21%	3.3	\$349
VFR	49%	29%	51%	5.0	\$336
Other	5%	4%	3%	3.7	\$309



California represents 7% of overnight visitors from the U.S., and 8% of visitor spend. VFR is the major reason people visit Toronto, with half of visitors and person nights related to visiting friends and relatives. Californians have a high propensity to visit other cities while in Toronto, with 11% visiting Niagara, 6% going to Montreal, and 7% travelling to Ottawa. They are fairly active while travelling, with higher than average numbers for shopping, visiting friends or relatives, visiting historic sites, museums and galleries and nature parks.<sup>4</sup>

Californians visit throughout the year with a slight increase in the second quarter and a few less in the first quarter. Only one in three person-nights spent by Californians in Toronto is in paid accommodation, reflecting the high number of VFR visitors.<sup>4</sup>

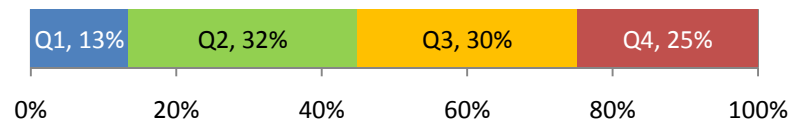
### Top 10 Visited Neighbourhoods



Californians who were interviewed in Toronto said that the waterfront, Yonge and Dundas and Yorkville areas were their favourites. They have high visitation rates of many downtown neighbourhoods.<sup>6</sup>

## Illinois<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	136,169	\$68.22	0.51	3.7	\$501
Business	33%	57%	26%	2.9	\$854
Pleasure	25%	23%	20%	3.0	\$462
VFR	32%	13%	45%	5.2	\$199
Other	10%	8%	9%	3.4	\$388



Visitors from Illinois represent 6% of all U.S. visitors and 7% of all U.S. visitor spend in Toronto. A quarter of Illinois visitors are on a pleasure trip with another third each visiting for business or visiting friends and relatives.

More than 60% of Illinois visitors arrive in the six months between April and September, with only 13% arriving in the first three months of the year.

## Chicago

Potential visitors from Chicago are more interested in restaurants, sightseeing and sports than culture and arts<sup>5</sup> and this is reflected in the numbers from actual visitors, with 90% going to restaurants, bars and other entertainment and only 16% going to museums or galleries.<sup>6</sup>

In their rating of Toronto on specific attributes there is little variation with almost all scores around 7.5 out of 10. This suggests that potential visitors are not against the idea of visiting Toronto but are perhaps unfamiliar with the specific.<sup>5</sup>

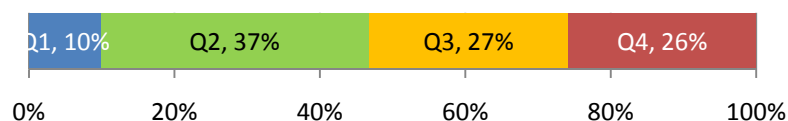
Activity Summary	%
Any Restaurant, Bar or Entertainment	90.4
Any Visit with Friends or Family	50.0
Any Shopping	50.0
Any Attraction	32.7
Any Museum or Gallery	16.3
Any Festival	11.5
Any Sports Event	8.7





## Texas

2008 <sup>4</sup>	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	131,187	\$87.67	0.50	3.8	\$668
Business	48%	65%	36%	2.9	\$919
Pleasure	27%	22%	35%	5.1	\$555
VFR	21%	11%	25%	4.5	\$351
Other	5%	1%	3%	2.9	\$203



Top individual mentions	%
Restaurant	74.4
Bar	17.4
CN Tower	9.1
Theatre	8.3
Royal Ontario Museum	7.4
Independent sightseeing	6.6
Any Spectator Sport	5.0
Art Gallery of Ontario	5.0
Nightclub	4.1
Blue Jays (MLB)	4.1



Texas represents 6% of overnight visitors from the U.S., and 8% of visitor spend. The most popular reason Texans visit Toronto is for business, representing half of all visitors and 65% of all visitor spend.<sup>4</sup>

Of those Texans who responded to the Tourism Toronto visitor survey a quarter said that they intend to return for a pleasure trip in the next two years.<sup>6</sup>

Over 8% of Texans said that they went to the theatre in Toronto, compared with only 3% of all U.S. respondents.<sup>6</sup>

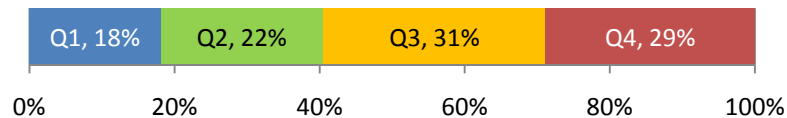
### Do you intend to return to Toronto in the next two years?

	%
For business	29.8
For pleasure	24.0
To visit friends or relatives	33.9
For another reason	5.0
For ANY Reason	64.5



## New Jersey<sup>4</sup>

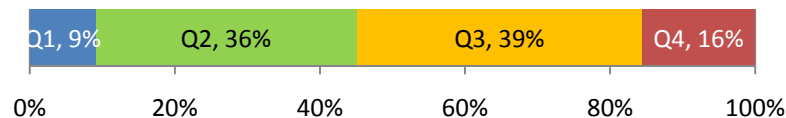
	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	118,185	\$49.96	0.36	3.0	\$423
Business	34%	44%	25%	2.2	\$541
Pleasure	24%	23%	21%	2.6	\$400
VFR	37%	29%	51%	4.2	\$334
Other	4%	4%	3%	1.8	\$372



New Jersey represents 6% of overnight visitors from the states, and 5% of visitor spend. Business and VFR visitors are the largest component, with 2 in 3 visitors to Toronto visiting for these purposes. Visitors from New Jersey and Pennsylvania are likely to shop and sightsee on their trip to Toronto, with almost 10% attending a festival. A quarter visit Niagara while on the same trip to Toronto.

## Florida<sup>4</sup>

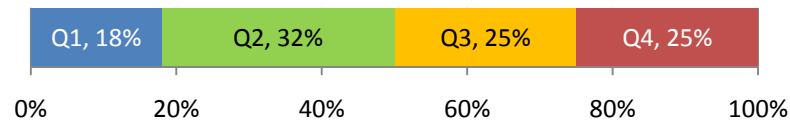
	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	88,661	\$55.88	0.44	4.9	\$630
Business	37%	48%	22%	2.9	\$829
Pleasure	20%	26%	41%	10.2	\$808
VFR	28%	16%	27%	4.7	\$360
Other	15%	10%	10%	3.3	\$418



Visitors from Florida represent 4% of all U.S. visitors to Toronto. Two in five of all visitor nights spent by Floridians in Toronto are by pleasure visitors, who have an average stay of over 10 nights. The spring and summer attract 75% of all visitors with only 9% arriving in the first three months of the year.

