CITY OF TORONTO

PREMIER-RANKED TOURIST DESTINATION PROJECT

Research Report

"MAKING TORONTO THE BEST IT CAN BE"

December 2007

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TORONTO Tourism

Ontario

Toronto's Premier-ranked Tourist Destination Project

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INTRODUCTION

What is the Premier-ranked Tourist Destination (PRTD) Project?

The purpose of the Premier-ranked Tourist Destination Project is to determine the current strength of Toronto's tourism industry. The process also identifies gaps and opportunities, which need to be addressed in order to improve Toronto's competitive position within the tourism marketplace.

The Premier-ranked Tourist Destination Framework (PRTDF) was developed by the Ontario Ministry of Tourism and Recreation (now the Ministry of Tourism) in 2001 to assist regions in assessing their destination. The framework is summarized in the PRTD workbook, which sets out the research and consultative methodology and leads the region through a series of questions probing its product, performance and futurity (which the Toronto project has relabelled "sustainability") dimensions. The workbook has been designed to guide users through a three-stage process of evaluation, interpretation, and planning. Copies are available for downloading at www.premier-ranked.ca.

The following table indicates these stages and their respective steps:

Table 1.1
Project Process

Evaluation:	Step 1 - Complete the Resource Audit Step 2 - Measure Destination Product Step 3 - Measure Destination Performance Step 4 - Measure Destination Futurity
Interpretation:	Step 5 - Complete the Destination Performance Summary Step 6 - Determine whether your Destination is among the Premier-Ranked
Planning:	Step 7 - Determine the next steps in Tourism Development for the Destination

The project thereby provides:

- An inventory of tourism resources and assets
- A clear appraisal of Toronto's current competitive position in the tourism marketplace
- A benchmark to measure tourism performance and market position
- A solid foundation for a tourism development strategy by creating an action plan of short and long-term tactics

What is in This Report?

This report summarizes Steps 1 through Step 6 of the Toronto PRTD project. Behind this research manual is an extensive amount of information gathered during the course of the project. It outlines the findings from primary and secondary research resources according to the workbook questions.

As is further outlined below, Toronto retained the services of a consultant (Brain Trust Marketing & Communications) experienced with applying the PRTD framework in other regions to advise on the research and lead the planning stages of the process. Brain Trust has drawn from this research manual to produce a separate report summarizing the interpretation and planning stages of the project.

The Toronto Premier-ranked Tourist Destination Framework Process

In the summer of 2006, the City of Toronto began the implementation of the Premier-ranked Tourist Destination Project. Support for the project was provided by Service Canada and the Investment Development Office and Regional Services at the Ministry of Tourism as well as by the City of Toronto. In January 2007, tourism researchers were hired as Audit Team members to work on Toronto's PRTD Project. A summary of all the parties involved in the project are as follows:

- Fieldwork by the Audit Team
- Facilitation by BRAIN TRUST
- Guidance from City of Toronto and Ministry of Tourism staff
- Leadership from the Steering Committee (tourism industry leaders)
- Consultation with Sector Working Groups (tourism industry professionals in Attractions, Festivals and Events, Retail, and Food and Beverage, as well as special advisory group members who were consulted on an individual basis)

Why Toronto?

With a population of over 2.5 million, the City of Toronto is both the largest urban centre in Canada and the fifth-largest city in North America. It is a vibrant city filled with culture, entertainment, performing arts, festival and events, sports events, international cuisine, parks and recreation, first-rate accommodations, and shopping. The city is heralded as having one of the most diverse and multicultural populations in the world. It is positioned as the safest large metropolitan area in North America by Places Rated Almanac.[1]

Why Tourism?

Economic Benefits

Toronto has a large and diverse economy with a Gross Domestic Product (GDP) of $130 billion in 2006. Since Toronto's economic growth is largely determined by the competitiveness of the region's export clusters, the city's Economic Development Strategy focuses attention on the importance of export-oriented industries, as they bring new wealth to the local economy, which is then redistributed among local businesses and residents through purchases, employment and income. Tourism is a key export industry that plays an important role in the growth of our economy by generating employment, foreign exchange earnings, investment and regional development.

Toronto is the leading tourism destination in Canada, attracting more that 19 million Canadian, U.S. and International visitors annually. In 2004, tourists in Toronto spent over $4 billion, generating $3.2 billion of GDP, over 57,000 tourism jobs and more than $1.7 billion in labour

[1] Source: Places Rated Almanac, as mentioned in City of Toronto web page. Toronto's Racial Diversity. Retrieved July 20, 2007 from: http://www.toronto.ca/toronto_facts/diversity.htm

income in the municipality of Toronto. Total taxes generated as a result of visitor spending in the City of Toronto reached $1.8 billion including $105 million in municipal taxes that accrue to the City of Toronto.[1]

Community Benefits

Tourism also benefits the community by increasing the amenities it offers its residents. For instance, tourism helps to create, maintain and support a programme of events, arts, sports and other cultural amenities across the destination. It also plays a major role in building distinctive communities which helps to increase the pride and self confidence of the local inhabitants. From an environmental perspective, tourism can draw attention to the need to protect the natural environment and encourages a more rigorous analysis of the importance of the local eco-system. Overall, tourism aids in achieving a higher quality of life for everyone.[2]

Toronto is the country's most important tourist destination and has a widely recognized array of major festivals, events, and attractions. Some examples include: Toronto International Film Festival (TIFF), PRIDE week/parade, Canadian National Exhibition, Caribana, CN Tower, Rogers Centre, Art Gallery of Ontario, Royal Ontario Museum, Ontario Science Centre, and the Toronto Zoo.

Considering all of Toronto's attributes, one may ask "why complete the workbook?" Globalization has increased tourism competitiveness between Toronto and other Canadian urban centres, as well as international tourist destinations. Significant shifts in visitation patterns have occurred. Tourism has not been increasing in Toronto over the last decade to the same extent as has been enjoyed in many other destinations. There seems to be a feeling of "been there, done that." The product is perceived as being "tired"; something big is needed in order to correct this impression. There has particularly been a decrease in U.S. visitors due to SARS, the appreciating Canadian dollar vis-à-vis the U.S. dollar (which has negatively impacted the value equation), confusion about new passport regulations, border difficulties/delays and 9/11. The increase in overseas travellers visiting Toronto has not compensated for the decline in U.S. travel to the city. There also has been a decline in Canadian's intentions to visit Toronto.[3]

The Premier-ranked process assists in gaining a holistic insight of the tourism industry in Toronto. The workbook identified gaps and opportunities in a systematic way that needs to be addressed. The findings will lay a foundation for the development of the new Tourism Action Plan to replace the current Action Plan undertaken by the City in 2003.

The Ontario Ministry of Tourism selected Toronto as one of the seven key destinations across the province designated for support through the Destination Development Team initiative. The destinations were selected for their role and importance in the overall success in tourism performance for the province and for their potential capacity for strong growth in the future. Toronto's Destination Development Leadership Team encouraged the undertaking of the Toronto PRTDF project. The purpose was to gain a more comprehensive understanding of the current tourism environment and to determine the next steps and actions required for the Toronto Destination Development initiative.

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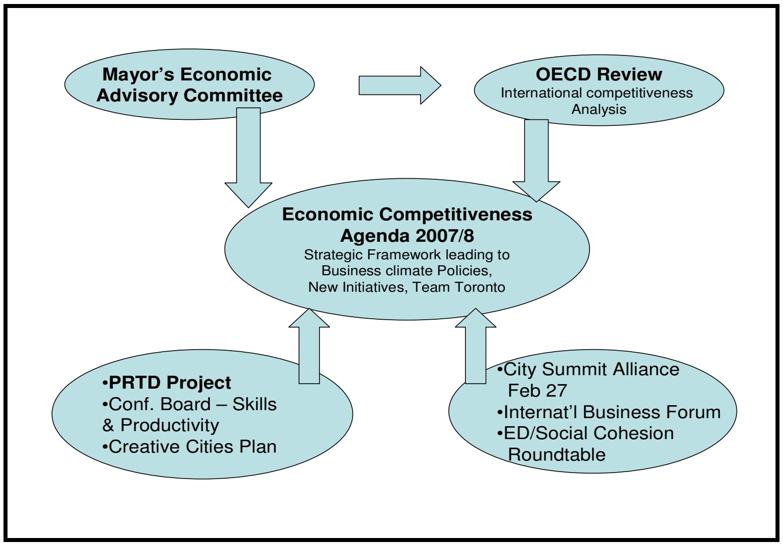
[1] Source: Ontario Ministry of Tourism. (2006). *Regional Tourism Profiles: CD 20: Toronto Metropolitan Municipality*. Toronto: Queen's Printer for Ontario.
[2] Source: New Zealand Ministry of Tourism. Benefits and Challenges of Tourism. Retrieved June 18, 2007, from http://www.tourism.govt.nz/tourism-toolkit/tkt-intro/benefits-challenges.html
[3] Source: Ontario Ministry of Tourism. (2007, February). *Travel Intentions Study Report Wave 8.* Prepared by TNS Canadian facts, Toronto. Retrieved July 2007, from http://www.tourism.gov.on.ca/english/research/travel_intentions/Feb%202007_Report.pdf

The initiation of the PRTD project is also dovetailing with a broader assessment of Toronto's economic competitiveness (see Figure 1.1). These initiatives will occur from 2007 to 2009. Tourism is one of the key sectors of our economy and the Premier-ranked process provides the input needed to develop policy and strategy for this sector. Tourism is also an important part of Toronto's new Prosperity Agenda.

Figure 1.1
Toronto's Prosperity Agenda 2007/2008



METHODOLOGY

STEP 1 – COMPLETE THE RESOURCE AUDIT

The Resource Audit is intended to provide a snapshot of Toronto's current position in the tourism industry. It is built from primary data, collected through the use of questionnaires and interviews/meetings (both phone and in person), and secondary data assembled from the review of commissioned reports and strategies, municipal, provincial and federal strategic plans as well as association membership lists.

Tourism Resources Inventory

The Tourism Resources Inventory Matrix was based on a template from the Ministry of Tourism. All tourism resources within the Municipality of Toronto were identified and recorded. The information was procured through both primary and secondary data sources. (Please see Appendix I for summary of numbers of tourism related assets).

Transportation Checklist

The information gathered to complete the Transportation Resources Checklist was obtained through a combination of direct contacts with various transportation stakeholders (e.g. Toronto Transit Commission -TTC, Greater Toronto Transportation Authority -GTAA), websites and other transportation-related reports. Additional data from other secondary sources and reports, such as from the City of Toronto Planning Department, were also sourced.

Travel Trade Checklist

The travel trade checklist was completed via consultation with Tourism Toronto's Leisure Trade Sales staff as well as receptive tour operators interviewed by the consultant and staff.

Scope

The purview of the PRTD project includes all tourism related resources that are within the Municipality of Toronto's geographical boundaries. The resources were broken down into ten sectors:

Table 2.1[1]
Toronto's Tourism Sectors

1. Food and Beverage	6. Marinas
2. Retail	7. Parks and Recreation
3. Festivals and Events	8. Spas
4. Attractions	9. Wineries and Breweries
5. Accommodation	10. Meeting Planners and Venues

[1] Source: Resource Audit

Survey Contact Database

As a large urban centre, Toronto has a vast array of service sector businesses. The purpose of the study was not to try to represent the entire complex of businesses, but rather focus on the subset of businesses which serves tourists. It seemed a reasonable assumption that all of the hotels, attractions and meeting planners and venues in the city did serve tourists as a portion of their business. However, the identification of tourist-oriented businesses was less clear in the other sectors. The Survey Contact Database was populated using a non-probability "snowball" sampling method which relied on the judgement, expertise and referrals of tourism industry stakeholders. It is important to note that the sample is not indicative of each industry sector in and of itself but rather, can only infer truisms for the tourism industry portion of each sector. The main sources, listed by sector, used to distinguish tourism related resources are listed on the next page:

Table 2.2[1]
Sample Selection Sector by Sector

Sector	Tourism Associations	Ranking Guides, Magazines, Newspapers and Websites	Stakeholder Knowledge/Interviews
Accommodation	• Tourism Toronto • GTHA • Ontario Accommodation Association • Federation of Ontario B & B Association	• Toronto Visitor Guide • Michelin Guide • WHERE • Toronto Life • Condé Nast • Bed and Breakfast www.bbcanada.com	
Attractions	• Tourism Toronto • TAPA • Attractions Ontario	• Fodor's Guide • Michelin Guide • WHERE • Toronto Life • Toronto Visitor Guide • Toronto City Guide	• BIAs • Sector stakeholders
Parks and Recreation		• Toronto's Golf Guide • Toronto Life • City of Toronto – Fun Guide • www.toronto.ca	• City of Toronto Parks and Recreation Staff • Industry participants • Toronto Region Conservation Authority
Retail	• Tourism Toronto	• WHERE • Toronto Life • Condé Nast	• BIAs • City of Toronto Tourism Research staff
Festivals and Events	• Tourism Toronto • Festivals and Events Ontario	• Toronto Visitor Guide • New York Times • Michelin Guide	• City of Toronto Special Events staff • Toronto Festivals and Events Committee
Wineries and Breweries	• Tourism Toronto	• Fodor's Guide • www.bartowel.com	
Food and Beverage	• Tourism Toronto	• Zagat Guide • Fodor's Guide • Michelin Guide • WHERE • Toronto Life • NOW – City Guide • www.dine.to	• Toronto food critics (e.g. James Chatto's 'best' lists) • BIAs • City of Toronto Special Events (Winterlicious & Summerlicious)
Meeting Planners and Venues	• Tourism Toronto		• BRAINTRUST Marketing and Communications
Spas	• Tourism Toronto • Premier Spas of Ontario • Ontario's Finest Spas	• WHERE • Toronto Life • Canadian Spa	
Marinas	• Tourism Toronto • Ontario Marine Operators Association		

[1] Source: Resource Audit

A comprehensive catalogue for the accommodation, spa, marina and winery/brewery sectors was generated through the above sources and all of the establishments that could be identified in each sector were included in the survey. Due to the extensive nature of the parks and recreation, food and beverage, retail, festivals and events and attractions sectors, where possible, the contact database was initially generated through tourism association membership lists (e.g. Attractions Ontario, GTHA, Tourism Toronto, Festivals and Events Ontario, etc.), and was then supplemented with resources recorded in tourism related ranking guides (Zagat, Fodor's, Michelin, Condé Nast, etc.) and local magazines (WHERE, Toronto Life, NOW, etc.) used by tourists. These lists were in turn made known to staff in various City of Toronto Divisions, in addition to business improvement areas (BIAs) and industry stakeholders for review and comment.

Questionnaire Design

A template was provided by the Ministry of Tourism which was altered to meet the unique needs of Toronto's industries.

Working Group Consultation – The draft questionnaire forms were pilot tested at working group committee meetings to verify their relevance. Recommended modifications from the industry were then incorporated in the final design.

A-list Selection

The most significant businesses/resources were deemed to be the "A-list" and were chosen using the above list of sources. Priority was given to those businesses that appeared in many of the sources (e.g. ranking guides, local magazines and travel brochures) as well as those belonging to tourism specific associations. The selection process included guidance from the generally accepted *Pareto Principle* which states: "for many phenomena, 20% of invested input is responsible for 80% of the results obtained" or more aptly stated, 20% of Toronto's tourism businesses act as the main drivers for the industry and generate approximately 80% of total revenues. The research team focussed on the A-list when following up with businesses to encourage survey completion. Out of the 1,069 distributed A-list surveys, 446 were returned completed, equalling a 42% response rate.

Distribution

- ***Methods*** – The questionnaires were initially sent out en masse using email and were accompanied by an introductory letter from Toronto's Mayor David Miller. The email contained a link to an online survey application (surveymonkey.com) for easy, user friendly access. Where email addresses were unavailable, standard post was used; surveys were accompanied by Mayor Miller's letter, an information brochure and a postage paid return envelop in an attempt to increase the response rate, followed by fax and phone/in person interviews.
- ***Follow Up –*** Various forms of follow up were conducted a minimum of four different times during the project. The methods included personalized emails to business operators, phone calls as well as re-mails. Steering committee members also participated in making phone calls and sending emails to encourage responses.

Limitations

Language Barrier – Toronto is one of the world's most ethnically diverse cities. Since the survey was administered in English only, it may have hindered response rates.

In Summary

- *Database* – Identified businesses were contacted to promote awareness of the project and after exclusions, (e.g. previously surveyed association members, duplicates, etc.), a database of 2,632 tourism related businesses was created for the purposes of survey distribution
- 44 surveys were returned due to business closures/incorrect addresses
- Leaving a total sample size of 2,588 applicable businesses
- 982 total surveys were received back
- 847 were deemed useable for the purposes of analysis giving a response rate of 33%

Table 2.3[1]
Summary of Sector Survey Results

Sector Response Rates Results							
Sector	**Total Sent**	**Total Received**	**Total Received Useable**	**Percentage Returned Useable**	**Total Sent A list**	**Total Completed A List**	**Percentage Returned A List**
Accommodations	225	113	99	44%	79	56	71%
Attractions	234	140	130	56%	119	82	69%
Festival/Event	142	90	82	58%	53	35	66%
Food and Beverage	845	230	200	24%	346	118	34%
Marina	13	6	4	31%	13	4	31%
Parks and Recreation	36	26	20	57%	36	20	57%
Retail	900	311	260	29%	270	83	31%
Spas	47	19	10	21%	20	4	20%
Winery and Breweries	6	6	6	100%	6	6	100%
Other (Meeting Planners/Venues/Etc.)	140	41	37	26%	128	38	30%
Total	**2588**	**982**	**847**	**33%**	**1069**	**446**	**42%**

STEP 2 TO 4 – MEASURE THE DESTINATION PRODUCT, PERFORMANCE, AND SUSTAINABILITY (FUTURITY) DIMENSIONS

Steps 2 to 4 required the PRTD research team to work through the PRTD Workbook, answering a series of questions that evaluated destination Product, Performance and Sustainability. The Resource Audit, secondary research, and in some cases consultation with informed stakeholders provided the information needed to answer each question.

Each measure is generally in two parts. The first part of the measure is in the form of a statement which asks if you can affirm the statement as "true", "almost true" or "not true yet". It is answered with "Yes", "Almost" ("A"), or "No". The second part asks for the reasons that validate the answer to the question. The following elements are the basis of Toronto's evaluation, and they have been incorporated into this report. The 11 elements ("A" to "K")

[1] Source: Resource Audit

summarized in Table 1.2 are further supported by 117 performance measures. This analysis is summarized in Section 4, 5 and 6 of this report.

Table 2.4
Premier-ranked Tourist Destination Framework

Product Dimension:	***A Premier-ranked Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of:*** A. Distinctive Core Attractors B. Quality and Critical Mass C. Satisfaction and Value D. Accessibility E. An Accommodations Base
Performance Dimension:	***The quality of the tourist experience and the destination's success in providing it is validated by:*** F. Visitation G. Occupancy and Yield H. Critical Acclaim
Futurity Dimension:	***And sustained by:*** I. Destination Marketing J. Product Renewal K. Managing within Carrying Capacities

STEPS 5, 6 AND 7 – INTERPRETATION AND PLANNING

In the Interpretation stage the generated responses in Step 2 to 4 were transferred to the Framework Performance Summary (Appendix J). The provincial guideline is that in order to be graded as a Premier-ranked Tourist Destination, a destination must obtain “Yes” responses for the Product and Performance dimensions, and a “Yes” response for two of the three elements within the Futurity dimension.

In step 7, future actions are determined as to what needs to be done in order to improve Toronto’s market position, based on the insights gained from completing the previous steps. This step is beyond the scope of the current document. It is contained within the Final Report prepared by Brain Trust Marketing in consultation with the Steering Committee and other stakeholders and staff.

The first exercise of the analysis phase of the PRTD framework is to summarize the community profile. This provides a context within which its tourism sector can be better understood.

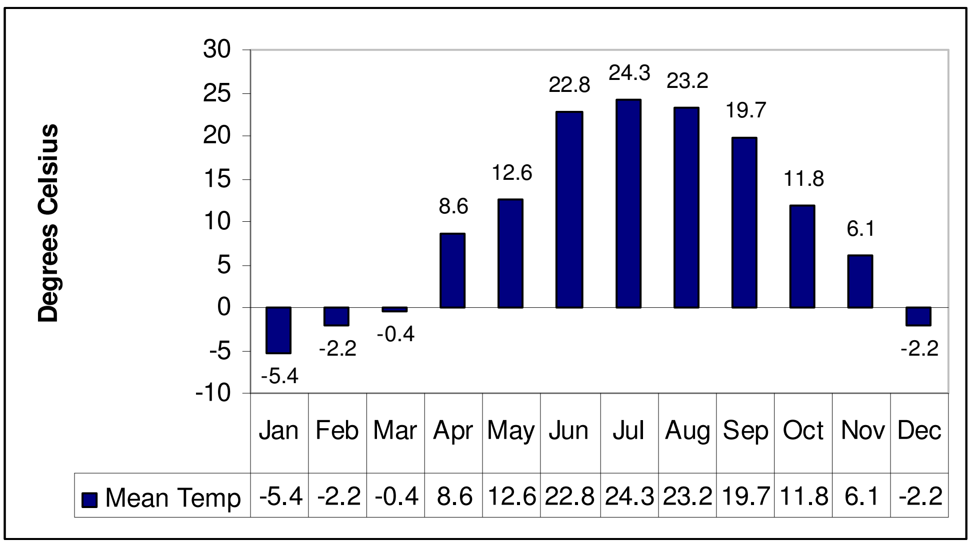
Geography

The City of Toronto is located on the northwest shore of Lake Ontario at Latitude 43° 39' N, Longitude 79° 23' W. It stretches 43 km from east to west and 21 km from north to south at its longest points. The perimeter is approximately 180 km. Toronto's land area is 630 km^2.[1]

Weather

Daily average temperatures in Toronto from 1971 to 2000 were: -4.2°C in January (winter), 7.6°C in April (spring), 22.2°C in July (summer), and 10.6°C in October (autumn).[2]

Figure 3.1[3]
Climatological Information for Toronto: 2005 Mean Monthly Temperatures



History: From Water Route to Megacity

"Place of meeting" is one of many meanings given to Toronto (derivations include "fishing weir", "harbour", and others) in the Huron language, as First Nations people used a trail and canoe route to travel between Lake Ontario and Lake Huron. French fur traders, United Empire Loyalists and merchants all saw the appeal of proximity to key travel routes and settled in the area. York was planned by Upper Canada's first governor, John Graves Simcoe in 1793 and the town grew in status through the years: made capital of Upper Canada, incorporated as the City of Toronto by 1834, made capital of Ontario at Confederation in 1867, and became North America's 5th largest city (2.4 million people) in 1998. Toronto is Canada's financial capital,

[1] Source: City of Toronto. Toronto's Geography. Retrieved July 23, 2007, from http://www.toronto.ca/toronto_facts/geography.htm
[2] Source: Environment Canada. Canadian Climate Normals 1971-2000. Retrieved July 3, 2007, from http://www.climate.weatheroffice.ec.gc.ca/climate_normals/results_e.html?Province=ALL&StationName=toronto&SearchType=BeginsWith&LocateBy=Province&Proximity=25&ProximityFrom=City&StationNumber=&IDType=MSC&CityName=&ParkName=&LatitudeDegrees=&LatitudeMinutes=&LongitudeDegrees=&LongitudeMinutes=&NormalsClass=A&SelNormals=&StnId=5097&
[3] Source: Environment Canada. Monthly Data Report for 2005: Toronto City. Retrieved October 3, 2007, from http://www.climate.weatheroffice.ec.gc.ca/climateData/monthlydata_e.html

home to corporate head offices, and popular tourist destination for same day and overnight visitors.[1]

Table 3.1[2]
Economy at a Glance

	City of Toronto	Toronto Region
Population	2,503,280[3]	5,113,149 (CMA)[4]
Land area (km^2)	630	5,903 (CMA)
Labour force	1,427,210	2,998,650 (CMA)
Unemployment rate (annual avg.)	7.51%	6.56% (CMA)
Office space (ft^2)	115,395,852	160,519,086 (GTA)
Industrial space (ft^2)	287,399,902	774,215,403 (GTA)
Retail space (ft^2)	71,811,000	157,873,000 Region
Number of businesses (2005)	76,000	153,000 (CMA)
Gross Domestic Product (billions)	$130	$263 (CMA)
Retail sales (billions)	N/A	$55.2 (CMA)
Per capita income estimate	$35,549	$35,974 (CMA)
Average household income	$69,125	$76,454 (CMA)
Total annual building permits - 2006 (000's)	$3,464,404	$10,960,147 (CMA)
Residential (000's)	$1,953,837	$7,065,749 (CMA)
Commercial (000's)	$1,081,938	$2,386,334 (CMA)
Industrial (000's)	$131,904	$726,513 (CMA)
Institutional (000's)	$296,725	$781,551 (CMA)
Average price of resale single detached home	$529,148	$462,747 (CMA)
Housing starts	12,726	37,080 (GTA)

[1] Sources: Natural Resources Canada. The Real Story of how Toronto got Its Name. Retrieved July 23, 2007, from http://geonames.nrcan.gc.ca/education/toronto_e.php and Canadian Encyclopedia. Toronto. Retrieved July 23, 2007, from http://www.canadianencyclopedia.ca/PrinterFriendly.cfm?Params=A1ARTA0008050
[2] Source: City of Toronto. (2007, May). *Economic Indicators*. Retrieved June 16, 2007, from http://www.toronto.ca/business_publications/indicators.htm
[3] Source: Statistics Canada. Population and dwelling counts, for Canada and census subdivisions (municipalities), 2006 and 2001 censuses - 100% data. Retrieved July 19, 2007, from http://www12.statcan.ca/english/census06/data/popdwell/Table.cfm?T=301&S=3&O=D
[4] Source: Statistics Canada. Population and dwelling counts, for census metropolitan areas and census agglomerations, 2006 and 2001 censuses - 100% data. Retrieved July 19, 2007, from http://www12.statcan.ca/english/census06/data/popdwell/Table.cfm?T=201&S=3&O=D&RPP=150

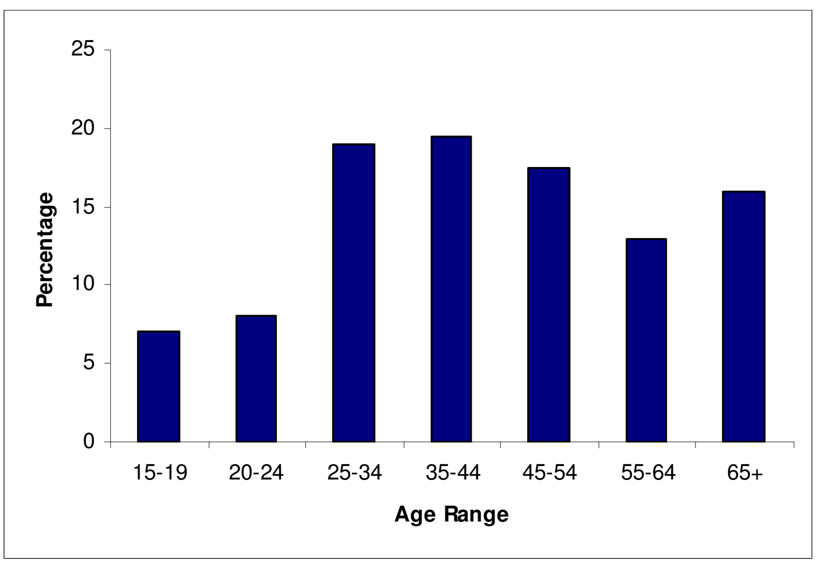
Table 3.2[1]

Selected Demographic Characteristics

		Toronto	Ontario	Canada
Population		2,503,280	12,160,280	31,612,895
	Male	1,205,370	5,930,700	15,475,970
	Female	1,297,910	6,229,580	16,136,925
Age Structure	0-14 years	409,620 (16.4%)	2,210,800 (18.2%)	5,579,835 (17.7%)
	Male	210,500 (17.5%)	1,133,850 (19.1%)	2,857,320 (18.5%)
	Female	199,120 (15.3%)	1,076,950 (17.3%)	2,722,515 (16.9%)
	15-64 years	1,740,205 (69.5%)	8,300,300 (68.3%)	21,697,805 (68.6%)
	Male	845,305 (70.1%)	4,079,330 (68.8%)	10,731,550 (69.3%)
	Female	894,900 (68.9%)	4,220,970 (67.8%)	10,966,260 (68.0%)
	65 and over	353,450 (14.1%)	1,649,180 (13.6%)	4,335,255 (13.7%)
	Male	149,565 (12.4%)	717,520 (12.1%)	1,887,100 (12.2%)
	Female	203,890 (15.7%)	931,665 (15.0%)	2,448,155 (15.2%)
Median Age		38.4	39	39.5
	Male	37.4	38.1	38.6
	Female	39.3	39.9	40.4

Figure 3.2[2]

Labour Force Age Structure (2006)



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[1] Source: Statistics Canada. Age and Sex Highlight Tables, 2006 Census. Retrieved July 19, 2007, from http://www12.statcan.ca/english/census06/data/highlights/agesex/Index.cfm

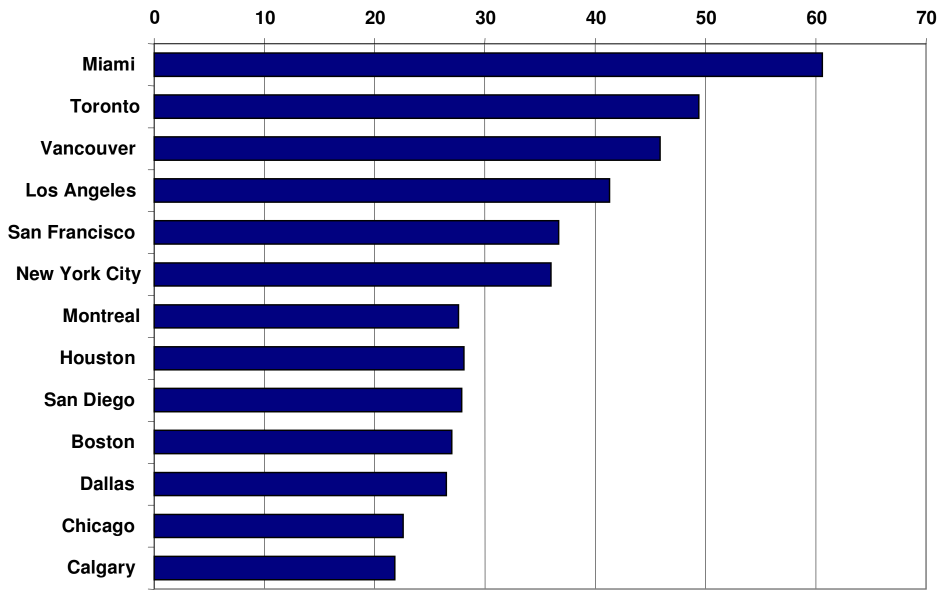
[2] Source: Statistics Canada. (2006). *Labour Force Survey*. Cited in City of Toronto. (2007, June). *Economic Overview*.

Immigration

According to Citizenship and Immigration Canada, in 2006 Toronto had the highest number of permanent residents who immigrated to the city at 99,236 (39.4%). The average annual immigration number for the past ten years was 101,600.[1]

Toronto had the second highest percentage of foreign born residents (just under 50%) of selected North American cities in 2001 with Miami having the highest percentage (just over 60%).

Figure 3.3[2]
Percent of Foreign Born (2001)



Languages

Over 100 languages and dialects are spoken, and almost half of Toronto residents first learned a language other than English and/or French (as illustrated in Table 3.3). Toronto has 79 ethnic publications.[3]

Table 3.3[4]
Language(s) first learned and still understood (2001)

	# of Residents
English only	1,271,960
French only	30,525
English and French	4,375
Other	1,149,945

[1] Source: Citizenship and Immigration Canada. Facts and Figures 2006, Immigration Overview: Permanent Residents. Retrieved July 3, 2007, from http://www.cic.gc.ca/english/resources/statistics/facts2006/permanent/18.asp
[2] Source: City of Toronto, Social Development Finance and Administration Division. Selected North American Cities Percent of Foreign Born, 2001. Cited in City of Toronto. (2007, June). *Economic Overview*.
[3] Source: City of Toronto. Toronto's Racial Diversity. Retrieved July, 2007, from http://www.toronto.ca/toronto_facts/diversity.htm
[4] Source: Statistics Canada. *2001 Census*. Cited in City of Toronto. Language(s) first learned and still understood. Retrieved July 2007, from http://www.toronto.ca/invest-in-toronto/lang_first.htm

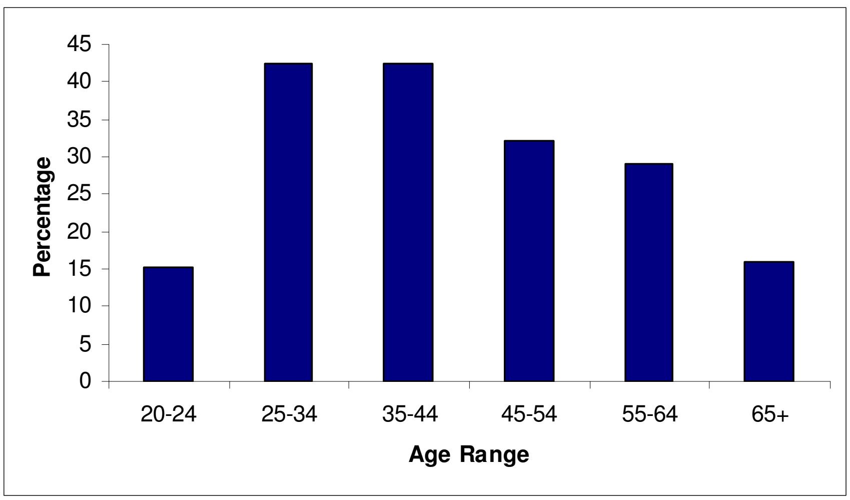
Education

City of Toronto residents are more likely to have a university degree than other Canadians:

Table 3.4[1]
Levels of Education in 2001 (Ages 20-64)

	Toronto CMA (# of residents)	%	Canada (# of residents)	%
No degree, certificate or diploma	1,121,490	20.9	8,381,480	25
High school graduation certificate	1,261,395	23.5	7,988,875	23.8
College certificate or diploma	959,200	17.9	6,184,320	18.4
University degree	1,559,860	29.1	6,630,005	19.8
Trades certificate or diploma	463,345	8.6	4,352,910	13

Figure 3.4[2]
University Graduates by Age (2006)



Prominent Post-secondary Education/Training Institutions

University of Toronto, Ryerson University, York University, George Brown College of Applied Arts and Technology, Humber College of Applied Arts and Technology, Centennial College, Seneca College, and Ontario College of Art & Design are publicly-funded institutions located in Toronto.

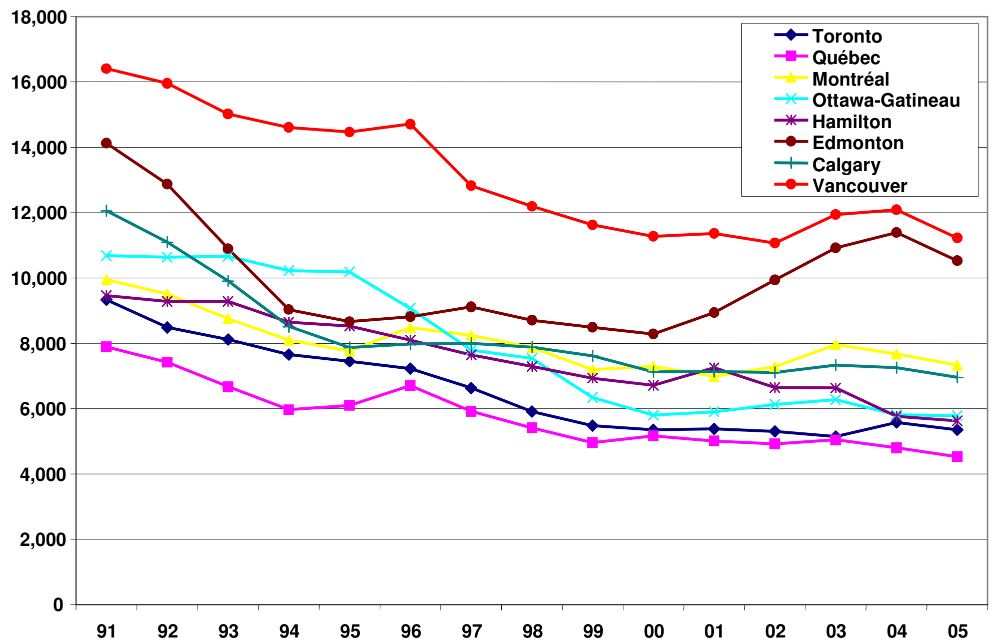
*10,738 international students chose to study in Toronto in 2001.[3]

[1] Source: Statistics Canada. *2001 Census*. Cited in City of Toronto. Highest Level of Schooling. Retrieved July 2007, from http://www.toronto.ca/invest-in-toronto/highest_level_schooling.htm
[2] Source: Source: Statistics Canada. (2006). *Labour Force Survey*. Cited in City of Toronto. (2007, June). *Economic Overview*.
[3] Source: Citizenship and Immigration Canada. (2005). *The Monitor, Fall 2005*. Cited in City of Toronto. Diversity. Retrieved July 2007, from http://www.toronto.ca/quality_of_life/diversity.htm

Crime

The Travel Intentions Research has indicated that Toronto is perceived as unsafe by fellow Canadians. An issue of violence/crime is the number one reason why Canadians are less inclined to travel to Toronto, Niagara Falls or Ontario.[1] However, Toronto is one of the safest cities in Canada (see Figure 3.5):

Figure 3.5[2]
Total Criminal Code (Excluding Traffic) - Rate Per 100,000 Population



Transportation

Table 3.5[3]
Transportation at a Glance

Pearson International Airport - Annual Passengers (2006)	31,000,000
Pearson International Airport - Total Passengers (March 2006)	2,633,000
Toronto Transit Commission - Average Weekday Ridership (March 2006)	1,413,000
GO Transit - Average Weekday Ridership (March 2006)	180,700

[1] Source: TNS Canadian Facts. (2007, February). *Travel Intentions Study Report Wave 8*. Retrieved July 31, 2007, from http://www.tourism.gov.on.ca/english/research/travel_intentions/Feb%202007_Report.pdf
[2] Source: Statistics Canada, Canadian Centre for Justice Statistics. *Uniform Crime Reporting Survey for Census Metropolitan Areas 1991-2005*. Cited in City of Toronto. (2007, June). *Economic Overview*
[3] Sources: All of the following sources cited in City of Toronto. (2007, May). *Economic Indicators*.
Greater Toronto Airport Authority (GTAA). Toronto Pearson International Airport (Enplaned + Deplaned) Passengers. Retrieved August 10, 2007, from http://www.gtaa.com/local/files/en/Corporate/Statistics/PassengerTraffic.pdf and GO Transit. What is GO? Retrieved August 10, 2007, from http://www.gotransit.com/PUBLIC/aboutgo/whatisgo.htm and Toronto Transit Commission (TTC). (2006). TTC Operating Statistics for 2006. Retrieved August 10, 2007, from http://www.toronto.ca/ttc/pdf/operatingstatistics2006.pdf

Critical Acclaim

Figure 3.6[1]
Toronto in the World

<u>Toronto in the World</u>

- FDI Magazine, a subsidiary of the Financial Time of London, awarded the Greater Toronto Area the distinction of the second **Top City Region of the Future**, receiving top honours for Best Transport, Best IT and Telecom, Best Quality of Life and Best FDI Promotion Strategy.
- The city has been ranked as one of the World's Top 10 Economic Centres with a strong credit rating of AA (Standard & Poor's, 2006)
- It has the 12th strongest city brand in the world (Anholt GMI City Brands Index, 2005)
- Toronto was ranked 2nd in North America and placed 15th world wide in the Mercer Human Resources Quality of Living Survey 2007
- It is identified by The Carbon Group as one of the leading cities in the world in terms of reducing carbon emissions
- Toronto was ranked as the 3rd in the world as most desirable destination for business travel in The Economist's Intelligence Unit business trip index 2006
- Toronto's skyline was ranked 11th in the world on its visual impact according to Emporis Skyline Ranking 2007

[1] Source: City of Toronto. (2007, June). *Economic Overview.*

PRODUCT DIMENSION – RATING: ALMOST PREMIER RANKED

The Product Dimension elements, criteria, and measures address the features that enable a destination to offer a high quality tourist experience. The City of Toronto was assessed on the following five Product elements: Core and Supporting Attractors, Quality and Critical Mass, Satisfaction and Value, Accessibility, and Accommodations Base.

Element "A": Distinctive Core and Supporting Attractors – Rating: Yes

Distinctive Core Attractors criteria and measures assess:

- What it is about the destination that makes it stand out as distinct in the marketplace
- How the destination's attractors are distinguished; and
- How the destination's offering is relevant to market wants

Criteria and Measures	Rating
A1. Toronto offers distinctive core attractors which are linked to its physical setting and/or history.	**Almost**
A1.i A Resource Audit has been completed	Yes
A1.ii The Audit distinguishes between core and supporting attractors	Yes
A1.iii The core attractors motivate tourist travel to the destination on their own and as part of the regional complex	Yes
A1.iv Opportunities to build on complementary tourism attractors/activities with nearby destinations have been assessed	Almost
A1.v The core attractors are linked to the physical setting of the destination	Almost
A1.vi The core attractors are linked to the history of the destination	Almost
A1.vii Other Ontario destinations with competitive or similar offerings have been identified	Almost
A1.viii The destination is considered to stand out as distinct from its competition	No
A1.ix The destination's offering is superior because it offers a better guest experience	No
A1.x The destination has a product positioning statement	Yes

The following factors were taken into consideration in order to determine the core and supporting attractors for Toronto:

- The Resource Audit was completed. The Resource Audit identified relevant tourism assets available in Toronto and revealed the depth and breadth of the current tourism product.

- The activities that visitors to Toronto participated in while on their trip were reviewed.

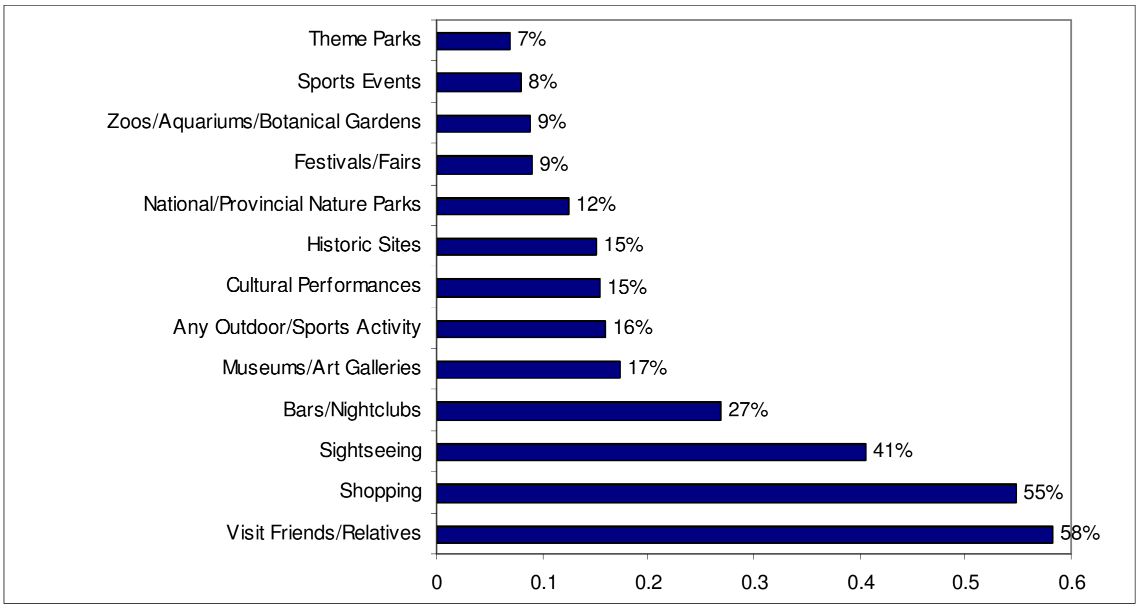
- Travel Activities and Motivations Survey (TAMS) reports were evaluated. TAMS reports examine recreational activities and travel habits of Canadians and Americans.

The reports provide detailed information on travellers' activities, and travel motivators, and help identify existing and potential travel markets in North America.

- In addition, relevant industry studies were considered that demonstrated demand for specific tourism activities.

As can be seen from Figure 4.1, there are a number of types of activities that are undertaken by overnight visitors to Toronto. In the following sections, the core and supporting attractors are identified followed by a description of the supply of attractors available, as well as a discussion of the relevant motivators and demand for each activity.

Figure 4.1[1]
Activities on Trip among Overnight Visitors



[1] Source: Statistics Canada, CTS/ITS, 2004

Core Attractors

Core Attractors are defined as the features, facilities, and/or experiences which act as the primary motivators for most travel to the destination; the attractors with the most tourist visits in the destination.

Culture in the City

Arts and culture are central to a healthy and vibrant community. Arts and culture educate, inform and reflect who and what we are as a community. Culture is also a key employment sector in the region. The sector's strength will be important as Toronto positions itself as a centre to attract business and knowledge workers in the coming years.[1]

Urban cultural attractions offer leisure opportunities for the enjoyment of local residents, domestic and international tourists. Appealing to all three markets enhances a city's competitiveness in a number of ways. To be successful players in the global economy, cities need to produce, attract and retain those talented workers who play a leading role in knowledge based industries. This highly mobile labour market tends to be attracted to cities, which offer high quality of life and diversity in leisure activities. Sophisticated and prestigious cultural products are important in attracting knowledge based industry workers and also tend to attract business travellers, convention planners and elite tourists of high income and advanced education.[2]

The depth of Toronto's cultural experiences compares favourably with other major North American cities. For example, in the week of June 22, 2006, Toronto had 981 listings for music, theatre, dance, comedy, movies and gallery showings. In comparison, Vancouver had 213 listings, Montreal had 761 listings and Chicago had 993 listings in the same week.[3] This is despite a relatively low level of public sector investment in culture. In 2003, the City of Toronto's per capita expenditures in arts and culture was $13, the lowest investment by any of the major North American cities. In terms of other municipal governments, Montreal had the highest Canadian per capita investment at $32 and San Francisco had the highest U.S. per capita investment at $80.

Table 4.1[4]
Per Capita Expenditures on Arts and Culture by City (2003)

	Toronto	**Chicago**	**Vancouver**	**Montreal**	**New York**	**San Francisco**
Population (2003)	2,611,661	2,869,121	577,962	1,871,700	8,115,135	751,682
Per Capita Expenditures	$ 13.00	$ 16.00	$ 19.00	$ 32.00	$ 54.00	$ 80.00

[1] Source: Toronto City Summit Alliance. (2003, April). *Enough Talk: An Action Plan for the Toronto Region.* Retrieved July 21, 2007, from http://www.torontoalliance.ca/docs/TCSA_report.pdf
[2] Source: Carmichael, B.A. (2002). Global competitiveness and special events in cultural tourism: the example of the Barnes Exhibit at the Art Gallery of Ontario, Toronto. *Canadian Geographer*, 46, 4.
[3] Source: Toronto Community Foundation (TCF). (2006). *Toronto's Vital Signs 2006: The City's Annual Check-up.* Retrieved October 23, 2007, from http://www.tcf.ca
[4] Source: Toronto EDCT Culture Division. (2005, November). *Culture Plan Progress Report.* Retrieved July 2007, from http://www.toronto.ca/culture/pdf/Culture-Plan-Progress-Reportpdf.pdf

With an increase of 35% from 1991 to 2001, growth in Toronto's artistic labour force was approximately 13 times the growth of the city's labour force in general. Toronto artists represent 40% of all Ontario artists, while the overall Toronto labour force represents 21% of the total Ontario labour force.[1]

In 2001, the City of Toronto led the country in terms of its absolute number of resident artists (21,000), with about twice as many artists as Montreal (10,100), and almost three times as many as Vancouver (7,300).[2]

Cultural activities in Toronto consist of attending cultural performances (live theatre, concerts, dance, literary), visiting a museum or art gallery, visiting an historic site, seeing a movie, and attending a festival or fair.

Culture: Performing Arts Cluster

Toronto is home to several of Canada's national performing arts organizations including the Canadian Opera Company, National Ballet of Canada and National Ballet School. Other groups and organizations of renown include Mirvish Productions, Toronto Symphony Orchestra, Canadian Stage Company, Soulpepper Theatre Company and the Royal Conservatory of Music.