## Ohio<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	114,356	\$46.78	0.29	2.6	\$409
Business	33%	48%	37%	2.9	\$599
Pleasure	47%	42%	40%	2.2	\$366
VFR	15%	6%	18%	3.0	\$161
Other	5%	4%	5%	2.4	\$337

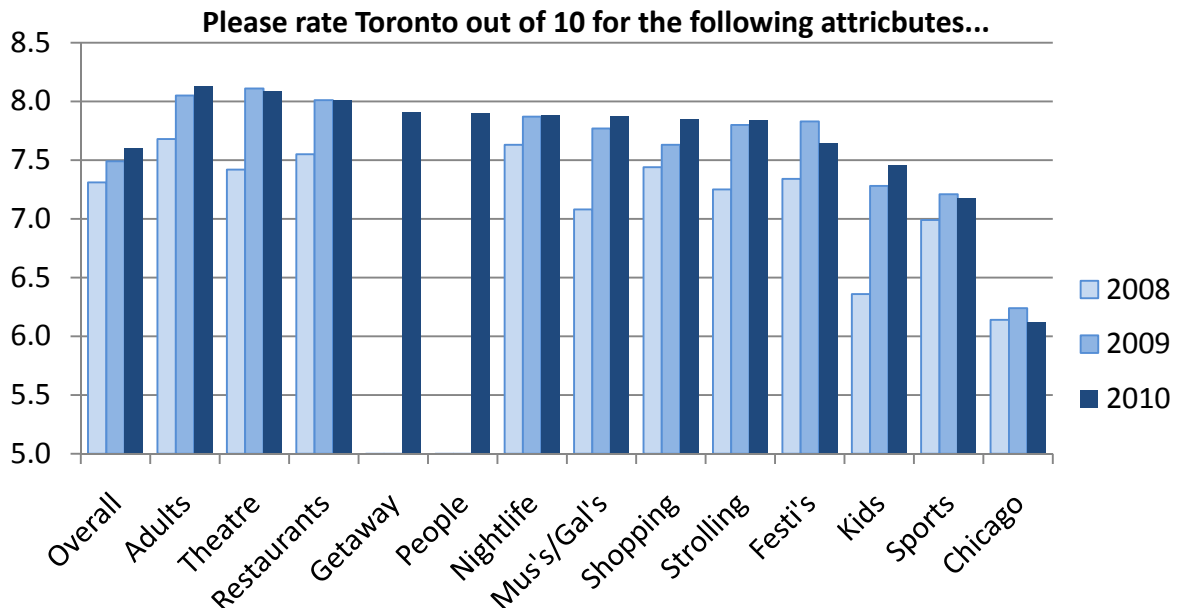


Visitors from Ohio account for 6% of U.S. visitors and 7% of U.S. visitor spend in Toronto. Almost half of visitors spend and person-nights are for pleasure purposes with the average vacation in Toronto being 2.2 nights.

Spring is the most popular time for Ohio visitors with 1 in 3 people arriving in this time. The last two quarters of the year both see 25% of visitors each.

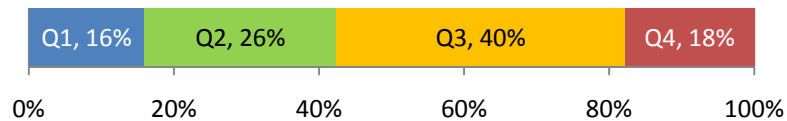
## Cleveland<sup>5</sup>

Respondents from Cleveland who stated an interest in visiting Toronto are particularly interested in culture and arts, restaurants and dining, nightlife and theatre. One in ten respondents stated theatre as a as an interest in visiting Toronto compared with less than 5% of the total U.S. respondent population. Their ratings of Toronto over the last three years have improved for almost every aspect, with all scores much higher than for Chicago.



## Pennsylvania<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	88,504	\$29.38	0.21	2.3	\$332
Business	39%	60%	38%	2.3	\$506
Pleasure	44%	33%	40%	2.1	\$245
VFR	9%	4%	17%	4.5	\$152
Other	8%	3%	6%	1.7	\$143



Visitors from Pennsylvania represent 4% of all U.S. visitors and 3% of all U.S. visitor spend. Business and pleasure visitors both represent a around 40% of all Pennsylvania visitors. VFR visitors have the highest trip duration at almost 4.5 nights.

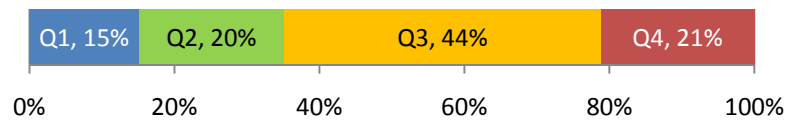
Visitors from Pennsylvania are likely to shop and sightsee on their trip to Toronto, with almost 10% attending a festival. A quarter visit Niagara while on the same trip to Toronto.

## Pittsburgh and Philadelphia<sup>5</sup>

Ratings of Toronto by respondents from Pittsburgh and Philadelphia are similar, but those from Pittsburgh generally rate Toronto slightly higher than those from Philadelphia, with particular good impressions for things for adults to do and restaurants. Potential visitors from Pittsburgh are interested in the cultural and arts products Toronto has to offer, as well as theatre and entertainment and shopping. Potential visitors from Philadelphia show less interest in culture and arts than those in Pittsburgh, but still rate it as the main draw. Philadelphia respondents mentioned the opportunity to visit Niagara and sightseeing as reasons why they would want to visit Toronto for an overnight trip.

## Massachusetts<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	74,138	\$33.27	0.20	2.7	\$449
Business	40%	63%	30%	2.0	\$710
Pleasure	19%	21%	16%	2.2	\$490
VFR	37%	14%	50%	3.7	\$173
Other	4%	1%	4%	3.0	\$172



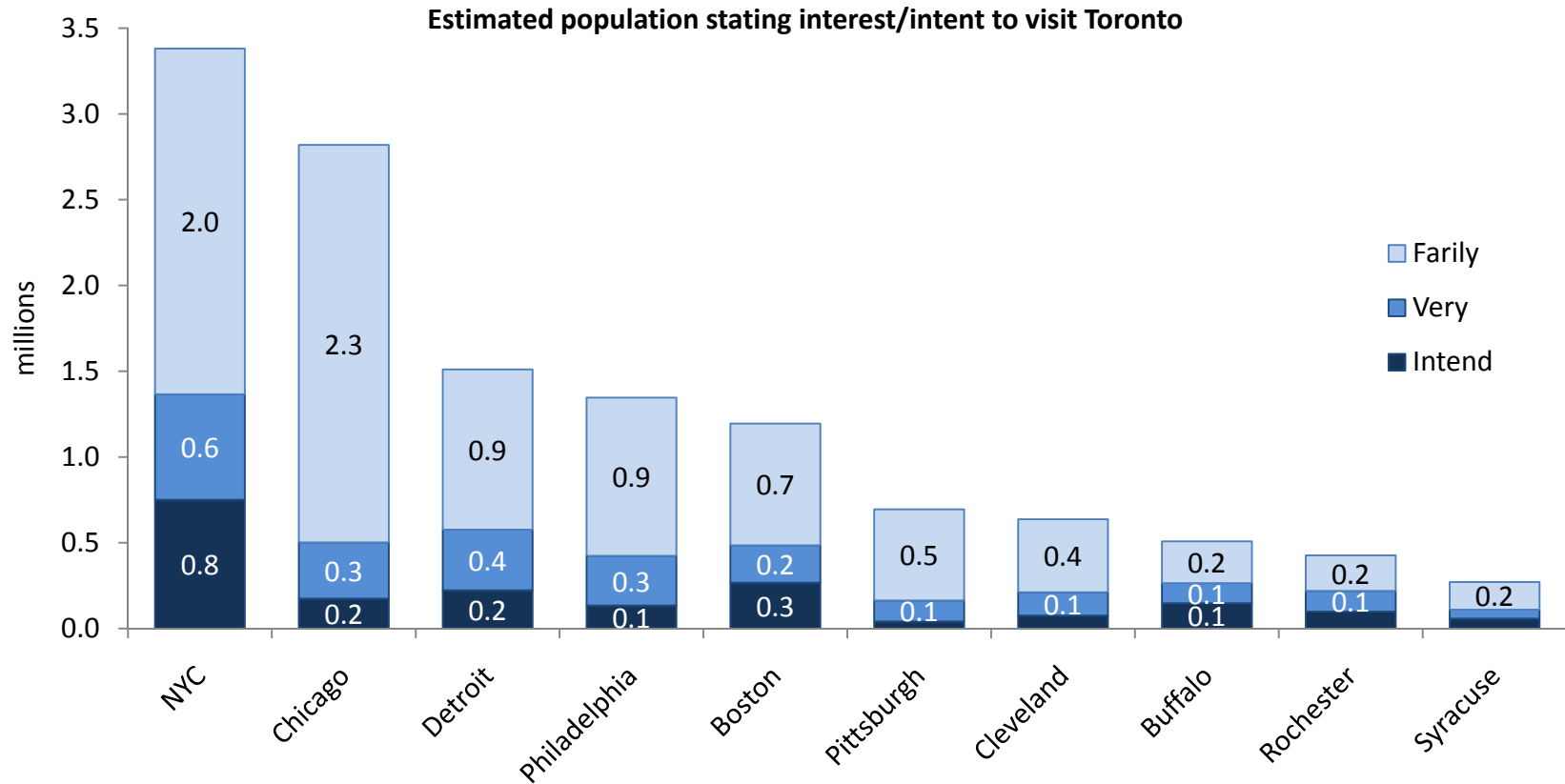
Visitors to Toronto from Massachusetts represent 3% of all U.S. visitors and visitor spend to Toronto. Business and VFR are the main reasons for travel, but with business visitors accounting for almost two thirds of spending and VFR visitors with half of all visitor nights. The summer months are the most popular time of travel. Visitors from New England shop, visit friends and relatives and sightsee when they visit Toronto. Over 13% also attend a sporting event compared with the U.S. average of 8%.

## Boston<sup>5</sup>

Boston respondents to the Travel Intentions Survey rate Toronto at 7.1 out of 10 as an overall leisure destination. The highest scores they give Toronto are as a destination with friendly people, lots to do for adults and a place with great restaurants. The ratings for different aspects of Toronto as a destination are not very varied, nearly all in the 7 to 7.5 range. This is not as varied as the ratings from other cities perhaps suggesting that people from Boston are not as familiar with Toronto and the different offerings available to visitors. People from Boston who stated an interest in visiting in the near future are particularly interested in the culture and arts, shopping, and to some degree sporting events in Toronto.

## U.S. MARKET POTENTIAL

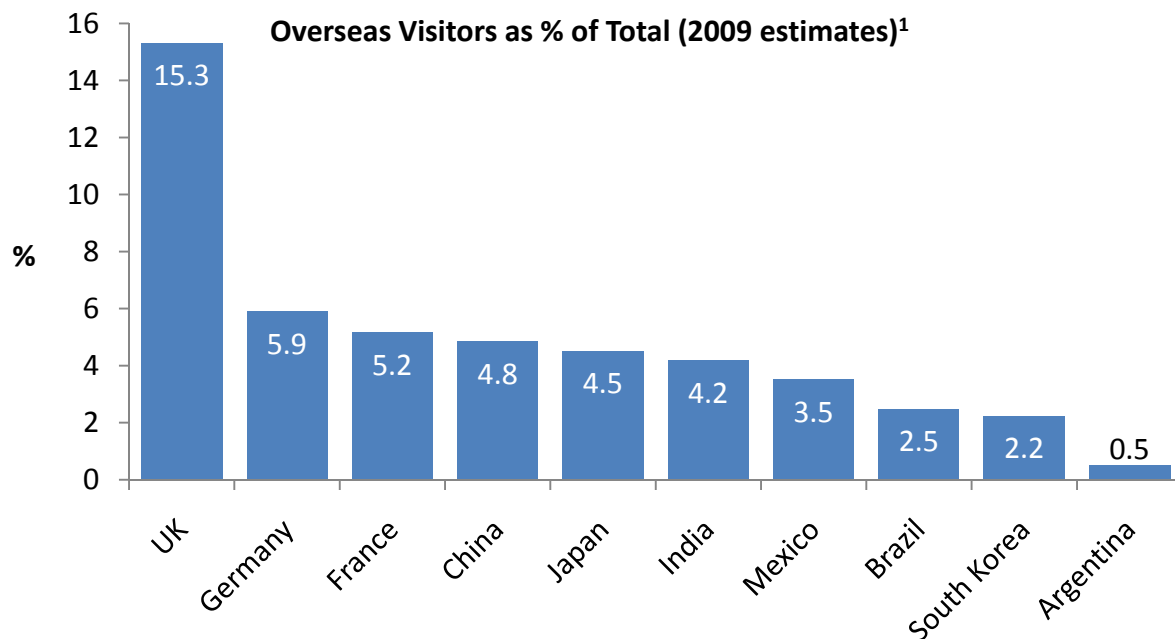
In the Travel Intetnions<sup>5</sup> survey adults are asked if they intend to visit Toronto in the next six months and if not, how interested they are in visiting Toronto in the next two years. The table and graph on this page illustrate the approximate population by U.S. city who are intending to visit Toronto, or who are either very or fairly interested in visiting in the next two years. New York City has the greatest number of adults who are both intending to visit and who are very interested in visiting, with almost 3.5 million people stating intent or an interest in visiting. Despite a relative lack of awareness of Toronto the sheer size of the larger cities make them attractive new markets for the region.



## OVERNIGHT OVERSEAS VISITORS: KEY MARKETS

In 2009 it is estimated that visitors from countries other than the U.S. represent around 12.5% of all visitors and 28.8% of all visitors spending<sup>1</sup>. Due to the greater distances visitors from overseas countries travel we tend to see longer trip durations and more multi destination journeys than U.S. and Canadian visitors. Overseas visitors are more likely to visit for pleasure reasons than business and to visit friends and relatives than Canadian and U.S. visitors.

	2007 <sup>4</sup>	2008 <sup>4</sup>	2009 <sup>1</sup>	% Change
Total	1,442,873	1,390,386	1,200,631	-13.6
UK	273,044	236,116	183,900	-22.1
Germany	74,978	80,129	70,900	-11.5
France	74,495	68,218	62,100	-9.0
China	70,624	61,949	58,200	-6.1
Japan	92,368	79,231	54,300	-31.5
India	58,899	54,874	50,300	-8.3
Mexico	84,479	77,473	42,200	-45.5
Brazil	37,487	39,578	29,800	-24.7
South Korea	50,871	42,807	26,900	-37.2
Argentina	7,154	7,688	6,100	-20.7



With the economic crisis in 2009 many visitor groups declined in numbers, a trend that is not unique to Toronto. Before 2009 Toronto had seen some stagnation of growth in some of the more traditional markets such as the U.K. and Germany, but had begun to see some growth from emerging markets in Asia and South America which it is hope will continue to grow in the future.

The UK is by far the largest international market after the U.S. Germany, France, China, Japan and India each account for between 4% and 6% of all overseas visitors to Toronto.

## OVERNIGHT OVERSEAS VISITOR TRIP CHARACTERISTICS

The information on this and the following page shows activities participated in by overseas visitors who spent at least one night in Toronto in 2008<sup>4</sup>. The activity could have taken place at any point on the visitor's trip, theoretically happening in another destination, but this is still useful insight into the behaviour of visitors.