Toronto is the third largest English language theatre centre in the world after New York and London England, and has the third largest number of live music venues in North America.[3] For 2006, Toronto's number of performances in the various sectors included: 5,614 live and musical theatre performances, 1,684 ballet and other dance performances, 1,009 classical music and opera performances, 151 major rock and roll/popular concerts by artists with global appeal and 1742 comedy shows.[4]

Performing arts venues are plentiful with over 38 mid-sized facilities (151-500 seats) and 16 large venues (501+ seats) giving the city a potential sales capacity of over 38,682 seats.[5] Facilities range from the historic Royal Alexandra Theatre and the Elgin and Winter Garden Theatres, to the repurposed Enwave Theatre and Young Centre for the Performing Arts, to the modern Four Seasons Centre for the Performing Arts and Diesel Playhouse. Roy Thomson Hall's auditorium has recently undergone renovations and acoustical enhancements, while Sony Centre for the Performing Arts (formerly known as Hummingbird Centre) and Massey Hall are set to undergo extensive renovations and additions.

In 2005/2006, the Toronto Alliance for the Performing Arts (TAPA) member organizations delivered 9,356 performances, up from 9,246 in 2004/2005. TAPA members indicated that the performing arts are clearly a draw for people living outside the city of Toronto, reporting that on average 22% of their audience members are from outside of the city and 4% of their audience members are international.

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[1] Source: Toronto Community Foundation (TCF). (2006). *Toronto's Vital Signs 2006: The City's Annual Check-up*. Retrieved October 23, 2007, from http://www.tcf.ca

[2] Source: Toronto Community Foundation (TCF). (2006). *Toronto's Vital Signs 2006: The City's Annual Check-up*. Retrieved October 23, 2007, from http://www.tcf.ca

[3] Source: Mercer, William M. (2002). *World-Wide Quality of Life Survey*. Cited in Toronto City Summit Alliance. (2003, April). *Enough Talk-An Action Plan for the Toronto Region*.

[4] Sources: Resource Audit and Toronto Alliance of the Performing Arts (TAPA). (2007, March). *Members Survey*. Prepared by Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel and Toronto Star Newspapers Ltd. (2006). *Eye Weekly*. Print issues (36 weeks) were reviewed July 3 & 10, 2007.

[5] Source: Toronto Alliance for the Performing Arts (TAPA). (2007). *Stages: Toronto's Theatre Facilities: 2007 edition.*

TAPA member organizations produced a wide array of live performances in the city including theatre (small to large productions - 72%), dance (22%), music and concerts (7%) as well as opera (6%).[1]

According to Statistics Canada in 2004, 15% of overnight visitors to Toronto participated in Cultural Performance activities.

A University of Guelph study entitled *Understanding Overnight Visitors to the Greater Toronto Area* ("Guelph Study"), conducted on behalf of Tourism Toronto, revealed significant shifts in trip motivators between 1998 and 2006, with "theatre" as a trip motivator for overnight Toronto hotel guests decreasing from 7% to 3% of the people surveyed.

The Travel Activities and Motivation Study (TAMS) on Canadian and American travellers was conducted between January and June of 2006. In the previous two years (2004 and 2005), 84% of adult Canadians and 79% of adult Americans had taken an overnight trip. 43% of Canadian travellers and 38.5% of U.S. travellers participated in various performing arts related activities while on vacation. 17% of Canadian travellers and 14.7% of American travellers reported that participation in various performing arts related activities motivated some of their overnight trips. The two most prominent activities in motivating overnight trips were theatre and rock and roll/popular music concerts. In terms of live theatre, 5% of Canadian and 4% of American travellers reported that attending live theatre was a trip motivator. In terms of rock and roll/popular music concerts, 6% of Canadian and 5.4% of American travellers reported that attending rock and roll/popular music concerts was a trip motivator.[2]

Table 4.2[3]
2006 TAMS: Canadian and American Travellers' Trip Activities and Motivators:
Performing Arts

	Attended Performing Arts Related Activities	% of Travellers for Whom This Activity Motivated Some of Their Trip
Canadian Travellers	43%	17%
American Travellers	38.5%	14.7%

Table 4.3[4]
2006 TAMS: Canadian and American Travellers' Trip Activities and Motivators:
Live Theatre

	Attended Live Theatre	% of Travellers for Whom This Activity Motivated Some of Their Trip
Canadian Travellers	16%	5%
American Travellers	13%	4%

[1] Source: Toronto Alliance of the Performing Arts (TAPA). (2007, March). *Members Survey*. Prepared by Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel.
[2] Sources: Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of Canadian Residents: An Overview.* Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20Canadian%20Report.pdf and Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of US Residents: An Overview*. Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20(FINAL).pdf
[3] *Ibid*
[4] *Ibid*

Profile

Travellers motivated by Performing Arts tend to be between the ages of 25 and 55, possess a post secondary education and do not have children under the age of 18. American travellers are more likely to be married than Canadians. For both Canadian and American travellers, a majority indicated that they went dining and shopping for clothing and footwear, jewellery, books or recorded music. However, over 50% of American travellers also went to Casinos and went to rock and roll/popular music concerts. Canadians were more likely to favour "Strolling around a City to observe its Building and Architecture", "Sunbathing or Sitting on a Beach", and to go to "Local Outdoor Cafes". (Please see Appendix B.)

Culture: Festivals & Events

Toronto has a large number of festival and events that attract visitors from both mass and niche market segments. Celebrations are organized by the private and public sectors, not-for-profit organizations and community groups and appeal to both mass and niche market segments at various price points. Festivals and events can be seasonal (e.g. winter – Ice Fest), thematic (e.g. architecture – Doors Open), cultural (e.g. Masala!Mendhi!Masti!), or industry-based (film festivals). Toronto's festivals and events that attract tourist audiences include 24 annual music, 90 annual non-music, 38 arts and crafts and 2 aboriginal.

Music fans attend the Beaches International Jazz Festival, International Bach Festival, Rogers Wireless North by Northeast Conference and Festival (NXNE), and Much Music Video Awards. The Royal Agricultural Winter Fair, Chinese Lantern Festival and CHIN Picnic are popular cultural celebrations. Film-lovers can enjoy several film festivals, from specialized ones such as Cinefranco (French language cinema), Hot Docs (documentaries), and Reel World (showcasing diversity) to the renowned Toronto International Film Festival (TIFF) in September.

According to Statistics Canada, in 2004 9% of overnight visitors to Toronto participated in Festival/Fair.

The *2003 Festivals and Events Ontario Economic Impact Study* ("FEO Study") surveyed attendees at 25 provincial events. The identified Toronto festivals were CNE, Celebrate Toronto Street Festival, Pride Toronto (a.k.a. Pride Week), Royal Agricultural Winter Fair, Toronto Beaches Jazz Festival, Toronto Cavalcade of Lights, and TD Canada Trust Toronto Downtown Jazz Festival (categorized as national or international events in the FEO Study), and the Toronto Marathon (categorized as a regional or provincial event). Festivals and events contribute significantly to the local economy. "When combining the 7 top tier Toronto events surveyed, the aggregate economic impact of the events was $184 million. These events created approximately 4700 jobs and generated nearly $100 million in taxes for all three levels of government."[1]

The FEO Study also recorded non-economic benefits of festivals and events attendance. Local attendees were extremely proud of their events and were just as proud of their community events as individuals attending larger international events. More than 50% of local attendees brought visiting friends and relatives (VFRs) with them to the events. Local attendees also provided word-of-mouth promotion about their events to the VFR market. 75 % of non-local attendees, on average, replied that their impressions of the regions visited were "very much" or "somewhat" improved because of their attendance at Ontario festivals.[2]

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[1] Source: Festivals and Events Ontario. (2004). *2003 Festivals and Events Ontario Economic Impact Study*. Prepared by Enigma Research Corporation.
[2] *Ibid*

Festivals and events also contribute significantly to the local economy. Events of renown such as TIFF, Caribana Parade/Festival, Pride Week and International Festival of Authors have brought international recognition and acclaim to the city. TIFF has an economic impact of $67 million annually, with $33 million of the amount attributed to tourism (2003 figures).[1] The Caribana Festival runs for two weeks, culminating in the famous parade. The festival generates millions of dollars in revenue for Toronto's hotels, retailers and restaurants, is the largest festival of its kind outside the Caribbean. Toronto's Pride Week, entering its 27th year, has been named the Best Festival in Canada by the Canadian Special Events Industry, is recognized as one of eight signature events in the City of Toronto, and is ranked as one of the TOP 50 Festivals by Festivals and Events Ontario.[2]

TAMS revealed that 43% of Canadian travellers and 41.5% of U.S. travellers participated in a festival or event while on vacation. 16 % of Canadian travellers and 15.3% of American travellers reported that attending festival and events motivated some of their overnight trips.[3]

Table 4.4[4]
2006 TAMS: Canadian and American Travellers' Trip Activities and Motivators:
Festivals & Events

	Participated in a Festival or Event While on Vacation	% of Travellers for Whom This Activity Motivated Some of Their Trip
Canadian Travellers	43%	16%
American Travellers	41.5%	15.3%

Profile

Travellers motivated by Festivals & Events tend to be between the ages of 25 and 55, possess a post secondary education and do not have children under the age of 18. American travellers are more likely to be married than Canadians. For both Canadian and American travellers, a majority indicated that they went dining and shopping (for clothing, shoes and jewellery). However, over 50% of Canadian travellers went shopping in a bookstore or music store. (Please see Appendix B.)

Culture: Museums, Galleries, Architecture and Historic Sites

Toronto is at the vanguard of a cultural renaissance with three levels of government supporting the renovations of several major cultural sites. The recipient sites included two museums (Royal Ontario Museum [ROM]) and Gardiner Museum of Ceramic Art), one art gallery (Art Gallery of Ontario [AGO]) and an art school (Ontario College of Art and Design [OCAD]). The renovations at the museums and school are completed while the AGO is set to reopen in 2008.

As the capital of Upper Canada and one of Canada's first major urban centres, Toronto has its heritage preserved through 26 museums, 19 art galleries, 7,430 local historic sites, 926 provincial

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[1] Source: Toronto International Film Festival (TIFF). Overview. Retrieved August 11, 2007, from http://www.tiffg.ca/content/divisions/tiff.asp
[2] Source: Pride Toronto. (2007, February 12). Pride Toronto unveils theme and logo for Pride Week 2007. Retrieved May 1, 2007, from http://www.pridetoronto.com/drupal/system/files/Pride_Toronto_2007_Theme_and_Logo_Release.doc
[3] Sources: Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of Canadian Residents: An Overview.* Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20Canadian%20Report.pdf and Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of US Residents: An Overview*. Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20(FINAL).pdf
[4] *Ibid*

historic sites, 33 national historic sites, 11 living history sites, 64 aboriginal historic sites and 6,803 architectural heritage sites.[1]

The City of Toronto owns and operates 11 museums, which focus predominantly on the people and events that mark the early history of the city (e.g. Mackenzie House, home of Toronto's first mayor). Fort York, recently designated as a national historic site, is integral to the founding and development of the city and the site is set to be one of the key locations in the upcoming bicentennial anniversary of the War of 1812. Through its EDCT - Culture Division, the City of Toronto also runs 12 cultural centres and galleries and supports the artistic community (as well as a variety of arts and cultural initiatives) through its arm's length agency, the Toronto Arts Council.[2]

Architectural attractions include heritage landmarks as well as modern day structures. They include Casa Loma, the Legislative Building at Queen's Park, Union Station, buildings of the Distillery District, Design Exchange Museum, City Hall, Canada's National Ballet School and OCAD's Sharp Centre for Design.

Religious structures have played a major role in Toronto's history and architectural landscape, with the eponymous Church Street housing numerous places of worship. In keeping with Toronto's continuous wave of immigration from all parts of the world, different faith groups have constructed places of worship including St. George's Greek Orthodox Church, Holy Blossom Temple and the Church of the Redeemer. The most recent place of worship constructed, a Hindu temple named BAPS Shri Swaminarayan Mandir, is an example of grandiose Indian architecture in Canada.

Toronto has a cultural history that began approximately 11,000 years ago. Protecting archaeological sites has become increasing important since landscape change has been occurring at an ever-increasing rate. The City of Toronto is in the process of developing an archaeological master plan to identify areas of archaeological potential.[3]

The annual Doors Open Toronto weekend (see Festivals & Events section) is a citywide event allowing the public free access and tours to explore buildings of architectural interest.

According to Statistics Canada in 2004, 15% of overnight visitors to Toronto visited "Historic sites", and 17% of overnight visitors attended "Museum/Art Galleries."

The benefits of large exhibits at museums and galleries was illustrated by the *Global Competitiveness Study* done on the Barnes Exhibit, a major art display of French impressionist paintings mounted at the AGO from September 1994 to January 1995 (shoulder season and off season). This exhibition was considered a 'hallmark' event because the rarely seen paintings came from a private collection and were displayed in only a few major international cities. The Barnes Exhibit's direct economic impact was $38 million, which produced $71 million of value-added goods and services for the provincial economy. Toronto's economy benefited from $5.5 million in souvenir purchases, $1 million in food and beverage purchases (operators near the AGO reported up to a 30% increase in business), $5 million in accommodation and entertainment sales, and $7.7 million in recreation receipts. U.S. visitors had higher accommodation and food and beverage expenses than Ontario visitors. The Barnes Exhibit was a success and the study showed that the event increased the tourism resource base and provided

[1] Source: Resource Audit
[2] Source: City of Toronto. Toronto Culture: History. Retrieved June 12, 2007, from http://www.toronto.ca/culture/history/history-provincial-centre.htm
[3] Source: City of Toronto. Archaeology. Retrieved November 1, 2007 from http://www.toronto.ca/heritage-preservation/archeology.htm

income for the AGO, area facilities and attractions. The exhibit attracted a variety of visitors, including new visitors who may not have otherwise visited the gallery. Local residents benefited from the event's contribution to quality of life and urban attractiveness.[1]

TAMS revealed that 57% of Canadian travellers and 54.3% of U.S. travellers went to exhibits, observed architecture, and visited historic sites while on vacation. 17 % of Canadian travellers and 18.1% of American travellers reported that such activities motivated some of their overnight trips. 22 % of Canadian and 19% of U.S. travellers respectively visited museums (general history or heritage museums). 39 % of Canadian and 32.3% of U.S. travellers strolled around a city to observe its buildings and architecture. 29 % of Canadian and 29.2% of U.S. travellers visited well known historic sites or buildings. 23 % of Canadian and 20.5% of U.S. travellers toured well-known natural "wonders".[2]

Table 4.5[3]
2006 TAMS: Canadian and American travellers' Trip Activities and Motivators:
Exhibits, Architecture, and Historic sites

	Visited Exhibits, Architecture, and Historic Sites	% of Travellers for Whom This Activity Motivated Some of Their Trip
Canadian Travellers	57%	17%
American Travellers	54.3%	18.1%

Profile

Travellers motivated by Exhibits, Architecture, and Historic sites tend to be between the ages of 25 and 55, possess a post secondary education and do not have children under the age of 18. American travellers are more likely to be married than Canadians. Apart from indicating that they went to attractions, the majority of both Canadian and American travellers also went dining. However, American travellers also had going to a casino as one of the top 15 activities that they participated in while on their trip. The percentage of Canadian travellers who went to an outdoor café was 57.5%, as opposed to only 43.6% of American travellers. (Please see Appendix B.)

Theme and Amusement Parks

Toronto has 9 amusement parks, 11 gardens and conservatories, 2 zoos, 2 animal farms, an observation tower, a water park, 5 specialty cinema venues, a science centre and a garden theme park.[4]

Toronto's iconic landmark, the CN Tower, celebrated it 30th anniversary in 2006 and until September 2007 was the World's Tallest Free-Standing Structure. The tower also acts as an important telecommunications hub. CN Tower attracts approximately 2 million visitors annually who take in the breathtaking views as well as enjoy the various features including dining in a rotating restaurant. In June 2007, CN Tower activated its energy-efficient and cost-effective

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[1] Source: Carmichael, B.A. (2002). Global competitiveness and special events in cultural tourism: the example of the Barnes Exhibit at the Art Gallery of Ontario, Toronto. *Canadian Geographer*, 46, 4.
[2] Source: Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of Canadian Residents: An Overview.* Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20Canadian%20Report.pdf and Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of US Residents: An Overview*. Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20(FINAL).pdf
[3] *Ibid*
[4] Source: Resource Audit

architectural illumination program, designed to highlight the structure's dynamic and visual elegance as part of Toronto's night skyline. In 2006, the Tower presented Communities in Bloom Gardens which featured gardens transplanted from some of the most attractive municipalities across the country. This was CN Tower's efforts in providing enhanced green spaces in the community.[1]

Ontario Place, opened in May 1971, is one of the city's larger recreation parks. Cinesphere (the world's first permanent IMAX theatre), Molson Amphitheatre (a major outdoor concert venue) and Soak City® (a water theme park), are situated by Lake Ontario's shoreline. Ontario Place hosts two festivals: the Rogers Chinese Lantern Festival, which is in its second year and is supported by funding from Rogers Communications and the Ministry of Tourism, and the Canada Dry Festival of Fire, which is an on-water fireworks competition held in June.[2] In 2006, the park received $1.81 million from the Ontario Ministry of Tourism to upgrade infrastructure. In 2007, Ontario Place received $2.5 million in capital support from the Ministry to fund repairs to existing property and equipment, as well as to ensure compliance with current provincial building and fire codes and accessibility regulations.[3]

Exhibition Place is one of two multi-purpose parks in Toronto. There is plenty of green space, with facilities for picnics, providing the setting for a mix of mass and niche appeal seasonal events: The CNE, Steelback Grand Prix, CHIN Picnic, Royal Agricultural Winter Fair, Rogers Masala! Mehndi! Masti! and Caribana Parade. Accessible from major roadways and by public transit, Exhibition Place attracts sports fans to BMO Field (soccer) and Ricoh Coliseum (for AHL Toronto Marlies hockey action). Exhibition Place ensures a variety of experiences for visitors: Direct Energy Centre's trade and consumer shows, Medieval Times Dinner and Tournament (Middle Ages-experience), Muzik nightclub, Riding Academy at the Horse Palace and the Liberty Grand Entertainment Complex.[4]

Parc Downsview Park (PDP) is the second multi-purpose park in Toronto. PDP is home to the following theme and amusement facilities: Toronto Aerospace Museum and the Sports Action Complex, which features The Hangar Indoor Recreational Facility (indoor beach volleyball and soccer), Area 51 (paintball), The Rail Skate Park (skateboarding), HoopDome (basketball) and GrandPrix Kartways (electric go-karting).[5] The Toronto Aerospace Museum honours the aviation heritage of Toronto and the science and adventure of flight. Rare aircraft and artefacts are displayed in the 1929 aircraft factory of de Havilland Canada Ltd. where some of Canada's most famous aircraft and first satellite were built. Exhibit highlights include a 1943 DH 82C Tiger Moth trainer, a 1944 Avro Lancaster bomber under restoration, and a full-scale replica of the famous Avro CF-105 Arrow supersonic interceptor built in Toronto in 1958, which was abruptly cancelled and scrapped in 1959.[6]

Home to the Stanley Cup (which is enshrined in a rococo building that formerly housed a bank) and tribute to the sport of hockey, the Hockey Hall of Fame (HHOF) is centrally located in the downtown core (Yonge and Front streets). In 2003, HHOF opened 10,000 ft^2 of revitalized exhibit space, featuring improved and state-of-the-art interactive and multimedia attractions. The expanded capacity permitted exhibits of hockey's most precious artefacts and space for a

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[1] Source: CN Tower (2007) Communities in Bloom Gardens – La Tour CN Jardins Collectivités En Fleurs. Retrieved July 5, 2007, from http://www.cntower.ca/cib/downloads/CIB_Gardens_BrochureEngbLR.pdf
[2] Source: Ontario Place. Retrieved July 20, 2007, from http://www.ontarioplace.com
[3] Source: Ministry of Tourism Media Release. (2007, July 8). Ontario Place Receives $2.5 Million for Capital Repairs. Retrieved July 20, 2007, from http://www.tourism.gov.on.ca/english/about/n080707.htm
[4] Source: Exhibition Place. Retrieved July 20, 2007, from http://www.explace.on.ca/
[5] Source: Parc Downsview Park. Events @ Downsview Park. Retrieved August 31, 2007, from http://www.pdp.ca/en/events/index.cfm
[6] Source: Tourism Toronto. Toronto Aerospace Museum. Retrieved September 2, 2007, from http://www.torontotourism.com/cgi-bin/MsmGo.exe?grab_id=0&page_id=1012&query=aerospace%20museum&hiword=aerospace%20museum%20

replica dressing room and rink zone, theatres, and on-theme gift shop. HHOF unveiled the new $2.0 million NHL ZONE in 2006. The ZONE included 6,000 ft^2 of new exhibits: NHL Legends, NHL Retro, NHL Today, NHL Milestones and Stanley Cup Dynasties.[1] HHOF has been voted Toronto's Top Appeal Attraction by Zagat Survey.

Opened to the public in 1974, the Toronto Zoo grew to quickly become Canada's premier zoo. Set on 287 hectares in the scenic Rouge Valley on the eastern edge of the city, the zoo is easily accessed from major highways by public transit. Visitors can trek the over 10 km of walking trails and view over 5,000 animals and exhibits. Included are: the award winning 30-acre African Savanna, and the Gorilla Rainforest (the largest indoor gorilla exhibit in North America). For families, there is the Zellers Discovery Zone which features the Kids Zoo, Splash Island and the Waterside Theatre (home of the seasonal Amazing Animal Show).[2]

Centreville Amusement Park is located on Toronto's Centre Island, nestled in over 600 acres of parkland. It is accessible via the Toronto Island Ferry located at the foot of Bay Street. The ride across the harbour provides visitors with some of the most breathtaking views of Toronto's skyline. In 2006, the park celebrated 40 years of offering visitors gentle amusement with over 30 rides and attractions and more than 14 food outlets.[3]

Designed by Toronto architect Raymond Moriyama, the Ontario Science Centre (OSC) was built by the Government of Ontario to provide the public with engaging and thought-provoking experiences in science and technology. OSC has hundreds of interactive exhibits and visitors can experience "surround sound and view" films at the Shoppers Drug Mart OMNIMAX Theatre. As part of its $47 million Agents of Change initiative, OSC has transformed over 30% of its internal exhibition spaces. Visitors can participate in and explore over 50 open-ended experiences at the newly opened Weston Family Innovation and TELUSCAPE, a large outdoor science exploration plaza.[4]

The Toronto Music Garden (TMG) was designed by internationally renowned cellist Yo Yo Ma and landscape designer Julie Moir Messervy. TMG interprets, in nature, *Bach's First Suite for Unaccompanied Cello* with each dance movement within the suite corresponding to a different section in the garden. Open year-round with free music and dance programming during the summer months, TMG features guided and self-guided tours by Harbourfront Centre, in partnership with the City of Toronto Department of Parks, Forestry and Recreation.[5]

Gardens and Conservatories

Of the 15 City of Toronto gardens, there are 8 gardens which are particularly noteworthy from a "tourist experience" perspective:

Table 4.6[6]
Prominent Toronto Gardens

Alexander Muir Gardens	Rosetta McClain Gardens
Edwards Gardens (Toronto Botanical Gardens)	St. James Gardens
Humber Arboretum	Toronto Centre Island Gardens
James Gardens	Toronto Music Garden

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[1] Source: Hockey Hall of Fame. New Interactive Areas Unveiled. Retrieved September 8, 2007, from http://www.hhof.com/html/exncrp.shtml
[2] Source: Toronto Zoo. About the Zoo. Retrieved September 6, 2007, from http://www.torontozoo.com/AboutTheZoo/
[3] Source: Centreville Amusement Park, Toronto Islands. About Us. Retrieved September 6, 2007, from http://www.centreisland.ca/about.html
[4] Source: Ontario Science Centre. 2000 +. Retrieved September 6, 2007, from http://www.ontariosciencecentre.ca/history/default.asp
[5] Source: Harbourfront Centre. Toronto Music Garden 2007. Retrieved August 9, 2007, from http://www.harbourfrontcentre.com/noflash/perfarts/musicgarden.php
[6] Source: Resource Audit

James Gardens is Canada's first urban wildflower reserve.

Three conservatories in the city attract visitors year-round:

Table 4.7[1]
Toronto Conservatories

Allan Gardens Conservatory
Centennial Park Conservatory
Cloud Gardens Conservatory

Year round seasonal displays of exotic plants at Allan Gardens and Centennial Park conservatories are provided when five major floral shows are staged. Many of the gardens and conservatories in Toronto have free admission, and appeal to a mass market.

The Travel Activities and Motivation Study (TAMS) revealed that 46% of Canadian travellers and 52.4% of U.S. travellers visited a theme park while on vacation. 15 % of Canadian travellers and 23.9% of American travellers reported visiting a theme park motivated some of their overnight trips.

Table 4.8[2]
2006 TAMS: Canadian and American travellers' Trip Activities and Motivators:
Theme Parks

	Visited Theme/Amusement Park on Trip	% of Travellers for Whom This Activity Motivated Some of Their Trip
Canadian Travellers	46%	15%
American Travellers	52.4%	23.9%

Meetings and Conventions (MC) and Trade and Consumer Shows (T&CS)

Meetings and Conventions (MC)

Toronto's share of the MC business is significant both domestically and within the North American market. In 2004, Toronto attracted 653,000 business convention visitors or 53% of the total 1,302,000 business convention visitors to Ontario.[3] Overall average spending in 2004 for visitors to Ontario was $144.40 per person per visit. By comparison, business convention visitors spent more than four times that amount or $558 per person per visit, highlighting the lucrative growth opportunities provided by this market.[4]

Three major convention centre facilities exist within Toronto and 145 meeting planner businesses supply a host of services. There are over 30 hotels, with meeting space inventory

[1] Source: Resource Audit
[2] Sources: Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of Canadian Residents: An Overview.* Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20Canadian%20Report.pdf and Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of US Residents: An Overview*. Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20(FINAL).pdf
[3] Source: Statistics Canada, CTS/ITS, 2004
[4] *Ibid*

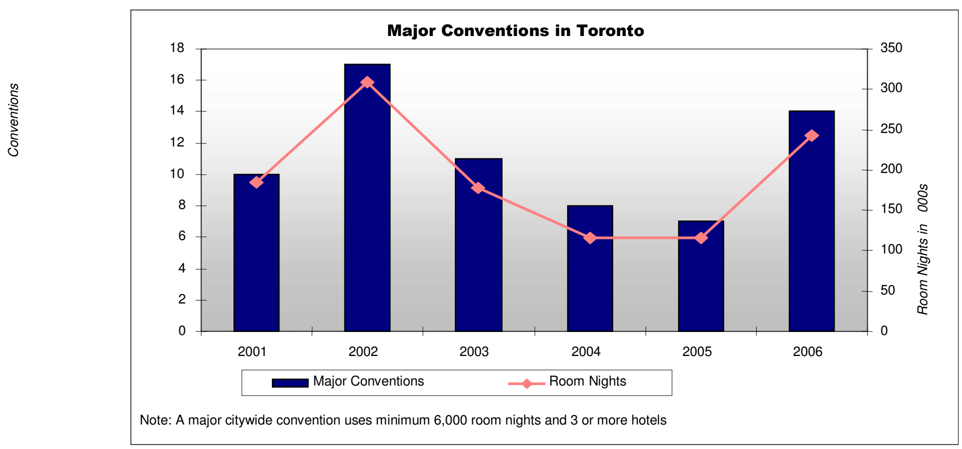
exceeding 1,263,815 ft^2. More than 50 special event venues (e.g. Casa Loma, Enwave Theatre) offer a unique dimension to any meeting or convention.[1]

Table 4.9[2]
Major Convention Centre Facilities

Venue	Meeting Rooms	Exhibit Space (Ft^2)
Direct Energy Centre	• 23 meeting rooms • 100-seat theatre • 10,000-seat arena	9 connected exhibit halls containing 1 million ft^2
Metro Toronto Convention Centre	• 64 furnished meeting rooms (104,000 ft^2) • 1,330-seat John Bassett Theatre	460,000 ft^2
Toronto Congress Centre	• 33 state-of-the-art meeting rooms (over 60,000 ft^2)	500,000 ft^2 (soon to grow to 1 million ft^2)

In 2006, Toronto hosted 13 citywide[3] conventions accounting for 242,000 room nights and 104,000 attendees, indicating that the market is recovering from severe losses of MC business due to the 2003 SARS outbreak (see Figure 4.2).

Figure 4.2[4]
Major Conventions in Toronto



The 2006 International AIDS Conference set the new mark for attendance with 19,000 delegates from 186 countries. The conference attracted 1,668 national and international media attendees drawing world-wide attention to the city by way of event coverage. The conference supported an estimated 397 jobs, including 323 jobs in Toronto, paying \$8.9 million in wages and salaries (an additional \$3.3 million was paid in the rest of the province). Overall, the event generated nearly

[1] Source: Resource Audit
[2] Source: Resource Audit
[3] Note: A major citywide convention is one that uses a minimum of 6,000 room-nights and 3 or more hotels.
[4] Source: Tourism Toronto 2006

$21 million in GDP, of which more than $15.5 million occurred in Toronto. Hosting the event is estimated to have supported nearly $9.3 million in taxes to the three levels of government.[1]

As a testament of the significance and value of MC business, Tourism Toronto was named the top Canadian convention and visitor bureau (CVB) for client service again in the 2006 Flaspöhler survey of meeting planners and remains the only Canadian CVB in the top ten for North America. Out of 46 North American cities assessed in the study, Toronto ranked 19th overall, with strengths not only in its CVB, but in the number of hotels well suited for large meetings and easy accessibility around the city. The study ranked these cities using 9 key evaluation and selection factors. Toronto placed in the top quartile in 2004 but the concentration of competing cities dramatically increased in 2006. While Toronto still ranks as the leading Canadian city, it has to compete with a greater number of major U.S. cities who have invested heavily in convention centres (new and upgraded), room booking accounting systems, and improved/increased free time activities. However, Toronto's growing status as an international stepping stone for organizations seeking to hold their first meeting outside the U.S. has allowed the city to carve a strategic niche in this sector.[2]

Convention and exhibition facility capacity is expected to produce future challenges for Toronto and other Canadian destinations in maintaining their traditional market shares in this sector.[3] Some organizations in Toronto have already begun investing or are planning to invest in new or renovated meeting, convention and trade/consumer show venues. In 2006, CN Tower opened a meeting/event venue with 1,100 ft^2 of flexible space adjacent to the CN Tower's 144-seat Maple Leaf Cinema. The new meeting rooms are fully equipped for audiovisual presentations and a variety of room layouts can accommodate up to 90 people with full food and beverage services.[4] The Dynamic Hospitality and Entertainment Group and Ontario Place Corporation are marketing Atlantis Pavilions as Toronto's premier convention and event facility on the waterfront, after a $5 million renovation conducted this year. The venue features four ballrooms with floor-to-ceiling windows providing views of the Toronto skyline and waterfront. On December 11, 2007 Toronto City Council approved the Conference Centre redevelopment at Exhibition Place. The 160,000 square foot Automotive Building will undergo a $46.88 million renovation to create a new Conference Centre. The centre will be designed according to International Association of Conference Centres (IACC) standards.[5]

Meetings and Incentive Travel (M&IT) magazine's *2006 Market Report* survey had 865 Canadian industry respondents (more than double that of 2005) of which 342 were from corporate organizations, 346 from associations and 177 meeting planners. Respondents indicated that Toronto continues to be the number one Canadian meeting destination (73%), with Vancouver (34%) and Montreal (34%), Calgary (33%) and Ottawa (20%) trailing behind.[6] 45 major conventions have already been confirmed for the period of 2007-2015, which accounts for more than 700,000 room nights and 360,000 attendees.[7]

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[1] Source: Tourism Toronto & City of Toronto. *XVI International AIDS Conference Economic Impact Assessment, August 2006*. Prepared by Paradigm Consulting Group.
[2] Source: Tourism Toronto. (2007, May 3). *Tourism Toronto Annual Report 2006: Drawing Inspiration.*
and Flaspöhler. (2006, March). *2006 Meeting and Convention Planners Survey*.
[3] Source: Tourism Toronto. (2006, April 20). *Economic Impact of Trade and Consumer Shows*. Prepared by Marion Joppe, HS Chris Choi, & Dongkun Yong, University of Guelph, School of Tourism Management.
[4] Source: CN Tower. Canada's Landmark Icon Expands Meeting and Event Space. Retrieved July 2, 2007, from http://www.cntower.ca/portal/SmartDefault.aspx?at=1369
[5] Source: Confidential Report.
[6] Source: Rogers Publishing Ltd. (2006, January/February). Gathering Strength (2006 Market Report). *Meetings and Incentive Travel(MC&IT).* Retrieved September 14, 2007, from http://www.mit.rogers.dgtlpub.com/data/flash/MIT/8500000407/home.html.
[7] Source: Tourism Toronto 2006

Table 4.10[1]
Major Conventions booked by Tourism Toronto as of August 2006

Year	Major Conventions	Room Nights
2007	10	148,484
2008	11	135,990
2009	10	126,109
2010	7	126,315
2011	4	77,756
2012	1	18,750
2013	1	17,850
2014	0	N/A
2015	1	57,500
Total	**45**	**708,754**

Trade and Consumer Shows (T&CS)

The consumer and trade show industry is one of the fastest growing sectors within the tourism industry. 90 major consumer shows, ranging from mainstream (Canadian International Auto Show) to niche (One of a Kind Christmas Craft Show) to ethnic (Suhaag Wedding show-largest South Asian bridal show in North America) were held in Toronto in 2006. The city's three major convention centres (Direct Energy Centre, Metro Toronto Convention Centre and Toronto Congress Centre) hosted 70 shows, while other venues in the city hosted the remaining shows. More than 45 major trade shows are exhibited in Toronto each year; the shows spanned from large technology to niche spa and fashion events. According to the Expo Canada Report 2004 ("Expo Report"), the pharmaceutical, medical and scientific cluster is the fastest growing sector for trade shows (up 12% from 2003) with the industrial, technical and information technology sectors following. The Expo Report indicated 67% of respondents stated that they held events in Ontario, followed by British Columbia (43%) and Alberta (38%).[2]

An Economic Impact of Trade & Consumer Shows study ("EITCS Study") was conducted for the first time by the University of Guelph, on behalf of Tourism Toronto, between September 2004 and September 2005. The EITCS Study measured total direct expenditures to Toronto and area to be $1.1 billion (see Table 4.11 on the following page).

[1] Source: Tourism Toronto 2006
[2] Source: Expo Canada Report (2004)

Table 4.11[1]
Economic Impact of Trade and Consumer Shows

	Toronto	Rest of Ontario
Total Direct Expenditures	$1,096,169,137	N/A
GDP (Total Impacts)	$810,628,216	$94,141,284
Labour Income	$464,493,673	$57,855,759
Employment:		
Direct	9,929	269
Indirect	1,267	444
Induced	1,514	578
Total Taxes	$343,480,456	$29,062,368

Other findings from the report showed:

- T&CS tourists (people whose residence is more than 80 km outside Toronto) spent $210.21 per person per visit.
- Overnight fringe residents (residents living outside of Toronto but less than 80 km away) spent $145.32 per person per day.
- Exhibitor spending was $103.87 per person per day, exhibitor companies spent $5,880 per company per show and show organizers spent $467,145 per show.[2]

T&CS visitors arrived from a variety of destinations, though the majority of visitors were from Ontario and Canada:

Table 4.12[3]
Origins of Visitors and Exhibitors to Trade and Consumer Shows

Visitor Origin	Visitors	Exhibitors
Ontario	72.7%	49.3%
Other Canada	14.1%	27.2%
USA	8.4%	14.9%
Overseas	4.8%	8.6%

Exhibition facility growth is expected to produce future challenges for Toronto and other Canadian destinations in maintaining their traditional fair market shares for exhibitions and trade shows.[4]

Local Residents Hosting Friends and Relatives

Local residents are often ignored as a potential audience. Yet they are an important audience, because residents are consumers of tourist facilities and services. Residents can also be walking ads for their home cities. More tourists will visit friends and relatives during their trip. In 2004, 35%[5] of all visitors to Toronto reported their main purpose of trip was Visiting Friends and Relatives. The resident hosts' knowledge of and impressions about an area or about specific

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[1] Source: Toronto Convention & Visitors Association (Tourism Toronto). (2006, April 20). *Economic Impact of Trade and Consumer Shows*. Prepared by Marion Joppe, HS Chris Choi, & Dongkun Yong, University of Guelph, School of Tourism Management.
[2] *Ibid*
[3] *Ibid*
[4] *Ibid*
[5] Source: Statistics Canada, CTS/ITS, 2004

tourism facilities determines where their out of town guests go and what they do. Hence, resident hosts can have a major impact on the activities that tourists participate in. If resident hosts hold negative perceptions about their communities or are unfamiliar with its attractions, visitors are unlikely to travel to those destinations.

Residents of the City of Toronto are a large reason for prompting visits to the area. Friends and relatives (FR) are core attractors in themselves. The visiting friends and relatives (VFR) market is consistently being reported as one of the major motivations for domestic pleasure travel. The VFR market is not only substantial, but it also exerts more of an economic influence on receiving communities than was previously assumed. Its economic value has been underestimated. VFRs make substantial contributions to local economies and make significant use of restaurants, tourism attractions, commercial tourism operations, commercial recreation organizations, and national airlines. This market also books hotel rooms and attends spectator and cultural events, contributing positively to the local economy. In a study by Seaton and Palmer (1997), it was determined that VFR travel was more equally distributed throughout the year and actually peaked in months of traditionally low general tourism volumes. Therefore, it helps reduce disparities between high and low tourist seasons.

VFRs also constitute a considerable segment of the international travel market, particularly for regions with a strong immigration tradition (like the City of Toronto). In Chadwick's (1984) report *Travel to Canada by Residents of the United Kingdom,* it is reported that VFR continued to be the main reason for more than half the visits of U.K. residents to Canada. In Meis, Joyal, and Trites' (1995) report *The US Repeat and VFR Visitor to Canada: Come Again Eh!*, it is found that VFRs constituted a large part of U.S. repeat travellers to Canada. International VFRs can make significant use of commercial accommodation and have significant expenditures on food and beverages, transportation, gifts and souvenirs, and entertainment. A large proportion of foreign currency earnings are derived from VFR sectors. For some destinations this market is the principal source of tourists. The VFR market is often the dominant source of foreign visitor arrivals besides business travellers.[1]

Supporting Attractors

Supporting Attractors are the features and/or facilities that draw guests to the area by giving them additional but secondary reasons to travel to the particular destination. Supporting attractors can be primary travel motivators (i.e. core attractors) to some markets (typically niche segments). They are distinguished from core attractors by the smaller number of visitors that they draw to the destination.

Spectator Sports: Professional

Fans of spectator sports have year-round reasons to attend professional sports events in the city. Toronto is the only city in Canada with professional basketball and soccer teams. Baseball, football, hockey, and lacrosse provide the other major league sports experiences available in the downtown area.

According to Statistics Canada in 2004, 8% of overnight visitors to the City of Toronto attended sports events.

[1] Source: Xinran You Lehto, Alastair M. Morrison and Joseph T. O'Leary (2001). *Does the Visiting Friends and Relatives' Typology Make a Difference? A Study of the International VFR Market to the United States*. Cited in: Journal of Travel Research 2001; 40; 201. SAGE Publications. Retrieved August 18, 2007, from http://jtr.sagepub.com/cgi/content/abstract/40/2/201

The Resource Audit has indicated that there are seven professional sports teams in Toronto (seen in Table 4.13 on the following page):

Table 4.13[1]
Professional Sports Teams in Toronto

Team Name	Professional Sport	Season	Venue
Toronto Argonauts	Football (CFL)	Summer, Fall	Rogers Centre
Toronto Blue Jays	Baseball (MLB)	Summer	Rogers Centre
Toronto FC	Soccer (MLS)	Spring, Summer, Fall	National Soccer Stadium (BMO Field)
Toronto Marlies	Hockey (AHL)	Fall, Winter, Spring	Ricoh Coliseum
Toronto Maple Leafs	Hockey (NHL)	Fall, Winter, Spring	Air Canada Centre
Toronto Raptors	Basketball (NBA)	Fall, Winter, Spring	Air Canada Centre
Toronto Rock	Lacrosse (NLL)	Winter, Spring	Air Canada Centre

Multifunctional venues Air Canada Centre (ACC), Ricoh Coliseum and Rogers Centre can convert their ice surfaces into configurations for concerts, consumer shows, and large assemblies. The privately-owned Ice Gardens at York University possess 5 NHL regulation-size rinks and 1 international size event/competitive rink.[2] The new 20,000 seat soccer stadium, BMO Field, is owned by the City of Toronto and will have a winter bubble which supports four-season usage by community, youth and adult soccer groups and leagues.[3] Canada's national soccer teams are also based at BMO Field.[4] High interest in the soccer stadium by soccer fans generated a sell-out of Toronto FC season tickets for the team's first year of play in 2007.[5]

In June, Woodbine Racetrack hosts the Queen's Plate, the oldest thoroughbred horserace in North America. Exhibition Place, along the shore of Lake Ontario, sets the scene for the Steelback Grand Prix of Toronto (Steelback Brewery acquired title sponsorship of the event this year, after years of Molson sponsorship), a July motorsport competition. Every August, Tennis Canada's Rexall Centre tennis complex draws spectators north to watch the Rogers Cup tournament (which alternates between the men's and women's events annually). One of 10 Tier I tournaments on the WTA Tour, the Rogers Cup offers US $1.325 million in prize money and attracts the stars of professional tennis.[6]

The following table is a glance at Toronto's professional spectator sports events for 2007:

Table 4.14[7]
2007 Professional Sports Competitions Hosted by Toronto

Professional Sports Competitions	Event Date(s)
2007 Rbk Hockey AHL All-Star Classic Game	January 2007
FIFA Men's Under-20 World Cup Canada 2007	July 2007 (12 matches, including the gold medal match)
Canadian Football League's (CFL) 95th annual Grey Cup football game (held at Rogers Centre)	November 2007 (pinnacle event of Grey Cup week activities)

[1] Source: Resource Audit
[2] Source: York University. Ice Gardens. Retrieved August 3, 2007, from http://www.yorku.ca/schkine/facilities/ice_gardens.htm
[3] Source: Toronto FC. Our Brief History and Bright Future. Retrieved August 3, 2007, from http://toronto.fc.mlsnet.com/t280/about/
[4] Source: BMO Field. BMO Field to be Home for Toronto FC and Canada's National Soccer Teams. Retrieved August 3, 2007, from http://www2.bmo.com/bmo/files/news%20release/4/1/bmo_bmofieldtor_sep2006_en.htm
[5] Source: Toronto FC. Toronto FC Tickets. Retrieved August 3, 2007, from http://toronto.fc.mlsnet.com/t280/tickets/
[6] Source: Rogers Cup. The Tournament. Retrieved August 3, 2007, from http://www.rogerscup.com/4/en/tournament/tournamentinfo.asp
[7] Sources: Resource Audit

The economic impact analyses, conducted by Tourism Toronto on two major sport events, underscore the monetary benefits of professional sports to the local economy:

Table 4.15[1]
Grand Prix-2002 Molson Indy Economic Impact Analysis

Economic Impact	Ontario Total (CAD)	Greater Toronto (CAD)	Rest of Ontario (CAD)
Direct Visitor Spending	$14,200,000	$14,200,000	-
Direct Organiser Spending	$13,500,000	$13,500,000	-
Gross Domestic Product	$33,300,000	$29,400,000	$3,900,000
Wages	$20,800,000	$18,700,000	$2,100,000
Full-Year Equivalent Jobs	723	669	54
Total Taxes Generated Attributed to Attendance & Business Operation of Event	$14,400,000	$13,100,000 *Federal-$6.3M* *Provincial-$5.1M* *Municipal-$1.7M*	$1,300,000

Table 4.16[2]
Tennis-2001 Rogers AT&T Cup Economic Impact Analysis

Economic Impact	Ontario Total (CAD)	Greater Toronto (CAD)	Rest of Ontario (CAD)
Direct Visitor Spending	$48,600,000	$48,600,000	-
Direct Organiser Spending	$10,600,000	$10,600,000	-
Gross Domestic Product	$66,000,000	$55,700,000	$10,300,000
Wages	$42,000,000	$36,000,000	$6,000,000
Full-Year Equivalent Jobs	1530	1390	140
Total Taxes Generated Attributed to Attendance & Business Operation of Event	$29,900,000	$26,500,000 *Federal-$11.9M* *Provincial-$10.3M* *Municipal-$4.3M*	$3,400,000

Professional sports spectators share some key characteristics. American travellers are more likely than Canadian travellers to be named "professional sports enthusiasts," as are male travellers, from both Canada and the United States, compared to female travellers. This spectator group is active in outdoor sports during travel and favours experiences featuring personal indulgences (night life, relaxation, gaming, romance, and learning vacations). A study suggests that destination marketing activities promote professional sports tourism packages with gaming and entertainment components. New tourism products on the market that could appeal to this group include jazz and film festivals and Great Lakes cruises.[3]

Table 4.1 (on the following page) provides highlights about this spectator sport demographic group:

[1] Source: Tourism Toronto. (2002). *Economic Impact Analysis: The 2002 Molson Indy*.
[2] Source: Tourism Toronto. (2002). Economic Impact Analysis: 2001 Rogers AT&T Cup.
[3] Source: Lang Research. *TAMS: Interest in Professional Sports (As A Spectator) Profile Report, April 2001*. Retrieved August 3, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202000%20%20Professional%20Sports%20(as%20Spectator).pdf

Table 4.17[1]
Impact of Professional Sports on Overnight Travel

Overnight Travellers	Exhibit Moderate Interest in Professional Sports	Classified as Professional Sports Enthusiasts (males, as compared to females)	Demographic group with Highest Interest in Professional Sports	Key Target Market for Professional Sporting Events
Canadian	37.2%	82%	Under 35 years of age & single	Young, affluent males
American	49.1%	77%	Same as above	Same as above

There are major benefits from hosting significant spectator sports events in a city like Toronto. In the study *Non-Host Community Resident Reactions to the 2002 Winter Olympics: The Spillover Impacts*, 11 positive benefits/impacts are mentioned that applies to Toronto:[2]

1. Enhanced International awareness
2. Employment
3. Economic activity/gain
4. Highlights the international profile of the country/region
5. Impact on long term tourism to the host country
6. Improves the host community's quality of life
7. Mega events (Olympics) have the power to strengthen regional values and traditions and even lead to cultural understanding among residents and visitors
8. Community pride
9. Utilization of the actual recreation resources
10. Shopping opportunities
11. Revenue for local government

Spectator Sports: Amateur

Sports are a major industry, and are reasons for people to travel. While there are literally hundreds of sports, there is a tendency to think only 20 or so traditional sports are active in Toronto. There are many others that are "below the radar" which are desirable from a sport tourism viewpoint. Amateur sports events and tournaments take place annually in Toronto. In 2006, there were 63 significant, recurring amateur sports events, both high calibre and smaller-scale.[3]

Toronto-based organizations (e.g. Bayside Rowing Club, Scarborough Soccer Association, Toronto City Hall Cricket Club), as well as Provincial and National sports organizations (e.g. Volleyball Canada, Canadian Adult Recreation Hockey Association) chose Toronto to host their tournaments or events in 2006.

Toronto has 95 indoor and outdoor arenas, 366 baseball facilities, 238 soccer fields, 756 tennis courts, 1469 sports fields, 136 community centres, 833 playgrounds, and 1014 sports gyms.

[1] Source: Lang Research. *TAMS: Interest in Professional Sports (As A Spectator) Profile Report, April 2001*. Retrieved August 3, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202000%20%20Professional%20Sports%20(as%20Spectator).pdf
[2] Source: Deccio C, & Baloglu S. (2002, August). Nonhost Community Resident Reactions to the 2002 Winter Olympics: The Spillover Impacts. Cited in: *Journal of Travel Research*, Vol.41, Sage Publications.
[3] Source: Resource Audit

There is one basketball-only facility located at Downsview Park called the HoopDome.[1] It is a 42,000 ft^2, four-court facility that opened in March 2007. Ashbridges Bay Park is known for the numerous outdoor volleyball games held in the park's ample space.

Toronto Lynx (men's league) and Toronto Lady Lynx (women's league) are members of the United Soccer Leagues Premier Development League (Great Lakes Division of the Central Conference) and play at the Centennial Park Stadium in Etobicoke.

Toronto International is the City of Toronto unit responsible for attracting international events to the city. Sports tourism remains an important aspect of the division's portfolio. Table 4.18 is a review of past amateur spectator sports events:

Table 4.18[2]
2006 Amateur Sports Competitions Hosted by Toronto

Amateur Sports Competition	Event Date(s)
Barclay Churchill Cup of Rugby	June 3 & 10 (two matches)
FISAC-IRSF World Rope Skipping Championships	July 18-27
International Dragon Boat Federation Club Crew World Championships	August 8-13
Canadian Beach Volleyball Championships	August 26-27
Bell Swimming Grand Prix	November 24-26

There were approximately 30,000 facility permits issued for tournaments and events in Toronto last year and approximately 2,900 sports groups and organizations.[3] There is quite a high visitation rate and audience turn out from tourists.
According to TAMS, 11% of Canadian and 7% of U.S travellers had participated in amateur sport tournaments/competitions while on overnight trips. 5% of Canadian and 3.6% of U.S. travellers said that participating in an amateur sport tournament is a motivator for some of their trips.