As %	Total	UK	Germany	France	China	Japan	Mexico	South Korea
Shopping	88.5	86.5	86.7	87.6	90.5	85.3	86.4	83.9
Sightseeing	72.9	75.0	83.0	70.3	81.7	73.9	74.4	71.1
Visit friends or relatives	65.1	56.8	47.1	56.2	63.6	49.7	45.6	73.1
Historic site	49.1	50.4	58.0	63.7	41.3	39.8	57.0	36.1
Nature Park	47.6	43.4	64.8	60.0	60.5	56.8	43.9	46.6
Museum or art gallery	34.7	41.0	25.9	59.3	24.4	29.4	44.5	32.1
Bar/Nightclub/Restaurant	31.0	46.4	31.3	46.6	24.2	21.6	40.2	17.2
Zoo/Aquarium/Botanical Garden	22.0	19.6	25.8	39.8	20.7	5.9	30.1	7.8
Festival	19.7	16.0	14.2	23.1	19.9	11.9	27.3	11.2
Play/Concert	15.9	20.4	12.8	17.4	7.8	3.8	24.1	4.2
Amusement park	12.6	10.7	11.6	17.6	13.3	4.6	21.7	8.5
Casino	11.2	9.3	6.8	9.2	23.8	13.8	24.1	11.7
Spectator Sports	7.6	11.6	5.9	6.6	5.1	1.5	9.1	1.2
Boating/canoeing/kayaking	7.6	11.4	11.4	17.5	4.9	0.7	3.5	9.2

\*Includes all non-U.S. international visitors

Shopping, sightseeing and visiting friends and relatives are popular activities for overseas visitors. Some differences exist between behaviour of visitors from different countries, for example, French, Mexican and British visitors are far more likely to visit a museum or art gallery than the Germans or Chinese. Nearly half of visitors from the UK and France go to a bar, nightclub or restaurant, compared to 22% of Japanese visitors and only 17% of Koreans.



## TRAVEL PARTY AND ACCOMMODATION TYPE

As % <sup>4</sup>	Total	U.K.	Germ -any	France	China	Japan	Mexico	South Korea
Niagara	39.8	44.7	45.3	44.7	32.8	39.4	48.5	36.2
Montreal	24.6	15.3	29.7	57.6	14.1	5.7	36.0	20.9
Ottawa	18.1	16.9	26.2	42.8	17.2	6.2	22.8	16.9
Quebec City	17.1	10.0	23.1	46.2	4.8	1.1	33.3	15.2
Vancouver	12.6	9.6	7.0	1.7	36.4	31.7	0.9	33.9
Calgary	4.5	6.3	9.4	0.0	4.1	7.4	0.0	8.0
Victoria	3.0	4.3	4.1	1.0	4.0	0.8	0.0	5.4
Halifax	1.5	1.6	6.5	0.0	0.0	0.5	0.0	0.0
Edmonton	1.3	3.1	1.4	1.1	2.1	0.0	0.0	0.0
Windsor	1.1	1.5	1.7	1.6	1.4	0.7	1.9	0.8

Overseas visitors to Toronto often combine going to other destinations on the same trip. The most popular Canadian destinations visited as part of a trip that includes Toronto are Niagara and Montreal. Niagara is popular with all markets. Montreal and Quebec City are particularly popular for Mexican and French visitors while Vancouver is more popular with our Asian visitors.

Nine out of ten overseas visitors to Toronto are in adult-only parties, with visitors from South Korea the most likely to have under 18's travelling with them. The French, Japanese, British and Germans are the most frequent users of paid accommodations with the Chinese and South

Koreans the most likely to use unpaid accommodations reflecting a high number of VFR visitors. Discussion on individual countries follows.

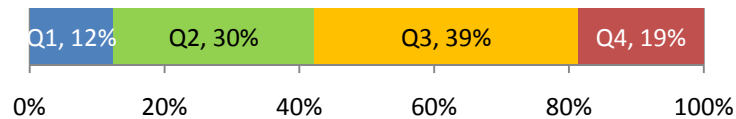
Party Composition <sup>4</sup>	Total	U.K.	Germ -any	France	China	Japan	Mexico	South Korea
Adults Only %	90.2	92.7	92.3	90.6	96.9	84.6	91.6	88.8
Adults with Children %	5.5	4.7	5.2	5.3	2.7	1.9	2.8	10.7
Not Stated %	4.0	2.6	2.5	3.6	0.4	13.5	2.3	0.4

Accommodation Use (by person nights) <sup>4</sup>	Total	U.K.	Germ -any	France	China	Japan	Mexico	South Korea
All paid roofed accommodation %	17.8	36.2	31.2	35.4	14.3	27.3	21.1	15.7
All unpaid accommodation %	70.6	50.0	37.6	53.3	76.1	65.5	55.4	76.8
Other/Not Stated %	11.6	13.9	31.2	11.3	9.6	7.2	23.5	7.5

# OVERNIGHT OVERSEAS VISITORS: A MARKET COMPARISON

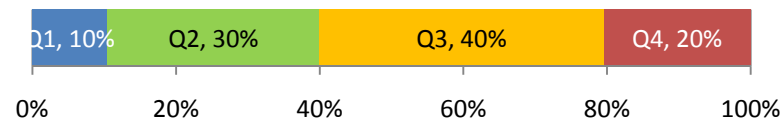
## Total Overseas<sup>4</sup>

	Visitors in millions	Spend in billions	Nights in millions	Avg. Nights	Trip Spend
Total	1.39	\$1.03	12.54	9.0	\$740
Business	18%	30%	13%	6.6	\$1,252
Pleasure	37%	30%	24%	6.0	\$604
VFR	39%	34%	56%	12.9	\$639
Other	6%	6%	7%	9.6	\$736



## UK<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	236,116	\$154.11	1.41	6.0	\$653
Business	15%	23%	16%	6.6	\$1,252
Pleasure	49%	49%	39%	6.0	\$604
VFR	32%	24%	42%	12.9	\$639
Other	4%	4%	4%	7.2	\$662



Pleasure and VFR are the main reasons Toronto receives visitors from overseas, representing 76% of all visitors, 64% of all visitor spend and 90% of all person nights. VFR and pleasure visitors have a similar trip spend, but VFR visitors stay over twice as long as pleasure visitors. Despite their relatively small number, business visitors are responsible for almost a third of all visitor spending. The summer is by far the most popular season for overseas visitors, followed by spring, with January to March being the least popular.

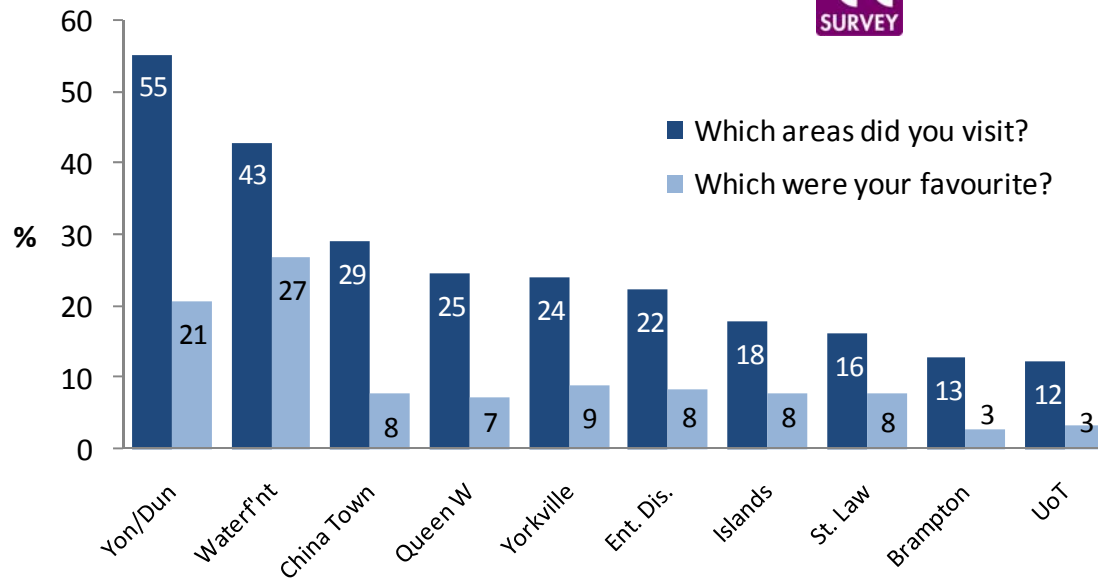
Visitors from the UK represent around 15% of all overseas visitors<sup>1</sup>. 81% of all UK visitors come to Toronto for a pleasure trip or to visit friends or family. The summer is the most popular period with 40% of visitors arriving in this time. Visitors from the UK like to shop, sightsee, visit friends and family, go to museums and attractions. They also have a high propensity to eat and drink out and attend a sporting event compared with other overseas visitors.