Table 4.19[4]
Canadian and American Travellers' Trip Activities and Motivators

Overnight Travellers	Participated in amateur sports tournament or competition during trip	Motivated by amateur sports tournament or competition to travel
Canadian	11%	5%
American	7%	3.6%

Hosting an international amateur competition generates media attention, capital funding for infrastructure, and economic benefits to the host city. The Western Beaches 600 metre multi-sport Watercourse was a $27 million project started in 2005 specifically for the International Dragon Boat Federation Club Crew World Championship and was funded by Federal, Provincial, and Municipal governments. The course is city-owned and is a water-sport training

[1] Source: Resource Audit
[2] *Ibid*
[3] *Ibid*
[4] Sources: Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of Canadian Residents: An Overview.* Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20Canadian%20Report.pdf and Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of US Residents: An Overview*. Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20(FINAL).pdf

site. “This project is exciting both for the international events it will draw to Toronto, and for the improvements it will bring to our waterfront that all Torontonians can enjoy”, said Mayor David Miller. “This is another example of the great work that can be done when three governments work together toward a common goal.”[1]

The Canadian Sport Tourism Alliance (CSTA) estimated the 2006 International Dragon Boat Federation Club Crew World Championship’s impact on Toronto by using the Sport Tourism Economic Assessment Model - Professional Version (illustrated in Table 4.20):

Table 4.20[2]
2006 International Dragon Boat Federation Club Crew World Championships Economic Impact

Category	Toronto (CAD)	Accrued to Ontario (CAD)	Ontario (CAD)
Initial Expenditure	$28,564,823	n/a	$28,564,823
GDP	$15,468,466	$8,737,268	$24,205,734
Wages & Salaries	$9,437,816	$5,121,864	$14,559,680
Taxes – Total	$5,450,021	$3,226,205	$8,676,226
Federal	$2,669,598	$1,541,410	$4,211,008
Provincial	$2,013,953	$1,268,029	$3,281,982
Municipal	$766,470	$416,766	$1,183,236
Jobs	177.1	78.1	255.2

The initial expenditures were the construction of the Western Beach Watercourse ($23 million), the organizing committee’s operating costs ($1 million), and visitor spending ($4.5 million). From on-site surveys, the CSTA determined that per party per trip daily spectator spending varied from $45.07 (regional visitors) to $198.28 (overseas visitors) to $213.79 (U.S. visitors). The CSTA analysis noted that the August 10-13 event featured more than 3,500 participants, involved 15,000 volunteer hours, attracted a net spectator count of 22,000 and directly contributed to the building of sport infrastructure, which otherwise would not have occurred.

The TELUS Toronto International Dragon Boat Race Festival is an annual event that also gets large attendance-125,000 spectators. It is a two-day event that brings sports, multicultural entertainment and international spirit to Toronto Centre Island. The 19th festival took place on June 16 and 17, 2007. There were close to 180 teams with over 5,000 paddlers competing in over 100 races in two days. Athletes of different backgrounds from all over the world take part in the ancient Chinese tradition and friendly competition.

Profile

Travellers motivated by Spectator Sports tend to be male, between the ages of 18 and 55. While Canadians tend not to be married and do not have children less than 18 years of age, American travellers are more likely to be married and have children under 18 and are also more likely to have some post secondary education.

Apart from indicating that they went to sporting attractions, the majority of both Canadians and American also went dining and shopped for clothing, shoes and jewellery. However, a much

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[1] Source: City of Toronto. (2005, October 11). Construction starts on $27M Watercourse in Toronto’s Western Beaches. Retrieved July 20, 2007, from http://wx.toronto.ca/inter/it/newsrel.nsf/7017df2f20edbe2885256619004e428e/f7a5d0229cd78a42852570970050653f?OpenDocument

[2] Source: Canadian Sport Tourism Alliance. *2006 IDBF Club Crew World Championships*: *August 2006*: *Economic Impact Analysis*.

higher percentage of Americans than Canadians also went to a casino (50.9% vs. 34%, respectively). Canadians, on the other hand, were more likely to go to a beach or lake for swimming or sunbathing, as opposed to Americans (about 50% of Canadians vs. about 38% of Americans). (Please see Appendix B.)

Shopping

Toronto's retail shopping sector has 2,866 fashion/clothing stores, 453 ethnic food/specialty shops, 104 factory outlets/shopping malls (with more than 30 stores), 50 department stores, 273 antiques/coins & stamps/memorabilia shops, 490 arts & crafts/gift/novelty shops, 481 jewellery stores, 165 fur/leather/leather goods stores, 743 electronic stores, 159 spas/high-end beauty shops and 324 retail galleries.[1]

According to Statistics Canada in 2004, 55% of overnight visitors to the City of Toronto participated in shopping while on their trip.

The *Travel Activities and Motivations (TAMS) of U.S. and Ontario Markets*, May 2007 established that shopping, though not usually a trip motivator is an important activity for 66% of U.S. travellers and 70% of Ontario travellers while at a destination. Beyond shopping while they travel, many of these travellers also indicated that great shopping opportunities were highly important to them when choosing a destination for their pleasure or vacation trip.

TAMS for U.S. and Ontario Markets for Shopping indicated the importance of shopping at the trip-planning stage: 15% of adult Canadians and 16% of adult Americans rated "great shopping opportunities" as a highly important aspect when choosing a pleasure destination. Shopping segments' responses varied from a low of 14% of Canadians and 18% of Americans (books and music segment or antiques segment) to a high of 20% of Canadians and 23% of Americans (clothing segment or gourmet good segment) on this trip-planning aspect.[2]

TAMS categorized visitors who browsed or shopped as the: clothing segment (clothing, shoes, and jewellery), books and music segment (bookstores and music stores), antiques segment, gourmet food segment (gourmet foods in retail stores), arts and crafts segment (local arts and crafts studios or exhibitions), and garden segment (greenhouses or garden centres).

Demographically, compared to travellers in general, all of the shopping segments:

- Have higher proportions of women than men, particularly in the clothing segment.
- Are better educated.
- Have higher household incomes, with the gourmet segment having the highest incomes and the garden segment having one of the lowest – reflecting to some extent their high retirement ratio.
- Live with a spouse or partner, with the antiques and garden segments being most likely to live with a spouse or partner and have higher proportions of retired members than other segments or than the overall U.S. travellers. These two segments also have the lowest proportion of families with children younger than 18 years of age.
- Show a decline in the incidence of shopping after the age of 65. While the clothing segment shows a continuous decline in the incidence of shopping as the segment's

[1] Source: Resource Audit
[2] Source: Ontario Ministry of Tourism. (2007, May). *Shopping: An Analysis of the shopping segments from the Travel and Motivations Study (TAMS): The U.S. and Ontario Markets*.

members become older, the remaining segments exhibit in increase in shopping activity up to ages 62 to 65, then the segments show declination.

- Have a higher incidence of wanting to visit undiscovered places, with the exception of the clothing segment. TAMS revealed that Ontario travellers who shopped liked to relieve stress, have a break from daily routines, and satisfy their intellectual curiosity.[1]

Ontario is considered a pleasure destination to shoppers. All of the shopping segments had better opinions of Ontario than the overall U.S. travel population. The gourmet and garden segments provided the highest ratings for the province. However, other annual studies conducted by Statistics Canada (*International Travel Survey-ITS*) reveal that the incidence of shopping of U.S. travellers to Ontario is significantly lower than their incidence of shopping in other parts of Canada or the world (*U.S. In-Flight Survey*). This suggests that the province does not appear to provide the travellers with the shopping venues that they seek. As such, Ontario may be losing opportunities within these market segments.[2]

Dining/Culinary Tourism

Toronto's more than 5,000 restaurants[3] reflect tastes, cultures and ingredients from around the world. From upscale to down home, visitors can find dining experiences and culinary adventures to satisfy every taste. This is evidenced by the number and variety of dinning establishments: 566 licensed ethnic restaurants, 206 unlicensed ethnic restaurants, 1,500 licensed restaurants, 789 unlicensed restaurants, 442 pubs/bars/nightclubs, 1,612 take-out/fast food/donut shops, 36 caterers and 218 street vendors with permits.[4]

Restaurant entrée prices vary from $7-$250 per person.[5] Numerous restaurants have accredited chefs with distinctions ranging from red seal certification to diplomas from culinary schools, province issued smart serve training. The city's restaurants also have expansive wine lists and a number of accredited sommeliers. In 2006 the CN Tower was recognized as having the Guinness World Record for World's Highest Wine Cellar.[6]

Changes to the Ontario Ministry of Health's Health Protection and Promotion Act in the summer of 2007 have paved the way for the City to provide street vendors with permits to serve a variety of ethnic food from vending carts. However, the City of Toronto does not have enough food inspectors or equipment to enact the new ruling. The City hopes to enact the new ruling by 2008.[7] By comparison New York City is home to some 10,000 food and merchandise street vendors, selling almost every type of cuisine imaginable, and to the annual Vendy Awards for the tastiest culinary delights.[8]

The Artist's Group, a talent agency, has developed a lifestyle division and website (400degrees.com) to transform Toronto's growing list of well-known chefs into household names much like their international counterparts. They are committed to representing existing celebrity chefs while building new ones and will represent and promote them in the local markets as well as potential markets. Artist's Group chefs include Mark Thuet, Susur Lee, Mark

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[1] Source: Ontario Ministry of Tourism. (2007, May). *Shopping: An Analysis of the shopping segments from the Travel and Motivations Study (TAMS): The U.S. and Ontario Markets*.
[2] *Ibid*
[3] Source: Resource Audit
[4] *Ibid*
[5] *Ibid*
[6] Source: CN Tower. CN Tower Wine Cellar Designated "World's Highest" by Guinness World Records. Retrieved September 28, 2007, from http://www.cntower.ca/portal/Secure/Community/417/ContactUs/Media/PressKit/20061109_CNTower_NR_Worlds_Highest_Wine_Cellar.pdf
[7] Source: City News. (2007, July 13). New Toronto Street Meat Plan Delayed Until Next Spring. Retrieved August 24, 2007, from http://www.citynews.ca/news/news_12848.aspx
[8] Source: Ferguson, R., & Benzie, R. (2007, July 7). By summer's end, outdoor vendors free to offer more than hot dogs. *Toronto Star*. Retrieved July 23, 2007, from http://www.thestar.com

McEwan and up-and-coming chef David Adjey (personal chef to Dan Aykroyd, designed menus at Windsor Arms Hotel, Nectar, Brassaii, Brant and the new private club Atelier).[1]

There are many on-theme culinary events and festivals in the city including Summerlicious, Winterlicious and Toronto Festival of Beer at Fort York held on the long weekend in August. Other Toronto festivals, shows and annual award events include the S. Pellegrino™ City Dine Restaurant Weeks, Black Creek Brews Fest, C'est What Spring Festival of Small Breweries, C'est What Fall Festival of Craft Breweries, LCBO Summerhill Ontario Craft Beer Festival, Ontario Brewing Awards, Canadian Brewing Awards, Golden Tap Awards, Gourmet Wine and Cheese Show and The Beer and Cocktail Show. Many restaurants, pubs and food establishments hold on-premise events through the year.[2]

The brewing industry has long been a part of Toronto's and Ontario's heritage. Thomas Carling opened his Brewing & Malting Company in 1840 to supply the British army and the early pioneers, and by the 1870s, brewing had become a modern industry and maltsters were important businessmen. During the mid-1800s to mid-1900s, there were more than 300 breweries across the province. Prohibition and the Temperance League in 1916 closed most of the small, family-run operations, but even with prohibition repealed, the era of the small brewery was over. Restrictive distribution laws, the Depression, and organized, big breweries who delivered good, well-advertised product soon led to consolidation.[3]

Today, Toronto has come of age, beer-wise, and options for drinking it in the city are good and getting better, with brewers and importers bringing in and developing new brands and new styles.

The past few decades have seen a resurgence of small, craft breweries. Founded in 1987, Great Lakes Brewery has 5 brands, one seasonal beer, offers tours and is starting a Brew School in 2007. The Amsterdam Brewing Company founded in 1986 has evolved from a brewpub into a brewery with 11 brands, 4 seasonal beers and a large event space available for rent on the premises. From its beginnings as a licensed brewpub, The Granite Brewery and Restaurant in midtown has become a licensed brewery with 4 brands and 2 seasonal beers and sells its products off-site. Mill Street Brew Pub founded in 2002 makes Ontario's first certified organic lager along with 7 other brands and 2 keg-only beers. Steam Whistle Brewery opened in 1998 in the CPR John Street Roundhouse, brews a premium craft pilsner, sponsors an art awards program (The Untitled Art Awards), hosts art exhibits, readings and offers tours of its historic premises.[4]

There are several pubs and restaurants that specialize in beers both local and international. The beer selection at Smokeless Joe in the Entertainment District averages 200 to 300 choices. C'est What in Old Town Toronto carries 35 craft beers on tap. The beerbistro in the Financial District lists over 130 ales and lagers, and its kitchen infuses beer into virtually every dish it serves. The Esplanade Bier Markt serves over 100 beers from 24 countries and a loyal after-five clientele. There are two midtown pubs of note. The Rebel House focuses on local Ontario micro beers and serves a locally sourced menu while the Bow and Arrow Pub has 27 draught taps featuring locally crafted micro beer including 3 cask conditioned ales.[5]

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[1] Source: St. Joseph Media. (2007, March). Cuisine: Canadian chefs take a page from their U.S. and U.K. counterparts. *Fashion Magazine.* Retrieved June 10, 2007, from http://www.fashionmagazine.com/inthisissue/march07/

[2] Sources: Resource Audit and Bar Towel. Bar Towel News. Retrieved September 11, 2007, from http://www.bartowel.com/ and Nestle Waters Canada. S. Pellegrino City Dine. Retrieved September 11, 2007, from http://www.citydine.ca/

[3] Source: Fodor's Travel. (2007). Toronto-Beer: The National Drink. Retrieved September 11, 2007, from http://www.fodors.com/world/north%20america/canada/toronto/feature_30008.html

[4] *Ibid*

[5] Source: Fodor's Travel. (2007). Toronto-Beer: The National Drink. Retrieved September 11, 2007, from http://www.fodors.com/world/north%20america/canada/toronto/feature_30008.html

True to Toronto's (Ontario's) British roots, pubs in the "olde English" style with names that include words like Duke, Fox, Barmaids, Fiddle, or Firkin abound, and can be found on most downtown and midtown streets.[1] Prices range from $4 for a 12-ounce glass of draft to $7 for a half litre, or 18 ounces. Bottles of local beer are usually about $5, but cellar imports can be anywhere from $12 to $24 a bottle.[2]

Shopping and Dining

The *TAMS Canadian Residents 2006* indicated that 82% of total Canadian travellers participated in shopping and dining during their overnight visits. Among these travellers, 16% of them identified shopping and dining as motivators for their trips. The *TAMS U.S. Residents 2006* revealed a similar pattern for U.S. travellers. Shopping or browsing for clothing, shoes and jewellery is the most popular shopping activity for 48% of all American travellers.

While on overnight trips, Canadians and Americans indicated they most enjoyed participating in the following shopping/dining/food activities:

Table 4.21[3]
Activities during Overnight Trips (2004-2005)

ACTIVITIES DURING OVERNIGHT TRIPS IN 2004-2005	% of Total Canadian Travellers	% of Canadian Travellers for whom this Activity Motivated some of their Trips	% of Total America Travellers	% of American Travellers for whom this Activity Motivated some of their Trips
Shopping/Dining/Food (Net)	82%	16%	64.9%	7.5%
Shop/browse - clothing, shoes and jewellery	56%	7%	48.2%	5.2%
Dining at restaurants offering local ingredients & recipes	56%	5%	56.5%	5.8%
Shop/browse - bookstores or music stores	41%	3%	33.6%	2.8%
Went to local outdoor cafes	38%	3%	27.3%	2.1%
Shop/browse - local arts & crafts studios/exhibits	36%	3%	32.5%	3%
Dining at other high-end restaurants	26%	3%	24.0%	2.4%
Shop/browse - antiques	23%	2%	22.7%	2.7%

Given the activities that are common to a majority of shoppers and the fact that all shopping segments expect that the destinations they visit be safe and offer lots for adults to see and do, an optimal city design from their perspective would involve neighbourhoods that offer the following:

[1] *Ibid*
[2] *Ibid*
[3] Sources: Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of Canadian Residents: An Overview.* Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20Canadian%20Report.pdf and Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of US Residents: An Overview*. Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20(FINAL).pdf

- Diversified browsing and shopping opportunities (from clothes to books and antiques to gourmet foods) within walking distance.
- A streetscape layout with storefront displays, conducive to browsing and shopping while strolling around to observe buildings and architecture.
- An integration of shopping opportunities, various dining options and other points of interests within walking distance of each other in order to minimize inconvenience and to contribute to "feeling safe at the destination" (a feeling that is not always present in exclusively shopping-focused areas that look deserted after the stores are closed).[1]

From a tourism perspective, an integration of neighbourhoods, especially with respect to shopping and dining establishments, is preferable to homogeneous neighbourhoods. Integrated neighbourhoods would also address the shopping segments' requirement of "feeling safe at the destination" since diversified neighbourhoods always have pedestrian traffic, a situation that is not always true of, for example, exclusively shopping-focused areas.[2] Thus, destinations that aspire to attract the mass travel market need to evaluate the shopping and dining opportunities that they offer to their visitors as these appear to be the most popular activities among travellers.

Neighbourhoods[3]

Toronto's diverse neighbourhoods are ideal for such on-theme activities as shopping, dinning, clubbing and related experiences. Most neighbourhoods are supported by one of the 63 Business Improvement Areas (BIAs). BIAs help create safe, unique, and thriving business areas that attract shoppers, diners, tourists, and new businesses in an age of competition with shopping malls and big-box retailers. However, the stakeholders consultations noted that the increasing mix of residential and entertainment venues is becoming more of a challenge as the influx of new residents into condominiums has lead to a stricter enforcement of the 11 p.m. City noise by-laws, a situation that is not conducive to tourists looking for a vibrant night-life.[4]

Bloor-Yorkville

The Bloor-Yorkville neighbourhood is considered one of the City's more elegant shopping and dining areas with many upscale hotels located in the district. There are cobblestone courtyards and streets lined with Victorian restorations, allowing visitors to participate in such on-theme activities as shopping at antique stores and over 700 boutiques and retail art galleries. Some of the most exclusive fashion labels can be found in boutiques and high-end shopping complexes like Hazelton Lanes and Holt Renfrew Centre. Celebrity sightings, especially during the Toronto International Film Festival can be seen. Cultural experiences can be had at two major attractions, the Royal Ontario Museum and Gardiner Museum of Ceramic Art. The area is supported by the established Bloor-Yorkville BIA and the Bloor Street BIA. The latter entity was created in 2006 to finance the Bloor Street Transformation Project, a streetscape improvement plan to reinforce Bloor Street's status as a pedestrian-oriented, premier shopping destination.

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[1] Source: Ontario Ministry of Tourism. (2007, May). *Shopping: An Analysis of the shopping segments from the Travel and Motivations Study (TAMS): The U.S. and Ontario Markets*.
[2] *Ibid*
[3] Sources: Neighbourhood sources unless otherwise stated are: City of Toronto. About BIAs. Retrieved September 24, 2007, from http://www.toronto.ca/bia/about.htm#1 and Where Toronto. Toronto's Neighbourhoods. Retrieved September 24, 2007, from http://www.where.ca/toronto/article_feature~listing_id~143.htm and Tourism Toronto. Neighbourhood Dining. Retrieved September 24, 2007, from http://www.torontotourism.com/Visitor/WhereToEat/NeighbourhoodDining.htm and Tourism Toronto. Neighbourhood Shopping. Retrieved September 24, 2007, from http://www.torontotourism.com/Visitor/WhereToShop/NeighbourhoodShopping.htm
[4] Source: Toronto PRTDF Steering Committee Meeting, June 19, 2007. Comments by industry stakeholders in response to Content Analysis discussion of findings.

Church & Wellesley: The Gay Village

In 1826, Alexander Wood, a pioneering gay magistrate and merchant, bought the land on which this community now sits. A predominantly gay neighbourhood located in the heart of downtown, it hosts Canada's largest annual gay and lesbian Pride celebration as well as the Church Street Fetish Fair and Halloween. The area, maintained by the Church-Wellesley Village BIA, is great for weekend brunch, people-watching on the many patios, shopping in the many gay-oriented shops and dining at the dozens of restaurants, from trendy martini bars to intimate eateries, many of which double as clubs and bars in the evening.

The Annex

In the late 19th century, wealthy families looking for more space moved to this lush district as the downtown filled up and quarters got tight. Founding families like the Gooderhams, Eatons and Masseys built magnificent homes here. Exclusivity didn’t last and neither did fortunes, and many soon moved north to Rosedale, leaving behind whole blocks of elegant Romanesque revival mansions, evidence of wealthy 19th century housing that were soon inhabited by students and professors. Close to the University of Toronto, the Annex is a university-centric neighbourhood. Supported by both the Bloor Annex and the Mirvish Village BIAs, the Annex’s shopping and dining experiences include bookstores, bars, coffeehouses, and inexpensive eateries. Neighbourhood sights and activities include the iconic Honest Ed’s bargain emporium, with its exterior of twinkling Hollywood lights, the Bata Shoe Museum (North America’s unique museum dedicated to footwear), and viewing historic, architectural gems located on the picturesque University of Toronto-St. George campus.

Yonge-Dundas

Yonge Street, famous as the longest street in the world, runs through the core of the Downtown Yonge BIA. This popular shopping district is anchored by Yonge-Dundas Square, Toronto’s up-and-coming cultural and entertainment public space similar to New York City’s Times Square. Same-day discount tickets for theatre, dance, opera, comedy, music and special events can be purchased at the T.O. Tix booth in the square, while rock music fans indulge in nostalgia at the Hard-Rock Café across the road. Toronto Eaton Centre is one of Canada’s best-known retail landmarks and features over 350 shops, restaurants and services, along with Centre Court's famous wishing fountain. Entertainment, in several forms, is staged at the nearby Canon Theatre, Massey Hall, Nathan Phillips Square and the Elgin and Winter Garden Theatres, one of the last operating double-decker theatres in the world.

PATH – Toronto’s Underground City and Financial District

The PATH is a 27 km long subterranean shopping concourse beneath Toronto’s downtown Financial District. With close to 1,200 retail shops, cafés and restaurants, the underground city connects to 48 office towers, six hotels and five subway stations. With over 361 700 ft^2 of retail space (an area of six to ten city blocks), PATH rivals the world's largest shopping centre, West Edmonton Mall.[1] PATH is in the Guinness Book of Records for largest underground shopping complex.

The Financial District was first developed in the late 19th Century as part of “New Town”, the westward continuation of the Old Town of York. A century later, the original shops and houses

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[1] Source: Virtual Tourist. Toronto Travel Guide. Retrieved September 3, 2007, from http://www.virtualtourist.com/travel/North_America/Canada/Province_of_Ontario/Toronto-903418/Things_To_Do-Toronto-Financial_District_Underground_City-BR-1.html

were replaced with substantial commercial buildings that extended along King and Wellington Streets, west of Yonge Street. The Great Fire of 1904 destroyed most of the area. Subsequently a massive rebuilding campaign saw the construction of Toronto's first skyscrapers.[1] The banking industry's brand names are reflected in the names of the skyscrapers: the Toronto-Dominion (TD) Centre, First Canadian Place, BCE place, HSBC building, Royal Trust Tower, Exchange Tower, Commerce Court, Scotia Plaza, Royal Bank Plaza, and Ernst & Young tower. Within and around the TD Centre buildings are a variety of Canadian artworks: sculptures, tapestries.[2] Restaurants, such as Canoe, Jump and 5th Element, cater to local and visiting business clientele. The Design Exchange, located in the original Toronto Stock Exchange building, and historic Union Station are district attractions. Union Station remains the focus of a revitalization Master Plan by the City.[3]

Entertainment District

Supported by the Toronto Entertainment District Association (TEDA), the district features hundreds of restaurants, cafes, and nightclubs. Boutiques, commercial art galleries, boutique and large chain hotels, sporting facilities (Air Canada Centre, Rogers Centre), attractions (CN Tower, ChumCity Building, Canada's Walk of Fame) and live theatre provide incentives for visitors to stroll in the area. Performing arts venues include the Four Seasons Centre for the Performing Arts, (home of the Canadian Opera Company and the National Ballet of Canada), Roy Thomson Hall, Princess of Wales Theatre, the Royal Alexandra Theatre and a host of late night clubs open until 2 a.m.

Chinatown and Fashion District

Toronto has five Chinatowns and the one located at the intersection of Dundas Street and Spadina Avenue is one of the largest in North America. Supported by Toronto's newest BIA, the area offers a wealth of Oriental shops (baked goods, herbal medicines, books, videos, household items, and Chinese arts and crafts) and a vast selection of authentic East-Asian restaurants, where chefs prepare meals showcasing various regional dishes from China. There are two large shopping malls catering to the ethnic Chinese - the Dragon City and the Chinatown Centre complex. On weekends, the sidewalks are crammed with fruit stalls, vendors, and thousands of people of all backgrounds eager to shop, eat, and socialize.

In the heart of Chinatown, the Fashion District is the destination for clothing, fabric, leather and fur shopping. Local designers develop the latest fashions in their workshops, while nearby Art Gallery of Ontario, The Grange and the eye-popping architecture of the new Ontario College of Art and Design's Sharp Centre provide a visual invitation to visitors to explore them.

[1] Source: City of Toronto. Financial District. Retrieved September 3, 2007, from http://www.toronto.ca/heritage-preservation/pdf/herit_dwntwn_1-2.pdf
[2] Source: Planetware Inc. Toronto Dominion Centre. Retrieved September 3, 2007, from http://www.planetware.com/toronto/toronto-dominion-centre-cdn-on-ontdc.htm
[3] Source: City of Toronto. Part 3: The Plan. Retrieved September 3, 2007, from http://www.toronto.ca/union_station/pdf/part3_1.pdf

Kensington Market

Kensington Market, a national historic site, has undergone a slight gentrification in the last 10 years, which have not concealed the market's gritty character. The retail mix, combined with ethnicity, reveals a Portuguese clothing shop next to a Mexican empanada shop, which is just down the street from a Brazilian butcher, and around the corner from a West Indian roti shop. Some of the best vintage clothing stores in the city are hidden amid dozens of tiny shops and produce stands in a labyrinth of streets just west of Chinatown.

Queen Street West

Also known as the SoHo strip, Queen Street West is one of the city's most vibrant streetscapes. In the 1970s and 1980s, the area attracted artists and musicians who-made the area known for its artistic ambiance. Currently, the neighbourhood is populated with funky restaurants surrounded by cutting-edge fashion boutiques, art galleries, antique shops, fabric shops, old-time discount stores and dance clubs.

Old Town Toronto

Formerly considered the Town of York, Old Town Toronto was once the city's central hub of political, religious, educational and commercial activity. St. Lawrence Market Neighbourhood BIA sponsors many activities (e.g. Buskerfest , a lively celebration of street performance, with mimes, sword swallowers, acrobats and jugglers) in the area today, with the historical buildings providing the architectural background. The jewel in the crown of the district is the 200-year-old St. Lawrence Market, named by the American *Food & Wine* magazine as one of 25 of the World's Best Food Markets with its cornucopia of vendors selling fresh cheese, meats and fish, plus assorted fruits, vegetables and grains.

Also available to culture and history buffs is the two-hour St. Lawrence Market's Food and History Walking Tour. Area architectural highlights include the landmark Flatiron Building, St. James Cathedral and the rococo architecture of the Hockey Hall of Fame. One of the more impressive local interiors is that of BCE Place, with its soaring 85 foot high arches. The performing arts have a strong presence here, with the Sony Centre for the Performing Arts and the St. Lawrence Centre for the Arts (home to Canadian Stage Company).

Waterfront

Once the hub of Toronto's shipping industry, the waterfront of warehouses, freight sheds and old wharves has been transformed over 30 years into a popular residential and cultural neighbourhood. Parks, performing arts venues, hotels, galleries, shops, restaurants and museums have been established and the Queens Quay Harbourfront BIA promotes the district. Harbourfront Centre showcases arts and culture from Canada and around the world, plus offers outdoor recreation and boating facilities that make the centre a year-round destination. The Power Plant Contemporary Art Gallery, Premiere Dance Theatre, enwave Theatre, the outdoor Sirius concert stage and Toronto Music Garden provide the settings for themed summer entertainment programs. Shopping includes one-of-a-kind works by emerging and established Canadian artists at the historic Queen's Quay Terminal. Cruises on the waterfront or ferry service to the Toronto Islands/Centreville Amusement Park and Toronto Island Airport are accessed from different docks along the waterfront. West of the new HtO urban beach are Ontario Place, Molson Amphitheatre and Exhibition Place (site of Canada's largest and oldest fair, the CNE), which provide summer fun for families as well as visiting friends and relatives.

The east end of the waterfront known as the Port Lands contains the Docks entertainment complex (nightclub, restaurant, recreational activities and boat docking), the new T&T Oriental grocery store, and the location for Cirque du Soleil's Big Tent for its Kooza show in 2007.[1]

Distillery Historic District

North America's best preserved collection of Victorian industrial architecture is located on this 13 acre site, complete with forty five 19th century buildings. In November, 2001 Cityscape Development Corp. and Wallace Studios purchased the site and began its transformation into an exciting new setting for the Toronto arts and entertainment scene. It has been used as the set of many big-budget films, including *Chicago*, *The Recruit* and *Cinderella Man*. Today, the Distillery Historic District is comprised of shops, retail and artist galleries, restaurants, a microbrewery, jewellery stores and a chic café-- all tenants are hand-picked by the property owners. Jazz and other festivals, farmers' markets and art shows are staged throughout the year, along with historic tours, and absolutely no franchise or chain operations are allowed. East Toronto's first commercial brewery to open in more than 100 years, producing handcrafted beers and ales. Classical repertory theatre is performed year-round by Soulpepper Theatre Company at the Young Centre for the Performing Arts. The West Don Lands project, currently underway, will transform the area just to the east of the Distillery District into a neighbourhood including 5800 residential units (of which 1200 units will be affordable housing), 23 acres of parks and public spaces, an elementary school, a recreation centre and transportation connections for pedestrians, cyclists and public transit users.

India Bazaar / Little India

A veritable microcosm of South Asia, this lively neighbourhood encompasses Indian, Pakistani, Sri Lankan and Bangladeshi cultures. The TD Canada Trust Festival of South Asia, organized by the Gerrard India Bazaar BIA, gives visitors a taste of traditional East Indian hospitality and an introduction to the area's attractions. Dining and shopping options found at restaurants, grocers, *paan* (after-dinner course) shops, sweet shops and stores specializing in traditional saris and jewellery convey "Little India" to the stretch of Gerrard Street between Greenwood and Coxwell Avenues.

The Beach (es)

This former lakeside resort is now a laid-back waterfront community and a popular tourist destination. Actively used areas include Woodbine Beaches and Kew-Balmy Beach, bordered by a three-kilometre boardwalk and adjacent cycling and inline-skating trail. A few blocks north, Queen Street East is the main thoroughfare the street is lined with quaint and quirky shops, bars, sidewalk cafés and restaurants. The Beach BIA is active in the area, with the popular Annual Beaches International Jazz Festival in July (Toronto's second jazz event of the season).

The original Woodbine Race Track opened in this area in 1874 and was renamed Greenwood Race Track in the spring of 1963. Live racing was terminated at the end of 1993 and former track is now the site of a bustling neighbourhood recreation centre and off-track betting teletheatre. [2]

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[1] Source: Waterfront Toronto. What's New. Retrieved September 26, 2007, from http://waterfrontoronto.ca/index.php?home=true and Tourism Toronto. What's Hot in Summer '07? Retrieved from http://www.torontotourism.com/cgi-bin/MsmGo.exe?grab_id=0&page_id=2173&query=distillery%20district&hiword=distillery%20district%20

[2] Source: Woodbine Entertainment. Woodbine Racetrack. Retrieved September 20, 2007, from http://www.woodbineentertainment.com/woodbine/

Cabbagetown

Named by outsiders for the cabbages that grew on tiny lawns and were cooked in nearly every house, Cabbagetown contains architectural diversity that can be enjoyed by strolling visitors. The neighbourhood is located about 1.5 km east of Yonge Street and extends roughly from Parliament Street in the west to the Don River on the east, and from Bloor Street on the north to Queen Street East on the south.

The St. James cemetery at the northeast corner of Parliament and Wellesley streets contains interesting burial monuments and the small yellow-brick Gothic Chapel of St. James-the-Less, with a handsome spire rising from the church nave. Built between 1859 and 1860, the church is still considered as one of the most beautiful church buildings in the country. Riverdale Park is home to Riverdale Farm, a free living-history farm museum that is a special treat for children. Demonstrations of crafts, such as quilting and yarn spinning, are offered daily and farm animals include Clydesdale horses, cows, sheep, and a small assortment of other domestic animals. Nearby is Necropolis Cemetery, the resting place of many of Toronto's pioneers -- including Toronto's first mayor, William Lyon Mackenzie. The 1872 chapel, gate, and gatehouse of the non-sectarian burial ground constitute one of the most picturesque groupings of small Victorian buildings in Toronto.[1]

The Danforth / Greektown

Greek restaurants, bakeries and churches dot Danforth Avenue, reflecting the Greek heritage of immigrants establishing new beginnings after WWII. Attracted by the area’s casual atmosphere and lovely old homes, well-to-do families have moved into the neighbourhood. Ethnic restaurants, home decor shops and upscale boutiques have come with them. A large collection of restaurants – many with patios – feature authentic Greek cuisine in a lively atmosphere. “The Danforth” is also a night owl's haven, with clubs and cafés open into the wee hours and a great place to stroll after dining. The neighbourhood is supported by the Greektown on the Danforth BIA, which hosts the annual Krinos Taste of the Danforth, Greektown’s most popular street party attracting an estimated one million people each year.

Rosedale

Northeast of Queen's Park, Rosedale is one of the few neighbourhoods not conforming to the city's grid pattern of residential development. In the 1920s, Sheriff William Jarvis and his wife, Mary, settled on a 200-acre estate in what was then the country. Mrs. Jarvis named her home Rosedale for the wildflowers that bloomed in profusion. Most of the roses are gone now, as are the magnificent trees for which Elm Avenue was named. The charm of curving roads accentuate the many small parks and large trees landscaping the properties of oversize late-19th-century and early-20th-century houses in the Edwardian, Victorian, Georgian, and Tudor styles.

Though some of the fine old houses have been carved up into small apartments, the affluent residential neighbourhood is still home to old and new wealth and many who wield power. Besides strolling through the neighbourhood to admire its architecture and enjoying its parks, visitors can enjoy antique shopping at stores such as Belle Époque, French Country, French Country and Putti.[2]

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[1] Source: Fodor’s Travel. (2007). Cabbagetown. Retrieved September 4, 2007, from http://www.fodors.com/world/north%20america/canada/toronto/entity_182920.html
[2] Source: Fodor’s Travel. (2007). Rosedale. Retrieved September 4, 2007, from http://www.fodors.com/world/north%20america/canada/toronto/entity_182840.html

West Queen West

This area encompasses neighbourhoods that harkens back to the establishment of the City in the late 1800s. Designated as a Business Improvement Area (BIA) in 2005, West Queen West is an eclectic retail area specializing in fashion, design and style. Located on Queen Street West, between Bathurst Street and Gladstone Avenue, the area has over 400 businesses. The district houses: a variety of on-theme shopping that include boutiques, interior design shops, antique and vintage stores; a selection of distinctive and enticing restaurants; the largest concentration of commercial galleries in the city. With restoration of major landmarks like the Drake Hotel and Gladstone Hotel, West Queen West is currently experiencing an infusion of new activity and investment, creating one of the most vibrant commercial areas in the City.[1]

Little Italy / Corso Italia

Little Italy retains its European character and Italian spirit, making it one of the city's most vibrant neighbourhoods day and night. *Corso Italia*, a section of College Street between Shaw Street and Euclid Avenue, is filled with trendy stores and boutiques, and lots of great spots to dine and drink. Italian and Portuguese food dominates in this lively neighbourhood packed with *trattorias*, trendy restaurants and cafés, but Peruvian, Mexican and Japanese fare can also be enjoyed. When the lights dim, the nightlife heats up at clubs such as the Latin-flavoured El Convento Rico.

South American, Portuguese, and Asian newcomers contribute to the ethnic diversity in the neighbourhood. Royal Cinema, Johnny Lombardi Way and CHIN Radio, sponsor of CHIN Picnic every Canada Day, are local attractions.

Roncesvalles Village/Little Poland

An enclave of Eastern European and Russian residents, this area specializes in traditional cuisine, family bakeries, cafés, and special events from the "old countries". The April 2007 *enRoute* magazine used the following criteria in recognizing Roncesvalles Village/Little Poland as one of Canada's Next Great (10) Neighbourhoods: places where like-minded people could find a vibrant cultural scene in their own back yard, bungalows to renovate instead of lofts, green spaces near organic grocers, bars where they mix real drinks, not fluorescent martinis and restaurants that don't cost a fortune. In 2008, the Roncesvalles BIA, capitalizing on the TTC's major overhaul of the streetcar tracks, will undertake the revitalization and rejuvenation of its streetscape.[2]

Outdoors Cluster

The City of Toronto has an ample and diverse set of outdoor activities that attracts visitors year-round. This attraction is a cluster of many activities that appeal to the mainstream as well as special niche markets, depending on the type of site or pastime. Deemed a "City within a Park," the City of Toronto has 3,565 hectares of natural areas and open spaces, and there is more than 8,000 hectares of green space.[3] The city is an urban forest containing more than 3 million trees.[4]

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[1] Source: Toronto Association of Business Improvement Areas (TABIA). Member BIAs: West Queen West BIA. Retrieved September 4, 2007, from http://www.toronto-bia.com/bias/index.php?what=details&id=53&description=West%20Queen%20West and City of Toronto. West Queen West BIA. Retrieved September 4, 2007, from http://www.toronto.ca/bia/west_queen_west.htm

[2] Source: Rainford, Lisa. (2007, July 19). Full facelift planned for Roncy. *Bloor West-Junction-Roncesvalles The Villager*. Retrieved September 4, 2007, from http://www.insidetoronto.com/News/Villager/article/29457. Cited in Toronto Association of Business Improvement Areas, In the Media, http://www.toronto-bia.com/news/inmedia.php.

[3] Source: City of Toronto. Parks, Forestry and Recreation-FUN GUIDE. Retrieved June 11, 2007, from http://www.toronto.ca/parks/index.htm

[4] Source: City of Toronto. (2004, July). *Our Common Grounds: Parks and Recreation Strategic Plan*. Retrieved June 11, 2007, from http://www.toronto.ca/parks/reactivate/ourcommongrounds_final.pdf

There are 1,500 street trees, as well as 500,000 city-owned street trees.[1] The 11,000 acres Rouge River Valley is the largest park and nature preserve in Toronto. All of Toronto's outdoor activities and natural areas have helped identify horticulture for example, as a way to boost tourism by making the city a beautiful destination. "Compared to the value of our green assets, the net budget of $80 million a year we spend on parks, horticulture and forestry is very small."[2] The city of Toronto's outdoors cluster includes:

Parks

The city has 1,500 municipal parks and roughly 90% of them are smaller parkettes (approximately 1,350).[3] Thirteen percent of Toronto's area is parkland. It is estimated that 340,000 people visit Toronto parks everyday.[4] Toronto's 16 tourist oriented municipal parks (according to the Resource Audit) are:

Table 4.22
Tourist Related Municipal Parks in Toronto

Ashbridge's Bay Park	High Park
Bluffer's Park	Humber Bay Park East/West
Colonel Samuel Smith Park	Riverdale Farm
Don Valley Brickworks	Rouge Park
East Point Park	Sculpture Garden
Exhibition Park (green space within Exhibition Place)	Sunnybrook Park
Exhibition Place (recreation)	Tommy Thompson Park
Guildwood Park	Toronto Islands

Most of these parks are free of charge to visit. Some on-site events at a free park require a fee, or a park may have a cost for rental equipment or facility use (or in Rouge Park's case, there are fees to use the Glen Rouge Campground on site). Parks attract large amounts of people, which in turn contribute to spending and revenue that goes towards Toronto's economy. There are a multitude of activities that take place at Toronto's parks. Twelve of Toronto's parks provide sites for bird watching. A popular fishing spot is located at Centre Island, on the Toronto Islands. There are trails for walking, jogging, biking, rollerblading, cross-country skiing, to name a few. Sunnybrook Stables is situated in Sunnybrook Park and is an attraction to those interested in horse back riding. In addition to its municipal parks, Toronto is home to Parc Downsview Park- Canada's first national urban park. It is a unique urban recreational green space that offers a large number of events and activities for people to enjoy in all seasons.

Since amalgamation, Toronto has fallen back in investing in green assets. "In 1990, the old City of Toronto encompassed 97 km^2 of land and spent $12.71 per capita per year on forestry. The average staff person was responsible for maintaining the trees on 0.8 km^2. Since amalgamation, Parks and Recreation cares for trees across an area of 634 km^2. The average staff person is now responsible for the trees in 3.52 km^2, more than four times greater than before. In 2004, the City's expenditure on Toronto's urban forestry was $6.20 per capita per year. Staff must manage four times the land with half the resources of 1990. This is a recipe for failure." About 42% of

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[1] Source: City of Toronto. Parks, Forestry and Recreation-FUN GUIDE. Retrieved June 11, 2007, from http://www.toronto.ca/parks/index.htm
[2] Source: City of Toronto. (2004, July). *Our Common Grounds: Parks and Recreation Strategic Plan*. Retrieved June 11, 2007, from http://www.toronto.ca/parks/reactivate/ourcommongrounds_final.pdf
[3] Source: Resource Audit
[4] Source: City of Toronto. (2004, July). *Our Common Grounds: Parks and Recreation Strategic Plan*. Retrieved June 11, 2007, from http://www.toronto.ca/parks/reactivate/ourcommongrounds_final.pdf

Toronto's parkland is un-groomed, and is supposed to be self-sustaining. But Toronto's natural green spaces are under stress, and instead of moving forward, we have fallen back.[1]

Trails

Toronto has around 50 paved trails that make up about 90 km of length.[2] There are numerous natural and paved trails that are located within many of the city's 1,500 parks. Interpretive programs/walks/tours are also part of many outdoor activities offered. Most notably, "Discovery Walks" is a series of self-guided walks that lead people through many different sections of the city to explore a rich variety of parks, gardens, wildlife, historic and contemporary buildings, and streetscapes to name a few. The 11 Discovery Walks are shown in Table 4.23:

Table 4.23[3]
Discovery Walks

Humber Arboretum and West Humber River Valley Discovery Walk
Lambton House Hotel and Lower Humber River Discovery Walk
Humber River, Old Mill and Marshes Discovery Walk
Western Ravines and Beaches Discovery Walk
Garrison Creek Discovery Walk
Downtown Toronto Discovery Walk
Uptown Toronto Discovery Walk
Central Ravines, Belt Line and Gardens Discovery Walk
Northern Ravines and Gardens Discovery Walk
Don Valley Hills and Dales Discovery Walk
Eastern Ravine and Beaches Discovery Walk

Toronto's trails are free to use, can be great alternative transportation routes, and they appeal to a mass market.

Golf Courses

Golf Courses in Toronto attract Toronto residents, as well as visitors from outside of the municipality. Eight golf courses in particular are noteworthy for golf tourists. Five of the eight surveyed golf courses are owned and run by the city of Toronto (see Table 4.24).

Table 4.24[4]
Tourism Related Golf Courses in Toronto

City of Toronto- Dentonia Park Golf Centre	City of Toronto- Tam O'Shanter Golf Course
City of Toronto- Don Valley Golf Course	Centennial Park Golf Centre
City of Toronto- Humber Valley Golf Course	Flemingdon Park Golf Club
City of Toronto- Scarlett Woods Golf Course	Royal Woodbine Golf Club

There are various fees, ranging from modest to high amounts, charged for play at the golf courses. The fees depend upon membership versus public rates, players' ages (e.g. child), and the number of holes being played.

[1] Source: City of Toronto. (2004, July). *Our Common Grounds: Parks and Recreation Strategic Plan*. Retrieved June 11, 2007, from http://www.toronto.ca/parks/reactivate/ourcommongrounds_final.pdf
[2] Source: Resource Audit, and City of Toronto EDCT. *Toronto Parks & Trails*. (map).
[3] Source: Resource Audit
[4] Source: Resource Audit

Marinas-Boating Developments

Toronto has 13 prominent marinas and yacht clubs:

Table 4.25[1]
Toronto Marinas and Yacht Clubs

	# Transient of Slips
Ashbridge's Bay Yacht Club	n/a
The Boulevard Club	n/a
Bluffer's Park Marina Limited	400
Etobicoke Yacht Club	n/a
Harbourfront Centre- John Quay*	n/a
Harbourfront Centre- Marina Four	100
Harbourfront Centre- Marina Quay West	200
Mimico Cruising Club	n/a
National Yacht Club	n/a
Ontario Place Marina	240
Outer Harbour Marina	636
Royal Canadian Yacht Club	n/a
Toronto Island Marina	350

*John Quay is not an actual marina. It is a seawall portion of the site located in proximity to Marina Four. With vistas of Toronto's Inner Harbour, this quay provides ideal berthing for those seeking short hourly visits or larger motor and sailing yachts (from 45 to 200 ft. in length overall) requiring overnight dockage. Reservations are accepted. John Quay accommodates Pier 4 Restaurant and Patio, the Toronto Police Services Marine Unit, the Radisson Plaza Hotel Admiral, and a pump out station. Utilities include both 30 and 50-amp multiple services, fresh water and ice sales. Reservations are accepted for vessels over 45 ft. (length overall) only. Water depth alongside is approximately 18 ft.[2]

Tourists sail into the city and dock using one of the 1,926 transient slips.[3] The Outer Harbour Marina has a quiet urban wilderness location that is just 10 minutes to the downtown core. Marina Quay West and Ontario Place Marina are located along the downtown waterfront with immediate access to local shopping, dining, entertainment, hotels, while still just minutes away from the downtown core.

Visitors to Toronto, during the high season months of May to October, have 12 tour operators to choose from when purchasing their waterfront tour and entertainment packages. Tour components (water excursions only, water and land excursions, water excursions with meal/entertainment options) and marine vehicles (charter boats, cruise ships, canoes, kayaks, amphibious vehicles) offer experiences of different durations and at various price points. Tickets for regularly-scheduled tours through two operators can be purchased on-demand. The remaining ten tour operators require advance reservations. A city ferry provides regular service from Queen's Quay on the mainland to the Toronto Islands, site of an amusement park and host to some summer events.

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[1] *Ibid*
[2] Source: Harbourfront Centre. Docking and Marinas. Retrieved July 28, 2007, from http://www.harbourfrontcentre.com/noflash/outdoor/marine.php
[3] Source: Resource Audit

Aspiring boaters visiting Toronto can register for weekend nautical courses through Harbourfront Centre's Nautical Centre. Also offered are hourly or daily rentals of canoes and kayaks to accomplished paddlers, with a discount-rate card program available for frequent rentals.[1]

Cruise Ships

The city is also accessible to cruise ships. Visiting cruise ships berth at the International Marine Passenger Terminal which is an eight-minute drive to the downtown core. The terminal is a modern facility located at the corner of Cherry Street and Unwin Avenue, and offers a harbour with 8.2 m of draft and 213 m of dock wall. It was built by the Toronto Port Authority and opened in 2005. It is the first Canadian-U.S. border crossing to be constructed in 40 years and has full Canadian Border Services Agency facilities. Visiting ships, the travelling public, and Toronto Transit Commission (TTC) bus service can access the site.[2]

Other Outdoor Attractions

The City of Toronto is home to a **conservation area**- Black Creek Pioneer Village. It is an example of a typical crossroads community found in the Toronto area during the 1800's.

There are 12 **beaches** in the city (listed in Table 4.26). In 2007, six of them were awarded the Blue Flag eco-label designation (qualifying beaches met 27 strict standards based on water quality, environmental management, environmental education and safety and services):

Table 4.26
Toronto Beaches

Bluffer's Beach Park	Kew Balmy Beach
Centre Island Beach (Blue Flag)	Marie Curtis Park East Beach
Cherry/Clarke Beach (Blue Flag)	Rouge Beach
Gibraltar Point Beach (Blue Flag)	Sunnyside Beach
Hanlan's Point Beach (Blue Flag)	Ward's Island Beach (Blue Flag)
HtO	Woodbine Ashbridge's Bay Beach (Blue Flag)

The newly opened HtO beach ($10 million investment) is located on the waterfront just west of Yonge Street near Spadina Avenue. Complete with real sand, benches, and yellow umbrellas, the urban beach appeals to all ages.