## UK<sup>6</sup>

The most frequented areas of Toronto by UK visitors who responded to the Tourism Toronto Visitor Survey were the Yonge and Dundas area and the waterfront, with high numbers for China Town, Queen West, Yorkville and the Entertainment District. The waterfront and Yonge and Dundas areas were cited as favourites.

Two in every five UK visitors surveyed went to the CN Tower, 16% to the Royal Ontario Museum and 9% to the Art Gallery of Ontario. One in ten UK respondents went to the theatre and another one in ten went to a spectator sport.

**Top 10 Visited Neighbourhoods**

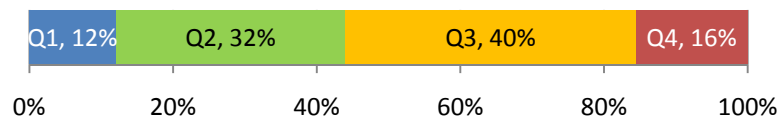


Top individual mentions	%
Restaurant	88.3
Bar	41.9
CN Tower	38.0
Royal Ontario Museum	15.6
Independent sightseeing	11.2
Theatre	9.5
Nightclub	9.5
Any Spectator Sport	9.5
Art Gallery of Ontario	8.9
Bus tour	7.8
Canada's Wonderland	7.8
Casa Loma	7.3
Boat tour	6.1
Centreville Toronto Islands	6.1
Blue Jays (MLB)	5.6



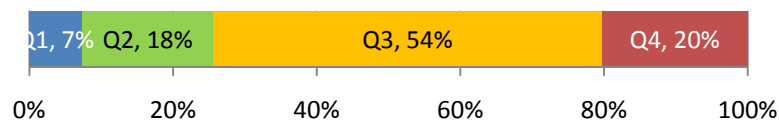
## Germany<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	80,129	\$51.18	0.48	6.0	\$639
Business	21%	38%	18%	6.6	\$1,252
Pleasure	52%	48%	53%	6.0	\$604
VFR	24%	13%	28%	12.9	\$639
Other	3%	1%	1%	2.6	\$229



## France<sup>4</sup>

	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	68,218	\$33.21	0.32	4.7	\$487
Business	17%	35%	18%	6.6	\$1,252
Pleasure	52%	38%	41%	6.0	\$604
VFR	28%	23%	37%	12.9	\$639
Other	3%	4%	4%	6.0	\$704

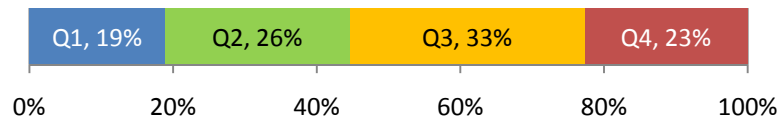


Visitors from Germany represent around 6% of all overseas visitors to Toronto. Over half travel here for pleasure and stay around four nights. The summer is the most popular season with 40% of all German visitors arriving in this period. Germans shop, sightsee, visit historic sites and nature parks, and half visit friends or family during their trip to Toronto. They have a high propensity to participate in outdoor activities such as kayaking and camping, meaning Toronto is likely an urban part of their multi destination trip that includes a natural environment. Many German visitors include other Canadian destinations on their trip with almost half visiting Niagara, 30% visiting Montreal, a quarter visiting Ottawa and Quebec City each.

Visitors from France represent around 5% of all overseas visitors to Toronto. Half are pleasure visitors and half visit in the summer months. Shopping, visiting historic sites, nature parks and museums and galleries are popular activities for French visitors. They are more likely to go to a bar, nightclub or restaurant, visit a zoo or botanical garden or go to a play or concert than other overseas visitors. They also have a high propensity to visit Montreal, Quebec City and Ottawa as part of the same trip.

## China<sup>4</sup>

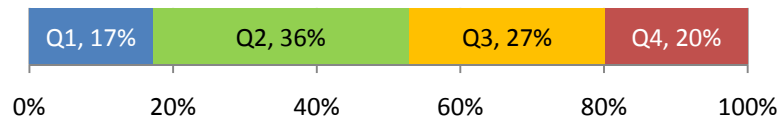
	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	61,949	\$72.51	0.97	15.6	\$1,170
Business	33%	58%	27%	12.7	\$2,045
Pleasure	14%	11%	5%	5.2	\$902
VFR	47%	28%	66%	21.8	\$690
Other	6%	4%	2%	6.4	\$741



Visitors from China to Toronto account for approximately 5% of all Toronto's overseas visitors. Half are here to visit friends and family, a third visit for business reasons and 14% are on a pleasure trip. VFR visitors stay for three weeks, and business visitors almost two weeks making Chinese visitors one of the longest staying markets. A third of all visitors arrive in the summer. Chinese visitors to Toronto are keen shoppers and almost a quarter visit a casino during their trip that includes Toronto. A third of Chinese visitors to Toronto also visit Niagara and Vancouver. Very few children travel from China to Toronto with 97% of visitors being part of adult only groups.

## Japan<sup>4</sup>

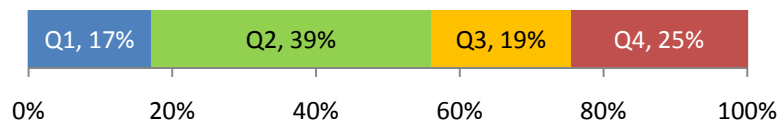
	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	79,231	\$51.53	0.46	5.8	\$650
Business	22%	39%	15%	4.1	\$1,164
Pleasure	39%	24%	16%	2.3	\$408
VFR	33%	32%	63%	11.1	\$623
Other	6%	5%	6%	5.6	\$497



Visitors from Japan represent about 5% of all overseas visitors to Toronto. Two in five Japanese visitors are here for a pleasure trip and a third to visit friends and family. Pleasure visitors stay for only 2.3 nights indicating that Toronto is likely part of a multi-destination trip. 40% of visitors also went to Niagara and more than 30% also went to Vancouver. Shopping, sightseeing and visiting a nature park are the most popular activities.

## India<sup>4</sup>

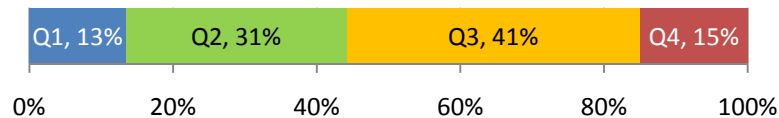
	Visitors	Spend in billions	Nights in millions	Avg. Nights	Trip Spend
Total	54,874	\$47.49	1.05	19.2	\$866
Business	15%	24%	17%	20.7	\$1,336
Pleasure	13%	8%	10%	14.8	\$515
VFR	65%	60%	69%	20.3	\$796
Other	6%	8%	4%	12.6	\$1,211



Visitors from India account for around 4% of all overseas visitors to Toronto. However they spend a total of 1.3million nights in the region, which is over 8% of all nights spent by overseas visitors in the Toronto region. VFR is the main trip purpose representing two thirds of all visitors from India. Spring is the most popular time for Indian visitors to Toronto. Indian visitors to Toronto stay for almost three weeks each.