The two most popular outdoor **swimming pools** in the city are the Gus Rider Sunnyside Pool and the Summerville Outdoor Pool. They attract locals and tourists alike in the summer months, bringing a sense of community and fun.

There are quite a few Toronto **water sports clubs**. Some examples are: Toronto Island Canoe Club, Toronto Windsurfing Club, Westwood Sailing Club, and the Argonaut Rowing Club.

The city of Toronto has two **downhill skiing** centres that are quite popular during the winter months: Centennial Park Snow Centre and North York Ski Centre.

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[1] Source: Harbourfront Canoe & Kayak Centre. Discover the Fun at the Harbourfront. Retrieved August 5, 2007, from http://www.paddletoronto.com/harbourfront_toronto_canoe_kayak_rentals.htm
[2] Source: Resource Audit

Mel Lastman Square, Nathan Phillips Square and Harbourfront Centre offer most popular **outdoor ice rinks** during the winter months.

Two **animal farms** are: Riverdale Farm (located in the Riverdale Farm park) and Far Enough Farm (located near Centreville on Centre Island).

There are three **archery ranges** in the city: Ontario Science Centre Range (outdoor), Toronto School of Archery (indoor), and University of Toronto Archery Club (indoor).

Glen Rouge Campground is Toronto's only **campground** nestled in 12,000 acres of forests and meadows located in Rouge Park. There are over 100 different sites available for tents, trailers, large RVs, backpackers or touring cyclists.

For horseback enthusiasts, there are four well known **equestrian** stables in Toronto. Sunnybrook stables (located in Sunnybrook Park) has two outdoor sand rings, as well as a 20 by 40 m indoor arena for year round riding lessons. The Riding Academy is another teaching institution located in the Ricoh Horse Palace, a landmark building which is situated at Exhibition Place. Biamonte Ralph Stables and Amberbrook Farm are two other organizations that offer these services.[1]

The cluster that makes up the parks, trails, and gardens and conservatories appeals to a mass market. It consists of touring families, adults and seniors who stay for one day on average. When looking at "Other Outdoor Attractions," the conservation area, beaches, swimming pools, downhill skiing, outdoor ice rinks, animal farms, and the campground are also considered to have mass market appeal. Golf, marinas-boating developments, water sports clubs, archery ranges and equestrian stables generally appeal to niche markets.

Other Travel Motivators

Secondary research, survey responses and suggestions from committee members have identified the following additional travel motivators, which provide opportunities for growth in Toronto's tourism industry.

Business Travel

In 2004 Toronto attracted almost 3.7 million business visitors which is almost one-fifth of the total visits to the city.[2] Business visitors to Ontario spent an average of $323 per person visit; this is 123% higher than spending by Ontario's total visitors (an average spending of $145 per visit).[3]

A key finding in the *Destination Canada* study conducted by Deloitte and the Tourism Industry Association of Canada is the current trend of combining business and leisure travel.[4] Improving business travellers' impressions of Toronto can stimulate return visits for vacation with family and friends.

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[1] Source: Resource Audit
[2] Source: Statistics Canada, CTS/ITS, 2004
[3] *Ibid*
[4] Sources: Deloitte and Tourism Industry Association of Canada (TIAC). (2007). *Destination Canada: Are We Doing Enough?* Retrieved September 10, 2007, from http://www.tiac-aitc.ca/english/documents/07-1031CBTIACbrochure_v3.pdf and Wilkening, David. (2007, June 21). Business travelers taking the family along. Retrieved September 28, 2007, from http://www.travelmole.com/stories/1119417.php?news_cat=&pagename=searchresult

Health (Medical) Tourism

The growing trends of medical tourism, medical conventions and wellness getaways is something Toronto can tap into as it is the centre for top level specialty hospitals (e.g. Hospital for Sick Children), teaching hospitals, and the MaRS (Medical and Related Sciences) complex.[1] As an example, the Shouldice Hospital in Thornhill (Vaughan), which has been known as the Centre of Excellence for the repair of hernias for more than 50 years, has successfully treated patients from over 115 countries.[2]

In addition to this, in terms of the medical research commercialization arena, Toronto is the prime location of venture capital firms, the major banks, spin-off companies created from university and hospital research, pharmaceutical companies, legal firms and patent agents. This would provide additonal growth potential for the business travel market.[3]

Toronto has the potential to book many of the lucrative medical conventions with the accompanying trade shows. However, the Canadian Pharmaceutical industry is governed by more restrictive policies on the promotion of pharmaceutical brands than exist in the United States. This negates the ability of conventions to cover their costs through trade show sales where names brands are promoted. This policy is having damaging effects on medical conventions bookings.

Spas

In terms of consumer trends, the stress associated with daily living has created an increased "need for periodic pampering" or indulgence. Spa visits are seen as a means of escaping these pressures and getting re-energized.[4]

Ontario offers the most dynamic and promising market for spa products and services, as the leading spa market growth in Canada. In 2005, Ontario spas represented 44% of all spas in Canada; more than double that of any other province. Ontario spas generated 47 % or $476 million in revenue in 2005.[5]

The *2006 Canadian Spa Sector Profile* revealed that over the past decade, the number of spas in Canada has been growing at an average rate of 17% per annum, which is higher than the average tourism industry growth rate. While hotel/resort spas certainly understand the importance of the segment, there is a great untapped potential within this segment. To take advantage of this potential is going to require the education of spas about their prospective role in the tourism sector.[6]

The Resource Audit identified 159 Spas in Toronto. Many Toronto hotels are taking advantage of the trend to health and wellness, particularly while on vacation and are either adding or renovating existing spa space. Though many city hotels with spas partner with Tourism Toronto to offer spa/golf or spa/shopping or urban getaway/spa packages, there are no partnerships or offers with stand-alone spas and Toronto is not yet known as a spa destination. Despite the fact

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[1] Source: MaRS. Welcome to Mars. Retrieved September 28, 2007, from www.marsdd.com and Canadian Broadcast Corporation (CBC). Medical Tourism: Need Surgery, Will Travel. Retrieved September 28, 2007, from http://www.cbc.ca/news/background/healthcare/medicaltourism.html
[2] Source: Shouldice Hernia Centre. Vol. 8.1. Retrieved September 28, 2007, from http://www.shouldice.com/newsletter.htm
[3] Source: University of Toronto. Foundation Heads to MaRS. Retrieved September 28, 2007, from http://www.news.utoronto.ca/bin6/050926-1667.asp
[4] Source: Canadian Tourism Commission (CTC). (2006, July). *2006 Canadian Spa Sector Profile*. Prepared by Association Resource Centre Inc., Research and Strategy Division. Retrieved August 15, 2007, from http://www.tourism.gov.on.ca/english/research/studies/2006_Canadian_Spa_Sector_Profile_eng%20final.pdf
[5] *Ibid*
[6] *Ibid*

that Canada has world class facilities staffed by some of the best trained professionals in the world, travel consumers don't know about it.[1]

International Student and Youth Travel

The 2007 *World Youth Student and Educational Travel Confederation* (WYSE) survey of student youth travellers, shows the average spent by young people on a trip abroad is now $2,600 U.S., a 39% rise since 2002. Of this amount approximately 40% was spent on transportation (usually air fare) and the remaining $1,550 U.S. was spent in the destination. The study revealed what young travellers want most of all from their travel is a range of different experiences, with 70% of respondents indicating that they travel with the purpose of exploring, having contact with local people, learning a language, volunteering, working and studying.[2] The tourism industry has an opportunity to capitalize on these findings given that Toronto is home to a diverse population speaking many languages.

The *WYSE* 2007 survey also found that more than 80% of young travellers are now using the internet to search for information before departing on their trip, up from 70% in 2002. This verifies Tourism Toronto's launch of a dedicated student travel web page in 2005 (www.torontotourism.com/leisuretrade) which also offers collateral material in Chinese, Japanese and Korean languages. Destination information from family and friends was the second highest source of information for this group at 70% indicating another opportunity in the Visiting Friends and Relatives (VFR) market.

Visitation by learning/ education travel groups is an emerging trend in Toronto and across Ontario. Toronto's universities and colleges attract many foreign-language students and offer English as a Second Language (ESL) classes. The city is also home to over 30 English-language and ESL schools catering to foreign students looking to learn English and experience our culture. In the Resource Audit, it was suggested that in order to deal with Toronto's lack of tour guides with multi-lingual training, the industry recruit these people as volunteers. This would give them an opportunity to practice their English while providing much needed tour guide services in the many languages that are representative of this diverse city.[3]

Film Industry - Movie and TV Tours

The film and television industry provides approximately 25,000 jobs in Toronto, making it one of the city's largest employers.[4] In 2005, film and television production companies spent $898.25 million filming on-location in Toronto, a 5% decrease in total production spending compared to the $949.1 million reported in 2004 and continuing a decrease of over 5% annually over the past 5 years.[5]

Los Angeles, New York City and Boston have all seen the benefits of leveraging film/TV location shoots into Movie and TV tours. Traveller reviews on the Trip Advisor website (www.tripadvisor.com) have consistently given the Boston's Movie Tour a 4 to5 star rating (out of 5). Location film shoots also help promote a city as a tourist destination. Toronto has stood

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[1] *Ibid*

[2] Sources: Richards, Greg. (2007*). New Horizons II: The Young Independent Traveller 2007. World Youth Student and Educational (WYSE) Travel Confederation*. Retrieved August 22, 2007, from http://www.wysetc.org/Docs/New_HorizonsII.pdf and Wilkening, David. (2007, September 27). New study highlights growth of student travel market. Retrieved August 22, 2007, from http://www.travelmole.com/stories/1122802.php?news_cat=&pagename=searchresult

[3] Source: Resource Audit

[4] Source: City of Toronto. A snapshot: film, television, commercial and music video production in Toronto. Retrieved August 8, 2007, from http://www.toronto.ca/tfto/stats.htm

[5] Source: Toronto Community Foundation (TCF). (2006). *Toronto's Vital Signs 2006 – The City's Annual Check-up*. Retrieved August 22, 2007, from http://www.tcf.ca and Toronto Film and Television Office. A snapshot: film, television, commercial and music video production in Toronto. Retrieved from http://www.toronto.ca/tfto/stats.htm

in for many cities in such well know films as *Chicago*, *Cinderella Man*, *The Hulk* and *X-Men*. These location shoots along with the tie-in to the Toronto International Film can provide many tourism opportunities for movie and TV tours. Casa Loma conducts a seasonal Hollywood Tour during TIFF however it is not cross promoted by TIFF.[1]

Investment by private-sector business will see the development of the Filmport, North America's largest studio and media-facilities cluster outside Los Angeles. Located on the eastern waterfront the $250 million development will include a condo-hotel-office building by British architect Will Alsop.[2]

The new Corus Entertainment headquarters designed by Toronto architect Jack Diamond and developed by Toronto Economic Development Corporation (TEDCO) with input from the City of Toronto, Corus Entertainment and Waterfront Toronto, will kick start revitalization of the area south of Queen's Quay Blvd., near the Jarvis St. slip.[3]

Gay and Lesbian Market

Canada is a well recognized destination among the gay and lesbian community. According to the *12th Annual LGBT Tourism Survey*, conducted by Community Marketing, progressive social policies (e.g. gay marriage) and successful outreach through marketing channels have contributed to make Canada the favourite destination for American gays and lesbians. The survey asked respondents about destinations they have visited in the past year while on vacation. Three of the top ten were in Canada: Vancouver, Toronto, and Montreal, making Canada the #1 gay destination in the world. [4]

The LGBT market has a great growth potential as gay men and lesbians travel more than the mainstream. Also, 98% of gay and lesbian survey respondents indicated that they had taken an overnight trip compared to 72% of mainstream Americans. Furthermore, they are more likely to have a valid passport (71%) compared to 24% to 30% for all adult US citizens. 7% of gay male respondents and 3% of lesbian respondents visited Toronto. [5]

The CTC, OTMP and Tourism Toronto partner in marketing to this target group. Tourism Toronto has developed a GBLT section of their website, which has recorded a 180% increase in visits 2007 over 2006. 2007 campaign geographically targeted San Francisco, Los Angeles, Chicago and New York City. Major community partners are the Church Wellesley BIA and the Gay & Lesbian Chamber of Commerce [6]

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[1] Sources: Tours listed on the following sites: http://www.alllosangelestours.com/, www.bostonmovietours.net, www.screentours.com, http://www.toronto.ca/tfto/fullguide.htm, http://www.thedistillerydistrict.com/frameset.html, http://www.attractionsontario.ca/index.cfm?DSP=Section&ID=30&ACT=EventDisplay&Event_ID=488 and http://www.tripadvisor.com/Attraction_Review-g60745-d612114-Reviews-Boston_Movie_Tours-Boston_Massachusetts.html

[2] Source: Ross, Val. (2007, August 8). Toronto Mayor to Unveil New Will Alsop Building. *Globe and Mail*. Retrieved from http://www.theglobeandmail.com/servlet/Page/document/v5/content/subscribe?user_URL=http://www.theglobeandmail.com%2Fservlet%2Fstory%2FRTGAM.20070808.walsop08%2FBNStory%2FEntertainment%2F&ord=3591937&brand=theglobeandmail&force_login=true

[3] Source: City of Toronto. (2007, September 28). Aecon Construction Retained for TEDCO's Corus Entertainment Building. Retrieved October 1, 2007, from http://wx.toronto.ca/inter/it/newsrel.nsf/7017df2f20edbe2885256619004e428e/a0a6186a7776218b8525736400525742?OpenDocument

[4] Source: Canada Tourism Commission (2007, November 14). *Canada Top LGBT Destination*. Retrieved November 15, 2007 from http://www.corporate.travel/corp/media/app/en/ca/newsItem.do?articleId=67233

[5] Source: Community Marketing Inc. (September, 2006) *11th Annual LGBT Survey*

[6] Source: Tourism Toronto

Regional Complex

The regional complex surrounding Toronto can be defined in several different ways. People visiting for short term trips typically make day trips throughout the Golden Horseshoe. Within the boundaries of the Golden Horseshoe are attractors such as Canada's Wonderland, the McMichael Gallery, African's Lions Safari, Niagara Falls, Niagara on the Lake and the Niagara wineries. Toronto's international accessibility via air, rail and highway also make it a gateway to Central Canada and upper New York State. Many tourists use Toronto as the starting and/or end point for travelling to Ottawa, Montreal, Algonquin Park, Quebec City, Niagara region, Stratford, etc.

Tourism Partnerships with Other Destinations

Opportunities to build on complementary tourism attractions/activities with nearby destinations were assessed as part of the *Ontario Tourism Strategy* report. It concluded that Toronto and Niagara are already recognized as international travel icons. It also established that greater collaboration between Toronto and the Niagara Region will strengthen them as destinations and major gateways for tourism in the province.

- The Ministry of Tourism (MTOU) encourages greater collaboration among industry leaders and municipalities in these destinations in order to facilitate the development and implementation of a 'joint tourism agenda'.
- Support for product development and marketing will be based on long-term tourism business plans, innovative partnerships and priorities established for this area.
- As the City of Toronto and Region of Niagara together attract almost 30% of tourists to Ontario, they act as gateways for tourism to the rest of Ontario. The strategy recommends Toronto and Niagara region work with other regional destinations to improve visitors' experiences and extend their stays throughout the province.

The *Ontario Tourism Strategy* report also stated that between Toronto and Niagara there are transportation issues that need to be addressed (i.e. gridlock, lack of public transportation, connections between destinations), and that these same issues also exist elsewhere in Ontario. Part of the plan also concluded that opportunities for experiences that cross destination boundaries and occur in a variety of locations should be linked where appropriate. In order to improve tourism, a partnership among several players in the tourism industry is required, and operators can also help each other through collaborative ventures (including marketing).[1]

In order to see if tourism partnerships are being explored more extensively, a review of tourism related websites was conducted by the PRTD research team. It was found that Tourism Toronto, Canada Tourism Commission and Ontario Travel.net websites have very few cross promotion tourism packages with nearby destinations. On the Tourism Toronto website, only 2 cross promotion tourism packages were available. The remainder of packages were offered within the city. As for the Ontario Travel.net website, there are no promotions involving Toronto and other destinations. All promotions are within each city. On the Canada Tourism Commission website, again there were no cross promotional packages with other destinations available for tourists. However, from different private company websites, there were double, even triple destination packages available involving Toronto and destinations like Montreal, Niagara Falls and Ottawa, just to name a few. These packages can range anywhere from one to fourteen days, or even

[1] Source: Ontario Ministry of Tourism. (2004, June 14). *Ontario Tourism Strategy: More to Discover*. Retrieved September 26, 2007, from http://www.tourism.gov.on.ca/english/tourism_strategy/ont_tourism_strategy-e.pdf

longer, depending on your vacation time. Activities include theme parks, water parks, sightseeing and so on.[1]

A new tourism initiative launched on June 5, 2007 introduced bike racks onboard select VIA rail Canada departures between Toronto and Niagara Falls. The Toronto-Niagara Bike Train Initiative was developed in response to the growing tourism demand and opportunity for improved transportation access for cyclists between Toronto and the Niagara Region. This pilot program ran until the end of August 2007. It is being continued in 2008.[2]

Physical Linkage

Toronto was established and developed on the north shore of Lake Ontario in proximity to the Humber and Don Rivers, which once served as trading routes with the hinterland. There is also a natural harbour created by the Toronto Islands which facilitated the development of an inland port, which linked Toronto to world markets. With the coming of the railway age, Toronto's close proximity to other major Canadian cities, as well as to the U.S. Eastern Seaboard and Midwest, made Toronto well positioned to become a major railway terminal for both passenger and freight traffic. In the latter half of the Twentieth Century, major highways and Pearson International Airport were constructed to further strengthen these linkages.

These physical attributes have given rise to the development of a variety of core and supporting attractors.

Core Attractors

- Amusement/Theme parks: Ontario Place/Exhibition Place, Centreville Amusement Park (Toronto Islands), Toronto Zoo (set in Rouge Valley).
- Multi-purpose venues: Harbourfront Centre, The Docks entertainment complex.
- Festivals & Events: Toronto International Dragon Boat Festival (Toronto Centre Island), Wakestock (Toronto Centre Island), Virgin Fest (music festival on Toronto Centre Island), GWN Dragon Boat Challenge (Marilyn Bell Park- City of Toronto purpose built Western Beaches Watercourse).
- Meeting and Conventions: a major centre due to air and land accessibility to major cities along the eastern seaboard and Europe.

Supporting Attractors

Toronto's lake-side setting has allowed for the development of beach areas, marinas, hiking and biking trails and the setting for many outdoor activities such as canoeing, fishing, and all manner of water sports.

Historical Linkage

Toronto came under British control in 1763. Thirty years later, colonial officials built Fort York which was the location of the Battle of York during the War of 1812 and laid out the town of York as the capital of Upper Canada. York grew both as the seat of government and a commercial centre with the building of such industries as the Gooderham & Worts Distillery (founded in 1832) which was once the largest distillery in the British Empire. In 1834, with 9,250 residents, York was incorporated as the "City of Toronto". Industrialization, beginning

[1] Source: Resource Audit
[2] Source: Toronto-Niagara Bike Train. Take the Train – Bring Your Bike! Retrieved November 15, 2007, from www.biketrain.ca

modestly in the mid-19th century, expanded greatly after Confederation in 1867 and contributed significantly to shaping the city's environment and prosperity. At that time the city was home to 50,000 people.

Prior to 1879, an annual fair organized by the Provincial Agricultural Association and the Board for Agriculture for Canada West was held in a different Ontario city each year. The success of the 1878 Fair in Toronto prompted local politicians and business leaders to lobby (against heavy opposition) for a permanent Exhibition in Toronto and on March 11, 1879 the Canadian National Exhibition at Exhibition Place was proclaimed.[1]

By 1901, the industrial, commercial, financial, and institutional centre had a population of 208,000, which rose to 667,500 by 1941. During these years, Toronto began to compete with Montreal as the nation's premier centre, not only economically, but also culturally. Today, with well over two million people, Toronto is Canada's largest city, the heart of the nation's commercial, financial, industrial, and cultural life, and is one of the world's most liveable urban centres.

Core Attractors

- National Heritage Site: Historic Fort York built in 1793.[2]
- National Heritage Site: The Distillery Historic District (formerly the Gooderham & Worts Distillery) is North America’s best preserved collection of Victorian industrial architecture is located on this 13-acre site, complete with forty-five 19th century buildings.[3]
- Culture-Performing Arts, Museums: Royal Ontario Museum founded in 1912 and the Toronto Symphony founded in 1922.[4]
- Festivals & Events: Canadian National Exhibition (CNE) founded in 1879.[5]

Destinations with Competitive or Similar offerings

The table presents competing cities and their proximity in kilometres to Toronto.

Table 4.27[6]
Proximity to Toronto’s Competitors

City	Distance to/from (km)
Montreal	548
Chicago	829
Ottawa	455
Boston	906
Philadelphia	763

[1] Source: Exhibition Place. The Early Years. Retrieved September 10, 2007, from http://www.theex.com//downloads/Early%20Beginnings%20of%20the%20Fair.pdf
[2] Source: City of Toronto. Fort York. Retrieved September 10, 2007, from http://www.toronto.ca/culture/fort_york.htm
[3] Source: Distillery District. Tenant Guide. Retrieved September 10, 2007, from http://www.thedistillerydistrict.com/frameset.html
[4] Source: City of Toronto. Toronto Culture: History. Retrieved September 11, 2007, from http://www.toronto.ca/culture/history/history-shortversion.htm
[5] Source: Exhibition Place. The Early Years. Retrieved September 10, 2007, from http://www.theex.com//downloads/Early%20Beginnings%20of%20the%20Fair.pdf
[6] Source: Truck News. Truck News.com Retrieved August 8, 2007, from www.trucknews.com

Distinctiveness of the Destination

There hasn't been a comparative study done recently which evaluates the extent to which Toronto is distinct from its competitors (listed above). However, the most recent Travel Intentions study suggests that Toronto is not perceived as a "Must see/Must do" destination among American and Canadian tourists, which implies that our product is not seen as being superior or distinct from the competition.

Product Positioning Statement

In 2004, Tourism Toronto, the City of Toronto, the Ontario Ministry of Tourism, and the Toronto City Summit Alliance established the Toronto Branding Project. The goal was to create a single Toronto brand and to develop a fresh new way of communicating the city's strong and dynamic identity to the rest of the world. It was part of a larger unified effort to define and promote Toronto's identity and raise our profile as a unique global tourist and business destination.

The Toronto brand was developed by looking at the city from the inside-out as well as the outside-in. Extensive research was conducted among target markets in the United States, United Kingdom and Canada. Focus groups and public consultations with Torontonians, marketing experts and local community leaders were held. All of this was an effort to best tell Toronto's Story.

Signature Line and Logo: Toronto Unlimited

Toronto is a city built with the boundless imaginations of the people that live here, a city of true imagination. Using this as a starting point, the signature line, "Toronto Unlimited", was developed. It is meant to celebrate the unlimited potential of the people and the endless opportunities they offer the city. The symbol of the logo was designed by bringing together the two letters of Toronto's nickname "T.O." to create a fluid and energetic form.[1]

Previous Product Positioning Statements

There were other logos used prior to the most recent branding project. They included: "Toronto: Affectionately yours" (1970s), "World within a City" (late 1990's and early '00s), "Toronto: You Belong Here" (post-SARS 2003) and "It's time for a little TO" (post-SARS Tourism Toronto campaign). We have also been known as "Toronto the Good" and "Hogtown." Still current is "Toronto: City within A Park," Toronto Parks and Recreation department's moniker.[2]

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[1] Source: Toronto Unlimited. Brand Toronto: Logo and Signature Line. Retrieved August 6, 2007, from http://www.torontounlimited.ca/logo.htm

[2] Source: Sandals, Leah. (2007, May 20). Urban Branding: TOslogans past, present and future. *Toronto Star*. Retrieved from http://www.thestar.com/sciencetech/article/215846

Criteria and Measures	Rating
A2. Attractors are relevant to the expectations of the identified market segments.	**Yes**
A2.i The Resource Audit classifies destination resources and their appeal to Regional, Provincial, National/US and International geographic market segments.	Yes
A2.ii Core attractors are relevant to a tourist base. This base is considered to be a) Mass market and b) niche market	Yes
A2.iii Attractors appeal to guests from beyond Ontario's borders	Yes
A2.iv The market segments for whom the identified attractors are expected to have a compelling appeal have been identified	Yes
A2.v The core attractors pull visitation from all segments on a year-round basis	Yes

Destination Appeal

Although all of the businesses included in the Resource Audit are tourist oriented, their reliance on the local market is noteworthy. Even the accommodation sector derives 25% of its business from within the GTA. This percentage climbs to more than 70% for festivals and food and beverage establishments. Such finding is not surprising when one considers that the GTA is home to more than 5 million people. However, it does mean that many establishments focus on developing their local markets instead of their tourism potential. This said, all sectors report attracting significant numbers of international, U.S., and Canadian tourists, speaking to the far reaching appeal of the city and its attractors.

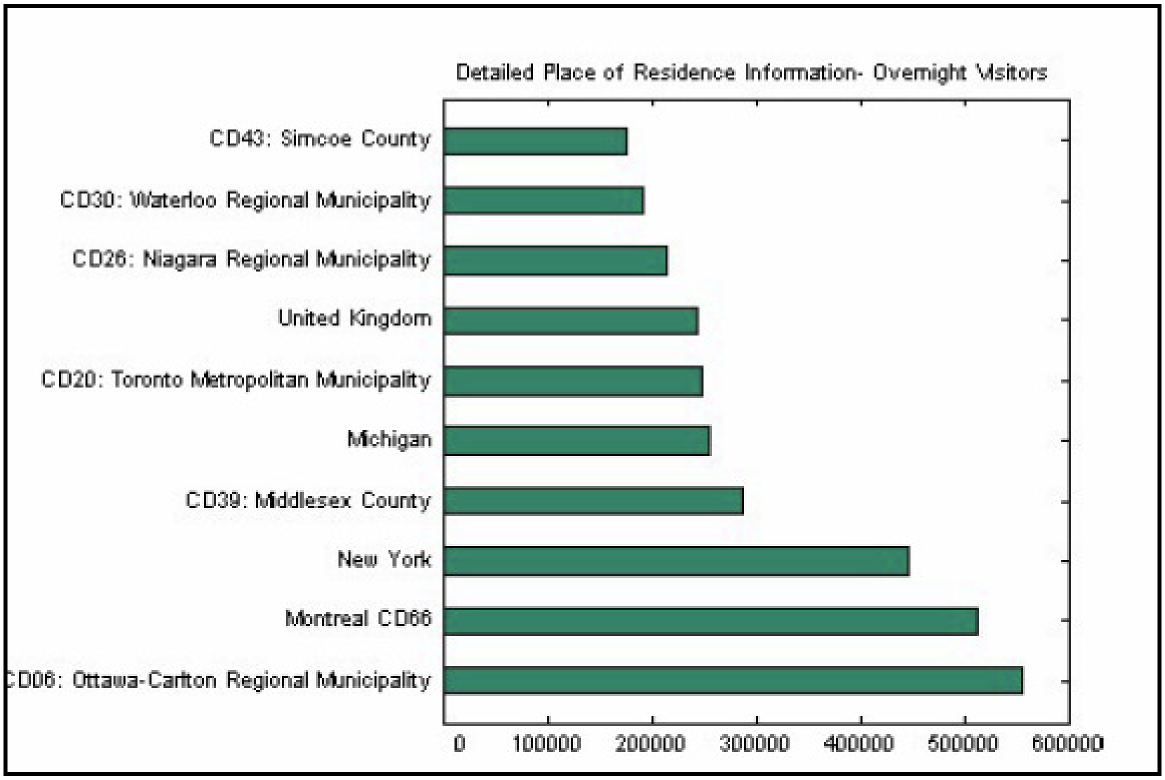
Table 4.28[1]
Origin of Guests by Industry Average

	Local	GTA	Provincial	National	U.S. - (NY State and Michigan)	U.S. - Other	International
Sector							
Accommodation	14.6%	10.9%	17.1%	17.2%	11.1%	11.4%	17.7%
Attraction	40.2%	19.5%	9.8%	5.5%	6.7%	6.9%	11.3%
Festivals and Events	45.7%	25.2%	13.0%	3.2%	5.2%	3.3%	4.5%
Food and Beverage	53.4%	18.1%	6.3%	4.8%	5.3%	6.3%	5.9%
Retail	50.1%	15.5%	6.9%	6.9%	7.1%	6.5%	7.1%
Parks and Recreation	44.9%	13.5%	4.9%	4.1%	4.1%	20.4%	8.2%
Overall	52.9%	21.0%	11.7%	9.4%	8.6%	9.4%	12.6%

Figure 4.3 illustrates the origin of overnight visitors to Toronto, indicating that the domestic visitors come mainly from Ottawa and Montreal, the U.S. visitors come most predominantly from New York State and Michigan, and the overseas visitors largely from the United Kingdom.

[1] Source: Resource Audit

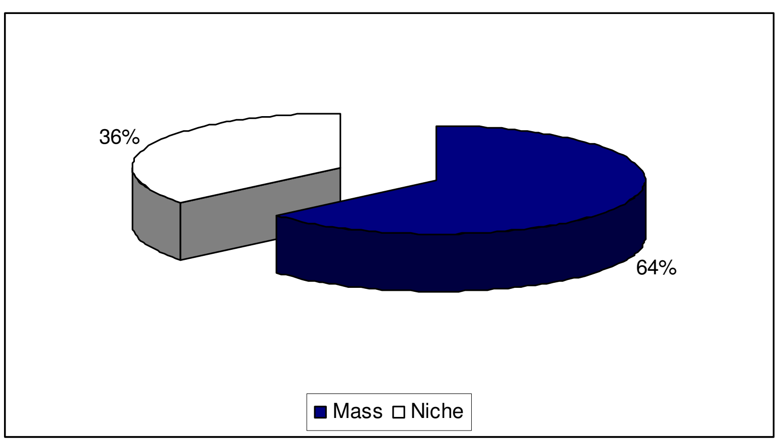
Figure 4.3[1]
Overnight Visitors to Toronto (2004)



Appeal to Market

The Resource Audit indicated that Toronto's core and supporting attractors appeal to a myriad of demographics with plenty of suitable options for both mass and niche markets.

Figure 4.4[2]
Market Appeal

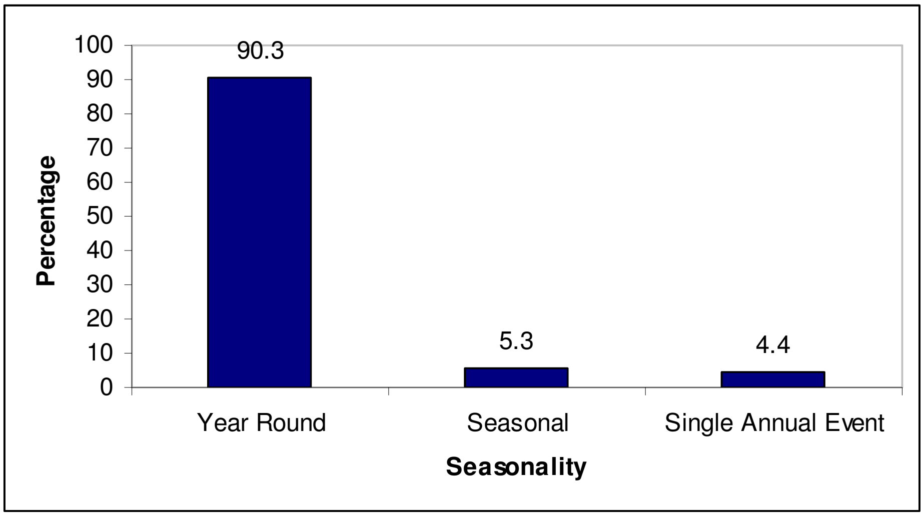


[1] Source: Statistics Canada, CTS/ITS, 2004
[2] Source: Resource Audit

Seasonality

As evidenced by the table below, the vast majority of respondents operate their establishments on a year round basis. Toronto clearly is a four season tourist destination.

Figure 4.5[1]
Yearly Range of Operation



[1] *Ibid*

Element "B": Quality and Critical Mass – Rating: Yes

The Quality and Critical Mass criteria and measures address the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging in:

- Core and related activities; and,
- Entertainment, shopping and dining.

Criteria and Measures	Rating
B1: The destination offers a range of memorable experiences, sufficient to sustain interest for more than 24 hours.	**Yes**
B1.i The destination experience stands out as memorable to visitors	Almost
B1.ii The core experience is typically "consumed" over a period greater than 24 hours	Yes
B1.iii A variety of supporting activities are available to give guests reasons to stay overnight	Yes
B1.iv The average length of stay at the destination is greater that 24 hours	Yes
B2: The destination offers a range of memorable experiences, sufficient to sustain interest on a year-round basis.	**Yes**
B2.i The destination offers core activities on a year-round basis	Yes
B1.ii The destination offers supporting activities on a year-round basis	Yes

Memorable Experience

A large majority (93%) of visitors noted that they would likely recommend the GTA, and 77% answered that they would most likely revisit the region in the next 12 months. However, respondents who rated their experience as "very satisfied" decreased from 69% in 1998 to 47% in 2006. A similar drop in service performance occurred: 30% of respondents felt that the levels had exceeded their expectation in 1998, but only 17% expressed the same answer in 2006.[1]

Sustaining Interest for More Than 24 Hours

Although many of the individual activities visitors participate in are only a few hours in duration, the combination of the experiences is often consumed over a period of several days. For example, if visitors attend a 3 hour theatre performance, they will most likely spend a few hours for dining and possibly a few hours for shopping. Depending on their origin and frequency of trips to Toronto, they may also take the opportunity to attend some of the attractions or festivals available throughout the year, making the overall visitor experience typically consumed well over a 24 hour period.

[1] Source: Tourism Toronto (Guelph Study). (2007). *Understanding Overnight Visitors to the Greater Toronto Area.* Prepared by University of Guelph, School of Hospitality and Tourism Management. Retrieved August 6, 2007, from http://www.torontotourism.com/web.cms/pdf/HotelProfileStudy.pdf

Table 4.29[1]
Season and Duration of Stay

Main Category	Sub-Category	Season	Avg. Length of Stay (Hours/Days)
Core Experiences			
Performance Arts	a. Theatre	Year Round	2-3 hours
	b. Dance	Year Round	2-3 hours
	c. Concerts	Year Round	2-3 hours
	d. Opera	Year Round	3-5 hours
Cultural Heritage	a. Museums	Year Round	1-2 hours
	b. Galleries	Year Round	Less than 1 hour
Meetings and Conventions		Year Round	
Trade/Consumer Shows		Year Round	3-5 hours
Attractions	a. CN Tower	Year Round	1-2 hours
	b. Hockey Hall of Fame	Year Round	2-3 hours
	c. Ontario Place	Year Round	3-5 hours
	d. Ontario Science Centre	Year Round	3-5 hours
	e. Toronto Zoo	Year Round	3-5 hours
Supporting Experiences			
Dining		Year Round	
Shopping		Year Round	
Festival and Events	a. Caribana Festival	Summer	5-8 hours
	b. International Authors Festival	Fall	Less than 1 hour
	c. Toronto International Film Festival	Summer	2 hours to 1-10 days
	d. World Routes Summer Festival	Summer	Less than 1 hour
Outdoor Recreation	a. Golf	Spring to Fall	3-5 hours
	b. skiing	Winter	2-3 hours
Spectator Sports		Year Round	2-3 hours

Length of Stay

As indicated by the Resource Audit, Toronto has an abundance of activities sufficient to sustain tourist and visitor interests for greater than 24 hours. According to Statistics Canada, the average length of stay for visitors (same day and overnight) from overseas is 7.62 nights compared to the average length of stay for visitors from the U.S. of 2.27 nights and for Canadian visitors 1.14 nights (see Table 4.30 on the following page).

[1] Source: Resource Audit

Table 4.30[1]
Length of Stay

ORIGIN OF VISITORS	AVERAGE VISIT DURATION (NIGHTS)
Domestic Visitors	1.14
U.S. Visitors	2.27
Overseas Visitors	7.62
Overall	1.82
Note: Data pertains to Toronto CMA	

Criteria and Measures	Rating
B3: Core activities are easily accessible to a variety of market segments at a variety of price points and layers of added value.	**Yes**
B3.i Core and on-theme activities are easy to buy	Almost
B3.ii There is a range of options and price points available for a variety of segments to engage in core and on-theme activities	Yes
B4: The destination offers a variety of activities attractive to a variety of market segments at a range of price points and layers of added value. The range extends from most basic to multiple layers, including opportunities for relaxation, entertainment, learning, skills development, adventure and new experiences.	**Yes**
B4.i The destination offers a variety of activities with a range of sub-options for each	Yes
B4.ii This range of activities is well promoted to and understood by guests	Almost
B4.iii This range of activities is easy to buy	Almost
B4.iv Groups have cooperatively invested in programming or animating public spaces, gathering and queuing areas	Yes

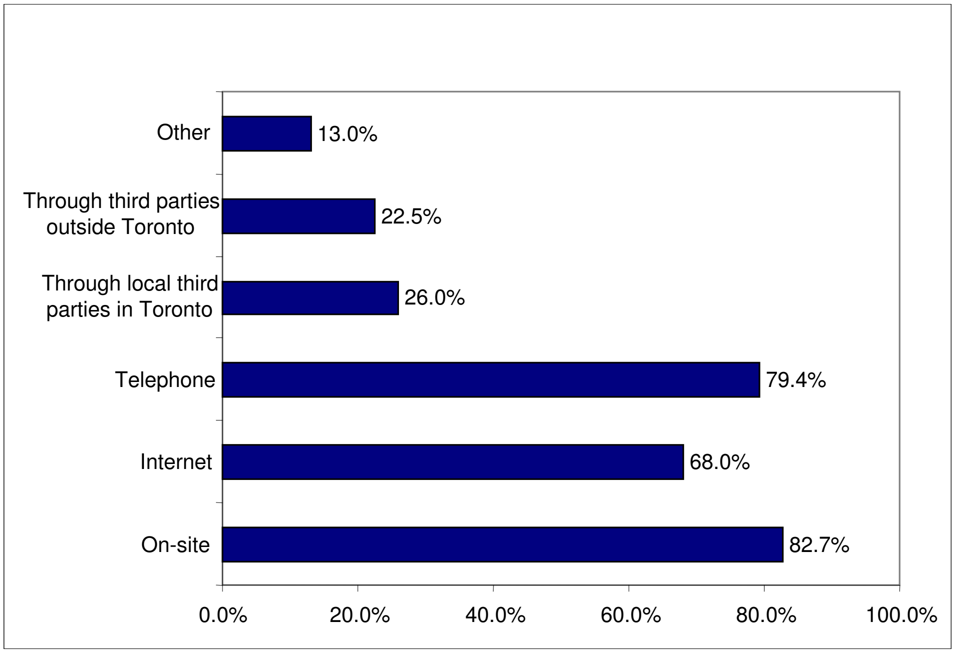
Purchase Opportunity

With purchase points located centrally (e.g. on-site at T.O. TIX booth located at Yonge Dundas Square, etc.), distributed across the destination (through local third parties), as well as those distant from the destination area (e.g. internet sites such as City Pass.com, TicketWeb National call centre, 1-800 telephone numbers accessible in both Canada and the U.S., or through third parties located outside of Toronto) tourists have numerous points of sale that they may employ to purchase any of the desired amenities that Toronto has to offer. However, a consultation with the Tourism Toronto Travel Trade Department revealed that it is difficult for outside tour operators to access blocks of tickets to theatre performances as none of the medium to large theatre operators have a ticketing system on par with New York and London. In those cities, tour

[1] Source: Statistics Canada CTS/ITS, CITIES data, 2004

operators have preferential access to online theatre tickets, which can be purchased on behalf of clients instantly, providing operators with immediate confirmation. In addition, stakeholders have commented that some performing arts venues have limited hours of operation, which restricts purchasing opportunities for potential customers.

Figure 4.6[1]
Purchasing Methods



[1] Source: Resource Audit

Table 4.31[1]
Tourism Activities by Price Range

Main Category	Sub-Category	Price Range (CAD)
Core Experiences		
Performance Arts	a. Theatre	$7-$539
	b. Dance	$15-$24
	c. Concerts	Free-$300
	d. Opera	$60-$275
Cultural Heritage	a. Museums	$4-$85
	b. Galleries	Free-$100
Meetings and Conventions		
Trade/Consumer Shows		Free-$145
Attractions		Free-$539
Supporting Experiences		
Dining		$7-$250
Shopping		Discount - High End
Festival and Events		Free-$250
Outdoor Recreation	a. Golf	$12-$48
	b. Skiing	$8-$25
Spectator Sports		Free-$300

Variety of Activities

Whether tourists are looking for relaxation or adventure, entertainment or cultural/historical understanding, Toronto offers a variety of activities that suit different traveller's budgets. These activities range from free to over $500. The Resource Audit confirms that Toronto offers a wide range of experiences suited to the full gamut of budgets. A visitor can find a good variety of free activities, as well as high calibre, premium priced experiences offered by the world's top performers, artists, chefs and athletes.

Table 4.32[2]
Variety of Activities

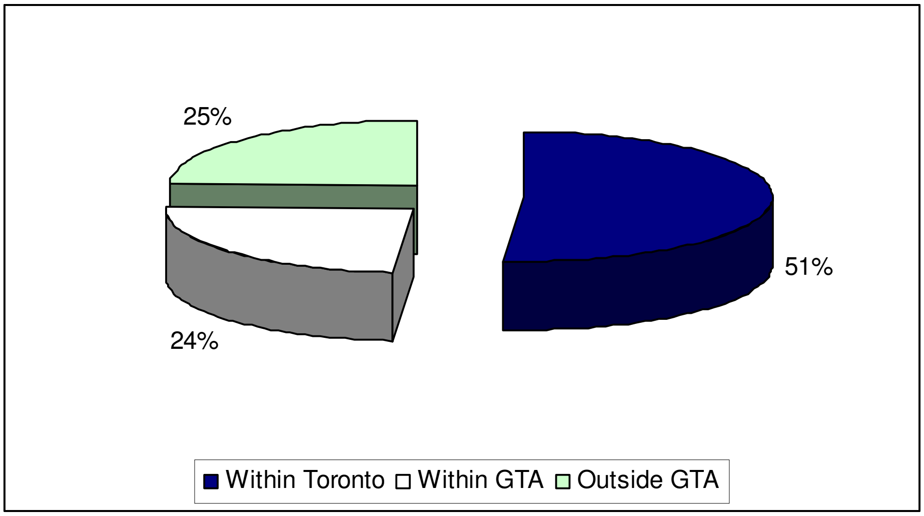
Category/Activity	# of Responses	Approximate Price Range (CAD)
Relaxation	20	Free-$125
Entertainment	91	Free-$539
Interpretation	3	Free-$8
Education	14	Free-$100
Cultural/Historical Understanding	34	Free-$47
Skills Development	1	Free
Adventure	9	Free-$150

[1] Source: Resource Audit
[2] *Ibid*

Marketing and Communications

PRTD survey respondents invest the majority of their marketing budget on advertisements within the municipality. This stands to reason, given that the highest proportion of visitors who frequent Toronto are of local origin (41.5%).[1] Of the 25% of the budget geared towards areas outside of the Greater Toronto Area, most of the advertising dollar is spent in the U.S., as it is noted as being the largest foreign tourist group to visit the city.

Figure 4.7[2]
Marketing Budget



Communication Channels

As evidenced by the chart below, the most prevalent communication channels used within the GTA, as well as outside of the region, are websites, print ads and brochures.

Table 4.33[3]
Communication Channels

Within Toronto	%	Within GTA	%	Outside of GTA	%
1. Website	64	1. Website	50	1. Website	50
2. Print Ads	49	2. Print Ads	31	2. Internet Ads	27
3. Brochures	41	3. Brochures	28	3. Print Ads	27

[1] Source: Resource Audit
[2] *Ibid*
[3] *Ibid*

Toll-Free Access

The following table illustrates the number of respondents who indicated whether or not their businesses had toll-free telephone numbers within Canada and within the United States.

Table 4.34[1]
Toll Free Access

	# with Canada toll-free	%	# with U.S. toll-free	%
Yes	180	55.9	149	48.2
No	142	44.1	160	51.8

Co-operative Programming and Animation of Public Spaces

Private, public and government organizations work cooperatively to develop programs and initiatives that invest in the beautification of and/or animation of public spaces. BIAs and business associations in Toronto such as Tourism Toronto, Toronto Board of Trade, as well as the Provincial and Municipal governments, all play a part.

Business Improvement Areas (BIAs)

A Business Improvement Area (BIA) is an association of commercial property owners and tenants within a defined area who work in partnership with the City to create thriving, competitive, and safe business areas that attract shoppers, diners, tourists, and new businesses. By working collectively as a BIA, local business have the organizational and funding capacity to be catalysts for civic improvement, enhancing the quality of life in their local neighbourhood and the City as a whole.[2]

The City of Toronto initiated the concept of Business Improvement Areas (BIAs). With 61 BIAs across the city, Toronto has the most number of BIAs of any city in North America. The City of Toronto Business Improvement Area (BIA) Office works in partnership with BIAs to enhance their neighbourhood business areas. The properties they include are valued at over $5 billion, which generates an annual tax base of $350 million. Representing over 30,000 businesses, the BIAs collectively generate over $16 million in annual funding towards streetscape enhancement, marketing and special event initiatives, clean street campaigns, and crime prevention strategies.[3] The success of Toronto's BIA program can be seen in the growth in the number of BIAs in the last 7 years - increasing from 42 in 2001 to 61 at the end of 2007.[4] A sampling of the initiatives, activities and events that take place in Toronto's BIAs can be viewed in Appendix C.

Toronto Board of Trade

The Toronto Board of Trade was founded in 1845 by members of the business community. Its current mandate is to:

- Contribute directly to its members' success by acting as a dynamic business catalyst and providing innovative and valuable business tools.

[1] Source: Resource Audit
[2] Source: City of Toronto. About BIAs. Retrieved August 2007, from http://www.toronto.ca/bia/about.htm#1
[3] Source: Toronto EDCT Tourism Division (Prosperity Agenda). (2007, September). Toronto's Premier Ranked Tourist Destination Project-Industry Consultations. Prepared by BrainTrust Marketing & Communications.
[4] *Ibid*

- Create opportunities for governments and the business community to work together on issues that are important to our members.

The Toronto Board of Trade's Community Action Program exists to:

- Create opportunities for developing executives and professionals to build leadership skills through community engagement.
- Complete projects of lasting community importance.
- Facilitate a process for participants to better understand the way their city works and the impact that volunteers can have.[1]

Toronto Entertainment District Association (TEDA)

TEDA is a volunteer-based group, founded in 1993, with over 87 area businesses committed to:

- Developing cooperative marketing programs.
- Promoting its unique neighbourhood to the local community and tourism markets outside of Toronto.
- Fostering strong government relations.
- Networking with members in the heart of the district as well as those businesses that carry on activity within the district.
- Encouraging participation in events.

TEDA runs a variety of special events that allow members to get involved, such as Taste Toronto and an annual Concierge event. The association is evolving into a marketing-focused organization, committed to developing visitation to its neighbourhood. A host of marketing initiatives are underway, such as:

- Ontario Tourism Marketing Partnership
- Consumer Show Partnerships
- Continued Website Development
- TEDA Brochure

TEDA's Government Affairs and Planning Committee has spent the past five years building solid relationships with local politicians, government officials and other concerned community groups. When an issue comes under review that affects the district, TEDA receives the information directly from the source so TEDA can alert its members to issues affecting them:

- Taxation
- Road Closures
- Parking
- Safety Issues
- Garbage Collection
- Graffiti
- Noise

[1] Source: The Toronto Board of Trade. Community Action Program. Retrieved August 2007, from http://www.bot.com/ContentIslands/PublicPages/MenuPages/CAP.asp

Yonge-Bloor-Bay Business Association (YBBA)

The YBBA, founded in 1920, is a not-for profit organization whose objective is to advance development of the district as a desirable shopping, business, commercial and residential area. YBBA's membership is comprised of retailers, services, offices, land and building owners and residents in an area which encompasses St. George Street to the west, Sherbourne Street to the east, Alcorn Street to north and Wellesley Street to the south.

The YBBA provides an opportunity to build relationships with other members and businesses. It has a working committee to develop action plans to deliver policy positions or issues that concern the private sector. These include business property tax reform, local governance and an efficient and sustainable physical infrastructure. By influencing the public policy agenda and lobbying for change, the YBBA enhances the competitive environment of its community. The association also has an active working committee that works closely with the police and other emergency units to keep the area safe and secure.