## Mexico<sup>4</sup>

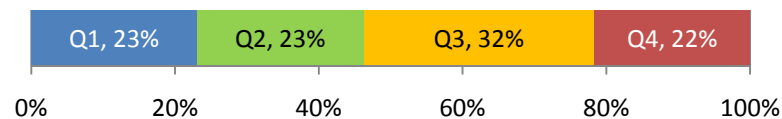
	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	77,473	\$63.64	0.84	10.9	\$822
Business	25%	33%	18%	7.8	\$1,075
Pleasure	44%	39%	43%	10.7	\$729
VFR	29%	27%	37%	14.1	\$773
Other	3%	2%	2%	6.6	\$472



2009 was a poor year for the Mexican market, primarily due to the new visa requirements introduced in the summer. It is estimated that in 2009 3.5% of Toronto's overseas visitors were from Mexico.<sup>1</sup> In 2008 44% of Mexicans visiting Toronto were on a pleasure trip and stayed for more than 10 nights. During their trip to Toronto Mexicans like to shop, sightsee and visit historic sites. They have high numbers for attending festivals, going to amusement parks and casinos.

## Brazil<sup>4</sup>

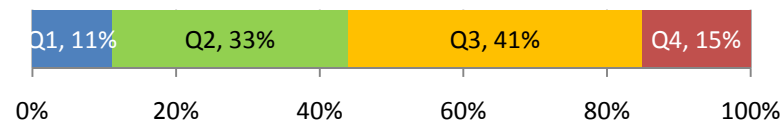
	Visitors	Spend in billions	Nights in millions	Avg. Nights	Trip Spend
Total	39,578	\$34.46	0.36	9.1	\$871
Business	10%	17%	6%	4.9	\$1,456
Pleasure	49%	48%	31%	5.7	\$853
VFR	36%	32%	61%	15.4	\$775
Other	4%	2%	2%	5.5	\$430



It is estimated that in 2009 Brazilians who visited Toronto accounted for 2.5% of all overseas visitors to the city. Half of Brazilian visitors to Toronto are on a pleasure trip, staying almost 6 nights and spending around \$850 per person. A third of all visitors from Brazil visit Toronto in the summer months of July through September. Brazilians love to shop when they travel, as well as other sophisticated urban activities that positions Toronto

## South Korea<sup>4</sup>

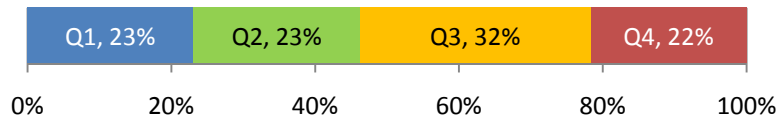
	Visitors	Spend in millions	Nights in millions	Avg. Nights	Trip Spend
Total	42,807	\$26.87	0.32	7.4	\$628
Business	18%	32%	15%	5.9	\$1,106
Pleasure	18%	16%	6%	2.6	\$551
VFR	56%	45%	70%	9.2	\$506
Other	8%	7%	10%	9.1	\$552



Of all overseas visitors to Toronto around 2% are from South Korea. More than half of South Koreans who visit Toronto are here to see friends or family and stay around 9 nights each. The third quarter is the most popular with two in five visitors arriving in this time. South Koreans like to shop, visit friends and relatives, sight see and visit nature parks. A third of South Koreans who visit Toronto also visit Niagara and a third also visit Vancouver, 20% visit Montreal and 17% visit Ottawa. South Koreans have a low propensity to stay in paid accommodation with three quarters of all person nights spent in Toronto in unpaid accommodation.

## Argentina<sup>4</sup>

	Visitors	Spend in billions	Nights in millions	Avg. Nights	Trip Spend
Total	7,688	\$7.10	0.05	7.1	\$923
Business	29%	35%	16%	4.0	\$1,135
Pleasure	40%	16%	33%	5.9	\$365
VFR	31%	49%	51%	11.7	\$1,440
Other	0%	0%	0%	1.0	\$163



Argentina is a new emerging market for Toronto with great potential to expand. Argentinean visitors have a relatively high trip duration at over one week, and have a high number of pleasure visitors. They are also fairly evenly distributed across the seasons. Pleasure visitors account for two in five Argentineans who visit Toronto and stay 6 nights. Visitors from Argentina who are in Toronto to see friends and family have a comparatively high spend, accounting for only 30% of visits but 50% of spend. These visitors also have a long trip duration of almost 12 nights.

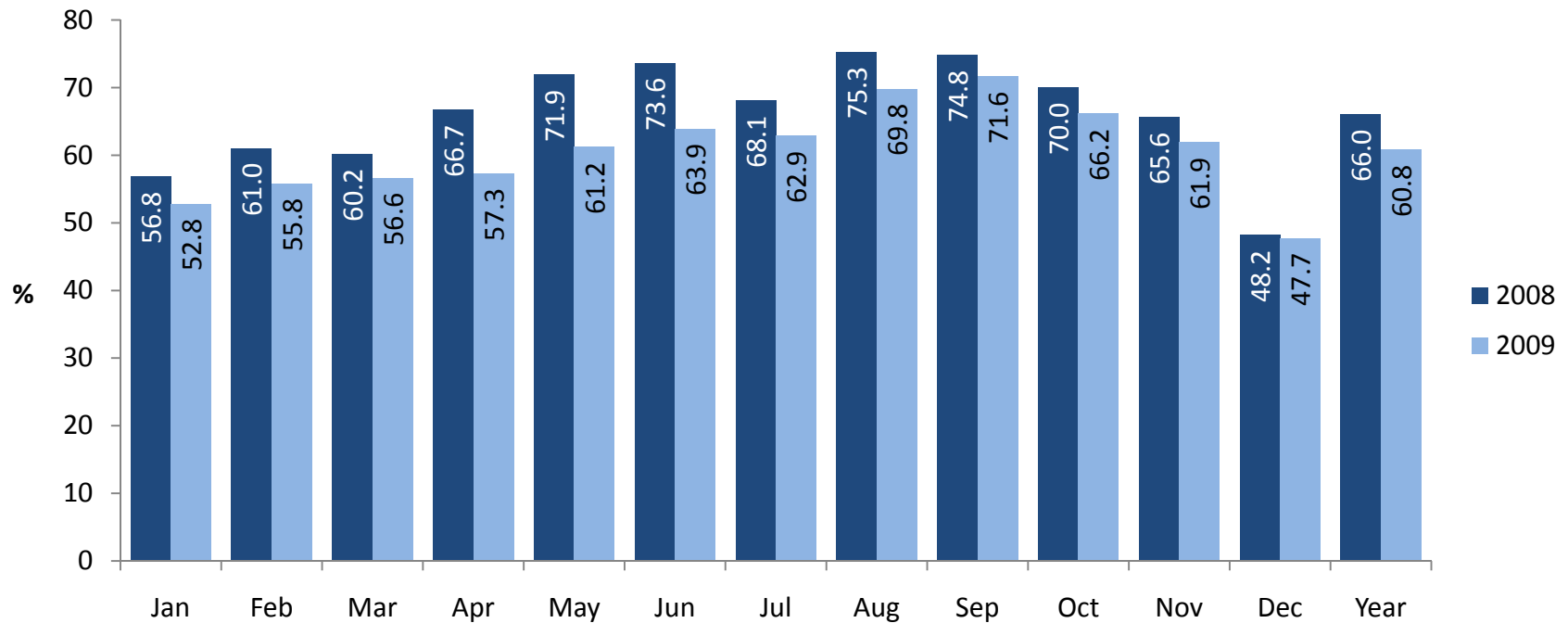


# HOTEL PERFORMANCE

There are over 230 hotels and 38,000 hotel rooms in the Toronto region, with a combined annual revenue of approximately \$1.05 billion<sup>7</sup>.