Tourism Toronto: Cultural Enhancement Program (CEP)

TT launched this initiative in 2006 to invest up to $1 million annually in new cultural projects that have the potential to be significant tourism draws. Of the five CEP investments for 2007, four are located in the city of Toronto. Supporting its diverse neighbourhoods through the winter/shoulder seasons, the investments are (program, neighbourhood/association): enhancement to Cavalcade of Lights program; Neighbourhood Holiday Lighting Program Bloor-Yorkville Business Improvement Area; One-Of-A-kind 30-foot light tree at Yonge-Dundas Square, Downtown Yonge Business Improvement Area; and new lighting on Berczy Park adjacent to the Flatiron Building, St. Lawrence Market Neighbourhood Association. Tourism Toronto invests selectively in projects on a cost-share basis providing there is a business potential to attract visitors and to increase the length of stay by visitors.

The Investment Criteria are as follows:

1. Market potential to attract visitors to Toronto (including capacity for ticket sales to markets outside the GTA).
2. Management capabilities of the lead organization and track record with successful projects. The applicants and their partners must demonstrate past cases of fiscal responsibility and managerial expertise.
3. The project should provide unique and lasting benefits to the Greater Toronto Area. The economic return to the GTA for the project will be 40:1 ($40 return for every $1 invested) based on the IACVB's (International Association of Convention and Visitor Bureau) visitors spending estimated and the Canadian Tourism Research Institute's Tourism Economic Assessment Model.
4. Clearly defined marketing plan including:

    - Targeted market segments
    - Media plan (by media type and frequency)
    - Messaging
    - Promotional and media relations plan
    - The project will lead to positive financial results for the proponents

5. Organizations and their partners must be members of Tourism Toronto. The length of membership tenure will be considered; special consideration will be given to regional

tourism initiatives (from Tourism Toronto members in the City of Mississauga and in York Region).

Ineligible Projects Include:

- Established, ongoing annual programs and events
- Events of a local nature with limited potential to attract tourists
- Trade fairs, conventions or conferences
- Events closed to the general public[1]

Ontario Ministry of Tourism: Celebrate Ontario Program

In recognition of the important economic contributions that festivals make in communities across Ontario, the Provincial government launched the $4 million Celebrate Ontario Program in the spring of 2007. This one-time funding initiative is designed to support the growth of existing festivals and events by supporting new marketing and programming enhancements. The Ontario Tourism Event Marketing Partnership Program (TEMPP) is providing an additional $500,000. Fifty-seven festivals and events across the province, eight of which are in Toronto (plus one receiving TEMPP funds only), will be receiving programming funding of up to $75,000, and marketing funding up to $18,750 from the Celebrate Ontario initiative for total funding of as much as $93,750 each.[2]

City of Toronto: Clean and Beautiful City Initiative

Many stakeholders have expressed concern about a decline in the city's appearance. Toronto often looks "frayed" and uncared for, too many of its numerous new buildings and streetscapes are not as attractive as they could be. Our parks are suffering and parts of the urban tree canopy are in distress or on the decline. Anxious to reverse these trends, City Council has directed staff to embark on an aggressive program to restore Toronto's image and achieve a Clean and Beautiful City. Council recognizes that beauty is not a "frill", but is essential to the City's economic future, the social welfare of its residents, and their civic pride.

The Clean and Beautiful City Initiative adopted by Council in March 2004 outlined a two-phase approach to achieving its goals. Phase 1 focused largely on ten steps to a coordinated and sustainable program of cleanliness, as well as a step to initiate a coordinated approach to street furniture.

Phase 2 set out the following four steps to achieve Beautiful City goals:

- Raising the bar on the urban design and architecture of private and public developments.
- Forging key partnerships and strategic alliances within City services and with private citizens, philanthropic donors, organizations and institutions on specific public realm initiatives.
- Maximizing development review benefits by working with the development industry to ensure that proposed developments are designed to meet the City's urban design standards and provide a high level of public amenity.

[1] Source: Tourism Toronto. Cultural Enhancement Program. Retrieved September 2007, from http://www.torontotourism.com/AboutUs/CulturalEnhancementProgram.htm

[2] Source: Ontario Ministry of Tourism. (2007, March 14) Revision to second last paragraph - Ontario Government Launches Domestic Tourism Campaign. Retrieved July 9, 2007, from http://ogov.newswire.ca/ontario/GPOE/2007/03/14/c2400.html?lmatch=&lang=_e.html

- Improving the attractiveness of public parks, local parks ravines and other civic open spaces including landscaping, parks design and public art.

The Five-Point Clean and Beautiful City Action Plan:

The five-point action plan organizes an evolving list of Clean and Beautiful City initiatives into five key actions: "Sweep It, Design It, Grow It, Build It", and "Celebrate It".

The plan includes approximately 48 initiatives, 13 of which are new proposals, and highlights a number of programs which already contribute to the Beautiful City agenda.

The action plan represents an ongoing cycle of activities in which the City and its residents are engaged at any given moment. For example, while great buildings and streetscapes need to be built, they must also be maintained, and trees must be planted to thrive, not just survive. Slippage in any of the links in the cycle will undermine the whole.[1]

City of Toronto Grants for Neighbourhood Improvements

Neighbourhood Beautification Program

The program was established in the spring of 2005. This was a result of the five-point Clean and Beautiful City Action Plan approved and supported by City Council and the Mayor's Roundtable. The program provides up to $3,000 to each ward for community-based improvement projects. The capital cost share for projects that adhere to the City's guidelines and criteria for the Neighbourhood Beautification Programs such as the Commercial Façade Improvement program and Cavalcade of Lights initiative programs are divided equally, 50/50 between the BIA and the City. Other related programs considered to be a part of the Beautification Program are banners, light poles, planting and watering of tree planters and flower pots.

Based on the Project Criteria as follows:

1. Maximum visibility and impact to the neighbourhood.
2. Simple in design and workload.
3. Organized group of volunteers to help execute and maintain the project over time.
4. One in-kind donation (meaning contribution of volunteer services, materials, etc).
5. Project should be completed within a one-year time frame.

Graffiti Transformation

This program employs youth for removing graffiti and replacing it with murals, through grants to community organizations.

Commercial Façade Improvement Program

The Façade Improvement Program is administered by Economic Development and provides funding to private property owners to redesign, renovate or restore commercial or industrial building facades. Eligible improvements include, but are not limited to, brick cleaning, restoration, wheelchair accessibility, doors, signage, windows, lighting and masonry.

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[1] Source: City of Toronto. About the Clean and Beautiful City Initiative. Retrieved September 8, 2007, from http://www.toronto.ca/cleanandbeautiful/about.htm and City of Toronto. Five Point Clean and Beautiful City Action Plan. Retrieved September 8, 2007, from http://www.toronto.ca/cleanandbeautiful/plan.htm

Economic Development Mural Program

The Mural Program helps local businesses and communities create an attractive and positive identity for their commercial areas. Funding of up to $5,000 is available for mural projects that demonstrate strong local involvement, community partnerships, and commitment to promoting economic development initiatives.[1]

Criteria and Measures	**Rating**
B5. The destination offers cultural experience and entertainment options, from basic to venues/shows events credible at regional to larger scales, over a range of price points.	**Yes**
B5.i The destination offers a range of cultural experience and entertainment options	Yes
B5.ii Events or venues in the last two years included performances by artists with name recognition beyond the local region	Yes
B6. The destination offers a broad range of dining options.	**Yes**
B6.i The destination offers a range of dining options at a range of price points	Yes
B6.ii A number of restaurants have wine lists with more than 25 labels	Yes
B6.iii A number of restaurants have trained and accredited chefs	Yes
B6.iv A number of restaurants/chefs have name recognition beyond the local region	Yes
B7. The destination offers a broad range of shopping options.	**Yes**
B7.i The destination offers a range of shopping opportunities at a range of price points	Yes
B7.ii Stores or galleries in the destination have name recognition beyond the local area	Yes

[1] Source: City of Toronto. City of Toronto Grants Directory. Retrieved August 2007, from http://www.toronto.ca/grants/grants_directory.htm

Cultural Experiences and Entertainment Options

There are a wide variety of cultural experiences and entertainment options available for visitors to Toronto.

Table 4.35[1]
Cultural Experiences and Entertainment Options

Activity	Approximate Price Range (CAD)
Live theatre performance	
Stage Performance	Adults (16-59) $90.00-340.00 Seniors (60+) $90.00-240.00
Dinner Theatre	Adults (16-59) $52.50 Seniors (60+) $45.50
Museum	
City-Owned	Adults (16-59) $3.25-6.00 Seniors, Students $3.25 Child (Under 12) Free
Public Museum	Adults $15.00 Seniors(65+) $8.00 Full-time students with ID $6.00 Child (under 12) Free, with adult
Gallery (non-profit)	Adults $15.00 Seniors & Students $12.00 Child (under 15) Free
Living History Site	Adults $13.00 Seniors, Students $12.00
Water Park –grounds admission	Ages 6-64 $17.75 Ages 4-5 & Seniors (65+) $11.75
Tours	
Land & Water Excursion	Adult $38, Seniors (65+) $33.00 Student (13-17) $33.00 Child (3-12) $25.00 Infant (under 3) $3.00
Themed Walking Tour	Adults $43, Seniors $38.50 Child $12.50-27.50
Museum or Attraction-Guided Walk	Free (waterfront garden, prior to concert)

[1] Source: Resource Audit

Internationally Recognized Performing Acts

Toronto regularly plays host to internationally recognized artists and performers. Some of the entertainers who performed in Toronto in 2006 are listed in Table 4.36:

Table 4.36[1]
Internationally Recognized Acts

2006 Concert Date(s)	Artist(s)	Ticket Price Range (CAD)
January 21 - 30	Bon Jovi	$66.25-125
February 6	Il Divo	$59.50-89.50
February 15	Nickelback	$39.50-49.50
March 22 – 23	Coldplay	$49.50-89.50
March 20	Oasis	$49.00- 71.00
May 14	INXS	$55.00-75.00
July 12	Buffy Sainte-Marie	$50.00
August 27	Shakira	$19.50 – 87.50
September 8	Tom Petty & the Heartbreakers	$27.00-81.75
October 5	Dwight Yoakam	$42.50-49.50
October 17, 20	Barbra Streisand	$85.00-550.00
November 4	Elton John	$50.00-150.00
Note: Ticket prices do not include service charges or taxes.		

Dining Options

The following table illustrates restaurant price points in type, percentage and average price per person. These results were tabulated from the Resource Audit through multiple surveyed responses.

Table 4.37[2]
Restaurants Price Points

Type	Percentage	Avg. Price ($)/per Person (CAD)
Low Price	24.4%	$33
Mid Price	76.7%	$45
High End	34.2%	$78

[1] Source: Resource Audit
[2] *Ibid* (Note: multiple responses were possible)

Wine Offerings

A menu analysis of restaurants participating in the Summerlicious or Winterlicious programs was conducted. Out of the 99 restaurants evaluated, the following characteristics stood out:

- Most participants had extensive wine lists ranging from 23 to 650 types of wine.
- 88% of those wines were international, 11% were from Ontario and another 1% was from other parts of Canada.
- Only 1 out of the 99 restaurants had more Canadian than international labels.

Accredited Chefs and Recognition/ Smart Serve

Toronto covers the spectrum of culinary offerings. From value-priced to high end, ethnic to local, Toronto's restaurants are highly regarded and plentiful, satisfying the taste buds of experienced foodies. The entrée prices vary from $5-$250 per person, including taxes, tip and alcohol. Numerous restaurants have accredited chefs with distinctions ranging from red seal certification, diplomas from culinary schools, as well as smart serve training. The city's restaurants also have expansive wine lists and a number of accredited sommeliers.[1] (Please see Appendix D.)

Shopping Options

The table below demonstrates that Toronto's retail sector has a wide range of pricing options:

Table 4.38[2]
Retail Price Points

Type	# of Responses	Percentage
Discount	35	12%
Average	138	48%
High-End	114	40%
Total	287	100%

Retail Recognition

Table 4.39 on the following page describes the merchandise carried by the retail stores that participated in the Resource Audit. Tourists like to purchase unique items associated with the location they are visiting, a trend well recognized by these stores. The majority also carry internationally recognized brands.

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[1] Source: CN Tower. (2006, November 8). CN Tower Wine Cellar designated "World's Highest" by Guinness World Records. Retrieved August 2007, from http://www.cntower.ca/portal/Secure/Community/417/ContactUs/Media/PressKit/20061109_CNTower_NR_Worlds_Highest_Wine_Cellar.pdf
[2] Source: Resource Audit

Table 4.39[1]
Product Types

Types of Product	Percentage
Locally created goods	43.7%
Locally designed items	39.1%
Items identified with Toronto/Canada	23.3%
Internationally recognized items/brands	69.3%
Other unique specialty items	29.8%
Note: Multiple responses were possible	

Retail Appeal beyond Local Region

Department stores, exclusive shops, neighbourhood retailers and ethnic markets – Toronto has more than 20,000 stores catering to all fashions and tastes. Its premier shopping destination, the Eaton Centre, is a multi-levelled, glass-roofed galleria comprising more than 320 shops and restaurants, 16 cinemas, and a 400-room Marriott hotel. Built in 1979, the Eaton Centre boasts $746 of sales per square foot of retail space – the highest in North America – and is one of the top tourist attractions in Toronto with one million visitors a week. Modelled after the Galleria in Milan, Italy, the Eaton Centre was among the first major downtown shopping centres constructed in North America.

Toronto's most exclusive retail district is located in the Bloor/Yorkville area. International retailers offering high fashion designs, eclectic boutiques, fine crystal and china shops, art galleries, and superb restaurants are all available in the village-like atmosphere of Yorkville and Hazelton Lanes.

As one of the world's most ethnically diverse city, Toronto also has distinctive shopping districts and markets that offer a wide range of unique shopping experiences. These vibrant retail areas include Queen Street West, Kensington Market, St. Lawrence Market, five Chinatowns, Little Italy along St. Clair West, the Greek community along “The Danforth,” Little Portugal at Dundas and Bathurst Streets, and Gerrard India Bazaar at Gerrard and Greenwood.[2]

[1] Source: Resource Audit
[2] Source: Toronto Convention & Visitors Association (Tourism Toronto). Neighbourhood Shopping. Retrieved August 21, 2007, from http://www.torontotourism.com/Visitor/WhereToShop/NeighbourhoodShopping.htm

Element "C": Satisfaction and Value – Rating: Almost

The Satisfaction and Value criteria and measures document the extent to which the destination offers its guests:

- A welcome;
- Satisfied expectations; and,
- Value for money

C1. Guests feel welcomed into a community that is happy to host, serve or engage them.	**Almost**
C1.i The destination is considered "friendly" or "very hospitable" by guests, travel agents and tour operators	Almost
C2. The destination offers a highly satisfying experience to its guests.	**Almost**
C2.i The destination carries out regular surveys which track guest satisfaction and their perceptions of value and hospitality	Almost
C2.ii The most recent survey indicated that most guests were very satisfied with their destination experience	Almost
C3. The destination is perceived as offering value for money spent.	**Almost**
C3.i The destination is considered "good value" or "expensive but worth every cent" by guests, travel agents, and tour operators	No
C2.ii Key experience and service prices are monitored and are staying constant or trending up	Yes
C3.iii Visitation is trending upwards. This trend is parallel to or independent of key experience service price trends	Almost

Hospitality

The School of Hospitality & Tourism Management at University of Guelph has completed a study on understanding overnight visitors to the Greater Toronto Area on behalf of Tourism Toronto. This study identified and examined the profile of visitors. The methodology used, was to distribute surveys in 21 participating hotels located in Toronto-East, West and Downtown. Among these surveys, 897 were collected and 812 were used for the data analysis. This present study replicated to a large extent research that was conducted during 1998 in partnership with Tourism Toronto and Where Magazine. Forty seven percent of respondents said they were "Very Satisfied" with their visit and 50% were "Satisfied". Satisfaction levels are generally substantially higher for pleasure travellers than for business travellers. The study identified gaps in the way that Toronto is viewed in terms of hospitality. Canadians identify hospitality as one of Toronto's weaknesses. On the other hand, both U.S. and overseas visitors perceive hospitality of Torontonians as a major strength. The latter finding is consistent with a recent study by Anholt City Brands Index *How the World Views Its Cities* which ranked Toronto 9th globally as a welcoming city.

Other differences among Canadian, U.S., and Overseas visitors include the following: American visitors seem to be very impressed by the hospitality, cleanliness and safety of the city. Overseas visitors indicated that Toronto Shopping facilities were not up to par compared to their expectations. Ontario visitors and visitors from other provinces indicated that they were concerned about their personal safety and the overall level of cleanliness of the city.[1]

There has been a dramatic shift with excitement levels dropping substantially between 1998 and 2006 (as shown in Table 4.40:

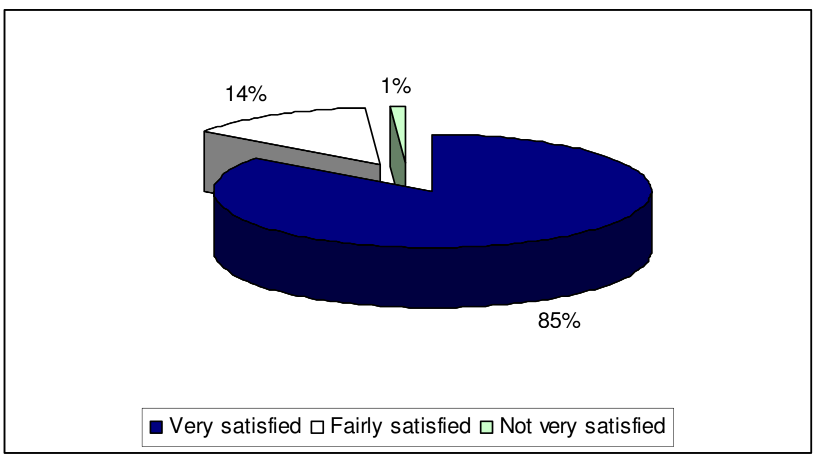
Table 4.40[2]
Activity Excitement of Hotel Guests with their Toronto Experience*

Activity	1998	2006
Dining	66%	43%
Shopping	56%	35%
Entertainment	56%	46%
CityScape	54%	42%
Cultural Venues	45%	33%

Note:* Percentages are respondents who said "Very Exciting"

A second study conducted for the City of Toronto by TNS of people who utilized a visitors information centre, concluded that visitors satisfaction with their trip was high with 85% indicating "Very Satisfied", and 14% indicating "Fairly Satisfied". A total of 99% indicated "Very/Fairly Satisfied". The satisfaction level of visitors to Toronto that attended tourist information centres (VIC) is notably higher, than that reported by hotel guests suggesting that the information obtained at the VIC may have a positive effect on satisfaction values (See Figure 4.8).

Figure 4.8[3]
Guest Satisfaction Levels



In a follow up question to guest satisfaction level, over a third of guests (37%) indicated a "Very Likely" potential for a return trip to Toronto within twelve months. Of the "Very Likely" respondents the majority (57%) were Canadians, 38% were from the United States and 32% were from overseas. Eighteen percent of respondents indicated that they were "Fairly Likely" to

[1] Source: Tourism Toronto (Guelph Study). (2007). *Understanding Overnight Visitors to the Greater Toronto Area.* Prepared by University of Guelph, School of Hospitality and Tourism Management. Retrieved August 2007, from http://www.torontotourism.com/web.cms/pdf/HotelProfileStudy.pdf
[2] Source: Tourism Toronto (Guelph Study). (2007). *Understanding Overnight Visitors to the Greater Toronto Area.* Prepared by University of Guelph, School of Hospitality and Tourism Management. Retrieved August 2007, from http://www.torontotourism.com/web.cms/pdf/HotelProfileStudy.pdf (Note: Percentages represent those who said "very exciting")
[3] Source: City of Toronto (2006). *An Assessment Of The Visitor Information Centres in Toronto. Prepared* by TNS Canadian Facts.

return with the next twelve months. A total of 55% indicated "Very/Fairly Likely" to return within the next twelve months.

Guest Satisfaction Tracking

Even though several independent studies have been conducted by different tourism organizations, they have not been implemented in a consistent way. This presents a challenge in interpreting results or tracking changes over time.

Toronto Price Competitiveness

Canada Overall Competitiveness as a Tourist Destination

According to the Travel and Tourism Competitiveness Index in the *Travel and Tourism Competitiveness Report 2007*, Canada's overall rank is No. 7 in the world. However, Canada's rankings of price competitiveness in the travel and tourism industry are low in terms of ticket taxes & airport charges (No. 117), purchasing power parity (No. 100) and extent and effect of taxation (No. 66) based on the Country/Economy Profiles & Data Presentation in World Economic Forum (2007)(see Figure 4.9 on the following page).

Figure 4.9[1]
Canada Price Competitiveness in the Travel & Tourism Industry

	Price competitiveness in the T&T industry	
10.01	Ticket taxes and airport charges	117
10.02	Purchasing power parity	100
10.03	Extent and effect of taxation	66
10.04	Fuel price level	63

Visitors' Perception of Value for Money in Toronto[2]

In terms of value for money, visitors believed that events and hotels did not offer enough value for the money. Visitors found event prices (45.7%), hotel prices (38%), and attractions prices high (35.7%), as can be seen in Table 4.41. Only 1.4% of respondents rated "sales taxes" as low, while 27.6% considered that sales taxes were high in Toronto, which results in negative balance of opinion (balance of opinion is the difference between the percentage of respondents who report favourable conditions (low taxes) and unfavourable conditions (high taxes) of -26.2%.

[1] Source: Blanke, J. & Chiesa, T. (eds). (2007). *The Travel and Tourism Competitiveness Report 2007, Part 2 Country/Economy Profiles. Geneva: World Economic Forum.* Retrieved from http://www.weforum.org/en/initiatives/gcp/TravelandTourismReport/index.htm.
[2] Source: Tourism Toronto (Guelph Study). (2007). *Understanding Overnight Visitors to the Greater Toronto Area.* Prepared by University of Guelph, School of Hospitality and Tourism Management. Retrieved August 2007, from http://www.torontotourism.com/web.cms/pdf/HotelProfileStudy.pdf

Table 4.41
Service and Facility Price

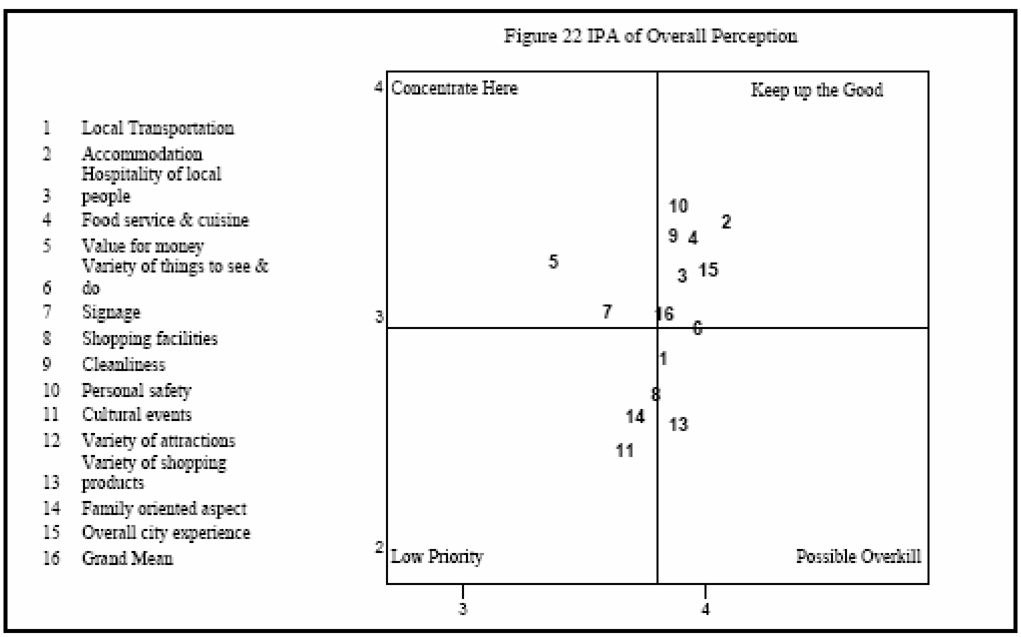
Value Type	Low	Average	High
Events	0.3%	54.0%	45.7%
Hotel	1.9%	60.0%	38.1%
Attractions	1.5%	62.8%	35.7%
Restaurant	1.6%	64.7%	33.7%
Shopping	1.0%	70.5%	28.5%
Sales taxes	1.4%	70.9%	27.6%

An Importance-Performance Analysis (IPA) was used as a positioning map to help understand visitor satisfaction perception on their recent visit to the GTA:

- *Concentrate Here (Quadrant I)*: High Importance/Low Performance-this quadrant indicates relative poor performance on important features of visit experience.
- *Keep up the good work (Quadrant II)*: High Importance/High Performance-visitors were satisfied with the service received or activities experienced.
- *Low Priority (Quadrant III)*: Low Importance/Low Performance-this quadrant indicates low performance on less important features.
- *Possible overkill (Quadrant IV*): Low Importance/High Performance-excellent performance on less important features.

Throughout the analysis, the overall perception of "value for money" and "signage" fall into Quadrant I (Concentrate Here-High Importance/Low Performance), which means immediate attention, is needed to improve this important feature (see Figure 4.10).

Figure 4.10[1]
Overnight Visitors to the GTA



[1] Source: Tourism Toronto (Guelph Study). (2007). *Understanding Overnight Visitors to the Greater Toronto Area.* Prepared by University of Guelph, School of Hospitality and Tourism Management. Retrieved August 2007, from http://www.torontotourism.com/web.cms/pdf/HotelProfileStudy.pdf

Toronto Airport Landing Fee[1]

Toronto's Pearson International Airport's landing fee is the 2nd highest among the global airports and is at risk of becoming the most expensive airport in the world. As Canada's aviation hub, the Pearson International Airport plays a critical role in bringing visitors to Canada from all over the world. Since the large portion of airport landing fees is government rent and taxes, unless the government change its policy, Pearson airport and its users will never be able to compete with others in terms of more and better flight options, which could substantially attract more visitors to Canada.

Parking Rate Comparison

According to an international parking rate survey conducted by Colliers, Toronto and Calgary have the highest median daily rate in Canada ($20.00 CAD) as compared to Montreal ($15.00 CAD) and Vancouver ($17.50 CAD). Median daily parking rates for Toronto are 33% higher than Montreal and 12.5% higher than Vancouver (see Table 4.42).

However, when compared to select American cities Toronto's parking rates are quite competitive. Boston ($33.00 USD), Chicago ($25.25 USD), Los Angeles ($25.00 USD), New York-downtown ($34.00 USD), New York-midtown ($42.00 USD) and San Francisco ($27.00 USD) have higher median daily parking rates than Toronto ($20.00 CAD). (See Table 4.43 on the following page.)

In a global context, Toronto's parking rates are very competitive, as evidenced by the data shown in Table 4.44 on the following page.

Table 4.42[2]
Median Daily and Monthly Parking Rates in Canada

Market	Median Daily Rate (CAD)	Median Monthly Rate (CAD)
Montreal, QC	$15.00	$262.09
Toronto, ON	$20.00	$301.85
Vancouver, BC	$17.50	$209.05
Calgary, AB	$20.00	$350.00

[1] Source: Air Transport Association of Canada. (2005). Airport landing fees. Retrieved May 1, 2007, from http://www.atac.ca/en/ourissues/advocacy/landing_fees.html
[2] Source: Colliers International. (2007, July 25). Consumers and Businesses Must Brace Themselves for Higher Parking Rates According to Colliers International's 2007 Parking Survey. Retrieved August 2007, from http://www.colliers.com/Content/Attachments/Denver/news/ParkingRelease2007.pdf

Table 4.43[1]
Median Daily and Monthly Parking Rates in the U.S.

Market	Median Daily Rate (USD)	Median Monthly Rate (USD)
Chicago, IL	$25.25	$285.00
Boston, MA	$33.00	$460.00
New York – NY Midtown	$42.00	$630.00
New York – NY Downtown	$34.00	$500.00
Philadelphia - PA	$21.75	$297.50
San Francisco - CA	$27.00	$350.00
Los Angeles - CA	$25.00	$192.00

Table 4.44[2]
Global Comparative Monthly Parking Rates

City	Parking Cost (USD unless noted)	City	Parking Cost (USD unless noted)
London	$1,198	Paris	$324
London (West end)	$1,162	Munich	$314
Tokyo	$702	Philadelphia	$297.5
Sydney	$688	Chicago	$285
Hong Kong	$682	Toronto	$302 CAD
Midtown Manhattan	$630	Frankfurt	$257
Moscow	$620	Montreal	$262 CAD
Zurich	$487	Vancouver	$209 CAD
Boston	$460	Ottawa	$195 CAD
Calgary	$350 CAD	Cleveland	$142.5

[1] *Ibid*
[2] Source: Colliers International. (2007, July 25). Consumers and Businesses Must Brace Themselves for Higher Parking Rates According to Colliers International's 2007 Parking Survey. Retrieved August 2007, from http://www.colliers.com/Content/Attachments/Denver/news/ParkingRelease2007.pdf

Table 4.45[1]
Provincial/State Tax Comparison

Provincial/State	Tax Rates (%)
British Columbia	7
CALIFORNIA	7.25(2)
FLORIDA	6
ILLINOIS (2)	6.25
MASSACHUSETTS	5
MICHIGAN	6
NEVADA	6.5
NEW YORK	4
OHIO	5.5
Ontario	8
PENNSYLVANIA	6
Quebec	7.5
TEXAS	6.25
Note: (2) Includes state wide local tax of 1.0% in California.	

Pricing Trends

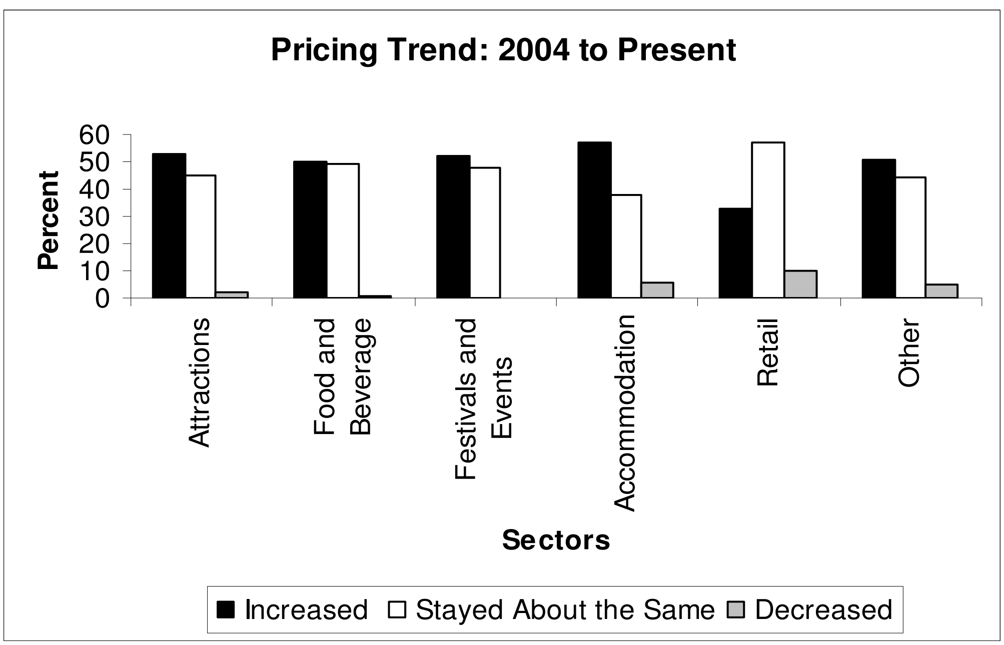
For Toronto's tourism industry, the Resource Audit indicated that the majority of prices related to tourist activities have been trending upwards (see Table 4.46 on the following page).

[1] Sources: State Sales Tax Rates. Retrieved October 26, from http://www.taxadmin.org/FTA/rate/sales.html and Canadian Taxpayers Federation. Tax Rates by Province – 2000. Retrieved October 26, 2007, from http://www.taxpayer.com/pdf/TaxRates%202000.pdf

Table 4.46[1]
Pricing Information

Main Category	Sub-Category	Price Range (CAD)	Trend
Core Experiences			
Performance Arts	a. Theatre	$7-$539	up
	b. Dance	$15-$24	up
	c. Concerts	Free-$300	up
	d. Opera	$60-$275	up
Cultural Heritage	a. Museums	$9-$85	up
	b. Galleries	Free-$100	up
Meetings and Conventions	-	-	up
Trade/Consumer Shows	-	Free-$145	up
Attractions	-	Free-$539	up
Supporting Experiences			
Dining	-	$7-$250	up
Shopping	-	Discount - High End	flat
Festival and Events	-	Free-$250	up
Outdoor Recreation	a. Golf	$12-$48	up
	b. Skiing	$9-$25	flat
Spectator Sports	-	Free-$300	up

Figure 4.11[2]
Pricing Trend: 2004 to Present



[1] Source: Resource Audit
[2] *Ibid*

Element "D": Accessibility – Rating: Yes

The Accessibility criteria and measures assess:

- The ease of getting to the destination;
- The transportation modes that serve it;
- For waterfront communities, "friendliness" to cruise ships or boat passengers.

Criteria and Measures	Rating
D1. The destination is within 2-3 hours from major population centres.	**Yes**
D1.i The travel time to the nearest major urban market is less than 3 hours	Yes
D1.ii The population with 3 hours drive is substantial	Yes
D1.iii Drive time from the nearest U.S. border crossing or international airport is less than 2 hours	Yes
D1.iv Flight time from the international to the nearest regional airport is less than 1 hour	Yes
D1.v Drive time from the airport is less than 1 hour	Yes
D2. Travel to the destination is not unpleasant, and is achievable with minimum effort and discomfort.	**Almost**
D2.i Travel to the destination is not unpleasant	Almost
D2.ii A direct connection to the destination is conveniently available, or travel by private car is over a route generally accepted as direct and well marked	Almost
D3. The destination is accessible by alternative travel modes and price points.	**Yes**
D3.i Alternative modes of travel to the destination are available	Yes
D3.ii If located on the water, the destination is accessible to cruise ships	Yes
D3.iii If located on the water, the destination offers slips to transient boaters	Yes
D3.iv If located on the water, the destination's cruise ship and/or transient marina slip dockage are located close to downtown	Yes
D4. The destination is investing in making access to it and its attractions attractive and visitor friendly.	**Almost**
D4.i The Transportation Resource Checklist has been completed	Yes
D4.ii And a minimum of 9 "Yes's" have been recorded	Almost

The Toronto area has excellent access to other major North American metropolitan areas. The region is within a 500 mile radius (one day's drive or 1 hour flight) of 135 million people. Direct air service between major cities in Canada and the U.S. has nearly doubled in the past 6 years.

Figure 4.12[1]
Proximity to Major Urban Centres

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[1] Source: Ontario Investment Service & Department of Foreign Affairs and International Trade. Investing in the GTA. Retrieved July 26, 2007, from http://www.greatertoronto.org/investing_demo_01.htm

Table 4.47[1]
Population Centres Within 3 hour Drive from Toronto

Destination	Population (2006)	Time it takes to get there from Toronto	Distance (approx.)
Ajax	90,167	36 min.	28.25 miles / 45.46 km
Barrie	128,430	1 hr. 13 min.	59.36 miles / 95.53 km
Brampton	433,806	37 min.	27.20 miles / 43.77 km
Brantford	90,192	1 hr. 18 min.	66.14 miles / 106.44 km
Buffalo City	292,648 (2000)	1 hr. 50 min.	11.45 miles / 18.43 km
Burlington	164,415	45 min.	37.07 miles / 59.66 km
Halton Hills	55,289	48 min.	37.81 miles / 60.85 km
Hamilton	504,559	50 min.	42.95 miles / 71.87 km
London	352,395	2 hrs. 16 min.	121.09 miles / 194.88 km
Markham-Unionville	261,573	24 min.	17.07 miles / 27.47 km
Milton	53,939	47 min.	36.17 miles / 58.21 km
Mississauga	668,549	29 min.	18.67 miles / 30.05 km
Newmarket	74,295	40 min.	31.96 miles / 51.43 km
Niagara Falls	82,184	1 hr. 33 min.	82.67 miles / 133.04 km
Oakville	165,613	30 min.	24.78 miles / 39.88 km
Oshawa	141,590	43 min.	35.96 miles / 57.87 km
Richmond Hill	162,704	22 min.	15.89 miles / 25.57 km
St. Catherines	131,989	1 hr. 19 min.	71.31 miles / 114.76 km
Waterloo	97,475	1 hr. 23 min.	70.03 miles / 112.70 km
Belleville	48,821	2 hrs. 5 min.	115.46 miles / 185.81 km
Cambridge	120,371	1 hr. 15 min.	62.77 miles / 101.02 km
Guelph	114,943	1 hr. 11 min.	59.54 miles / 95.82 km
Kingston	117,207	2 hr. 56 min.	162.30 miles / 261.20 km
Kitchener	204,668	1 hr. 18 min.	68.30 miles / 109.92 km
Peterborough	74,898	1 hr. 38 min.	82.89 miles / 133.40 km
Pickering	87,838	33 min.	23.96 miles / 38.56 km
Rochester	219,773 (2000)	2 hrs. 58 min.	170.42 miles / 274.26 km

Accessibility to the Destination (to Toronto)

The four main gateways to Toronto are as follows:

1. ***From Montreal/Ottawa***

    - *Private Automobile/Bus* – Highway 401 is the main highway route into Toronto. While highway access from the 401 to downtown is direct via the Don Valley Parkway, traffic volumes are normally heavy, especially during rush hours and, therefore, travel time is subject to delay. Most intercity buses travel to the main bus terminal at Dundas and Bay. Their trips are often impacted by traffic congestion on downtown streets getting to and from the highway.

    - *Rail* – There is direct and frequent Via Rail train service from Montreal and Ottawa (as well as intermediate towns and cities, such as Kingston). The Via Rail trains

[1] Source: Retrieved July 2007, from www.mapquest.ca

make a stop in the east end at Guildwood (Kingston Road/Eglinton area), and at Union Station. Union Station is located downtown at Bay Street and Front Street.

- *Air* – Air Canada and West Jet provide direct and frequent air service from Montreal and Ottawa to Pearson International Airport. Porter Airlines provides direct and frequent air service from Montreal and Ottawa to Toronto Island Airport.

2. *From Detroit/Windsor*

- *Private Automobile/Bus* – Highway 401 is the main highway route into Toronto. An alternate route is also available by way of using Highway 403/QEW/Gardiner Expressway, which intersects Highway 401 near Brantford. Bus service from Detroit/Windsor is provided by Greyhound.

- *Rail* – There is direct and frequent Via Rail train service from Windsor (as well as intermediate cities such as London, Brantford, Hamilton and Kitchener/Waterloo/Guelph).

3. *From Buffalo/Niagara Falls*

- *Private Automobile/Bus* – The QEW/Gardiner Expressway is the main highway route into Toronto. Bus service from Buffalo/Niagara Falls is provided by Greyhound.

- *Rail* – Amtrak offers daily train service from New York City via Buffalo and Niagara Falls, NY to Toronto Union Station. Via Rail operates additional trains between Niagara Falls, ON and Toronto Union Station.

4. *From Barrie and Northern Ontario*

- *Private Automobile/Bus* – Highway 400 is the main highway route into Toronto. If driving in by car, access to the downtown area can be via Highway 400 to Highway 401 eastbound and then the Don Valley parkway southbound to the Gardiner Expressway. Alternatively, from the south end of Highway 400, access is available via the many arterial roads. Highway 400 also is the southern access route to Toronto for traffic originating from western Canada and northern Ontario on the Trans Canada Highway. Both Greyhound and Ontario Northland offer bus service into Toronto. One can select to get off at the Yorkdale bus station in the north end, or stay on to go to the Toronto Coach Terminal, located at Bay and Dundas.

- *Rail* – Ontario Northland also offers a daily train from northern Ontario to Union Station.

- *Air* – Air service is available to Pearson Airport from northern Ontario communities such as Timmins and Thunder Bay.

Accessibility Within the Destination (Upon Arrival)

Having arrived in Toronto the three main transportation hubs are:

1. ***Union Station***

   - Union Station provides access and connections to all areas within Toronto by way of the TTC (subways and buses), Go Transit (trains and buses), PATH (underground walkway network) and Taxi Cabs.

2. ***Pearson Airport***

   - There is bus service from Pearson Airport to downtown Toronto via the Airport Express bus. The TTC also services the airport with bus service to TTC subway stations which provide access to all destinations in Toronto. There is also shuttle bus service to major hotels in the airport area. Flat rate licensed taxi cabs and limousines are also available.

3. ***Toronto Coach Terminal***

   - The downtown bus terminal is located at Bay Street and Dundas Street (opposite the Eaton Centre). TTC buses, street cars and subway stations are available nearby. Taxi services are also readily available.

TTC Special Passes

To encourage visitors and residents to take public transit to the city's attractions and events the Toronto Transit Commission (TTC) launched several passes in 2006. The Family/Day Pass offers a single customer or a family/group of customers unlimited one-day travel on all regular TTC services. Family/Groups can travel using this pass on Saturday, Sunday or a statutory holiday while single pass holders can travel any one day of the week including statutory holidays. This pass encourages these groups to avoid the hassle of driving and the high cost of parking downtown. However an extra fare is required for Downtown Express routes or contracted routes operated by the TTC outside the City of Toronto. The Convention Pass is available by special arrangement with the TTC and is designed for international and domestic delegates, participants and attendees of conventions, incentives, meetings, conferences, seminars, trade shows and special interest groups. The Greater Toronto Area (GTA) Weekly Pass is an accepted fare on all regular TTC, Mississauga, Brampton and York Region Transit routes (and service operated by these systems) – valid Monday through Sunday. Customers using a GTA Weekly Pass are not required to pay the additional zone fare when crossing municipal boundaries.[1]

Signage

The quality of signage on the major highways leading to Toronto is good in that they provide information as to the distance to downtown Toronto, adequate advance notice of approaching exists, along with the road names, and services available such as hotels, restaurants, gas stations, etc.

[1] Source: City of Toronto. Fares and Passes. Retrieved September 2007, from http://www.toronto.ca/ttc/fares.htm#gta

However, upon entering the City of Toronto, there is little in the way of directional signage to any of the major tourist oriented facilities. Unless the visitor knows in advance the route to travel, and where to exit, the visitor will not see any directional signage unless he/she happens to drive to its immediate vicinity.

The situation is even worse for those attempting to drive out of Pearson International Airport. Again, unless one knows the route and which highway to take, there is not even a clear indication upon leaving the terminal buildings as to how to drive to downtown Toronto.
The deficiencies mentioned above are backed up by The University of Guelph's School of Hospitality and Tourism Management's study, *Understanding Overnight Visitors to the Greater Toronto Area*. The survey respondents indicated that they perceive that signage was an issue that requires improvement.

Marine Accessibility

Ferries

The City of Toronto's Parks, Forestry and Recreation Department operates the ferry boat service from the Mainland Ferry Docks, located at Bay St. and Queen's Quay West to the Toronto Island Park. Regular service is provided to Centre Island, Ward's Island and Hanlan's Point from April 13, 2007 to October 10, 2007. Winter service (October 11, 2007 to April 12, 2008) is provided on a limited basis to Ward's Island and Hanlan's Point.

Cruise Ships and Transient Boats

Toronto is accessible to cruise ships. Toronto offers a harbour with 8.2 m of draft and 213 m of dock wall, at the international marine passenger terminal.[1] There are 1,926 slips available to transient boaters located at various areas of the waterfront, including downtown.

Transportation Resources Checklist

The Transportation Resources Checklist was completed. For a discussion of the issues, please refer to the "Accessibility" section (page 90) and the "Road, Transit, Parking and Trail Capacity" section (page154).

Why Should the Tourism Industry Consider Accessibility (Special Needs)?

According to the 2006 TAMS, in Canada, there were 1.2 million travellers (or 5.9% of all Canadian travellers) who indicated that an accessible travel destination was highly important to them when choosing a destination for an out-of-town pleasure or vacation trip. Another 3.2 million Canadian travellers (or 15.5%) indicated that this consideration was somewhat important to them in choosing their travel destination. In the U.S., 16.1 million travellers (or 9.2% of all American travellers) indicated that an accessible travel destination was highly important to them when choosing a destination while another 32.5 million (or 18.4%) indicated it was somewhat important to them.

It is important to point out that those interested in the issue of accessibility are not only the disabled, but also the growing numbers of seniors, as a result of Canada's (and the western world

[1] Source: Resource Audit

in general) aging population. Families may also be concerned about the ease of travelling with young children in strollers.

Accessibility, in this instance, refers to how easy it is for everybody to approach, enter, and use buildings, outdoor areas and other facilities, including transportation services, independently, without the need for special arrangements. Providing information on accessibility and improving access benefits a wide range of people who want to travel, but may find it difficult.

Providing accessible public transportation to tourist facilities provides an additional attraction for customers and gives a competitive advantage. Transportation providers, facilities and destinations that recognize the economic and social benefits of improving access, and wish to extend the service they provide, can consider investing in physical improvements where necessary and meeting higher standards of access. Transportation services, tourist facilities and destinations should focus on the barriers to access created by:

- Poor physical layout.
- Architectural barriers, such as narrow doors and stairs, as well as the lack of basic equipment.
- The way in which services are delivered.

There is already interest in this issue in many other parts of the world (i.e. potential competitors to Toronto in the quest to attract more tourists). The European Commission, for example, produced a document in June, 2004, entitled, "Improving Information on Accessible Tourism for Disabled People". It not only presents the case for investing in creating accessible facilities along with an accompanying information/publicity campaign, but it also provides a template for completing "accessibility fact sheets", as well as detailed specifications as to how to build and configure according to stated standards of access that would meet the needs of potential users with access concerns.

Toronto already has a good track record in accessibility awareness together with the necessary requirements and standards. There just needs to be a greater focus on these initiatives for those in the tourist industry to be in a stronger position to better promote the availability of accessible facilities with accessible public transportation to bring the visitors to the sites.

The Resource Audit confirmed that the majority of respondents indicated that they offer services or facilities to visitors with special needs. However, while 71.4% answered "Yes" to this question, the 28.6% who answered "No" actually represents a substantial number of tourist sites. This means that a tourist with special needs will find that nearly 1 in 3 sites may present him/her with accessibility problems, and, therefore, may represent a barrier to repeat visits, or even coming at all.

Even when looking at those respondents who indicated they did offer services or facilities, it is noteworthy to point out that there remains a gap in what is offered. For example, only 60.3% had an entrance ramp, 58.6% had wheelchair accessible washrooms, only 49.5% offered wheelchair accessible food and beverage and even lower percentages for other services and facilities (see Table 4.48 on the following page).

Table 4.48[1]

Services/Facilities Provided for Visitors with Special Needs

	Percentage
Entrance ramp	60.3%
Family washroom/change room	34.6%
Special dietary food options	38.2%
Wheelchair accessible F&B facilities	49.5%
Wheelchair accessible equipment	19.1%
Wheelchair accessible washrooms	58.4%
Other	21.7%
Note: Multiple responses were possible	

By primary business sector, it is apparent that while Festival & Events and Attractions scored the best of all, with only 9.3% and 18.8% respectively responding "No", the Retail sector, for example, had almost half responding "No" (45.4%). This may indicate that those sectors that may be considered "support" services and facilities to the tourist attractors, are those that are most deficient in services and facilities for those with special needs. From the perspective of the special needs user, it may be considered a negative experience if even one facility is inaccessible to him/her. For example, if someone with special needs was part of a group that first visited a museum that was fully accessible, but then afterwards went to a restaurant that wasn't accessible, the special needs individual will be excluded from part of the group's experience.

Therefore, it is apparent that despite all of the recent attention being given to providing access to those with disabilities and special needs, Toronto's tourist sites do not provide comprehensive access. Given the aging of the population and the corresponding increase in demand in this area, improvements in the appropriate areas and the advertising of their availability would represent an opportunity for growth in this growing market segment.

[1] Source: Resource Audit

Table 4.49[1]
Cross-Tabulation of Primary Businesses and Services/Facilities Offered to Visitors with Special Needs

Primary Business		No	Yes	Total
Accommodation	Count	23	70	93
	% within primary business	24.7%	75.3%	100.0%
Attractions	Count	21	91	112
	% within primary business	18.8%	81.3%	100.0%
Food & Beverage	Count	39	125	164
	% within primary business	23.8%	76.2%	100.0%
Festivals & Events	Count	5	49	54
	% within primary business	9.3%	90.7%	100.0%
Retail	Count	98	118	216
	% within primary business	45.4%	54.6%	100.0%
Other	Count	15	47	62
	% within primary business	24.2%	75.8%	100.0%
Grand Total	Count	201	500	701
	% within primary business	28.7%	71.3%	100.0%

Visitors with special needs may also find it difficult to find out what services and facilities are available to them. While many individual venues and attractions indicate how to access special services or if they can accommodate wheelchairs on their websites, there currently is not a consolidated information source available. Toronto also seems to have a shortage of facilities providing short term rentals of wheelchairs, strollers, and other mobility devices, meaning that visitors must bring their own.

[1] Source: Resource Audit

Element "E": Accommodations Base – Rating: Yes

The Accommodations Base criteria and measures assess the breadth and depth of the destination's offering in terms of:

- The range of accommodation classes available;
- The range of locations available; and
- The presence of higher end operators.

Criteria and Measures	Rating
E1. The destination offers accommodations across a range of types and a variety of quality levels and price points.	**Yes**
E1.i The destination offer rooms at a variety of quality levels and price points	Yes
E1.ii There is a range of choices in locations relative to attraction venues and a range of price points	Yes
E1.iii This inventory includes representation by branded and widely known and respected higher end operators	Yes

Accommodation Type

Toronto offers an assortment of accommodation facilities at varying price points. There are more Bed and Breakfast facilities in the city than there are other accommodation property types. However they are limited by the number of rooms offered (5.13 on average), as some B&B's have only one room to let. In comparison, chain hotels have 326 rooms on average. They represent the largest number of rooms out of the hotel inventory. University Residences tend to operate as hotels during the summer months. They represent the second largest number of available room rentals, and are heavily reliant on summer season tourists. This type of accommodations tends to cater more to a younger backpacker crowd similar to hostels. Motels have a small share of the total number of rooms and do not tend to be part of a larger chain. A large number of independent motels and hotels are also available for visitors. There is only one RV Park/Campground in Toronto located at Glen Rouge. Recently, the City of Toronto's Tourism Unit evaluated opportunities for development of the RV market and concluded that there is potential demand for additional facilities, provided that appropriate site can be identified.

Table 4.50[1]
Types of Accommodation

Property Class	# of Properties	# of Rooms	Price Range (CAD)
Bed and Breakfast	73	375	$45-$160
Motel	34	1,163	$50-$109
Hotel - Independent	29	2,995	$30-$495
Hotel - Chain	66	21,082	$69-$1000
Hotel/Condo	9	827	$50-$116
Hostels	6	331	$18-$112
Year-round Accommodations Subtotal	***217***	**26,773**	***$30 - $1000***
University Residences	11	3,313	$55-$85
RV Park	1	Full Service -87 Un-serviced -27	$30/day $22/day

Accommodations in Relation to Attractions

Accommodations in Toronto are generally located within close proximity to key attractors. The Ontario Science Centre is the attractor furthest away from the majority of hotels (see Table 4.51 on the following page for further details).

[1] Source: Resource Audit

Table 4.51[1]
Distances to Attractors from Accommodations

Hotel name	Location	CN Tower Entertainment District	Ontario place - Exhibition place	ROM - Yorkville	Ontario Science Centre	Yonge Dundas Square	Distillery District	Chinatown	Central Waterfront
Four Seasons	Yorkville	3.38 km	6.54 km	0.27 km	10.67 km	2.17 km	4.89 km	2.80 km	4.31 km
Delta Chelsea	Downtown Yonge	2.39 km	5.53 km	1.67 km	11.20 km	0.74 km	2.82 km	1.83 km	2.20 km
Sheraton Centre	Financial District	1.35 km	4.50 km	2.17 km	11.45 km	1.09 km	2.26 km	1.70 km	1.36 km
Sutton Place	Downtown	3.00 km	6.17 km	0.82 km	10.80 km	1.35 km	3.57 km	2.43 km	3.39 km
Drake Hotel	Downtown West	3.47 km	2.91 km	5.19 km	17.26 km	4.12 km	5.64 km	2.80 km	4.86 km
Le Royal Meridian King	St. Lawrence Market	1.52 km	4.47 km	3.07 km	11.84 km	1.08 km	1.68 km	2.60 km	1.15 km
Old Mill Inn & Spa	Bloor West Village	10.62 km	8.64 km	8.81 km	23.33 km	13.08 km	12.72 km	8.78 km	10.37 km
Pantages Suites	Downtown Yonge	1.94 km	4.89 km	2.49 km	10.78 km	0.50 km	1.95 km	2.01 km	1.56 km
Soho Metropolitan Hotel	Entertainment District	0.38 km	3.02 km	3.17 km	14.55 km	2.09 km	3.15 km	1.44 km	1.64 klm
Intercontinental	Bloor - Yorkville	0.24 km	3.29 km	3.02 km	13.55 km	1.93 km	2.20 km	2.09 km	1.01 km
Global Village Backpackers	King - Spadina	0.77 km	2.94 km	3.23 km	14.46 km	2.15 km	3.22 km	1.12 km	2.15 km
Cawthra Square	Church-Wellesley	3.83 km	6.63 km	1.83 km	9.96 km	1.86 km	2.93 km	3.37 km	3.41 km
Hotel Le Germain Toronto	Downtown	0.59 km	3.23 km	3.21 km	14.76 km	2.14 km	3.21 km	1.56 km	1.85 km
Metropolitan	Downtown Asian	1.73 km	4.90 km	1.73 km	11.12 km	0.30 km	2.73 km	1.27 km	2.14 km
The Fairmont Royal York	Financial District	0.64 km	3.70 km	2.83 km	13.69 km	1.75 km	2.81 km	2.36 km	1.31 km

[1] Source: Retrieved July 2007, from www.mapquest.ca

PERFORMANCE DIMENSION – RATING: ALMOST PREMIER RANKED

The Performance elements, criteria and measures identify the extent to which the destination is successful and recognized in the marketplace. The City of Toronto was assessed on the following three Performance elements: Visitation, Occupancy and Yield; and Critical Acclaim.

Element "F": Visitation – Rating: Yes

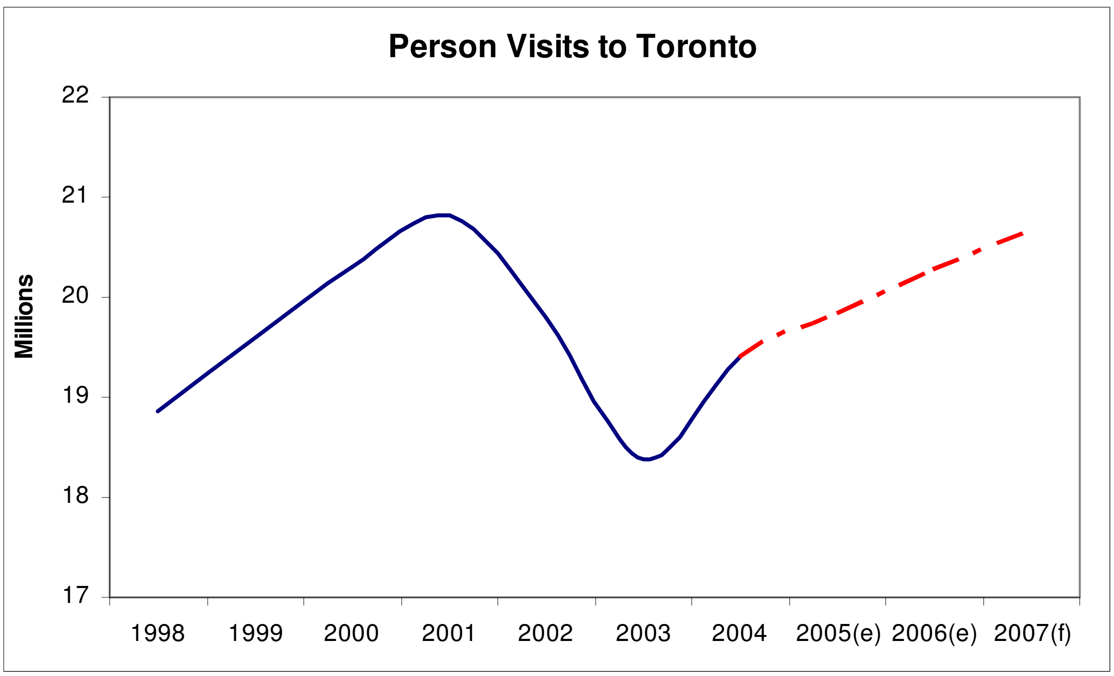
The Visitation criteria and measures assess the destination's market performance in terms of:

- Its visitation numbers and market shares;
- Its attractiveness of different market segments; and
- Its attractiveness over the four seasons of the year.

Criteria and Measures	Rating
F1. The destination draws a significant share of Ontario's total travel.	**Yes**
F1.i The destination attracts a significant number of guests	Yes
F1.ii The destination attracts a significant share of total VFR/Pleasure motivated travel by residents of Ontario	Yes
F1.iii The destination attracts a significant portion of its guests from markets beyond Ontario's borders	Yes
F1.iv The destination's share of visits by all visitors (day and overnight) to the province from markets beyond Ontario's borders is significant	Yes
F1.v The destination's share of meetings and conventions motivated travel to Ontario is significant	Yes
F1.vi Total visits is not dominated by same day guests	Yes
F1.vii The destination's share of visits in Ontario which included activities relying on the destination's core attractors classes is significant	Yes
F1.viii The destination's shares of the visits identified above are significant in comparison to competitive destinations in Ontario	Yes
F2. The destination offering draws from multiple market segments.	**Yes**
F2.i The destination attracts visitors with differing visitor profiles	Yes
F3. The destination offering draws from market segments over more than one season.	**Yes**
F3.i Visitation is distributed among multiple market segments over more than one season	Yes

Unfortunately, 2004 is the most recent year for which official statistical information about total visitation is available in Canada. This is because Statistics Canada changed the methodology and definition of domestic travel in 2005 and is still analysing the data before their release. That is the reason why the most recent official statistical information about total visits to Toronto comes from 2004. All information released since 2004 by various organizations regarding total visits are estimates and projections. 2005 and 2006 estimates by the City of Toronto (available in Figure 5.1) were derived from analysis of PRTD Audit survey responses. The figures were then compared to estimated percentage growth in visits by The Conference Board of Canada, Tourism Toronto and The Ministry of Tourism, and were found to be consistent. The forecast for 2007 visits was calculated using projections based on most recent border crossings for international visitors, and domestic travel forecasts provided by The Conference Board of Canada, and The Ministry of Tourism.

Figure 5.1[1]
Person Visits to Toronto



Toronto as a destination draws a significant share of Ontario's total travel. In 2004 Toronto attracted a total of 19,392,249 visitors. Of these guests, 10,671,396 were on day trips and 8,720,852 were overnight visitors. Person visits to Toronto peaked in 2001, but decreased sharply afterwards due to uncontrollable factors. Since 2003 tourism visits have been increasing.

[1] Source: Statistics Canada, CTS/ITS, 2004 (Note: 2005 and 2006 numbers are estimates based on findings from the PRTD Audit. 2007 numbers are forecasts by the City of Toronto, EDCT, Tourism Section)

Total VFR/Pleasure Motivated Travel by Ontario Residents

As the largest population centre in Canada, Toronto is a key destination for VFR/Pleasure motivated trips. Domestic and international visitors who come to Toronto for VFR/Pleasure account for 13.4 million trips annually. Interestingly, an identical percentage (69%) of Canadian and international travellers visit Toronto for VFR/Pleasure.

The destination attracted a significant share of the total VFR/Pleasure motivated travel by residents of Ontario. In 2004 Toronto attracted a total of 9,392,693 of the total 70,890,000 VFR/Pleasure motivated trips taken by Ontario residents. This represents a share of 13%. Overnight visits in the VFR/Pleasure motivated travel category represented 10% of the total 28,852,000 overnight VFR/Pleasure motivated trips taken by Ontario residents or 2,925,538.

Visitation from Beyond Ontario's Borders

The destination attracts a significant portion of its visits from markets beyond Ontario's borders. In 2004, overnight and same day visitors came from the following origins:

Table 5.1[1]
Origin of Person Visits to the City of Toronto

	Overnight	% of Overnight trips	Same Day	% of Same day trips	Total	% of trips
Ontario	3,899,800	45%	9,183,316	86%	13,083,116	67%
Other Provinces	1,656,742	19%	221,761	2%	1,878,503	10%
U.S.	2,046,046	23%	853,803	8%	2,899,849	15%
Overseas	1,118,265	13%	412,517	4%	1,530,782	8%
Total	8,720,853	100%	10,671,397	100%	19,392,250	100%

Table 5.2[2]
Toronto's Share of Ontario Visits from Markets beyond Ontario

	Toronto	Ontario	% Share of Ontario Visits
Other Provinces	1,878,503	5,847,000	32%
U.S.	2,899,849	21,391,000	14%
Overseas	1,530,782	1,993,000	77%

[1] Source: Statistics Canada, CTS/ITS, 2004
[2] *Ibid*

Business Visitation

Toronto is the financial hub of Canada and attracts a significant share of travel to Ontario for the purpose of business and business convention travel.

Table 5.3[1]
Toronto Share of Ontario Visits for Business Purposes

	Toronto	Ontario	% Share of Ontario Visits
Business Visitors	3,676,015	10,853,000	34%
Business Convention Visitors	685,000	1,302,000	53%

Same Day vs. Overnight

Visitation is not dominated by same day guests:

- In 2004, visitation by same day guests was 10,671,397 or 55%.
- In 2004, visitation by overnight guests was 8,720,853 or 45%.

Primary Purpose of Trip

Toronto is the most important Canadian destination receiving 8.7% of total trips to Canada. The nearest competitor is Montreal receiving 6.5% of total Canadian trips. Shares of visitation to Toronto were significant when compared to other major Canadian Cities by Primary Purpose of Trip. Business visitations represent 15.6% of total business visits in Canada compared to Montreal's 9.8%. This emphasizes Toronto's importance as a business centre. VFR visits to Toronto are also substantial as they represent 9.9% of total VFR visits to Canada. Toronto's shares of tourists coming for Pleasure and Personal/Other reasons are only slightly ahead of its competitors.

Table 5.4[2]
Primary Purpose of Trip

Primary Trip Purpose	Toronto	Quebec City	Montreal	Ottawa	Edmonton	Vancouver
Total of Canadian Visits	8.7%	4.1%	6.5%	3.5%	2.1%	3.5%
Visit Friends or Relatives	9.9%	3.7%	7.8%	4.1%	1.9%	2.7%
Pleasure	6.7%	4.8%	5.3%	2.6%	1.4%	3.9%
Personal and Other	6.5%	3.1%	4.9%	3.1%	3.3%	3.2%
Business	15.6%	4.4%	9.8%	5.2%	3.4%	4.5%

[1] *Ibid*
[2] Source: Statistics Canada, CTS/ITS, CITIES data, 2004

Toronto Share of Ontario Visitation

Table 5.5, describes Toronto's shares of Ontario visitors activities. Toronto has the highest share of visitors' participation in "Zoos/Aquariums/Botanical Gardens", "Museums/Art Galleries" and "Cultural Performances". It is perhaps surprising that given Toronto's abundant shopping assets and sporting events, its visitors have lower participation in those activities. It is important to note that the values given as Toronto shares included activities that could have taken place outside of Toronto while on the visit to Toronto (e.g. Visiting Toronto and going to Casino Rama or Niagara casino; or going to Algonquin Park during a trip to Toronto).

Table 5.5[1]
Toronto's Share of Ontario Visitor Activities

Activity	Toronto	Ontario	Toronto % of Ontario
Visit Friends/Relatives	10,463,232	58,771,000	17.8%
Festivals/Fairs	1,222,356	4,906,000	24.9%
Cultural Performances	2,222,031	5,845,000	38.0%
Museums/Art Galleries	2,090,763	5,764,000	36.3%
Zoos/Aquariums/Botanical Gardens	1,293,916	3,338,000	38.8%
Sports Events	1,252,260	6,765,000	18.5%
Shopping	8,194,814	38,156,000	21.5%
Sightseeing	5,212,358	23,836,000	21.9%
Bars/Nightclubs	3,447,955	10,687,000	32.3%
Casinos	487,924	4,945,000	9.9%
Theme Parks	1,116,947	3,186,000	35.1%
National/Provincial Nature Parks	1,531,619	7,698,000	19.9%
Historic Sites	1,720,103	7,037,000	24.4%
Any Outdoor/Sports Activity	2,242,915	25,966,000	8.6%
Boating	313,468	5,383,000	5.8%
Golfing	231,741	2,582,000	9.0%

Toronto Share vs. Ontario Destinations

In comparison to other competitive destinations within Ontario based on activities that visitors participate in, Toronto rated the highest in "Cultural Performances", "Zoos/Aquariums/Botanical Gardens", "Museums/Art Galleries", and "Theme Parks" (as illustrated in Table 5.6 on the following page). Ottawa and Niagara are the closest competitors to Toronto. The Competitive Comparison Index (obtained by dividing Toronto's proportion of an activity by its closest competitor's proportion of the same activity) reveals that Toronto has the largest advantage to other Ontario destinations for visitors participation in "Cultural Performances", and "Visiting Friends/Relatives" activities. The city faces stiff competition in the "Sightseeing" and "Zoos/Aquariums/Botanical Gardens" activities category by Niagara Falls. Most noteworthy, Toronto underperforms when it comes to visiting "Historic Sites".

[1] Source: Statistics Canada, CTS/ITS, 2004

Table 5.6[1]
Toronto's Share vs. Other Ontario Destinations

Activity	Competitive Comparison Index	Toronto Share	Ottawa Share	Niagara Share	Hamilton Share	Essex County Share	Sudbury Share
Visit Friends/Relatives	2.55	17.8%	7.0%	5.4%	3.6%	2.1%	1.2%
Festivals/Fairs	1.93	24.9%	12.6%	12.9%	1.9%	2.2%	1.0%
Cultural Performances	3.08	38.0%	9.1%	12.4%	1.5%	1.3%	1.1%
Museums/Art Galleries	1.65	36.3%	18.4%	22.0%	2.0%	2.1%	2.2%
Zoos/Aquariums/Botanical Gardens	1.08	38.8%	8.0%	36.0%	6.0%	3.4%	1.2%
Sports Events	2.39	18.5%	7.8%	7.3%	5.3%	1.5%	0.6%
Shopping	2.00	21.5%	9.3%	10.7%	3.1%	2.3%	1.6%
Sightseeing	1.06	21.9%	8.4%	20.6%	2.5%	2.0%	1.4%
Bars/Nightclubs	2.28	32.3%	9.9%	14.1%	4.1%	3.2%	1.5%
Casinos	0.40	9.9%	7.1%	24.9%	1.4%	4.1%	1.2%
Theme Parks	1.44	35.1%	5.3%	24.4%	2.8%	2.6%	1.4%
National/Provincial Nature Parks	0.95	19.9%	8.2%	21.0%	3.3%	2.6%	1.2%
Historic Sites	0.84	24.4%	14.5%	29.1%	3.5%	2.6%	1.6%
Any Outdoor/Sports Activity	1.22	8.6%	5.6%	7.1%	2.6%	1.9%	1.2%
Boating	1.09	5.8%	5.0%	5.3%	0.9%	1.2%	1.4%
Golfing	1.43	9.0%	5.0%	6.3%	4.0%	2.1%	1.1%

Toronto Share vs. Canadian Destinations

When comparing Toronto's share of activities participated in Canada to other major Canadian Cities, Montreal emerges as the closest Toronto competitor (Please see Table 5.7 on the following page). The Competitive Comparison Index reveals that Toronto outperforms its Canadian competitors by a largest margin for the following trip activities: "Visit a theme or amusement park", "Attend other cultural events", and "Attend sports events". Again, Toronto underperforms when it comes to visiting "Historic Sites".

[1] Source: Statistics Canada, CTS/ITS, 2004

Table 5.7[1]
Toronto vs. Other Canadian Destinations

Trip Activity Total	Competitive Comparison Index[2]	Toronto	Quebec City	Montreal	Ottawa	Edmonton	Vancouver
Visit friends or relatives	1.31	9.7%	4.1%	7.4%	3.9%	2.4%	3.0%
Attend a festival or fair	1.20	11.5%	8.3%	9.6%	6.7%	2.9%	5.2%
Attend other cultural events	1.48	14.9%	8.4%	10.0%	6.2%	2.4%	8.9%
Attend sports events	1.47	9.8%	3.3%	6.6%	3.2%	3.3%	3.3%
Go shopping	1.33	10.6%	5.9%	7.9%	4.3%	3.6%	5.5%
Go sightseeing	1.36	10.4%	6.4%	6.9%	4.4%	1.9%	7.6%
Go to a bar or nightclub	1.35	14.4%	6.1%	10.7%	4.9%	2.7%	5.9%
Go to a casino	0.78	6.9%	4.4%	8.9%	6.6%	3.1%	4.1%
Visit a theme or amusement park	1.73	17.0%	9.9%	8.4%	2.7%	8.2%	5.9%
Visit a National or Provincial nature park	0.70	7.4%	5.9%	4.8%	3.8%	2.1%	10.5%
Visit an Historic site	0.85	10.1%	11.9%	11.4%	6.7%	2.3%	9.6%
Participate is sports/outdoor activities	0.99	4.4%	4.4%	3.9%	2.5%	1.3%	2.87%
Golfing	1.39	5.3%	1.2%	2.4%	2.3%	1.9%	3.8%

Market Segments

Toronto appeals to multiple market segments. Visits to Toronto are relatively stable over the year, mainly as a result of the complementarity between pleasure tourism and business and conference tourism. The VFR segment is fairly evenly distributed throughout the four quarters. In the third quarter "Adults with Children" increases as does "Pleasure Travel". "Business" travel tends to peak in the fourth quarter. The quarterly distribution by segment and purpose are as follows:

Table 5.8[3]
Quarterly Distribution of Visitation by Market Segments

	Q1	Q2	Q3	Q4
Total Visitors	22.5%	24.6%	27.7%	25.2%
Adults Only	21.7%	24.7%	26.0%	27.6%
Adults with Children	23.9%	24.4%	30.4%	21.3%
VFR	24.7%	25.6%	24.8%	25.0%
Pleasure	19.1%	24.8%	35.8%	20.4%
Business	23.4%	22.2%	19.6%	34.8%
Other/not stated	24.1%	24.8%	26.4%	24.6%

[1] Source: Statistics Canada, CTS/ITS, CITIES data, 2004
[2] Note: The Competitive Comparison Index was obtained by dividing Toronto's proportion of an activity by its' closest competitor proportion of the same activity
[3] Source: Statistics Canada, CTS/ITS, 2004

Element "G": Occupancy and Yield – Rating: Almost

The Occupancy and Yield criteria and measures assess the destination's market performance in terms of:

- Accommodations base occupancy; and
- Guest expenditure levels.

Criteria and Measures	Rating
G1. The commercial accommodations base has occupancy rates in excess of 65%.	**Almost**
G1.i The annual average accommodations occupancy rate is over 65%	Yes
G1.ii Occupancy is spread throughout the year	Almost
G2. The destination attracts a significant share of total provincial expenditures.	**Almost**
G2.i The average expenditure per capita for guests on day trips to the destination is equal to or greater than the provincial average	No
G2.ii The average expenditure per capita for guests on overnight trips to the destination is equal to or greater than the provincial average	Yes
G2.iii The destination's share of expenditures by guests on day trips is equal to or greater than its share of day trips in Ontario	No
G2.iv The destination's share of expenditures by guests on overnight trips is equal to or greater than its share of overnight trips in Ontario	Yes

Occupancy Rate

The commercial accommodation base has occupancy rates in excess of 65%. In 2006, the annual average accommodation occupancy rate for Toronto was 66.4%. However, a consultation with hotel industry experts has revealed that generally, the industry is looking for occupancy to be in the 70 % range to have a chance at viability.

Occupancy Rate – Quarterly

The third quarter represents the largest occupancy for the year at 73.9%, while the occupancy in Q1 was 58.6%.

Table 5.9[1]
Quarterly Occupancy Rates

Q1	Q2	Q3	Q4
58.6%	69.9%	73.9%	62.6%

[1] Source: Pannell Kerr Forster Consulting Inc. *Trends in the Canadian Hotel Industry*. Cited in Ontario Ministry of Tourism, July 2007, Ontario Hotel Operation Statistics, 1997-2006.

Share of Provincial Visitors Expenditures

Toronto attracts a significant share of total provincial visitors' expenditures. In 2004 the average expenditure per capita for day trips to Toronto was slightly less (97.9% of or 2.1% less) than the average expenditure per capita for day trip visitors to Ontario. In 2004 the average expenditure per capita for overnight trips to Toronto was greater (145%) than the average expenditure per capita for visitors to Ontario.

Table 5.10[1]
Toronto's Share of Ontario Visitors Expenditures

	Toronto	Ontario	Percentage
Day Trips	$651,605,918	$4,474,313,000	14.6%
Overnight Trips	$3,410,763,587	$12,606,369,000	27.1%
Per Capita Expenditure			
Day Trip	$61.18 (CAD)	$62.48 (CAD)	97.9%
Overnight Trips	$391.1 (CAD)	$270.11 (CAD)	144.8%

In 2004, the total expenditure for guests on day trips was $651,605,918 or 14.6% of the $4,474,313,000 total for Ontario. The average expenditure per capita for guests on day trips was $61.2 or 97.9% of the $62.5 average for Ontario.

Total expenditure for guests on overnight trips to the destination was $3,410,763,587 or 27.1% of the $12,606,369,000 total for Ontario. The average expenditure per capita for guests on overnight trips to the destination was $391.1 or 145% of the $270.1 average for Ontario.

Total spending by guests on day trips to the City of Toronto was $651,605,918. Total spending by all tourists on day trips in Ontario was $4,474,313,000. The destination's share of total spending by these tourists was 14.6%. Toronto's share of day trips to Ontario was 14.9%.

Total spending by guests on overnight trips to the destination was $3,410,763,587. Total spending by all tourists on overnight trips in Ontario was $12,606,369,000. The destination's share of total spending by these tourists was 27.1%. Toronto's share of overnight trips to Ontario was 18.7%.

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[1] Source: Statistics Canada, CTS/ITS, 2004

Element "H": Critical Acclaim – Rating: Almost

The Critical Acclaim criteria and measures address the extent to which the destination is recognized as:

- "Must see/must do" on general grounds or those more specific to a given type of experience;
- Having a profile that contributes to the attractiveness of Ontario and Canada as a destination; and
- A top-ranked place to visit.

Criteria and Measures	Rating
H1. The destination is considered as "must see/must do" and is recognized as a symbol of its type of travel experience.	**No**
H1.i The destination is at the near or top of the list of places out-of-town guests must be taken, or things guests must do when "seeing the sights" in the wider travel region	Almost
H1.ii The destination is at near or top of mind when considering "must see/must do" places or activities offering the same type of travel experience as the destination	No
H2. The destination has a role in branding/marketing Ontario and/or Canada.	**Yes**
H2.i Destination imagery of, and/or text about the destination or its core attractors is used in promoting Ontario and/or Canada	Yes
H3. The destination or its attractors have been ranked "best in class" or "top tier" in consumer or industry rankings.	**Yes**
H3.i The destination or its core attractors have been ranked as "Number 1", "Best in Class", or "top tier"	Yes
H3.ii Other products or experiences in the destination have been ranked as "Number 1", "Best in Class", "top tier", or otherwise recommended	Yes

Toronto Consideration as a "Must See/Must Do" Destination

The Travel Intentions study comprises of series of studies whose goal is to measure intent to travel to Ontario and specific Ontario destinations within key U.S. and domestic markets. Interviewing was conducted by telephone among individuals 18 years or older using modified random digit dialling with a sample drawn from up-to-date telephone listings. The most recent study was completed in February, 2007. In total, 5,840 interviews were completed (1,909 in Canada; 3,931 in the United States.). As part of data processing, the sample was weighted using the most recently available census information from each country.

Toronto ranked a 7.1 "Must See" among Canadian Travellers based on a 10-point scale. Among Americans, Toronto ranked 6.7 as a "Must See" Destination. In both cases the "Must See" ranking has slipped by .2 (6.9 – 6.7) among American travellers from 2004 and by .4 (7.5 – 7.1) among Canadian travellers.

Table 5.11[1]
Toronto Ratings for Trip Types

	Americans			Canadians		
	Feb-04	**Feb-07**	**Change**	**Feb-04**	**Feb-07**	**Change**
Shopping/Restaurants/Nightlife	7.6	7.2	-0.4	8.1	7.9	-0.2
Arts, Culture, History	7.4	7.1	-0.3	7.8	7.6	-0.2
Strolling around to see buildings/sights	7.2	7	-0.2	7.4	7.1	-0.3
Family Vacation	7.1	6.8	-0.3	6.9	6.5	-0.4
Overall Rating	*7.5*	*7.2*	*-0.3*	*7.5*	*7.3*	*-0.2*
"Must See" Destination	*6.9*	*6.7*	*-0.2*	*7.5*	*7.1*	*-0.4*
Note: Average rating on 10-point scale among American/Canadian travellers						

Perceived Issues for Visitation to Toronto

The top 3 issues raised by Canadians that made them less inclined to travel to Toronto included:

1. "Issues of violence/crime"
2. "Too much traffic"
3. "Cost/Expensive"

The top 3 issues raised by Americans that made them less inclined to travel to Toronto were:

1. "Passport requirements"
2. "Difficulty/delays at the border"
3. "Bad weather"

Toronto Imagery/Text in Media: Tourism Toronto (TT)/Ontario Tourism Marketing Partnership Corporation (OTMPC)/Canadian Tourism Commission (CTC)

Tourism Toronto's 2006 consumer marketing campaigns focused on several themes and included both text and visuals highlighting the various city attractors. Images and text appeared predominantly in consumer magazines and newspapers in Ontario, Canada and U.S. cities (Boston, NY, Washington) and Border States. Other media employed included online, in-flight magazines. In the U.S. television, posters, direct mail and door hangars were used while free-standing inserts (FSI) were utilised in Ontario markets and radio in Ontario and U.S. markets.

- Family experiences: Toronto Zoo, Ontario Science Centre, Beaches.
- Luxury experiences: TD Jazz Fest, AGO, Blue Jays, Shakespeare in High Park, Hummingbird Centre, TIFF, Soulpepper, Wagner's Ring Cycle, Second City, Little India, Cabbagetown, Chinatown, Leslieville, St. Lawrence Market, Park Hyatt, King Edward Hotel, SoHo Metropolitan, Four Seasons, William Ashley, Holt Renfrew, MAC, Gee, Xacutti, Pusateri's, Yonge/Summerville and package offer.
- Cultural experience: Rogers Chinese Lantern Festival and package offer.
- Cultural experiences: "A Night Out" LOTR, Gee, Civelo, Holt Renfrew, Truffles, B2 plus a hotel price point.

[1] Source: Ontario Ministry of Tourism. (2007, February). *Travel Intentions Study Report Wave 8.* Prepared by TNS Canadian facts, Toronto. Retrieved July 2007, from http://www.tourism.gov.on.ca/english/research/travel_intentions/Feb%202007_Report.pdf

- Nightlife experiences: Guvernment, This is London, Republik, Gypsy Co-op, Docks, Sonic, Orange Room, and Lee's Palace.
- Shopping experiences: Yorkville, Bloor Street, Kensington, King Street, Mt. Pleasant, Queen Street, St. Lawrence Market and plus a hotel price point.
- "A Night Out": Gee, Civello, Holt Renfrew, Truffles, B2, and Lord of the Rings.
- Festive Season Holiday experiences: Santa Claus Parade, Rockettes, Cavalcade of Lights, Nutcracker, Seussical, Casa Loma, skating at Nathan Phillips Square plus a hotel price point.
- Festive Season Holiday Shopping: general images and text plus a hotel price point.

Consumer campaigns in partnership with the OTMPC incorporated images and text placed in newspaper advertising and direct mail pieces and focused mainly around events, festivals and special holidays. The Rogers Chinese Lantern Festival was used in a partnership CTC European newspaper advertising campaign to promote Canada.

- Canada Day activities: Festival of Fire, Toronto Zoo, Blue Jays, Edgefest, Toronto Downtown Jazz, Festival and including a hotel price point.
- Rogers Chinese Lantern Festival and package offer.
- Molson Grand Prix Weekend: Grand Prix packages, Molson Amphitheatre, Outdoor Art Exhibition, Festival of Fire, Fringe Festival, and CN Tower.
- Shopping: Yorkville, Bloor St., King St., Kensington, St. Lawrence, Mt. Pleasant, and Queen Street.
- "A Night Out": Gee, Civello, Holt Renfrew, Truffles, B2, and LOTR.
- Gay and Lesbian marketing campaign. Tourism Toronto developed a niche consumer marketing program directed at the gay and lesbian traveller in 2006. It also developed a GBLT section of their website, which has registered 180% increase in visits 2007 over 2006. The 2007 campaign geographically targeted San Francisco, Los Angeles, Chicago and New York City.

TT's 2006 Leisure Trade marketing campaign utilized Toronto text and visuals in a Student and Youth magazine advertising campaign in Ontario, Quebec and U.S. Border State markets. Toronto text and visuals were also used in co-op tour operator marketing, direct mail and various other print media in Ontario, Canada, the U.S., Mexico, Europe and South East Asia (China, Korea, Japan). In Europe TT partnered with the OTMPC on a "City Breaks" campaign that included television, radio, newspapers, magazines and online media buys. In addition there are a significant number of Joint Marketing Agreements with private sector tour operators in Europe and Asia which also results in the placement of Toronto imagery, ads and other marketing support.

In 2006 TT generated more than $25 million in measurable media content for Toronto as a destination from its communication and media relation's efforts.[1]

Influence Communication Study 2006-2007: Toronto and Montreal

On September 8, 2007 the Toronto Star (Toronto, ON) and La Presse (Montreal, QC) presented the findings of an exclusive one-year study revealing how Canada's largest cities are referenced and portrayed in the foreign press. Conducted by Influence Communication, the study surveyed

[1] Source: Tourism Toronto

articles from among the world's 50 most important newspapers and countries from May 1st 2006 to April 30th 2007.[1]

The study encompassed a total of 2.7 million different articles from newspapers in Australia, China, France, India, Russia, South Africa, the U.K. and the United States. The total number of readers of the papers included in the study represents 47% of the world's population.[2]

The study examined 50 newspapers from these eight countries outside of Canada for articles that mentioned Toronto or Montreal – excluding sports stories. Some highlights in terms of Toronto include:[3]

- Toronto was mentioned 6,000 times. Montreal was mentioned 3,500 times.
- Thirty percent of the stories about Toronto related to business, with the Toronto Stock Exchange accounting for 13% of mentions.
- Another 30% of the stories about Toronto related to culture. In that category, TIFF was by far the biggest story, accounting for one-quarter of all mentions of Toronto (or 25% of the sector, considered very large).
- TIFF was the most covered topic in the U.K., in the U.S., where it got 10 times more coverage than any other subject in the culture sector, and in India, explained in part by the strong Bollywood connection (between Toronto and Mumbai).
- Other important Canadian (Toronto) news stories included the AIDS/HIV conference in August 2006.
- The one area where Toronto fared badly in the international press was tourism. It was mentioned as a tourist destination in only 1% of stories, compared to 6% for Montreal. The majority of tourism stories about Montreal came from U.S. papers. The greatest proportion of tourism stories about Toronto came from the U.K. at 41%.

In terms of culture The Toronto International Film Festival is the city's biggest international newsmaker. Eric Leveille, general manager of Influence Communication, referred to it as a "media eclipse, meaning it's such a big event that it makes everything else look unimportant."[4]

Toronto Imagery/Text in Media in Comparison to Montreal and Vancouver

A review of travel media was conducted to examine Toronto's position in terms of its visibility and content as compared to its major competitive cities in Canada; Montreal and Vancouver. The results of this review are noted below. The methodology used was the summation of the area space of destination, hotel and attraction advertisements, photos, and articles of the travel media *Condé Nast Traveller*, *Travel and Leisure* and the *National Geographic Traveller* from July 2006 to July 2007. The results show that Toronto occupied 136,200.97 cm^2 of space, Vancouver 91,273.3 cm^2, and Montreal 20,358 cm^2 respectively. Compared to its Canadian cities, Toronto was allocated the most space and Montreal the least for the time period July 2006 to July 2007. (Please see Appendix E)

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[1] Source: Kopun, Francine. (2007, September 8). Toronto's surprise claim to fame: Survey that tracks which city events rate international coverage says film fest is T.O.'s technical knockout. *Toronto Star*. Retrieved September 8, 2007, from http://www.thestar.com/article/254471
[2] *Ibid*
[3] Source: Kopun, Francine. (2007, September 8). Montreal beats out Toronto for catching world's eye as tourist destination. *Toronto Star*. Retrieved September 8, 2007, from http://www.thestar.com/Article/254473
[4] Source: Kopun, Francine. (2007, September 8). Toronto's surprise claim to fame: Survey that tracks which city events rate international coverage says film fest is T.O.'s technical knockout. *Toronto Star*. Retrieved September 8, 2007, from http://www.thestar.com/article/254471

Toronto as a Destination Ranking – "Best in Class" or "Top Tier"

Toronto has received Critical Acclaim in several categories as listed below:

Table 5.12[1]
International Ranking and Acclaim

1st	Elite International Institute of Transport Management	2006
2nd	Foreign Direct Investment Magazines Cities of the Future (Financial Times)	2007
2nd	U.N. Population of Foreign Born Residents	2004
AA/Stable/A-1 +	Standards and Poor's Credit rating	2007
5th	The Economist's Most Liveable City	2007
9th	Conde Nast Travellers Choice Awards - Top 10 The America's	2006
10th	Canada's Most Sustainable City Ranking Corporate Knights	2007
11th	Emporis Skyline Rankings	2007
14th	How the World View - Anholt City Brands Index	2006
15th	Mercer - Quality of Living Survey	2007
19th	Meeting and convention planner survey - Flaspöhler	2006
21st	Mercer - Health and Sanitation Ranking	2007

[1] Sources: As indicated

Table 5.13[1]
Other Key Destination Rankings and Acclaim

1st	Canadian Town or City for the Arts - Destination Magazine	2007
1st	Canadian Town or City for Shopping - Destination Magazine	2007
2nd	Canadian Town or City for offerings to Motor Coach Groups - Destination Magazine	2007
1st	Tallest Freestanding Structure in the World - CN Tower	Since 1976
	CN Tower was recognized with the Guinness Book of World Records for World's Highest Wine Cellar	2006
1st	Longest Street in the World - Yonge St	Since 1965
1st	PATH – Largest Underground Shopping Complex – Guinness Book of Record	2007
-	One of the most Cost competitive Jurisdictions in the G7	2006
Only Canadian Hotel	Cosmopolitan Toronto Hotel - Condé Nast Traveller Hot List - 60 very Best New Hotels in World	2006
Top 25	St. Lawrence Market one of 25 of the World's Best Food Markets - *Food & Wine* magazine April 2004	2004
1st	Hockey Hall of Fame - Toronto's Top Appeal Attraction - Zagat Survey	2005
-	Casa Loma featured on A&E's Americas Castles "The Canadians"	2005
3rd biggest queer culture film event in the world	Inside Out Lesbian and Gay Film and Video Festival[2]	2007

Table 5.14[3]
Toronto Region Industry Sector in a North American Context (ranked by employment) – Institute for Competitive and Prosperity

2nd	Automotive	2004
3rd	Information and Communication Technologies	2004
3rd	Financial Services	2004
3rd	Film and Media	2004
3rd	Food and Beverage	2004
3rd	Business and Professional Services	2004
4th	Biotechnology and Pharmaceuticals	2004

[1] Sources: As indicated
[2] Source: Tillson, Tamsen. (2007, May 28). Bubble 'pops' at Inside Out. *Variety*. Retrieved September 11, from http://www.variety.com/index.asp?layout=festivals&jump=story&id=1061&articleid=VR1117965902&cs=1&query=inside+out+%26+toronto . Cited in Mark Slutsky, 2007, Queer View Mirror: A Spotlight on LGBT festivals across the country, *Pure Canada E-newsletter*. Retrieved September 11 2007, from http://pure.canada.travel/en_ca/category/6/story/208.html
[3] Sources: As Indicated

Destination Products Rankings – "Best in Class" or "Must See"

Toronto has many offerings that are considered "Must See" for tourists by major international travel guides. The following list published by Michelin Travel Guide illustrates some of the examples of tourist destinations and experiences while visiting, followed by Fodor's quintessential sites.

Table 5.15[1]
Michelin Guide 2003

Three Star Sights "Absolutely Must See"	Two-Star Sights "Must See"	
CN Tower	Art Gallery of Ontario	Gardiner Museum of Ceramic Art
Metro Toronto Zoo	Bata Shoe Museum	Ontario Place
Ontario Science Centre	Black Creek Pioneer Village	Roy Thomson Hall
Royal Ontario Museum	Casa Loma	SkyDome (Rogers Centre)
-	Gardiner Museum of Ceramic Art	Toronto Islands

Table 5.16[2]
Fodor's Guide 2005

Quintessential and/or Fodor's Choice		
Art Gallery of Ontario	CN Tower	High Park
St. Lawrence Market	Toronto Maple Leafs (Hockey Team)	-
The Fairmont Royal York	SoHo Metropolitan Hotel	Windsor Arms
Eaton Centre	Hazelton Lanes	Holt Renfrew
Kama Kazi	Kensington Market	Mountain Equipment Co-op
Sandra Ainsley Gallery	Toronto Antiques (formerly Toronto Antiques Center)	-
The Guvernment	Massey Hall	Second City
The Paddock	Rivoli	Top O' The Senator (1859-2005)
Canoe	Lai Wah Heen	Rodney's Oyster House
Takesushi	Thuet	Truffles

There are several other attractors that are in various travel publications, city guides, and visitor guides that can be considered "must see" for visitors including; The Eaton Centre, The Hockey Hall of Fame, University of Toronto, Old City Hall, and many others.

[1] Sources: As Indicated
[2] Source: Fodor's Travel. (2007). Experience Toronto. Retrieved from http://www.fodors.com/world/north%20america/canada/toronto/features.html

FUTURITY (SUSTAINABILITY) DIMENSION – RATING: ALMOST PREMIER RANKED

The Futurity (Sustainability) elements, criteria and measures identify the extent to which the destination is investing in its future as a place with viable and continuing attractiveness to evolving markets. The City of Toronto was assessed on the following three Futurity elements: Destination Marketing, Product Renewal, and Managing within Carrying Capacities.

Element "I": Destination Marketing – Rating: Yes

The Destination Marketing criteria and measures identify the extent to which the destination:

- Targets viable markets;
- Invests in managing and promoting its tourism marketplace; and
- Consults with the travel trade operators and agents serving area visitors and residents.

Criteria and Measures	Rating
I1. The destination's product offerings are created and packaged to attract significant market segments with prospects for stability if not growth.	**Almost**
I1.i There is market demand for the destination's type of offering	Yes
I1.ii Market demand to the destination's type of offering is stable or growing	Almost
I2. There is a DMO in place with funding sufficient to sustain awareness and motivate travel from target markets.	**Yes**
I2.i There is a DMO in place with a focus on the local destination vs. a larger travel region	Yes
I2.ii The DMO is funded at a level sufficient to reach target markets through print and electronic media	Yes
I2.iii The DMO conducts surveys which track the influence of marketing on guest visits	Almost
I3. Travel Trade operators and agents have been contacted for advice on product and package development opportunities.	**Yes**
I3.i The Travel Trade Resources Checklist has been completed	Yes
I3.ii A minimum of 10 "Yes's" has been recorded	Almost
I4. A tourism development and marketing strategy is in place.	**Yes**
I4.i A destination development and marketing strategy focussing on growth in visitation and/or yield has been developed and is being implemented	Yes
I5. Performance towards the development plan's objectives is being monitored.	**Yes**
I5.i A program for tracking progress towards objectives is in place	Yes
I6. Customer service training programs are in place.	**Yes**
I6.i There is a customer service training program in place at the key experience/activity providers, as well as programs for the service community generally	Yes

Market Demand

Toronto attracts the largest number of visitors annually in Canada. It is in significant demand as a tourist destination for Canadian and international travellers, however American visitors continue to decline. Tourism Toronto estimates that U.S. tourists to Toronto have declined by 15% in 2006 compared to 2000. Most of the decline can be attributed to same-day travellers, while visits from high-value overnight travellers from the U.S. have decreased at a lower rate (4.2%) over the past six years. Demand has decreased as a result of various uncontrollable factors such as SARS, 9/11, passport requirements, and the higher value of the Canadian dollar versus the U.S. dollar, which have all negatively impacted tourism to Toronto. This phenomenon is not unique to Toronto, since actual American visits to Canada have decreased by 34% in 2006 compared to 2000, according to figures compiled by Statistics Canada.[1]

Stability of Market Demand

Actual visits in 2004 were still below 2001 levels by almost 7%[2] due to various circumstances. Best estimates suggest that there has been a modest growth in market demand since 2004. This is driven by an increase in domestic and overseas travel, which has slightly outpaced the decline in U.S. visits to Toronto. Projections for future demand suggest that a similar trend will continue. However, it must be noted that the strong Canadian dollar may not only negatively impact U.S. visits, but also may lure more Canadians to substitute a trip to Toronto with a trip to a different country. Furthermore, the Travel Intentions study conducted in February 2007 showed deterioration in both Canadian and U.S. residents' intentions to visit Toronto. From February 2004 to February 2007 there was a decrease in intended visits to Toronto of U.S. and Canadian residents.[3] Toronto is perceived as a "been there/done that" destination and that other destinations offer more attractive tourism product.

Table 6.1[4]
Intentions to Travel to Toronto

	2004	2007	% Change
American	4 %	3%	-25%
Canadian	13%	10%	-23%
% of those intending to travel			

Destination Marketing Organization

Tourism Toronto (TT) is the official Destination Marketing Organization (DMO) for Toronto's tourism industry. TT focuses on promoting and selling the Greater Toronto Area (GTA) as a remarkable destination for tourists, convention delegates and business travellers. Officially operating as a not-for-profit agency, TT has over 1,000 members and is a partnership of the public and private sectors.[5]

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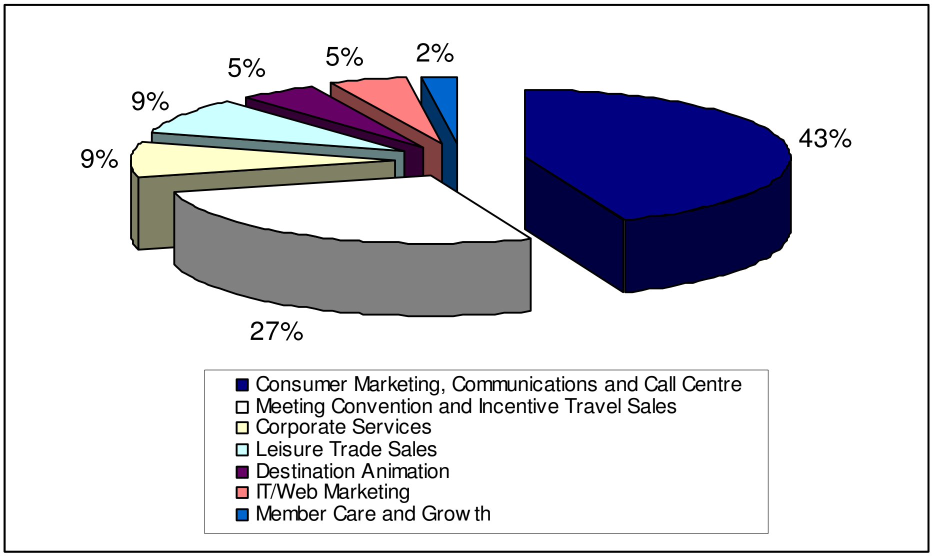
[1] Source: Deloitte and Tourism Industry Association of Canada (TIAC). (2007). *Destination Canada: Are We Doing Enough?* Retrieved September 10, 2007, from http://www.tiac-aitc.ca/english/documents/07-1031CBTIACbrochure_v3.pdf
[2] Source: Statistics Canada, CTS/ITS, 2004
[3] Source: Ontario Ministry of Tourism. (2007, February). *Travel Intentions Study Report Wave 8.* Prepared by TNS Canadian facts, Toronto. Retrieved July 2007, from http://www.tourism.gov.on.ca/english/research/travel_intentions/Feb%202007_Report.pdf
[4] *Ibid*
[5] Source: Tourism Toronto. What's Happening in Toronto. Retrieved August 7, 2007, from http://www.torontotourism.com/visitor/HomePage.htm

Successful marketing depends on the size of the yearly budget. Forty four percent or $13.9 million of the annual budget is directed towards Consumer Marketing, Communications and Call Centre operations. Other expenses are sales and marketing related such as Meeting Convention and Incentive Travel Sales (MC&IT) ($8.6 million or 27% of the budget), which involves a dedicated sales force marketing Toronto as a Convention destination.

Figure 6.1[1]
Allocation of Tourism Toronto Expenses – 2006



Tourism Toronto (TT) currently has sufficient marketing funds, because of the voluntary introduction of the Destination Marketing Fee (DMF) in 2004, which has brought Toronto's CBV marketing budget in line with other major North American travel destinations. Previous to that, TT was at a competitive disadvantage, as its budget was in the $8-9 million range, much less than what was being spent by its competitors. The increased marketing and sales activities will pay off in higher international awareness about Toronto and eventually create more visits to the region.