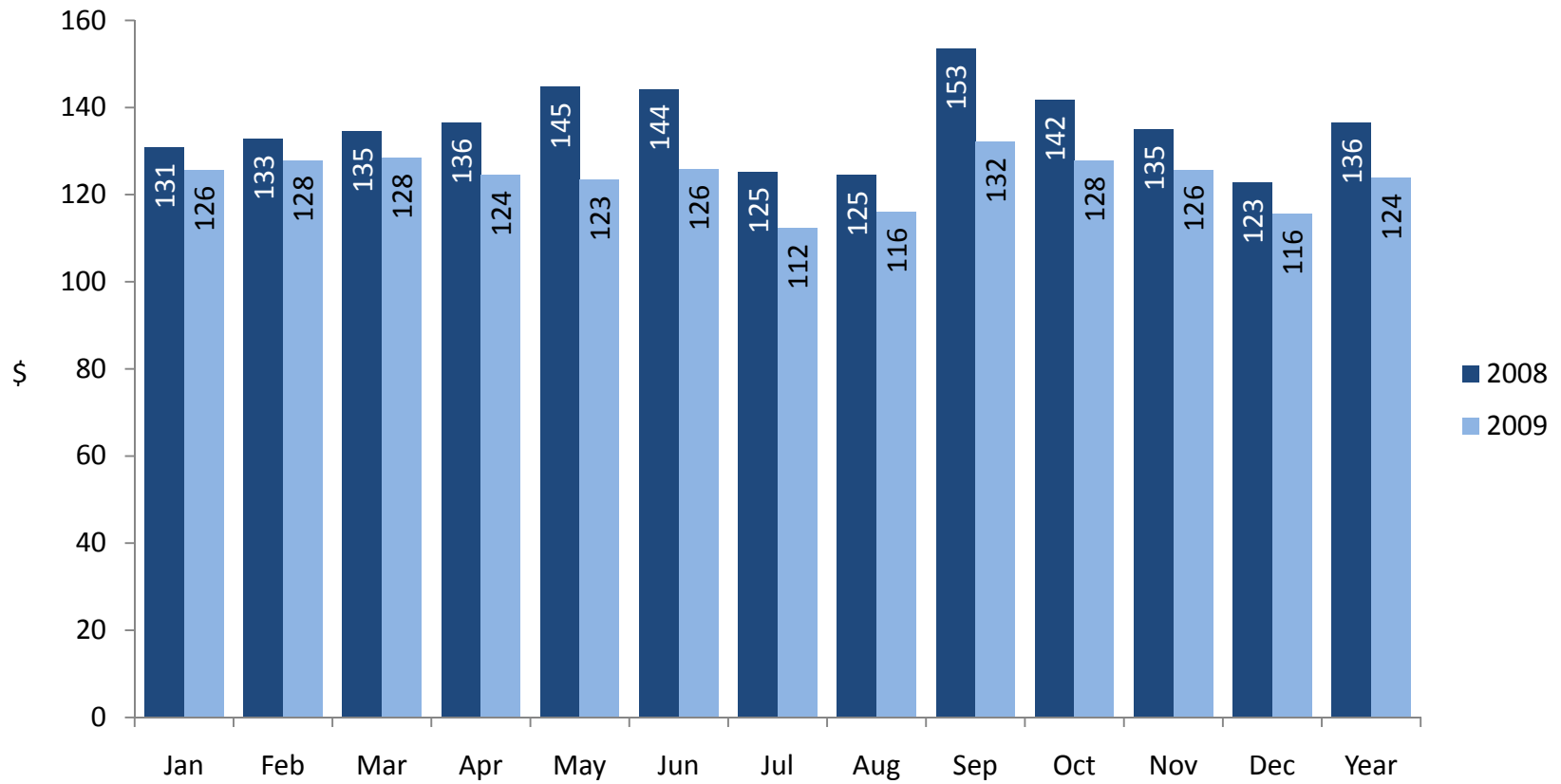
## Occupancy<sup>8</sup>

It was a tough year for the hotel community in Toronto and all over North America and beyond. Hotel occupancy fell by 7.9% in 2009 over 2008, with double digit declines in April through June. By December the declines had slowed down and in fact at the time of writing 2010 occupancy levels are pushing 2008 levels again.



### Average Daily Rates<sup>8</sup>

Average daily rates also saw declines in 2009 over 2008, with a few months seeing double digit drops. The year ended at \$124, which is a 9.3% decline on 2008. As with occupancy, towards the end of the year the declines reduced.



## Occupancy Compared<sup>7</sup>

According to Smith Travel Research Toronto's hotel occupancy declined by 7.8% in 2009 over 2008, yet despite this decline Toronto remained 10<sup>th</sup> in overall occupancy rate compared with 27 other North American destinations. Even with a 7.8% drop this placed Toronto 12<sup>th</sup> in growth ratings.

### Ranked by 2009 Occupancy (as %)

City	2008	2009	Change	2008 Rank	2009 Rank
New York	81.9	77.2	-5.7	1	1
Oahu Island	75.0	73.3	-2.3	3	2
San Francisco	75.3	71.6	-4.9	2	3
Miami-Hialeah	71.4	65.2	-8.7	4	4
Washington	67.0	64.9	-3.1	12	5
L.A.-Long Beach	71.1	64.3	-9.6	5	6
Vancouver	70.1	64.3	-8.4	6	6
Anaheim-Santa Ana	68.7	64.1	-6.7	8	8
San Diego	69.5	63.3	-8.9	7	9
<b>Toronto</b>	67.6	62.3	-7.8	10	10
Boston	66.5	62.2	-6.5	13	11
Philadelphia	65.3	61.7	-5.5	15	12
Seattle	67.9	61.6	-9.3	9	13
Orlando	65.8	60.7	-7.8	14	14
Canada	63.9	59.0	-7.7		
Montreal	62.4	57.9	-7.1	19	15
Denver	63.1	57.9	-8.2	17	15
New Orleans	62.9	57.7	-8.3	18	17
Chicago	63.3	56.6	-10.6	16	18
Minneapolis-St Paul	61.9	56.1	-9.4	20	19
Houston	67.3	55.8	-17.1	11	20
USA	60.3	55.1	-8.6		
Nashville	60.4	55.0	-8.9	21	21
St Louis	58.6	54.7	-6.7	25	22
Norfolk-Virginia Beach	55.0	53.2	-3.3	28	23
Atlanta	58.8	53.0	-9.9	23	24
Tampa-St Petersburg	56.7	52.7	-7.1	26	25
Phoenix	59.4	52.4	-11.8	22	26
Dallas	58.7	51.5	-12.3	24	27
Detroit	55.1	48.0	-12.9	27	28

### Ranked by Growth

City	Change	Rank
Oahu Island	-2.3	1
Washington	-3.2	2
Norfolk-Virginia Beach	-3.3	3
San Francisco	-5.0	4
Philadelphia	-5.5	5
New York	-5.7	6
Boston	-6.3	7
St Louis	-6.7	8
Anaheim-Santa Ana	-6.8	9
Tampa-St Petersburg	-7.0	10
Montreal	-7.1	11
Canada	-7.7	
<b>Toronto</b>	-7.8	12
Orlando	-7.9	13
New Orleans	-8.2	14
Denver	-8.3	15
Vancouver	-8.4	16
Miami-Hialeah	-8.7	17
USA	-8.7	
San Diego	-8.9	18
Nashville	-8.9	18
Seattle	-9.2	20
Minneapolis-St Paul	-9.4	21
L.A.-Long Beach	-9.6	22
Atlanta	-9.9	23
Chicago	-10.6	24
Phoenix	-11.8	25
Dallas	-12.3	26
Detroit	-12.8	27
Houston	-17.0	28

**Average Daily Rates  
Compared<sup>7</sup>**

According to Smith Travel Research Toronto's average daily rates decreased by 10%, but again despite this decline Toronto remained 8<sup>th</sup> in the overall rankings illustrating that the decline in rate was not unique to Toronto. Not one destination listed saw positive growth in 2009 in either occupancy or average daily rates highlighting the difficulties for the industry across the region.