Tracking Marketing

Tourism Toronto tracks the success of their marketing campaigns by web visits and sales centre calls. Studies are conducted on the ROI of the larger advertising campaigns, typically involving internet panel surveys in the markets with ad recall questions and the affect on decision making. TT also attempts to track visitation through sales packages and promotions that have links to specific websites. Tourism Toronto makes use of the Ontario Ministry of Tourism's *Travel Intentions* Studies as a broader guide to the perception and intentions of travellers to Toronto. TT uses Statistics Canada data to track the number of international and domestic visitors to Toronto by origin and trip purpose. Another tracking measure utilized by TT is hotel occupancy rates.

A large part of TT promotional activities involve attracting visitors though Public Relations (PR) and Travel media, in order to position Toronto as top of the mind destination to readers and viewers. Tracking the success of PR is measured by "earned media value", the fee for an ad of the equivalent size and position that the story received. The number of visitors these stories generate is too difficult to measure.[2]

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[1] Source: Tourism Toronto. (2007, May 3). *Tourism Toronto Annual Report 2006: Drawing Inspiration.*
[2] Source: Tourism Toronto

Travel Trade Checklist

The Travel Trade Resource Checklist was completed. Tourism Toronto's Leisure Trade Sales staff was consulted and identified the following issues and opportunities:

1. ***Attractions/Products***

   Theatre was identified as a top attractor for visitors to Toronto. However, there are barriers that affect growth opportunities:
   It is difficult for outside tour operators to access tickets to theatre performances as none of the medium to large theatre operators have a ticketing system on par with New York and London. In those cities, tour operators have preferential access to online theatre tickets, which can be purchased on behalf of clients instantly, providing operators with immediate confirmation. This poses a challenge for the FIT and scheduled group travellers who prefer to purchase tickets before they arrive at their travel destination. Another issue is the lack of unique shows that take place in Toronto. Thirdly, travel trade operators need to get information about upcoming theatre productions and events about a year in advance in order to meet the needs of the tourism consumers.

2. ***Lack of Multi-Lingual Services at Attractions***

   The availability of such service would make the "Toronto" product more appealing to sell.

3. ***Tour/Sightseeing Guides***

   - Many guides still give the same old scripted tour they did many years ago; others give a negative view of the city through their commentary.
   - There is a shortage of guides with multi-lingual skills.
   - Solution: License the guides like London does; George Brown College offers a course but it is an elective, not mandatory in the Certificate program and not offered as a Continuing Education course for those already in the industry.

4. ***Specialized Tours***

   Consumers are looking for specialized tours but few if any are offered by tour operators or attractions.

   - The challenge is that the ones that are available are not known to concierges who work at desks run by Tour Operators. Sites on Bikes and Segue for example, indicated to Tourism Toronto that tourists are pleasantly surprised to find out about their product but wished they had known about it in advance to make it part of their daily plan.
   - There is quite a bit of new product available but it's not Group ready.

5. ***Bus Parking***

   It is sufficient for now, since the level of bus tours is not as high as pre- 2003. However, it could pose a problem when the market takes a positive turn.

6.

7. *City Infrastructure*

- Road conditions continue to deteriorate. Road construction in the summer gives a bad impression to tourists and makes getting around the city quite challenging.
- Garbage is another issue that has become a growing problem in the past 5 years. Travel trade staff indicated that they do not schedule Familiarization tours (FAM) on Saturday or Sunday mornings as the garbage in the downtown area especially in the Entertainment District is very bad.
- The decline in visual appeal of the city, the increased number of homeless people and (aggressive) panhandling has a negative impact in the tourists' perception of the city.

7. *Airport/Rail link/Transportation around the GTA*

- There is a need for a link from the airport to the downtown core, as well as a need for a seamless and user-friendly TTC/GTA transit system.
- At the International Arrivals level of all terminals at Pearson International Airport visitors are required to "purchase" the use of a baggage cart for $2, which is an impediment because upon arrival, visitors don't usually have change of the country they are visiting.
- The increased number of "illegal" taxis at the airport poses safety risk to visitors, as unlicensed taxi cabs are usually uninsured.
- Taxis across the city: both international groups and FITs have noted the highly inconsistent service. Some of the most common complaints include: unclean cars with unpleasant odours, lack of air conditioning, and drivers talking on cell phones.
- Taxi drivers' lack of knowledge about the city is a major issue. Many drivers have limited knowledge about the layout of the city and the locations of attractions, hotels, restaurants, night clubs and neighbourhoods. In addition, some have been known to take the longest route to get to a destination. Ambassador Cabs are perceived to provide good all round service; safe and clean, however there is not enough of them. The City of Toronto training program is only 4 years old and knowledge of it is minimal in the industry.

8. *Value for Money*

- U.S. student market: In Washington DC admission to attractions is free for students. In the U.K., admission to museums and gardens is free as it is funded by U.K. Lotteries.
- Japanese tourists and group operators believe that hotels in Canada are expensive. Niagara Region offers incentives to Japanese tour operators to purchase a full year of hotel rooms by selling them at lower-priced winter rates, which make Toronto hotels appear expensive. Overall though, Japanese tourists and operators believe the quality of the hotels, attractions and restaurants in Toronto is high.
- International perception: air access in terms of cost and number of flights from Europe and other destinations is an issue.
- The U.K. has plenty of flights to Toronto. Germany is also a good market for the city but air access in terms of number of daily/weekly flights is a big issue.
- As of April 2007, tourists cannot reclaim GST (with the exception of tour packages and foreign conventions) and there are no plans to reinstate the GST rebate by the Federal government. The elimination of the GST rebate has negatively impacted the overall value for money which was evidenced by comments made by Dutch and

German tour operators at Rendezvous Canada 2007, who said it would be a big deterrent to bookings.

9. ***Service in the Industry***

- Travel Trade staff noted the lack of professionalism in the managerial sector (e.g. lack of sales skills) and lack of training in all other parts of the industry (e.g. restaurant wait staff) where service and other relevant skill sets are lacking.
- There are plenty of receptive operators and they are served properly.
- Signage for motor coaches is better now that Tourism Toronto has a full guide on the website and the OMCA provides operators with updates. The City of Toronto started setting aside marked on-street parking spaces for buses.

Tourism Development and Marketing Strategy

City of Toronto Council adopted a *Five-Year Tourism Action Plan* to revitalize Toronto's tourism industry in June 2003. The research, conducted in conjunction with KPMG Canada, the Tourism Company and Cameron Hawkins and Associates Inc. (the Consultants) resulted in an action plan that identified five priorities:

1. Defining leadership and governance
2. Raising industry profile
3. Enhancing tourism product
4. Making Toronto investment friendly
5. Increasing marketing reach and impact

The following outlines the goals and accomplishments to date for each of the five priorities:

Priority One: Defining Leadership and Governance

The Action Plan identified fragmented leadership and lack of shared vision as major issues impeding tourism development, marketing and investment in Toronto. The first focus in acting on this issue was the relationship between the City and Tourism Toronto. A new Partnership Agreement was approved by Council in December 2005. Under the terms of the agreement the two organizations have agreed to work in partnership to support the City's tourism objectives and initiatives contained in the *Five-Year Tourism Action Plan*. The City of Toronto's Tourism Program focuses on the municipality's destination development and management while Tourism Toronto focuses on attracting visitors and conventions to the region and delivering increased business to its members through advertising, promotion and media relations, internet marketing, meeting, convention, and trade show marketing sales and servicing, and visitor information. In addition, a new funding relationship was approved, with Tourism Toronto committing $3 million to jointly approved projects over the term of the agreement.[1]

In 2006 TT reviewed its corporate governance and restructured the Board of Directors scaling it down from 40 members to 23. The governance review also encourages greater participation by all members by allowing for them to sit on committees where previously only Board members could participate.[2]

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[1] Sources: City of Toronto. Tourism Toronto. Retrieved September 12, 2007, from http://www.toronto.ca/abc/affiliates.htm#tourism and Toronto Financial Planning Division. (2004, December 22). 2005 Budget Briefing Note: Tourism Toronto and Reallocation of $1.0 million. Retrieved September 12, 2007, from http://www.toronto.ca/budget2005/pdf/tourism_paymentandrellocation.PDF

[2] Sources: Toronto EDCT Tourism Division. (2003, May 30). *Five Year Tourism Action Plan*. Prepared by Cameron Hawkins & Associates Inc., The Tourism Company, & KPMG. Retrieved September 12, 2007, from http://www.torontoalliance.ca/docs/edct_tourism_consultant_report_May3003.pdf and

Other organizations involved in Toronto's tourism sector include the Greater Toronto Hotel Association, the Ontario Hotel Motel Restaurant Association, Toronto City Summit Alliance and the Toronto Board of Trade. There are also a number of industry associations, several levels of government partnerships, private sector partnerships, and volunteer groups which play an active role.[1]

It was then determined that Premier Ranked Tourist Destination Framework project should be undertaken to refresh the perspective on the issues facing the sector. The PRTDF program directly involves industry stakeholders in auditing the destination's tourist attractions, infrastructure and resources, in assessing its strengths and weaknesses, and in developing recommendations to guide the future. The consultative framework it provides facilitates cross-sectoral discussion and group learning about Toronto's tourism sector and the challenges and opportunities ahead. Its recommendations will carry on from the current Tourism Development Action Plan in setting priorities for the timeframe beyond 2007.[2]

Priority Two: Raising Industry Profile

The economic, social and cultural importance of the tourism sector must be communicated through a communications and education strategy aimed at three target audiences: business and political leaders, the community at large and all Torontonians having contact with visitors. In 2004 the TAP into TO! Program was implemented which engages local resident volunteers, showcasing their neighbourhoods to interested visitors. In 2006 the mobile travel information centre, InfoTOGO MOBILE was launched in partnership with the CN Tower, to increase the interface between industry and the public.

Priority Three: Enhancing Tourism Product

The *Five-Year Tourism Action Plan* includes the following short and medium term recommendations for enhancing tourism product:

- Development of an events strategy that reinforces Toronto's positioning as a leisure tourism destination. The City and the Province continue to support popular major events, particularly those where Toronto enjoys a unique, sustainable position in the marketplace such as Caribana, Toronto International Film Festival and Pride Week. City events include the Cavalcade of Lights and WinterCity along with the launch in 2003 of the Winterlicious and Summerlicious restaurants promotion to profile Toronto as a culinary destination and encourage dining-out in traditionally slow periods.[3]

The Cultural Enhancement Program (CEP) was developed in 2006 by TT. It invests up to $1 million annually in new cultural projects that have the potential to be significant tourism draws.

- Implementation of a strategy to pursue major events. The creation of EDCT's Toronto International unit is primarily responsible for proactively seeking opportunities for the City of Toronto to create alliances with bid proponents to host international and national

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Toronto EDCT. (2006, May 23). Tourism Action Plan: 2003-8 Implementation and Future Directions. Prepared for the Economic Development and Parks Committee.

[1] Source: City of Toronto. Tourism Toronto. Retrieved September 12, 2007, from http://www.toronto.ca/abc/affiliates.htm#tourism

[2] Sources: Toronto EDCT Tourism Division. (2003, May 30). *Five Year Tourism Action Plan*. Prepared by Cameron Hawkins & Associates Inc., The Tourism Company, & KPMG. Retrieved September 12, 2007, from http://www.torontoalliance.ca/docs/edct_tourism_consultant_report_May3003.pdf and Toronto EDCT. (2006, May 23). Tourism Action Plan: 2003-8 Implementation and Future Directions. Prepared for the Economic Development and Parks Committee.

[3] *Ibid*

sports, cultural, social and other events of significance to enhance Toronto's profile, stimulate the tourism sector and generate legacies for the community. Successful bids include the 2002 World Youth Day, 2006 XVI International AIDS Conference, 2006 International Dragon Boat Federation Club Crew World Championships, FIFA U-20 World Cup Canada 2007 and Grey Cup 2007. Toronto International facilitated the development of the Western Beaches Watercourse for dragon-boat racing and other uses and the national soccer stadium, BMO Field, which opened in 2007 for the FIFA U-20 World Cup.

- Focus product development and packaging on unique, export ready products and attributes. Since 2003 the City has worked with proponents of 40 different product development and packaging initiatives including: Gay & lesbian Tourism Development (in 2005 launched niche marketing program with CTC, OTMPC and TT), Toronto's Aerospace Museum, Great Lakes Cruising Coalition, Canada's Walk of Fame, the development of the Old Town Toronto alliance and producing Nuit Blanche to draw international interest to Toronto as a cultural destination.

The Clean and Beautiful City Initiative, increasing facilities for motor coach parking, regulating pedicabs (rickshaws) and the Tour Guide Enhancement program and certificate at George Brown College also were initiated and supported, increasing the strength of Toronto's tourism product.

Homelessness, holiday shopping, community safety and hospitality sector labour force readiness are all social issues that are being addressed within the enhancing tourism product target.

- Focus on quality of the urban environment.
- Develop capital plans for city and provincially owned assets.

Priority Four: An Investment Friendly City of Toronto

The *Five-Year Tourism Development Action Plan* recommended that the City proactively seek out new investment in the sector, and work to maximize tourist sector opportunities in developing key areas such as the Waterfront. The period between 2002 and 2008 represents an unprecedented period of investment in Toronto's cultural attractions and venues by the private and public sector. Thirteen new facilities or significant expansions and renovations have been or will be completed during this period, including investments in all of the city's major cultural icons. In many cases the projects were supported by three levels of government and have resulted in a cultural renaissance for Toronto. In addition, Pearson International Airport is undergoing a major expansion, two major sporting facilities were completed (Western Beaches Watercourse and BMO Field), five boutique hotels have opened, and an additional sixteen commercial and business properties are in development.

Priority Five: Increasing Marketing Reach and Impact

A 3% Destination Marketing Fee (DMF) was introduced in January 2004 as a levy voluntarily charged on hotel rooms by Greater Toronto Hotel Association members for marketing TT member attractions, accommodations, hospitality and services. The levy was expected to generate between \$15 and \$19 million in annual revenue and in 2006 raised over \$26.5 million. DMF revenues has allowed TT to deliver targeted sales and marketing campaigns that have increased visits from overseas travellers and resulted in new convention bookings. The DMF funded the pursuit of key initiatives like leading the creation of a new destination brand for

Toronto, and the Destination Animation Marketing Investment Program, which directly invests in original world class entertainment like the Lord of the Rings.[1]

The Toronto Branding Project was established by Tourism Toronto, the City of Toronto, the Ontario Ministry of Tourism, and the Toronto City Summit Alliance. The goal was to create a single Toronto brand and to develop a fresh new way of communicating the city's strong and dynamic identity to the rest of the world. This is part of a larger unified effort to raise the city's profile as a major global tourist and business destination.[2]

The Toronto brand, *Toronto Unlimited,* was developed by looking at the City from the inside-out as well as the outside-in. Extensive research was conducted among target markets in the United States, United Kingdom and Canada while consultations were held with Torontonians, marketing experts and local community leaders.[3]

Marketing Strategy: Tourism Toronto's *2007-2009 Strategic Plan* and *2007 Marketing Plan: It's Happening Here.*

The plans outlined the following:[4]

- MC & IT remains a solid core business with continuing success and has shown resistance to changing marketplace fundamentals.
- Consistent, compelling destination animation will distinguish Greater Toronto within Canada and raise profile globally.
- Intense competition for visitors has exposed a weakened Toronto – U.S. consumer value proposition ("just like you", inexpensive and easy to buy) that is no longer compelling or valid with high volume, legacy consumers.
- Toronto's brand experience and overseas consumer value proposition (Canadian, excitingly cosmopolitan and easy to buy) remains compelling and relevant as awareness expands and business grows.
- A consolidated regional approach to destination sales and marketing will ensure we don't compete against ourselves at a time where business challenges are substantial.
- The web will continue to play a critical role in tourism sales, marketing and service but it will never replace the personal touch.
- Global competition and product, as opposed to marketplace fundamentals, (exchange rate, and passport) are the greatest challenge to long-term success.
- TT must direct sizeable marketing investment in alternative U.S. market segments if the city is to reverse years of decline in U.S. visitor revenues.

In response to these findings TT set out its 2007-09 Strategic Objectives:

1. Secure the core business, invest in high-yield
2. More business, made in Canada marketing
3. Own the position as a global culture and entertainment destination
4. Engage Torontonians in selling Toronto

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[1] Sources: Tourism Toronto. (2005, May 12). Tourism Toronto Applauds McGuinty Government's Tax Exemption for Destination Marketing Fee. Retrieved September 26, 2007, from http://www.torontotourism.com/Media/PressReleases/Tax+Exemption+for+Destination+Marketing.htm and Toronto City Summit Alliance. Issues Facing Our City-Tourism. Retrieved September 26, 2007, from http://www.torontoalliance.ca/urban_challenges/tourism/ and Tourism Toronto. (2005, April 18). "The Big Story:" Renewing Tourism in Greater Toronto. Retrieved September 26, 2007, from http://www.torontotourism.com/NR/exeres/7A6E0209-016F-4DAC-8509-D7EFC4B339E7,frameless.htm?NRMODE=Published and Tourism Toronto. (2007, May 3). *Tourism Toronto Annual Report 2006: Drawing Inspiration.*

[2] Source: Toronto Unlimited. Retrieved August 6, 2007, from http://www.torontounlimited.ca/

[3] *Ibid*

[4] Source: Tourism Toronto. (2006, November 1). *It's Happening Here: 2007-2009 Strategic Plan and 2007 Marketing Plan and Budget-FINAL Membership Summary*. Retrieved June 11, 2007, from http://www.torontotourism.com/web.cms/pdf/ItsHappenningHerePresentation.pdf

Educational Institutions Offering Post-Secondary Tourism Programs

Tourism-related post-secondary programs are offered at the following educational institutions in Toronto:

Ryerson University – School of Hospitality and Tourism Management

The university offers a full range of disciplines including business, arts, and hospitality and tourism. In addition, core professional studies in tourism, lodging, and food and beverage management, as well as professionally related business courses in accounting, finance, communications, law, human resources, marketing, research, and information technology, are offered.

Centennial College – Hospitality and Tourism

This program is designed for people planning to build their futures in the tourism industry. The college provides four areas for career-focused study: Convention and Meetings Management, Tourism Management, Food Service Management, and Accommodation Management.

George Brown College – School of Hospitality and Tourism

Home base for the Faculty of Hospitality and Tourism is a $13 million facility, featuring 12 state-of-the-art specialties cooking, bar and wine labs, as well as fully-equipped classrooms and computer labs. It also features the renowned Siegfried's Dining Room, a 120-seat restaurant staffed by students and open to the public. Hospitality and Tourism faculty and staff are top industry professionals with experience at some of the world's finest hotels, resorts and restaurants – and who continue to be involved in the industry.

Seneca College – Centre for Tourism and Leisure Services

The Centre provides a direct path to a wide variety of exciting careers that involve the provision of tourism (encompassing travel, hospitality and lodging) and leisure services (involving a myriad of recreation facilities, outdoor sites, programs and activities).

Customer Service Training

There are several hospitality and tourism related programs offered by educational institutions within the City of Toronto:

Ontario Tourism Education Corporation (OTEC)

- Service Excellence customer service programs

George Brown Hospitality and Tourism Training

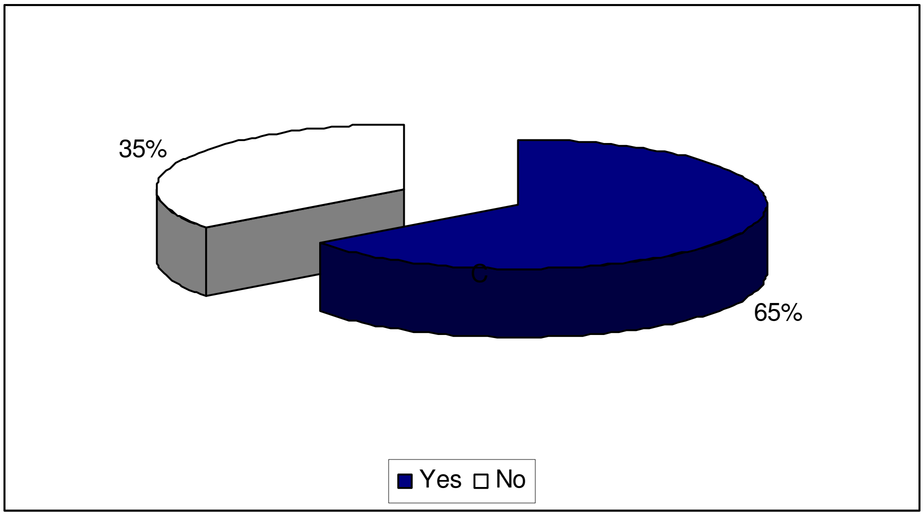
- Smart Serve/Bartending/Chef/Tour guide professional certificate

City of Toronto

- Ambassador Taxi Cab certificate program

As can be seen in the table below, almost two-thirds of respondents from the Resource Audit indicated that they provide customer service training for their employees.

Figure 6.2[1]
Customer Service Programs



Element "J": Product Renewal – Rating: Yes

The Product Renewal criteria and measures assess the extent to which the destination is making capital investments in its attractiveness into the future.

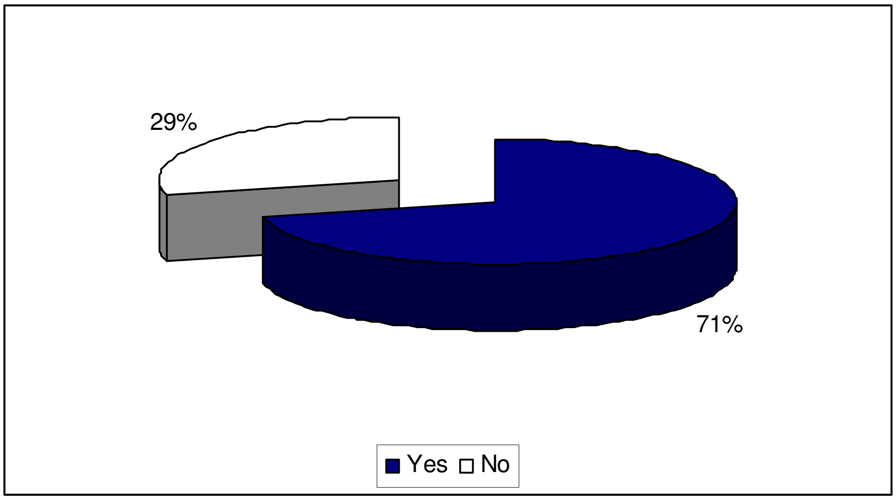
Criteria and Measures	Rating
J1. Reinvestment and new investment is occurring to enhance, revitalize or develop facilities relevant to the quality of the tourist experience.	**Yes**
J1.i In the past five years, capital has been invested in facility renewal, expansion or development	Yes
J1.ii A significant portion of that investment occurred in the past two years	Yes
J1.iii Core attractors demonstrate an ongoing commitment to reinvesting in programming and other improvements in order to enhance the visitor experience	Yes
J2. Investment and reinvestment in underdeveloped or underperforming assets is occurring.	**Almost**
J2.i Underdeveloped and underperforming assets have been identified in the Resource Audit	Yes
J2.ii Investment and/or reinvestment is being made in developing or revitalizing underdeveloped or underperforming assets	Almost

[1] Source: Resource Audit

Investments

The Resource Audit indicated that Toronto's tourism industry is committed to reinvestment and new investment to revitalize or develop facilities relevant to the quality of the tourist experience. 71 % of businesses indicated that they had reinvested capital into their respective businesses in the past five years.

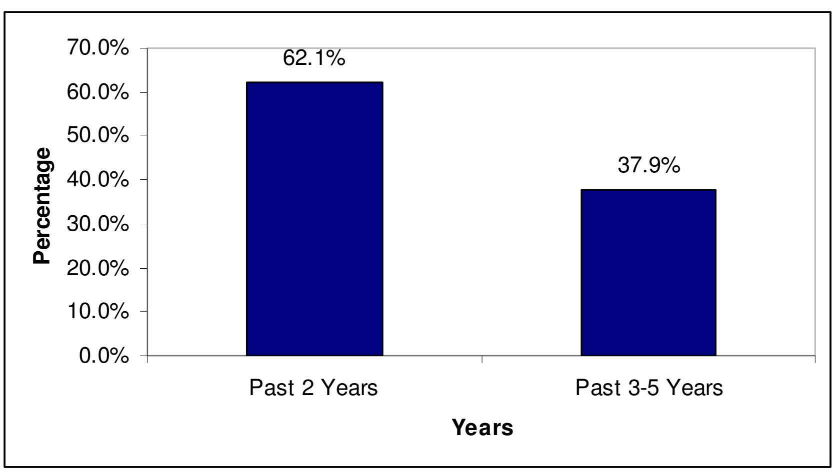
Figure 6.3[1]
Business Expansion through Investment of Capital



Portion of Investment

62 % of respondents said that the capital was invested in the past two years, while the rest (38%) indicated that they invested in capital the past three to five years.

Figure 6.4[2]
Capital Investment



[1] *Ibid*
[2] Source: Resource Audit

Recent Facilities Investment

Cultural Facilities

There has been substantial investments since 2002 in many cultural enhancement projects, the most prominent being the ROM and Toronto's first purpose built opera/ballet house the Four Seasons Centre for the Performing Arts. Culture is a key attractor for tourists and the consequences of such investments will make a positive economic contribution to Toronto and Ontario. BAPS Shri Swaminarayan Mandir temple is an important example of the cultural and ethnic-religious diversity of Toronto.

Table 6.2[1]
Recent Cultural Facility Investments

Culture	Year	Total Investment (CAD)
BAPS Shri Swaminarayan Mandir temple	2007	$40,000,000
Canada's National Ballet School	2005	$100,000,000
Four Seasons Centre for the Performing Arts (Opera/Ballet)	2006	$181,000,000
Gardiner Museum of Ceramic Art	2006	$11,000,000
Ontario Science Centre - Weston Innovation Centre	2006	$47,000,000
Royal Ontario Museum	2007	$200,000,000
Young Centre for the Performing Arts - Soulpepper Theatre Company and George Brown College	2005	$14,000,000
Toronto Botanical Gardens	2006	7,200,000
York University Accolade Project	2006	107,500,000
St. Lawrence Centre for the Arts	2007	3,000,000

Sports and Entertainment Facilities

Investments in sports and recreational tourism will enhance Toronto's chances at bringing major sporting events to the city. BMO Field is home to Toronto's new Major League Soccer team, the Toronto FC, and recently hosted the U-20 FIFA competition in July of 2007.

Table 6.3[2]
Recent Sports and Entertainment Facility Investments

Sports and Entertainment	Year	Total Investment (CAD)
BMO Field	2007	$62,900,000
Western Beach Watercourse	2006	$27,000,000
University of Toronto Varsity Centre (Phase I)	2007	$22,000,000

[1] Sources: Toronto EDCT Culture Division. Toronto's Cultural Renaissance. Retrieved August 2, 2007, from http://livewithculture.ca/livewithculture_ca/about/cultural_renaissance_projects/toronto_s_cultural_renaissance and Toronto EDCT Economic Development. (2007). *Economic Overview*.
[2] Source: Toronto EDCT Culture Division. Toronto's Cultural Renaissance. Retrieved August 2, 2007, from http://livewithculture.ca/livewithculture_ca/about/cultural_renaissance_projects/toronto_s_cultural_renaissance and Toronto EDCT Economic Development. (2007). *Economic Overview*.

Hotel/Condominium Facilities

There have been ongoing investments in residential and hospitality facilities. The mixed-use Hotel/Condominium model is very common in the downtown core. The Hazelton Hotel is the first five-star hotel in Toronto. Considerable hotel investment is taking place in the airport area as well.

Table 6.4[1]
Recent Hotel and Hotel/Condo Investments

Hotel/Condo	Year	Total Investment (CAD)	Rooms
Cosmopolitan Toronto Hotel	2005	Not Available	95
Four Points by Sheraton Toronto Airport	2006	Not Available	204
One King West	2005	$100,000,000	407
Pantages Tower Hotel/Opus Condominium	2004	$100,000,000	111
Residence Inn by Marriott Toronto Airport	2005	$11,690,400	137
Residence Inn Toronto Downtown	2007	Not Available	256
Sandman Signature Hotel Toronto Airport	2007	$9,000,000	256
The Hazelton and Private Residences	2007	$150,000,000	77

Future Facilities Developments

Cultural Facilities

The Art Gallery of Ontario is undergoing a major renovation designed by Frank Gehry that is scheduled to be completed by mid-2008. Filmport, once completed, will have a 45,000 ft^2 sound stage that will be the largest purpose-built sound stage in the world. The project creates a complete film community development in the port-lands with a hotel, soundstages, post-production facilities and commercial (retail and restaurant) businesses. The Woodbine investment has the potential to create a destination which will include mixed use hotel, retail, and entertainment and relaxation facilities. The Bell Lightbox will be home to the Toronto International Film Festival and have hosting facilities for festival films and special events.

Table 6.5[2]
Future Cultural Facility Investments

Cultural and Mixed Use	Year to be Completed	Total Investment (CAD)
Art Gallery of Ontario	2008	$254,000,000
Bell Lightbox (TIFFG)	2009	$129,000,000
Filmport (Toronto film Studios)	TBA	$275,000,000
Humber Arboretum Centre for Urban Ecology	2008	$4,000,000
Royal Conservatory of Music TELUS Centre for Performance and Learning	2008	$85,000,000
Fort York[3]	TBA	$10,955,000
AHA! Centre (Arts + Heritage Awareness Centre)[4]	2011	$75,000,000
Woodbine Live!	TBA	$750,000,000

[1] *Ibid*
[2] Sources: Toronto Economic Division. (2007). *Economic Overview* and City of Toronto EDCT Culture Division. Toronto's Cultural Renaissance. Retrieved August 2, 2007, from http://www.livewithculture.ca/livewithculture_ca/about/cultural_renaissance_projects/toronto_s_cultural_renaissance
[3] Source: Resource Audit and City of Toronto EDCT Culture Division. Fort York. Retrieved August 21, 2007, from http://www.toronto.ca/legdocs/2005/agendas/committees/edp/edp051109/it006.pdf
[4] Source: Resource Audit

Office Tower-Business

Investments in the development of new office buildings are taking place. Such investments will stimulate the business travel sector to Toronto.

Table 6.6[1]
Future Office Tower Investments

Office Towers	Year	Total Investment (CAD)
Bay Adelaide Centre	2009	$290,000,000
Canada Life/Great West Life Office Building	2009	$75,000,000
RBC Centre	2009	$400,000,000
SAS Institute (Canada) Head Office	2009	$75,000,000
Telus Tower	2009	$250,000,000

Hotel/Condominium Facilities

An additional 1,566 rooms will be added to Toronto's hotel inventory by 2011. Many of the new hotel developments will appeal to the upscale market. Thirty percent of the Ritz Carlton Hotel residential units were pre-sold to non-North American buyers representing a considerable amount of capital influx from off shore markets. The Ritz Carlton Hotel, the new Four Seasons, the Shangri-La and the Trump Tower are all on track to be five-star hotels.

Table 6.7[2]
Future Hotel and Hotel/Condo Investments

Hotel/Condo	Year	Total Investment (CAD)	Rooms
550 Wellington West Hotel and Condominiums	2008	Not Available	107
Bloor/Yonge SE Corner	TBA	Not Available	Not Available
Four Seasons Hotel and Private Residences	2009	$325,000,000	265
Hôtel Le Germain Maple Leaf Square	2009	$400,000,000	171
Manga Hotels International	2008	Not Available	250
Ritz Carlton Hotel	2009	$350,000,000	267
Shangri-La Hotel	2011	$430,000,000	220
Trump Int'l Hotel and Tower	2010	$500,000,000	286

Medical and Research Facilities

Medical and Related Sciences (MARS) has completed Phase I of the project. Phase II is expected to be completed in 2010. It will create a Medical research and technology destination in the heart of Toronto adjacent to the University of Toronto and the University of Toronto Hospital alliance members. This facility will draw researcher and conference participants. Toronto has

[1] Sources: Resource Audit

[2] Sources: Resource Audit

the potential to become a medical research destination for international experts. Hong Kong based Li Ka Shing has also invested in St. Michael's Knowledge Institute.

Table 6.8[1]
Future Medical Facility Investments

Medical/Research	Year	Total Investment (CAD)
MARS	2010	$450,000,000
Scarborough General - Emergency and Critical Care Centre	2008	$50,000,000
St. Michael's Hospital - Li Ka Shing Knowledge Institute	2009	$115,000,000
Sunnybrook Hospital - Expansion of Emergency Department	2009	Not Available

Other Significant Facility Investments

There is a large concentration of condominium development on Bay Street, Bloor Street, and Yonge Street. Numerous condominium developments were completed in the last few years or are under construction east and west of the downtown core. Ryerson University is committed to large scale renovations having recently completed the Ryerson Ted Rogers Management School. Metropolis, situated on the north-east corner of Yonge Street and Dundas Street, is slated to open in 2007 housing a cinema and major retailers and will be a shopping destination that compliments the Toronto Eaton Centre.

Recent and Future Waterfront developments are discussed in further details in the "Underdeveloped and Underperforming assets" section of this report (page 138)

[1] *Ibid*

Core Attractors Reinvestment in Programming

The city's core attractors, Performing Arts, Attractions, Cultural Heritage, Festivals & Events and Meetings, Conventions, and Trade and Consumer shows have all demonstrated some level of ongoing commitment to reinvesting in programming and other improvements in order to enhance the visitor experience. Examples of investment/reinvestment in Core Attractors include:

Investment by Core Attractors: Attractions

CN Tower

In June 2007, the CN Tower undertook energy efficient and cost effective architectural LED illumination program designed to highlight its dynamic and visual elegance as part of the Toronto night skyline year-round. The CN Tower is lit nightly from sunset to 2:00 am with a standard theme honouring Canada's colours, red and white. There are short effects at the top of each hour that changes from time to time. Throughout the year, the lighting will pay tribute to national holidays, special occasions and some citywide events.[1]

Hockey Hall of Fame

In 2003 10,000 ft^2 of revitalized exhibit space was opened featuring new and improved state-of-the-art interactive and multimedia attractions, in addition to expanded capacity for the Hall's exhibits of the game's most precious artefacts, replica dressing room and rink zone, theatres, and on-theme gift shop. The project cost of $3.8 million was funded by sponsorship contributions from Panasonic Canada Inc., Pepsi-Cola Canada Ltd., National Hockey League Players' Association and The Sports Network Inc.[2] In 2006 the Hall unveiled the new $2 million NHL ZONE comprising 6,000 $ft^2$of new exhibits including NHL Legends, NHL Retro, NHL Today, NHL Milestones and Stanley Cup Dynasties. The NHL Zone represents the final phase of a $12 million New Millennium 5-year Revitalization Plan.[3]

Massey Hall and Roy Thompson Hall

In their 2006 plan, The Corporation of Massey Hall and Roy Thomson Hall have a $25-60 million proposal in place to completely renovate Massey Hall, improving the facilities as well as acquiring adjacent land to expand the building in order to improve the visitor experience as well as provide greater seating capacity for ticketed events.[4]

Ontario Place

Ontario Place, supported by funding from Rogers and the Ministry of Tourism (MTOU) launched The Rogers Chinese Lantern Festival in 2006. The event, an exhibit of 30 massive illuminated lantern displays and 2,000 traditional lanterns, came in 51% over forecast. It had been expected to attract 133,000 visitors during its July 20 - October 1, 2006 run, but was held over to the Thanksgiving weekend and drew a total of 201,000 visitors. Gate receipts exceeded

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[1] Source: CN Tower. (2007, June). CN Tower Architectural Illumination Premieres. Retrieved August 2007, from http://www.cntower.ca/portal/GetPage.aspx?at=1584
[2] Source: Hockey Hall of Fame. (2003, March 7). New Interactive Areas Unveiled-North Concourse Project. Retrieved July 2007, from http://www.hhof.com/html/exncrp.shtml
[3] Source: Hockey Hall of Fame. (2006, March 10). New "NHL Zone" Highlights March Break Activities At The Hockey Hall of Fame. Retrieved from http://www.hhof.com/html/newsNHLZone.shtml
[4] Source: Resource Audit

$3 million and exit polling showed a 95% guest satisfaction rate. These results paved the way for the festival to run again in 2007.[1]

Toronto CityPass

Toronto's six major attractions banded together in 2004 to participate in being the first Canadian city to offer the CityPass. Toronto CityPass provides value-seeking visitors with front-of-the-line tickets to the six most visited attractions in the City at up to 50% savings. For one price, visitors gain admission to the Art Gallery of Ontario, Casa Loma, CN Tower, Ontario Science Centre, Royal Ontario Museum and the Toronto Zoo. Valid for 9 days the pass can be purchased on-line in advance or at any one of the participating attractions. In 2007 the Hockey Hall of Fame came on board, replacing the AGO which will be closed for renovations from October 2007 to mid-2008.[2]

Investment by Core Attractors: Performing Arts

Canadian Opera Company (COC): Wagner's Ring Cycle

The Four Seasons Centre for the Performing Arts opened in 2006. Its critically acclaimed acoustics (Variety magazine 2006) were demonstrated in the new COC season production of *Wagner's Ring Cycle*. The three cycles were 99% sold-out, with near capacity audiences of over 2,000 patrons each week with 20% of *Wagner's Ring Cycle* tickets sold outside of Canada, 30% outside of Ontario and 40% outside of the Greater Toronto Area. Patrons travelled from 9 provinces and 2 territories in Canada as well as 30 different countries to attend the production including Argentina, Australia, Bermuda, Brazil, China, Columbia, Denmark, Finland, France, Germany, Israel, Italy, Japan, Luxembourg, Mexico, New Zealand, South Africa, the United Arab Emirates, the United Kingdom, the U.S. (38 states) and Uruguay. The greatest distance travelled by a patron to attend *Wager's Ring Cycle* was 16,256 km from Australia.[3]

Mirvish Productions: Lord of the Rings

In 2005 Mirvish Productions undertook a brand new theatre production of the *Lord of the Rings* which opened in March 2006. The $27 million production was supported by a $3 million loan from the Ontario Ministry of Tourism and $3 million from Tourism Toronto for international marketing through its Destination Animation Marketing Partnership Investment Program.[4]

Investment by Core Attractors: Cultural Heritage

Historic Fort York

Historic Fort York is open year-round offering seasonal guided tours, musket and guard drills and music demonstrations that enhance the exploration of the fort and help visitors learn about its military history. Special annual events include the Pirate Festival at Fort York, Tecumseh Arts Festival – A Celebration of First Nations Culture and March Break. *The Fort at York*, a site-specific theatrical production by Crate Productions and Fort York National Historic site will run from mid-September to mid-October 2007. It explores of the night before the Battle of York, a harrowing War of 1812 exchange in which American ships attacked the fledgling town's

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[1] Source: Tourism Exchange Company. Chinese Lantern Festival Attendance Exceeds Expectations. Cited in *CTC E-News*, October 23, 2006. Retrieved from http://www.tourismexchange.com/exchange/en/cobrand/ctc/getArticle.jsp?articleID=1743&languageID=1
[2] Source: http://www.citypass.com/city/toronto.html http://www.cntower.ca/portal/SmartDefault.aspx?at=1097 and http://www.thedistrict.ca/press.cfm
[3] Source http://www.coc.ca/company/061001.pdf and http://www.coc.ca/company/061002.pdf
[4] Source: http://www.cbc.ca/story/arts/national/2006/03/23/lordoftherings-musical.html and http://www.cbc.ca/arts/story/2005/03/16/mirvishrings050316.html

defenders. The City of Toronto's Economic Development and Parks Committee has endorsed the *Fort York: Adding New Buildings* 10-year capital development plan for heritage building restoration and reconstruction at the fort that will engage the public while respecting its status as Toronto's birthplace and a National Historic Site. The approaching 200th anniversary of the War of 1812 and the Battle of York in April of 2013 provides a window of opportunity to advance this program in order to meet these key milestones.[1]

Investment by Core Attractors: Festivals & Events

LuminaTO – the Toronto Festival of Arts and Creativity

LuminaTO is an annual multi-genre, mulit-venue celebration featuring theatre, classical and contemporary music, dance, visual arts, film, literature, and more. LuminaTO's David Pecaut (Senior Partner, The Boston Consulting Group; Chair of the Toronto City Summit Alliance), and Tony Gagliano (Executive Chairman and CEO, St. Joseph Communications) envisioned a large-scale annual arts festival in Toronto. Since early 2006, $10 million was raised towards mounting the inaugural LuminaTO 2007 with a total Government of Ontario investment of $7.5 million. Partners and donors represent both the public and private sectors including governments, corporate sponsors, foundations, individual donors, arts councils, and tourism boards. The estimated economic impact of LuminaTO is $25 million in its first year with 400,000 attendees. Plans are well underway for succeeding years.[2]

Scotiabank Nuit Blanche, City of Toronto

Toronto's new signature fall festival showcases Toronto’s vibrant arts scene and the city’s cultural communities. In 2006, its inaugural year an estimated 425,000 attended the overnight event. The City of Toronto and Scotiabank are investing in this event again for 2007. The Ontario Cultural Attractions Fund ($250,000) and the Toronto Arts Council ($8,201,646) will also be investing for operating and project grants to be disbursed to 343 arts organizations across the city of Toronto, which is an increase of 5.3% over last year.[3]

WinterCity/Winterlicious and Summerlicious programs, City of Toronto

The year 2006 was the fourth year for the WinterCity/Winterlicious festival. The 14-day, city-wide celebration showcases Toronto’s vibrant arts scene, wealth of creative and talented performers, world-class attractions, and diverse culinary experiences. The City of Toronto Special Events section partners with many of the city’s attractions which, during the festival, provide visitors with discount admission and/or additional performances and special events, ranging from backstage tours and culinary demonstrations to acrobatic performances and kid-friendly shows. The event, along with its partner attractions and restaurants are promoted through a marketing/media campaign.[4]

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[1] Sources: Resource Audit and City of Toronto EDCT Culture Division. Fort York. Retrieved August 21, 2007, from http://www.toronto.ca/culture/fort_york.htm and Crate Productions. The Fort at York. Retrieved August 21, 2007, from http://www.crateproductions.com/ and Toronto EDCT. (2006, May 23). Tourism Action Plan: 2003-8 Implementation and Future Directions and Toronto EDCT Culture Division. Calendar of Events. Retrieved August 21, 2007, from http://www.toronto.ca/culture/events.htm

[2] Sources: Luminato. (2007). About Luminato. Retrieved August 21, 2007, from http://www.luminato.com/english/about.php and Luminato: Success or disappointment? Cultural festival lacked authenticity, says one Star critic, while another says it was right on the money. (2007, June 11). *Toronto Star*. Retrieved August 21, 2007, from http://pqasb.pqarchiver.com/thestar/advancedsearch.html

[3] Sources: Luminato: Success or disappointment? Cultural festival lacked authenticity, says one Star critic, while another says it was right on the money. (2007, June 11). *Toronto Star*. Retrieved August 21, 2007, from http://pqasb.pqarchiver.com/thestar/advancedsearch.html and Toronto Arts Council. (2007, June 27). Innovation, excellence, community and diversity: Toronto Arts Council supports arts organizations across Toronto. Retrieved August 22, 2007, from http://www.torontoartscouncil.org/media/2007_spring_grantrelease.htm and Ontario Ministry of Culture. (2006, September 29). All-Night Culturefest Nuit Blanche Another Toronto First. Retrieved August 22, 2007, from http://www.culture.gov.on.ca/english/about/n290906.htm

[4] Source: City of Toronto EDCT Special Events Division. Summerlicious. Retrieved August 2, 2007, from http://www.toronto.ca/special_events/summerlicious2007_post.htm

In it's fifth year, Summerlicious presented by American Express promotes Toronto's restaurant industry by providing an opportunity for restaurant lovers to enjoy the best of the city's eclectic cuisine through pre-fixed ($25 and $35) lunch and dinner offerings. In 2006, 130 restaurants participated, serving over 177,000 meals.[1]

Investment by Core Attractors: Meetings & Conventions, Trade/Consumer Shows

CN Tower

In 2006 The CN Tower launched its newest event venue with 1,100 ft^2 of flexible space adjacent to the CN Tower's 144-seat Maple Leaf Cinema. The new meeting rooms are fully equipped for audiovisual presentations and a variety of room layouts can accommodate up to 90 people for meetings, breakout sessions, working lunches, and more with full food and beverage services available in-room.[2]

Direct Energy Centre (DEC) /Exhibition Place

In 2006 the Direct Energy Centre/Exhibition Place did a market analysis with the plan to renovate and refurbish the Automotive Building into the Direct Energy Conference Centre (DECC). On December 11, 2007 Toronto City Council approved the Conference Centre redevelopment at Exhibition Place. The 160,000 square foot Automotive Building will undergo a $46.88 million renovation to create a new Conference Centre and is committed to achieving LEED (Leadership in Energy and Environmental Design) Silver rating design standard. Construction is scheduled to commence in March 2008 with an anticipated opening in April 2009.[3] The venue which is to be completed in April 2009 will include 20 meeting rooms and a ballroom that will hold as many as 3,000 people. The conference centre will connect to the Direct Energy Centre complex via an underground walkway.

Toronto Congress Centre

The Toronto Congress Centre is doubling its convention space to more than one million ft^2. The 500,000 ft^2 expansion includes 40 meeting rooms and a 25,000 ft^2 ballroom.[4]

Metro Toronto Convention Centre

The Metro Toronto Convention Centre invested a $4.2 million in a set of renovations and upgrades of its premier ballroom space. Among the new features of the newly renovated Constitution Hall are: new triple escalators, expanded pre-function space, LED feature lighting, five sets of new main entrance doors, enhanced interiors, upgraded technology, and enhanced washrooms.[5]

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[1] Source: City of Toronto EDCT Special Events Division. *Summerlicious*. Retrieved August 2, 2007, from http://www.toronto.ca/special_events/summerlicious2007_post.htm

[2] Source: CN Tower. (2006, January 24). *Canada's Landmark Icon Expands Meeting and Event Space*. Retrieved August 2, 2007, from http://www.cntower.ca/portal/SmartDefault.aspx?at=1369

[3] Source: Exhibition Place (2007, December 11) *New Conference Centre Development Approved*. Retrieved December 20, 2007, from http://www.explore.on.ca

[4] Source: Wilkening, David. (2007, October 9). *Canadian meeting space expansions now underway*. Retrieved August 3, 2007, from http://www.travelmole.com/stories/1123065.php

[5] Source: Metro Toronto Convention Centre (2007, November 5). Metro *Toronto Convention Centre Constitution Hall, Renovated and Revealed*. Retrieved November 27, 2007, from http://www.mtccc.com/news.cfm

Underdeveloped and/or Underperforming Assets

Waterfront

Toronto's harbour lands are, and have been for several decades, an undeveloped asset. A content analysis of the open-ended questions from the Resource Audit which asked respondents to give suggestions of what needs to be done to improve tourism in Toronto, revealed that waterfront development was seen as a key area that needs to be improved. Suggestions included: improving accessibility and transportation to the waterfront, adding more coffee shops and restaurants, and building new tourist attractions (aquarium, world-class contemporary art gallery, casino, marine museum, amusement park, etc). The waterfront can be separated into two distinct areas:

- The eastern waterfront consists of the Port Lands and lower Don River area. The city has invested a significant sum into developing the waterfront and approximately $17 million for the lower Don Lands adjacent to the Distillery District and to create affordable housing and usable park land. The development of Film Port, a multiphase development, will become a destination for major Hollywood and global film productions. The Port Lands are also home to the most suitable docks for cruise ships at the International Marine Passenger Terminal (the port of Toronto will have 6 cruise ship visits in 2007).[1] The cruise ship industry is one of the fastest growing tourism sectors in the world, which present an opportunity that Toronto can capitalize on.
- The central waterfront has seen a great deal of investment in the past fifteen years, but the developments have tended to consist of condominiums along the water's edge. To some observers this has taken away from the waterfront atmosphere of relaxation and its accessibility to the public (as confirmed by the PRTD Audit). The ACC and Harbourfront Centre are located in the central waterfront area and are significant tourist draws but the lack of ancillary products such as dinning, shopping and transit has limited the central waterfront's appeal to the larger tourism market. Developments such as HtO Park, Toronto Music Garden and the waterfront promenade at Harbourfront Centre have been welcome additions while the condo towers continue to rise.