U.S. Cities shown in US\$  
Canadian cities shown in CA\$.

**Ranked by 2009 ADR (as \$)**

City	2008	2009	Change	2008 Rank	2009 Rank
New York	275	215	-21.8	1	1
Oahu Island	169	150	-11.6	2	2
Washington	153	145	-5.4	6	3
Miami-Hialeah	160	141	-12.1	3	4
Boston	154	137	-10.5	5	5
Vancouver	145	136	-6.0	7	6
San Francisco	156	134	-14.4	4	7
<b>Toronto</b>	144	130	-10.0	8	8
Montreal	136	128	-6.0	10	9
Canada	133	126	-5.0		
San Diego	142	124	-12.7	9	10
L.A.-Long Beach	129	114	-11.1	12	11
New Orleans	118	114	-4.0	17	12
Seattle	127	113	-11.1	11	13
Chicago	132	113	-14.5	13	13
Philadelphia	123	111	-9.9	15	15
Anaheim-Santa Ana	123	109	-10.7	16	16
Phoenix	125	106	-15.4	14	17
Tampa-St Petersburg	107	98	-8.4	18	18
USA	107	98	-8.8		
Denver	106	93	-12.1	20	19
Orlando	106	93	-12.2	19	20
Houston	101	92	-8.5	22	21
Minneapolis-St Paul	102	91	-10.5	21	22
Nashville	96	90	-5.9	23	23
Dallas	94	86	-8.6	24	24
Norfolk-Virginia Beach	88	84	-5.3	26	25
Atlanta	91	83	-8.8	25	26
St Louis	87	82	-6.1	27	27
Detroit	87	78	-9.8	28	28

**Ranked by Growth**

City	Change	Rank
New Orleans	-4.0	1
Canada	-5.0	
Norfolk-Virginia Beach	-5.3	2
Washington	-5.4	3
Nashville	-5.9	4
Vancouver	-6.0	5
Montreal	-6.0	5
St Louis	-6.1	7
Tampa-St Petersburg	-8.4	8
Houston	-8.5	9
Dallas	-8.6	10
USA	-8.8	
Atlanta	-8.8	11
Detroit	-9.8	12
Philadelphia	-9.9	13
<b>Toronto</b>	-10.0	14
Boston	-10.5	15
Minneapolis-St Paul	-10.5	15
Anaheim-Santa Ana	-10.7	17
L.A.-Long Beach	-11.1	18
Seattle	-11.1	18
Oahu Island	-11.6	20
Miami-Hialeah	-12.1	21
Denver	-12.1	21
Orlando	-12.2	23
San Diego	-12.7	24
San Francisco	-14.4	25
Chicago	-14.5	26
Phoenix	-15.4	27
New York	-21.8	28

## NOTES, SOURCES AND LINKS

<sup>1</sup>Tourism Toronto Estimate adapted from data provided by the ITS and TSRC Special Tabulations and Border Crossing Data from Statistics Canada.

<sup>2</sup>Statistics Canada, 2006 Census.

<sup>3</sup>Ontario Ministry of Tourism [www.tourism.gov.on.ca/english/research/index.html](http://www.tourism.gov.on.ca/english/research/index.html).

<sup>4</sup>As most tourism segments in Canada our core tourism metrics are provided by using data collected by Statistics Canada. For more information visit the 'Travel and Tourism' page on the Statistics Canada website. Adapted from: Statistics Canada, 2007 International Travel Survey Microdata (66C001) and/or 2007 Travel Survey of Residents of Canada Microdata (87M006XDB96000) OR 2008 International Travel Survey Microdata (66M0001XCB) and/or 2008 Travel Survey of Residents of Canada Microdata (87M0006XCB). This analysis is based on Statistics Canada microdata which contain anonymised data collected in the Travel Survey of Residents of Canada and/or the International Travel Survey 2007/2008. All computations on these microdata were prepared by Research Resolutions Inc. on behalf of Tourism Toronto and the responsibility for the use and interpretation of these data is entirely that of the authors.

<sup>5</sup>The 'Travel Intentions Study' is an online survey of over 7,000 respondents from Ontario's near and mid Canadian and U.S. markets. It is a partnership between the Ontario Ministry of Tourism, FedNOR and Tourism Toronto. It is conducted twice a year, in February and May, and asks about perceptions of Ontario and Toronto, as well as Travel Intentions and barriers to visiting the area. For more information visit [www.tourism.gov.on.ca/english/research/travel\\_intentions/index.html](http://www.tourism.gov.on.ca/english/research/travel_intentions/index.html). The analysis contained in this report is based on a database which contains anonymized data collected in the Travel Intentions Survey, February 2008, 2009 and 2010. All computations on these data were prepared by Tourism Toronto and the responsibility for the use and interpretation of these data is entirely that of the authors.

<sup>6</sup>The Tourism Toronto Visitor Survey is a project conducted by Tourism Toronto in partnership with Ryerson University and the GTAA. Exit surveys are conducted at Pearson International Airport. Every subgroup included in this report is from surveys collected in 2009 and with a minimum of 90 responses.

<sup>7</sup>PKF Consulting.

<sup>8</sup>Smith Travel Research.

### Useful links

- City of Toronto [www.toronto.ca](http://www.toronto.ca)
  - Premier Ranked Tourism Destination Framework, 'a comprehensive assessment of Toronto's strengths and weaknesses as a tourist destination' [www.toronto.ca/tourismstudy/index.htm](http://www.toronto.ca/tourismstudy/index.htm)
  
- Ontario Ministry of Tourism Research [www.tourism.gov.on.ca/english/research/index.html](http://www.tourism.gov.on.ca/english/research/index.html)
  - Travel Intentions- as mentioned above.
  - eTAMS is a web tool that allows free access to the Travel Activities and Motivation Survey (TAMS) identifies travel markets in North America [www.tourism.gov.on.ca/english/research/etams/index.html](http://www.tourism.gov.on.ca/english/research/etams/index.html)
  - TAMS Summary reports on North American Market Segments by origin and activity [www.tourism.gov.on.ca/english/research/travel\\_activities/index.html](http://www.tourism.gov.on.ca/english/research/travel_activities/index.html)
  
- Ontario Tourism Marketing Partnership Corporation Research [www.tourismpartners.com/TcisCtrl?language=EN&site=partners&key1=research](http://www.tourismpartners.com/TcisCtrl?language=EN&site=partners&key1=research)
  
- Canadian Tourism Commission Research [www.corporate.canada.travel/en/ca/research\\_statistics/index.html](http://www.corporate.canada.travel/en/ca/research_statistics/index.html)
  
- Travel and Tourism Research Association Canada Chapter [www.ttracanada.ca/en/](http://www.ttracanada.ca/en/)
  
- Tourism Online Resource Centre [www.linkbc.ca/main/index.php?aboutTorc](http://www.linkbc.ca/main/index.php?aboutTorc)