The potential for this underdeveloped area is substantial and the initial steps are currently underway to make the waterfront a vibrant part of the urban mosaic of the city. The central waterfront 5 km promenade will be built over the next four years, with the first part being a boardwalk over the head of the Spadina slip to be completed June of 2008. It will connect the Toronto Music Garden and the recently completed HtO Park. The Port Lands sports fields are complete, with two regulation-sized fields and plans to add playground equipment and toilet facilities in 2008. Also, the first phase of the Mimico Waterfront Linear Park construction is underway and should be open to the public in 2008. Stretching from Superior Avenue to Norris Crescent, the $6.5-million park will connect the waterfront trail with a boardwalk, include sand dunes, a cobble beach and improved terrestrial and aquatic habitat. East of the Jarvis Street slip, Corus Entertainment will set up its Toronto headquarters and an approximate 500,000 ft^2 office in the First Waterfront Place building—a $12.5-million investment in creating a commercial and employment centre. It is expected to be completed by fall of 2009. In the fall of 2007, Waterfront Toronto issued a request for proposals for further development of the lands to the east of the site.[2]

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[1] Source: Resource Audit

[2] Source: Greater Toronto Marketing Alliance. (2005, October 5). Australian Delegation Puts GTA Under Microscope. *Novae Res Urbis*. Retrieved July 20, 2007, from http://www.greatertoronto.org/documents/NovaeAustralianDelegationPutsGTAUnderMicroscope.pdf

Culture

As discussed in the Product Dimension chapter, Culture is a core attractor for visitors to the city. Yet in terms of per capita expenditures on Arts and Culture by the City, Toronto had the lowest investment compared to other competitive North American destinations. Furthermore, as revealed in the Performance Dimension, Toronto's visitors participation in visiting "Historic Sites" is lower compared to other competitive Ontario and Canadian destinations.

Toronto is considered to be the third largest centre for English language theatre in the world behind New York and London, though growth in the performing arts sector has been stagnant for several years. The "Guelph Study" showed significant decline in "theatre" as a trip motivator for overnight Toronto hotel guests from 7% in 1998 to 3% in 2006.

The new facility developments and a production company are a welcome addition. After waging a 30-year campaign to build an opera house in Toronto, Richard Bradshaw saw his dream come to fruition with the 2006 opening of the Four Seasons for the Performing Arts, home to the Canadian Opera Company and the National Ballet of Canada. The new TELUS Centre for Performance and Learning, part of the Royal Conservatory of Music, which is adjacent to the ROM on Bloor Street is another welcome addition to the underdeveloped performing arts sector. Dancap Productions is a recently created musical theatre production company that will showcase productions at the Elgin Theatre and The Toronto Centre for the Performing Arts. The new developments will help raise Toronto as a top-of-mind destination for the cultured traveller. It is important to note that although Toronto is considered one of the top theatre destinations in the North America, Blue Man Group, had a limited run at the renovated Panasonic Theatre after an intended permanent stay and the world premiere of The Lord of the Rings closed after only six months despite large investments by the private and public sectors.[1]

Neighbourhoods

Toronto is one of the most culturally diverse cities in the world with over 100,000 new permanent residents arriving each year, many of them immigrants, which is reflected in the polyglot character of many neighbourhoods. A content analysis of the open-ended questions from the Resource Audit which asked respondents to give suggestions of what needs to be done to improve tourism in Toronto, revealed that neighbourhood development was a key area that needs to be worked on. Suggestions included: more pedestrian only streets (Kensington and Yorkville), fix panhandling and homelessness issue, promote neighbourhoods within the city, provide free neighbourhood maps to visitors, improve internet presence, fund culturally specific neighbourhoods, invest in beautification and experiences, and clean up litter and graffiti. (Please see Appendix A – Exhibit 2) Attention must be paid to urban design as currently neighbourhoods are separated by uninteresting streetscapes that induce the tourist to turn around and miss many undiscovered gems. Chinatown and Little Italy are practically beside each other separated by a few blocks of uncomfortable concrete surrounded by nondescript storefronts. It can also be a challenge to travel from one neighbourhood to another, even within the downtown core. For example, if one wishes to travel by TTC from Chinatown to the Distillery District, a distance of no more than 4 km, it requires multiple transfers and can take 30-45 minutes. Tom Dutton, senior VP of Daniels Corporation, the developer of the Bell Lightbox and Tower believes that the business/condo development could be the catalyst that makes a genuine

[1] Sources: CBC Arts. (2007, August 16). Richard Bradshaw of Canadian Opera Company dies at 63. Retrieved August 20, 2007, from http://www.cbc.ca/arts/music/story/2007/08/16/richard-bradshaw-obit.html and CBC Arts. (2005, March 17). Toronto welcomes musical 'Lord of the Rings.'Retrieved August 20, 2007, from http://www.cbc.ca/arts/story/2005/03/16/mirvishrings050316.html and Dancap Productions. (2007, July 30). Dancap Productions joins Elephant Eye Theatrical-The New Theatrical Development and Production Company. Retrieved August 20, 2007, from http://www.dancaptickets.com/files/news/Elephant_Eye_Dancap_July_30.pdf

neighbourhood out of the Entertainment District. Currently the district serves mainly as a temporary hitching post for tourists and those passing through for dinner and a show at one of the local venues such as the Princess of Wales or Roy Thompson Hall.[1] However, residents also create pressure for less noise and activity late at night. A balance has yet to be found between the neighbourhood ambiance created by full-time residents and an active nightlife.

Sports

The future of sports is important when thinking of adding benefits to Toronto's tourism industry. The opening of the ACC in 1999 and the BMO Field in 2007 brought a new sense of excitement and enthusiasm for professional sports in the city. Some events that took place in 2007 were the Grey Cup, AHL All-Star Game, and the FIFA Under-20 World Cup soccer event that was held at the BMO field. The City of Toronto was recently awarded the opportunity to host the 2008 Sierra Mist All-Star Game in July at the BMO Field.[2] University of Toronto's (U of T) Varsity Stadium has been revitalized as part a two-phase development. In 2008 construction is scheduled to begin on the innovative $53 million U of T Centre for High Performance Sport facility where students and Ontario's elite athletes can test and train. It will house a strength and conditioning centre, sport medicine clinic, a 2,000-seat basketball and volleyball court, and teaching and research labs that will explore a range of issues relating to health and athletic performance.[3] Nike partnered with Manchester United Football Club and other investors for a $25 million 30-acre, state-of-the-art soccer complex that will begin construction in the west end of Toronto in 2007. On a smaller scale, it has also been announced that the city will expand the Milliken Park Community Centre on McCowan Road by at least 5,000 ft^2 as part of what's called a Section 37 benefit for the city (backers will pay the city $1.8 million).[4] Building plans for two transitional sports fields at Cherry Beach for use as practice spaces during the FIFA Under-20 World Cup in July 2007 were scheduled to open in September 2007.[5]

There is insufficient infrastructure for amateur sports in Toronto. "A lot of ground has been lost in the last few years right across the whole spectrum of sport."[6] There aren't enough facilities in good condition available to fit the hierarchy of sports.[7] The most critical gap is the lack of sport facilities at the district level. "There are not enough clusters of district level facilities in close enough proximity to be attractive to tournament organizers. The loss of opportunities to host amateur sport tournaments has an economic development impact on local hotels, restaurants and entertainment venues."[8]

Even though there has been some progress in the revitalization of existing sports amenities and the development of new sports facilities, there is still a need for more district and regional level recreation facilities in the city. Twenty seven percent of Toronto's recreation facilities are over 40 years old. The ones that exist are in a severe state of disrepair and there are not enough to

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[1] Source: McDowell, Adam. (2007, September 7). Lights, Camera, Condo: The Film Festival's New Centre Mixes Culture And Real Estate. *National Post*. Retrieved from August 20, 2007, http://www.canada.com/nationalpost/news/toronto/story.html?id=353851b3-8216-4f94-9257-bc88dd8ef439&k=3226&p=2

[2] Source: Toronto Entertainment District (TEDA). (2007, July 18). Toronto Will Host 2008 Sierra Mist MLS All-Star Game. Retrieved August 2007, from http://www.thedistrict.ca

[3] Source: University of Toronto. (2007, June 26). U of T solidifies plans for Centre for High Performance Sport. Retrieved from http://www.ac-fpeh.com/news.php/ fpehnews/u-of-t-solidifies-plans-for-centre-for-high-performance-sport

[4] Source: Adler, Mike. (2007, July 24). The Landmark breaks ground in Scarborough. *Inside Toronto*. Retrieved September 2007, from article archive at http://www.insidetoronto.ca/printArticle/29643

[5] Source: Yuen, Jenny. (2007, July 12-18). Waterfront Corp's FIFA Fumble. *Now Toronto*, 26, 45. Retrieved August 2007, from http://www.nowtoronto.com/issues/2007-07-12/news_cityinbrief2.

[6] Source: Toronto Parks, Forestry & Recreation Division. (2004, July). *Our Common Grounds: Parks and Recreation Strategic Plan*. Retrieved June 11, 2007, from http://www.toronto.ca/parks/reactivate/ourcommongrounds_final.pdf

[7] Note: The sport facility hierarchy is: neighbourhood (small community centres, gyms, school grounds – used as places for children to play and learn basic sport skill), regional (large fields, community centres, high school facilities - used for recreational sports, house leagues and competitive team play), district (multi-pad arenas, multiple fields, college and university facilities, premier public facilities - used for competitive sports and tournaments), and national (Commonwealth Games, Olympics - used for elite sport activity and professional sport).

[8] Source: Toronto Sports Council. (2005, August). *A Sport Framework for the City of Toronto*. Prepared by The Lonsdale Group Inc, The Centre for the Development of Community Assets-Canadian Urban Institute and The Centre for the Study of Commercial Activity-Ryerson University.

accommodate or support the "playground-to-podium" continuum of sport for participants/athletes.[1]

Regional public facilities like the large fields, larger community centres and high school facilities are in a severe state of disrepair. "Competitive teams, leagues and sport organizations are not satisfied when they have to use neighbourhood facilities but are forced to do so by the lack of district and regional facilities." Competitive sport is therefore, bumping neighbourhood groups out of the neighbourhood facilities. Years of under-investment and poor growth management have left Toronto with a substantial sport and recreation infrastructure deficit.[2] According to the City of Toronto's Parks and Recreation Division, "Investment in new infrastructure for sports and recreation is as important as maintaining the infrastructure we've already got. We need to focus on building the soccer fields and cricket pitches for burgeoning new communities. Cricket is a fast growing sport in Toronto, soccer is the most popular sport in the world, but you wouldn't know that from counting our soccer fields and cricket pitches. Women who play rugby, hockey and ultimate frisbee have few places to go. By 2030 there will be 500,000 more customers clamouring for services and we have to get ready." Toronto has only one public, competitive 50 metre pool and there is only one indoor diving tower. A new arena hasn't been built in 20 years.[3] Having the right facilities is obviously critical to the community's ability to host events.

Tourism Toronto has recently established a sport tourism/event hosting group. However, this group's effectiveness is hampered by the lack of a database capable of identifying the details and location of sport facilities that could be used by event organizers to plan tournaments. Due to facilities being owned by a number of different jurisdictions and having inconsistent information and data, it is difficult to create a single interactive database for Toronto's sport and recreation infrastructure. There is a need for better coordination between jurisdictions (city, school boards, colleges and universities and private operators).[4]

Culinary Tourism

With its rich culinary traditions, fresh local foods and authentic regional cuisine, Ontario has all the ingredients to be an exciting culinary tourism destination. In 2006 the Province of Ontario working together with the tourism and hospitality industries, developed the new *Culinary Tourism In Ontario, Strategy and Action Plan 2005-2015* – a plan to make Ontario a leader in culinary tourism.

The strategy recommends a regional approach to develop new, high-quality culinary tourism products and experiences in established and emerging areas, including Niagara, Toronto, Ottawa, Muskoka, Prince Edward County and other destinations. It proposes to link growers and producers with stand-alone restaurants and destination accommodations such as inns and resorts. It also advocates the development and marketing of regional festivals and events that profile culinary excellence. The strategy includes a plan to build awareness of culinary tourism in Ontario, promote market-ready culinary tourism products, develop innovative culinary experiences, invest in research and raise quality standards.[5]

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[1] Source: Toronto Parks, Forestry & Recreation Division. (2004, July). *Our Common Grounds: Parks and Recreation Strategic Plan*. Retrieved June 11, 2007, from http://www.toronto.ca/parks/reactivate/ourcommongrounds_final.pdf
[2] Source: Toronto Sports Council. (2005, August). *A Sport Framework for the City of Toronto*. Prepared by The Lonsdale Group Inc, The Centre for the Development of Community Assets-Canadian Urban Institute and The Centre for the Study of Commercial Activity-Ryerson University.
[3] Source: Toronto Parks, Forestry & Recreation Division. (2004, July). *Our Common Grounds: Parks and Recreation Strategic Plan*. Retrieved June 11, 2007, from http://www.toronto.ca/parks/reactivate/ourcommongrounds_final.pdf
[4] Source: Toronto Sports Council. (2005, August). *A Sport Framework for the City of Toronto*. Prepared by The Lonsdale Group Inc, The Centre for the Development of Community Assets-Canadian Urban Institute and The Centre for the Study of Commercial Activity-Ryerson University.
[5] Source: Ontario Ministry of Tourism. *Culinary Tourism In Ontario: Strategy and Action Plan 2005-2015*. Retrieved September 2007, from http://www.tourism.gov.on.ca/english/IDO/IDO_images/Culinary_web.pdf

Toronto covers the spectrum of culinary offerings. From value-priced to high end, ethnic to local, Toronto's restaurants are highly regarded and plentiful, satisfying the taste of experienced foodies. The city is also home to several chefs of acclaim including Susur Lee, Jamie Kennedy, Mark Thuet, Greg Couillard, Mark McEwan, Dufflet Rosenburg, J.P. Challet, Keith Froggett, David Lee, Guy Rubino, Pat Riley and Lynn Crawford.[1]

Studies have shown that culinary tourists are older, better educated and more affluent than the average tourist, and have a greater economic impact than other visitors. Culinary tourism is also viewed as an important contributor to community sustainability and growth. It is growing around the world, as more and more people plan their holidays around the celebration of food and drink.[2]

TAMS revealed that 56% of Canadian travellers and 56.5% of U.S. travellers participated in dining in restaurants that offer local ingredients. Five percent of Canadian travellers and 5.8% of American travellers reported such activities motivated some of their overnight trips.

Table 6.9[3]
Travel Motivators during Overnight Trips

ACTIVITIES DURING OVERNIGHT TRIPS IN 2004-2005	**% of total Canadian travellers**	**% of Canadian travellers for whom this activity motivated some of their trips**	**% of total America travellers**	**% of American travellers for whom this activity motivated some of their trips**
Dining at restaurants offering local ingredients & recipes	56%	5%	56.5%	5.8%

The Resource Audit indicated that though many dining establishments use and serve local ingredients, wines and beers, few actually promote this fact. In addition, Toronto's culinary experiences don't seem to be profiled to tourist audiences as much as in other destinations such as Ottawa and Montreal, and the Resource Audit revealed that three quarters of the restaurants who responded do not currently partner with other types of businesses to offer cross-promotions or packages to tourists.

Green Tourism

There is a growing, world-wide trend of environmentally conscious travellers choosing their destinations accordingly. This can take the form of "ecotourism", which could, for example, mean a visit to one of Canada's National Parks. When choosing to visit a city, they will look for cities which offer "green" themes, such as cycling, taking walks in nature trails, the availability of hotels and restaurants that offer organic food, and environmentally conscious operations (e.g.

[1] Source; Maurin, Robert. (2007, January). 10 Top Toques. *Where Toronto*. Retrieved June 2007, from http://www.where.ca/toronto/article_feature~listing_id~177.htm and Chatto, James. (2007, March). Spice Cadet. *Toronto Life*. Retrieved June 2007, from http://www.torontolife.com/features/spice-cadet/

[2] Source: Ontario Ministry of Tourism. (2006, May 9). McGuinty Government Whets Appetite for Tourism – New Culinary Tourism Strategy Aims To Attract More Visitors. Cited in CTC Daily News.

[3] Sources: Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of Canadian Residents: An Overview*. Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20Canadian%20Report.pdf and Ontario Ministry of Tourism. (2007). *Travel Activities and Motivations (TAMS) of US Residents: An Overview.* Retrieved May 18, 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20(FINAL).pdf

recycling programs, energy efficient power systems), as well as an efficient public transit system to get around the city. Cities that are internationally recognized as being "urban green tourism" destinations are, therefore, in a competitive position to capture a share of this growing segment of the tourism market, which now includes groups and organizations staging conventions.

Urban Green Tourism is defined as travel and exploration in and around a city that:

- Provides visitors and residents with a greater appreciation of the City's natural and cultural resources, local heritage and arts.
- Encourages respect and conservation of urban resources, the local economy and community, ecological health, and cultural diversity.
- Inspires physically active, intellectually stimulating and socially interactive experiences that are accessible and equitable to all.

The Green Tourism Association is a unique non-profit organization that is committed to establishing an urban green tourism industry in Toronto. The Green Tourism Association works collaboratively with a network of businesses, community and environmental groups, government agencies, heritage and cultural organizations and individuals that share a common interest in promoting green tourism. Their Mission Statement is "To lead tourism in Toronto towards a sustainable future, evolving an industry which is ecologically sound, promotes and supports local economies, and fosters an appreciation of and respect for diverse cultural and natural heritage."[1]

Demand for more sustainable tourism will increase with Toronto's development plans that incorporate elements which are compatible with green tourism, such as:

- Waterfront Revitalization plans
- City of Toronto Official Plan
- Toronto Environmental Plan

Transportation-related planning proposals such as the recently released staff report published by the City of Toronto's Public Works and Infrastructure Committee, *Sustainable Transportation Initiatives: Short-term Proposals*, also address environmental/green issues consistent with the goals of the Green Tourism Association described above.

The Green Tourism Association also partners with the Smart Commute Association, which is a new partnership between the cities and regions of the GTA and Hamilton, with financial support from Transport Canada.[2] Smart Commute's goals and objectives are compatible with green tourism in that they are working to reduce traffic congestion and to take action on climate change through transportation efficiency. Assistance is provided to local employers and commuters with initiatives in alternative commuting options such as flexible work hours, cycling, walking, carpooling, teleworking, and of course, increased usage of public transit.

Joel Makover, a U.S.-based strategist on corporate environmental practices, recently concluded that there were 10 reasons why the current focus on the greening of business in tourism and other industries is more than merely a fad.

Makover's 10 reasons are as follows:[3]

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[1] Source: Green Tourism Association. Welcome. Retrieved September 2007, from http://www.tourgreen.ca/
[2] Source: Smart Commute. About Us. Retrieved September 2007, from http://www.smartcommute.ca/about_us
[3] Source: Canadian Tourism Commission (CTC). (2007, July 17). 10 Reasons Why Green Tourism Is Here To Stay. Retrieved October 2007, from http://www.corporate.canada.travel/corp/media/app/en/ca/newsItem.do?articleId=65831&language=english

- The corporate world's increasing drive for cost containment and efficiency while reducing risk and enhancing image.
- The political will is finally emerging.
- Consumers are now becoming more willing to choose greener products or products from companies perceived to be green leaders.
- Corporate and institutional buyers are looking upstream in the supply chain for their suppliers to provide innovative green solutions, such as a reduction in packaging or the use of more organic or bio-based ingredients.
- Shareholders, pension funds and other institutional investors are beginning to pressure companies to minimize risk in environmental compliance and hazards, as well as to acknowledge and report on environmental issues.
- Expectations are being raised so that for example, a company now has to achieve better than being simply carbon neutral to achieve a competitive advantage.
- Being "sustainable" is no longer considered an achievement. Companies in a leadership role will be those that are seen as restorative or carbon negative.
- An increasing number of companies are publicising their green achievements.
- The development of clean-green technologies has now reached the stage of new products reaching the marketplace.
- The environment is now being seen increasingly as a potential value addition.

WiFi

Many travellers today, whether they be on business trips, or on personal vacations, expect to be able to "stay connected" to the internet. Hotels now advertise the availability of high speed internet access, as those without this capability are now at a competitive disadvantage.

The modern, tech-savvy traveller also expects to be able to connect to the internet outside of his/her hotel room via their ever-present laptop, Personal Digital Assistant (PDA), or mobile phone. Many cities in the world now offer extensive WiFi networks to make this possible, which translates into a competitive advantage for such cities in their efforts to attract tourists and/or business travellers. Wireless Fidelity, or "WiFi", has among its many applications, the ability to provide internet access at an enabled network zone, or venue, known as a "hotspot."

In an attempt to provide Toronto with a competitive level of public wireless internet access, Toronto Hydro Telecom launched One Zone in October, 2006[1]. This high speed WiFi service allows users to get online from any suitably equipped laptop, PDA, or other wireless device. One Zone covers 235 blocks (6 km^2) in Toronto's downtown core. There are plans to extend the service to other areas in Toronto in coming years.

Over and above the One Zone network provided by Toronto Hydro Telecom, it is estimated that there are over 200 hotspots located throughout Toronto which are independent.

In addition, a non-profit organization, "Wireless Toronto" provides free, wireless internet access at its 40 member-sponsored hotspots[2]. The costs for the internet connections and wireless equipment are paid for by the hotspot venues, or sponsors, which are often cafes and restaurants. Wireless Toronto is actively recruiting additional venues and sponsors to increase the number of free hotspots throughout Toronto.

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[1] Source: Toronto Hydro Telecom. Welcome to One Zone. Retrieved September 2007, from http://www.thtelecom.ca/onezone/index.html
[2] Source: Wireless Toronto. Hotspot List. Retrieved September 2007, from http://wirelesstoronto.ca/

Attractor Impact

While Toronto has many attractions making it the most frequented location for visitors to Canada there is potential for further developments. The following chart indicates the impact on attracting additional pleasure visitors if each type of attractor were built. The chart is specifically for Toronto and indicates that the addition would be beneficial from a pleasure visitor standpoint.

Table 6.10[1]
Impact of Adding One More Attractor on Pleasure Visitors

Attractor	Average Impact on Pleasure Visitors
3-Star Amusement Park (e.g., Seaworld Adventure Park, Universal Studios in Orlando)	4.5Million - 7.0Million
3-Star Shopping Area (e.g., Macy's World, Chinatown NYC)	610,000 - 1,150,000
3- Star Specific Structure (e.g. Statue of Liberty, CN Tower)	1,020,000 - 2,870,000
Casino	390,000 - 430,000
Hotel Property	5,000
1% Improvement in Public Transit System	70,000
Note: “Quality" was defined according to the Michelin Guide's star system. 3-Star quality ratings refers to "Highly recommended/Worth a Journey"	

[1] Source: Ontario Ministry of Tourism and Recreation. (2004, June). *Factors Influencing Visitor’s Choices To Visit Urban Destinations*. Prepared by Global Insight Inc.

Element "K": Managing Within Carrying Capacities – Rating: Almost

The Managing within Carrying Capacities criteria and measures assess the extent to which the destination is aware of and manages within the capacity thresholds of its:

- Local economy;
- Ecosystems setting;
- Guest's satisfaction levels;
- Hard and soft services infrastructure; and
- Administrative systems.

Criteria and Measures	Rating
K1. Destination visitation generates economic benefits to the host community.	**Almost**
K1.i Guest visits and expenditures make a net positive contribution to the local economy	Yes
K1.ii Benefits and costs are balanced equitably within municipal boundaries	No
K2. Visitation does not consume local resources or increase their values to an extent that the local population is negatively impacted.	**Yes**
K2.i Attractiveness of the destination to recreational or retirement home or investment markets has not bid up the cost of housing to the extent that it is unaffordable to the locally employed population	Yes
K2.ii Where housing costs impacts are occurring, a plan to resolve the problem is being implemented	N/A
K2.iii Servicing guest visitation, or the investment to attract and accommodate it, does not consume labour or materials to the extent that their cost or availability to other sectors is impairing those sectors' profitability	Yes
K2.iv Where resource cost or availability impacts are occurring, a plan to resolve the problem is being implemented	N/A
K3. Trained labour is available to serve visitation demands at a level that maintains guest satisfaction.	**No**
K3.i There is a labour pool sufficient to accommodate current and projected levels of visitation	Almost
K3.ii Where labour pool constraints are occurring, a plan to resolve the problem is being implemented	No
K3.iii Guest surveys confirm satisfaction with hospitality and service	Almost
K3.iv Where dissatisfaction has been identified, a plan to resolve the problem is being implemented	No

Economic Benefits

In 2004, tourists in Toronto spent over $4 billion, generating $3.2 billion of GDP, over 57,000 tourism jobs and more than $1.7 billion in labour income in the municipality of Toronto (as illustrated in Table 6.11 on the following page). Not only does tourism provide tax revenue for the three levels of government, but it also contributes to jobs, income and GDP in other parts of Ontario.

Table 6.11[1]
Economic Impact of Visitor Spending to Toronto

	Impacts of spending by visitors retained in [location] (CAD 000's)	Impacts of spending by visitors in [location] that accrue to other parts of Ontario (CAD 000's)	Total impacts of Toronto Metropolitan Municipality's visitor spending in Ontario (CAD 000's)
GDP	$3,187,619	$732,787	$3,920,406
Jobs	57,382	10,322	67,704
Labour Income	$1,702,369	$452,350	$2,154,719
Total Taxes	N/A	N/A	$1,792,886
Taxes Federal	N/A	N/A	$945,229
Taxes Provincial	$638,724	$75,820	$714,544
Taxes Municipal	$105,304	$27,809	$133,113

Benefits and costs are not balanced equitably within the municipal borders since most of the tourism assets are located in the downtown core area. More specifically 64% of survey participants were located within the central area bounded by Dufferin St., Eglinton Ave., Bayview Ave., and Harbourfront. (Please see Appendix D)

Local Resources

There are several factors that have helped Canada and Toronto maintain healthy economic growth. These factors include: low unemployment rate, steady vacancy rates, historically low interest rates, strong housing starts, consumer confidence, and immigration. In a complex economy with a huge population such as Toronto, an increase in visitation has a marginal effect on local resources. There is no evidence to suggest that tourist visitation to Toronto consumes an inordinate amount of local resources or increases their price to the extent that the residents or other sectors of the city's economy are negatively affected.

Unemployment Rate

Toronto labour force is 1,427,210 and is 20.6% of Ontario's 6,927,260 labour force, and 8.1% of Canada's 17,592,760 total labour force.[2] Toronto has a higher unemployment rate (7.5%) than either Ontario (6.3%) or Canada (6.3%).

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[1] Source: Ontario Ministry of Tourism (CTS/ITS, CD 20). (2006). *Regional Tourism Profiles: CD 20: Toronto Metropolitan Municipality*. Toronto: Queen's Printer for Ontario.
[2] Source: Statistics Canada. (2006). *Labour Force Survey*. Cited in City of Toronto. (2007). *Economic Overview*.

The Organization for Economic Cooperation and Development (OECD) gives an estimate of the "full-employment unemployment rate" of 4% to 6.4%, suggesting that Toronto currently has capacity for further job growth without creating a labour market shortage.

Vacancy Rates

Vacancy rates have increased in the past few years indicating that there are more available apartments for rent compared to 2001. This is a direct result of the number of condominium projects that have been completed, as well as those projects that are under construction. The construction of condominiums doubly impact upon Toronto's rental vacancy rates: the purchase of condominiums by first time buyers create vacancies and the increased number of rental condominium units add to the rental supply (Please see Appendix G).

Office vacancy rates have decreased from a high in 2003. As companies streamline operations, many office consolidations occurred in the past few years, which slightly increased vacancy rates for offices. This trend is slowing and the demand for office space is rebounding. New office towers currently are being constructed that will complement the existing office space with key anchor tenants. This recovery indicates a direct relationship to the economic performance of Toronto.

Mortgage Rates

Mortgage rates provide an indication of the overall stability of the economy. The mortgage rates have been at historically low levels over the past few years (Please see Appendix G).

Housing Starts

Housing starts is a key indicator of consumer confidence in the economy. A higher consumer confidence translates into a higher number of new homes being developed. Over the past few years the housing starts have been fairly consistent indicating a continued consumer confidence in the stability of the Toronto and Canadian economy (Please see Appendix G).

Labour Pool

The general sentiment across Toronto's tourism industry is that the current labour pool is sufficient to support the various businesses in the long term (Figure 6.5). The festivals & events, attractions, and retail sectors are most satisfied with the availability of trained labour in the area, while opinions seems to be split in the accommodations sector. Together with the relatively strong economy of Toronto and a healthy rate of unemployment, a major factor contributing to this optimistic assessment is immigration, which is averaging 101,600 immigrants to Toronto per year. It must be noted that the food & beverage sector is the only sector that reported difficulties in attracting trained labour in order to support future growth.

Figure 6.5[1]
Sufficient Trained Labour across the Tourism Industry – Crosstabulation

Primary Business * Is there a sufficient pool of trained labour in the area to support your business in the long term? Crosstabulation

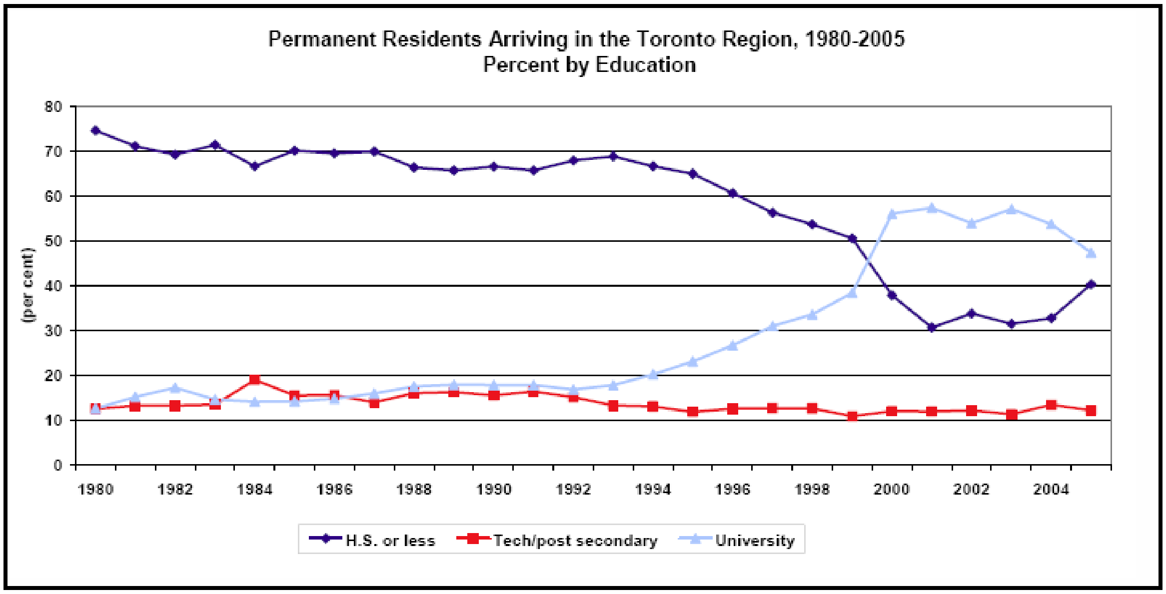
			Is there a sufficient pool of trained labour in the area to support your business in the long term?		
			Yes	No	Total
Primary Business	Accommodation	Count	47	37	84
		% within Primary Business	56.0%	44.0%	100.0%
	Attractions	Count	89	23	112
		% within Primary Business	79.5%	20.5%	100.0%
	Food&Beverage	Count	77	87	164
		% within Primary Business	47.0%	53.0%	100.0%
	Festivals&Events	Count	56	7	63
		% within Primary Business	88.9%	11.1%	100.0%
	Retail	Count	154	47	201
		% within Primary Business	76.6%	23.4%	100.0%
	Other	Count	37	24	61
		% within Primary Business	60.7%	39.3%	100.0%
Total		Count	460	225	685
		% within Primary Business	67.2%	32.8%	100.0%

The educational attainment profile among immigrants has recently been trending towards a higher percentage having a university education. The number of university educated permanent residents has steadily been increasing over the last 15 years, partly because of revisions to the point system used by Citizenship and Immigration Canada to qualify applicants for immigration. So while the percentage of permanent residents with a university education arriving in the Toronto Region has gone up to represent the largest group percentage-wise, there has been a corresponding drop in those with a technical/post secondary education, resulting in this group

[1] Source: Resource Audit

dropping to second. Those with a high school education or less has remained flat and is well behind in third place (see Figure 6.6 on the following page).

Figure 6.6[1]
Permanent Residents Arriving in the Toronto Region, 1980-2005, Percent by Education



While these trends in immigration and the growth in general that is expected to occur within the GTA would appear to support the satisfaction with the labour source by the tourism industry, there are some concerns and demographic trends that may result in labour related issues arising in the future. One area of concern involves the apparent low levels of job satisfaction being expressed by many of those currently employed in the tourism industry. Using hotel workers as an example, the average hotel worker earnings fall far short of the 2004 Toronto low-income cut off of $34,572 for a family of four. Moreover, even though there has been a recovery of hotel room occupancy rates in the last few years, both full and part time jobs have declined overall.

The majority of those still employed in this sector are immigrants and the earnings gap between immigrants and those who are Canadian born has increased despite policies aimed at selected individuals with greater economic potential to integrate. In spite of the fact that recent immigrants are now more highly educated, their wages and standard of living continues to decline. Many immigrants have reported that their educational accomplishments received abroad are often not recognized by professional associations and employers in Canada, forcing them into low paying, service jobs, such as those in the hotel and tourism industry. Given that many of these employees are also visible minorities and female, they encounter additional barriers.

These factors result in a work force with a high turnover rate, low job satisfaction, and with no particular interest in working in the tourism industry, other than as a way (temporarily, they hope) of surviving economically.[2]

A second potential issue is the aging of the population. According to the 2006 Census, the number of people aged 65 and over increased by more than 446,700 compared with 2001, an 11.5% increase, bringing the total number to 4.3 million. This is nearly four times as many

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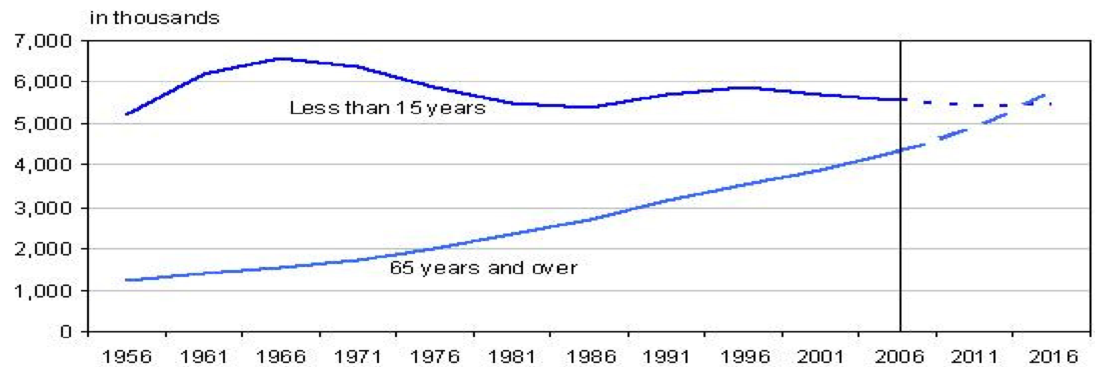
[1] Source: Toronto Social Development Finance & Administration Division. Permanent Residents Who Settled in Toronto: Top Ten Countries of Origin, 2000-2004 (chart: analysis of Citizenship & Immigration data). Cited in Toronto EDCT Division. (2007). *Economic Overview*.
[2] Source: Unite Here. *An Industry At A Crossroads: A High Road Economic Vision for Toronto Hotels*. Prepared by Toronto Task Force for the Hotel Industry.

seniors as in the first quinquennial census in 1956 for this demographic group. The number of children aged 15 years or less could be outnumbered by those aged 65 years and over within 10 years. The growth in the elderly population will accelerate even more in 2011 when the next wave of baby-boomers turn age 65 (see Figure 6.7 on the following page).

Figure 6.7[1]
Population Projections for Canada, Provinces and Territories 2005-2031



Sources: Statistics Canada, censuses of population, 1956 to 2006; and Alain Bélanger, Laurent Martel and Éric Caron-Malenfant. 2005. ***Population Projections for Canada, Provinces and Territories 2005-2031***, Statistics Canada Catalogue no. 91-520, scenario 3.

With the aging baby-boomer population there is a looming labour shortage as baby-boomers retire. The mandatory retirement age of 65 has been dropped in response to a combination of many healthy and productive baby-boomers not wanting to retire, and as a way of compensating for the growing labour shortages forecast by many employers. Baby-boomers being allowed to work beyond age 65 may benefit them and their employers, but may act a yet another barrier to younger people trying to enter the work force. Immigration may also compensate somewhat, however, the barriers mentioned earlier have hindered their participation in the labour market.

Overall Satisfaction of Hospitality and Service

A recent survey conducted by the University of Guelph determined that visitors were on average "Satisfied" to "Very Satisfied" with their visit. The survey was conducted of hotel guests during visits to Toronto. In the study, 47% of respondents deem themselves "Very Satisfied" with their visit and half are satisfied. Satisfaction levels are generally substantially higher for pleasure travellers than for business travellers. In 2006, 80% of visitors reported that service performance "Met Expectations" while 16.5% reported it "Exceeded Expectations". It must be noted, however, that in 1998 almost one-third of respondents felt that service performance levels had exceeded their expectations.[2]

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[1] Sources: Statistics Canada, censuses of population, 1956 to 2006; and Belanger, A., Martel, L., and Caron-Malenfant, E. (2005*). Population Projections for Canada, Provinces and Territories 2005-2031. Scenario 3*. Retrieved from http://www.statcan.ca/english/freepub/91-520-XIE/00105/ffront1.htm
[2] Source: Tourism Toronto (Guelph Study). (2007). *Understanding Overnight Visitors to the Greater Toronto Area.* Prepared by University of Guelph, School of Hospitality and Tourism Management. Retrieved August 2007, from http://www.torontotourism.com/web.cms/pdf/HotelProfileStudy.pdf

Criteria and Measures	Rating
K4. Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by visitation.	**Yes**
K4.i There is an environmental monitoring program in place which provides early warning that the quality of the resource or the visitor experience is at risk of being impaired	Yes
K4.ii There is a community health and well being monitoring program in place that provides early warning of whether quality of life impact thresholds are being approached	Yes
K4.iii Evidence from formal monitoring programs, or informal observations indicates that no capacity/thresholds are being exceeded	Almost
K4.iv Where the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented	Yes
K5. Growth in visitation to the destination is not threatening the experience enjoyed by current visitors.	**Yes**
K5.i Overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience are not being raised as issues by guest surveys or by managers of facilities and resources	Yes
K5.ii If issues are raised, they relate to one or two peak weekends only	N/A
K5.iii A response to identified issues has been defined and is being implemented	N/A
K6. Infrastructure is available to accommodate current or projected levels of demand without exceeding carrying capacities.	**Almost**
K6.i There is current/planned water treatment and delivery capacity to accommodate current and projected levels of visitation	Yes
K6.ii There is current/planned sewage treatment and trunk capacity to accommodate current and projected levels of visitation	Yes
K6.iii There is current/planned road, transit, parking and trail capacity to accommodate current and projected levels of visitation	No
K6.iv Assessments of the environmental effects of infrastructure expansions have been completed, with effects considered manageable and acceptable	Yes
K7.Municipal entities with approval authority are able to address development applications in a timely manner.	**Yes**
K7.i Local and upper tier (where present) Official Plans have tourism-related objectives and policies in place	Yes
K7.ii There is a political will to move forward with those projects to further the objectives expressed in the Official Plan or other planning documents	Yes
K7.iii There are sufficient administrative resources in place to efficiently manage review, approvals and permit processes	Yes

Carrying Capacities of Local Ecosystem

For tourism destinations, one of the most vital tasks is to monitor the inbound tourist's effect on the environmental and community health and wellness systems. With environmental issues more prominent in social and governmental circles alike, it has become increasingly important to focus on sustainable initiatives when implementing development projects that cater to both short and long term growth strategies. The carrying capacities criteria and measures established in the PRTD framework assess the scope to which the destination is cognisant of, and compliant to, the capacity thresholds of the natural environment that sustain local ecosystems as well as the quality of life at the destination, as it pertains to current and planned development initiatives.

Monitoring Programs

The environmental monitoring programs, along with specific commissioned reports and strategies that the City of Toronto currently has in place can be broken down into six distinct categories:

Table 6.12[1]
Environmental Monitoring Programs

Sensitive Areas	Mitigation strategy (ies)
Air Quality	Air Quality Strategy, Clean Roads to Clean Air Projects, Corporate Smog Alert Response Plan, Idling Control By-Law.
Water Quality and Efficiency	Watershed Planning, Source Protection of drinking water, Watersaver Programs, Wet Weather Flow Master Plan, Toronto Beaches' Blue Flag Program, Wastewater Master Plan, Sewage Treatment Action Plan.
Parks, Trees and Wildlife	Parkland Acquisition Strategy, Parkland Naturalization.
Waste and Recycling	Waste Reduction Program, Solid Waste Management Plan, Green Bin Program, Blue Box Recycling Program, Household Hazardous Waste Program, Adopt a Bin Program.
Transportation	National Transit Strategy, Green Fleet Transition Plan.
Health and Wellness	Food and Hunger Action Plan, Emergency Readiness Action Plan.

[1] Source: Toronto. The City of Toronto's Green Guide. Retrieved June 2007, from http://www.toronto.ca/greenguide/index.htm

Quality of the Guest Experience

There is no evidence to suggest that growth in visitation to Toronto is threatening the quality of the guest experience or that it is affecting the quality of the environment as these issues have not been raised in guest surveys or by facility managers.

Infrastructure

The City of Toronto's Official Plan (2006) relies on the fundamental principle of holistic planning that not one aspect of a bustling metropolis can be planned for in isolation. Instead, all City departments and services need to be examined in aggregate in order to maximize the competitive advantages associated with a highly connective, fluid, fully urbanized city. The Official plan (2006) establishes Toronto's responsibilities pertaining to all forms of development especially those developments posing realized and potential dangers to surrounding environmental systems. Assessments of the surrounding environmental systems indicate that effects from the improvement of the tourism industry infrastructure through a myriad of development initiatives are deemed controllable and acceptable.

Water and Sewage Treatment

Plant capacity is built to accommodate fluctuations in demand, in accordance with the City of Toronto's Wet Weather Flow Master Plan. Toronto's water and sewage treatment facilities staff are aware of population growth and the need to constantly evaluate circumstances for the future. The city is prepared to examine infrastructure with relation to population growth but future projects are contingent on sufficient funding.

Road, Transit, Parking and Trail Capacity

Gridlock has become a daily reality in Toronto and is becoming a competitive disadvantage for the city.[1] The GTA is the fourth-most congested area in North America, trailing only Los Angeles, the San Francisco Bay Area and Chicago. Congestion costs the GTA $2.2 billion each year. Commuting in the GTA currently takes 32 % longer than it would in free-flowing conditions. By 2031, that will rise to 40 %. The environmental cost of congestion is also unsustainable. GTA residents made approximately 10 million car trips per day in 2004 and were responsible for approximately 14 million tonnes of carbon dioxide emissions. If this trend continues, the time needed to travel by car from Toronto to Hamilton during peak hours, for example, will nearly double — from an hour-and-a-half in 2000 to about three hours in 2021.[2]

Landmark transportation decisions were made in the 1970's to cancel the planned network of expressways and shift the emphasis to an expansion of rapid transit (e.g. TTC subways and GO Transit commuter rail). However, there have been insufficient resources to fully implement this alternative strategy. At the same time, the population of the GTA has continued to grow (along with a corresponding growth in automobile and truck traffic). The result is the current situation; both the roads and public transit system are at or near capacity. With no new significant expansion of the arterial road and expressway system envisioned to occur in the near future, the solution to the ever-worsening gridlock lies with the TTC's Ridership Growth Strategy. This 2003 plan presents the case to increase ridership and itemizes the resources required to reach the

[1] Source: Toronto Transit Commission (TTC). (2003, March). *Ridership Growth Strategy*. Retrieved August 2007, from http://www.toronto.ca/ttc/pdf/ridership_growth_strategy.pdf
[2] Source: Government of Ontario. Office of the Premier. (2007, June). *MoveOntario 2020*. Retreived November, 2007, from http://www.premier.gov.on.ca/news/Product.asp?ProductID=1384

stated goals. The Transit City concept publicly proclaimed by the City of Toronto in 2006, would have dovetailed the TTC Ridership Growth Strategy, but is now in question as a result of the budget controversy.

The Ridership Growth Strategy was presented in the context of "a consistent lack of government support for the TTC in the past decade. Provincial funding was reduced a number of times in the mid-1990's and is only now being partly restored. The TTC's ridership and market share has fallen significantly during this period, to a large extent because of lack of government support."[1]

The Conference Board of Canada estimates that the overall infrastructure investment shortfall in the City of Toronto to be about $1.1 billion annually. A significant portion of this underinvestment is transportation-related, and it comes at a time when there should actually be increased investment to accommodate population growth, not only to maintain the status quo in a state-of-good repair.

Growth in demand has proceeded at a rate far higher than the expansion of the transit system, and predominantly in low density, automobile-oriented areas which makes transit service very difficult to provide. The TTC is already running its subway system at maximum frequency; i.e. during rush hours, the headway between trains is already at the limit specified by the operating criteria of the TTC's Intermediate Point Headway Control signalling system. The modal split (i.e. the percentage of travel using various modes; public transit versus private automobile) for transit actually went down from 1986 to 2001 because most of the growth in travel came in areas where little has been invested in good transit service.

There is 20 years' worth of catching up plus the demands of the next decades, and all this in a context where driving is a well-established way to move around the region. Transit modal splits today are high where there is fast, frequent service and travel distances are comparatively short. Regional growth, however, means long trips where transit, for the most part, cannot compete due to service frequency, transfer requirements, network structure and congestion.

The transit modal split for the GTA as a whole is projected to remain flat because transit gains will only keep up with gains in the auto sector. Anything that drives more people to transit, such as a change in the relative cost of auto commuting, will make this situation even worse. Meanwhile, the road system cannot accommodate the increased demand. Car ownership is growing faster than new or widened roads are created, and the major corridors have no room for expansion.

Major widening of most highways within the GTA is not feasible. The continuing expansion of downtown Toronto as an employment centre can only be served by public transit.[2] The same conclusion can be drawn with respect to access to the tourism-related facilities.

The following details illustrate the current situation and supply of the components making up Toronto's transportation infrastructure:

Public Transit

The Toronto Transit Commission (TTC)

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[1] Toronto Transit Commission (TTC). (2003, March). *Ridership Growth Strategy*. Retrieved August 2007, from http://www.toronto.ca/ttc/pdf/ridership_growth_strategy.pdf

[2] Source: Ontario Ministry of Transportation. (2007). *Transportation Trends And Outlooks for the Greater Toronto Area And Hamilton – Strategic Transit Directions*. Prepared by IBI Group. Retrieved August 2007, from http://www.gtta.com/en/news/Strategic%20Transit%20Directions_2007-01-29.pdf

The TTC operates an extensive network of buses, streetcars, subways and light rapid transit lines. The TTC operates a total of 178 routes throughout the City of Toronto. In 2006, the TTC carried 444,544,000 passengers. On an average business day, there were 2,333,000 revenue passengers and transfer fares. Acting as the backbone of the system are the 3 subway routes and the Scarborough rapid transit line. Many of the stations act as direct-transfer feeder hubs for bus and streetcar routes. The TTC has 68 km of subway and light rapid transit lines. Compared with some selected other cities: Chicago has 171 km; Washington, DC has 171 km; Montreal has 66 km. With respect to fares, revenue from the current TTC fare structure (e.g. Metropass - $99.75, Adult ticket – 5 for $10.50, Adult cash fare - $2.75, Day Pass - $8.50) account for 82% of all revenue required for operations – far higher than other public transit systems (e.g. Vancouver 34%, Montreal 47%, Washington, DC 43%, Boston 31%, Chicago 42%, Philadelphia 40%).[1] In other words, other public transit systems enjoy much greater financial support from various levels of government, which acts as a significant constraint on the TTC's operations and plans. The TTC also provides a variety of services for riders with special needs relating to accessibility. These include "kneeling" buses, complete with 2 wheelchair seating positions, subways stations with elevators, "Wheel-Trans" service for those passengers with physical disabilities using conventional public transit, and "Community buses", which are accessible, fixed-route buses that are primarily focused on passengers who have some difficulty accessing conventional transit systems.

GO Transit

GO Transit is the regional commuter rail and bus system that connects Toronto with the surrounding regions of Greater Toronto Area. GO Trains and GO Buses serve a population of more than five million in an 8,000 km^2 area extending from downtown Toronto to Hamilton, Milton, and Guelph in the west; Orangeville, Barrie, and Beaverton to the north; Stouffville, Uxbridge, and Port Perry in the northeast; and Oshawa and Newcastle in the east. The bus service extends as far as 100 km from downtown Toronto. Connections are made with every municipal transit system in the Greater Toronto and Hamilton areas, including the Toronto Transit Commission (TTC). While many of the routes serve inbound and outbound commuting to and from the downtown core, there are also many routes that service the rapidly evolving cross commuting patterns (e.g. Oakville-York University, Mississauga-Vaughan, Oshawa-Markham). Nevertheless, about 96% of all GO Train trips are to and from Union Station while about 70% of all GO bus trips are to and from the City of Toronto. The current combined train and bus system handles 49 million passengers annually.[2]

GO Transit currently operates the following six GO train lines:

- Lakeshore (Hamilton – Burlington – Oakville - Mississauga – Toronto Union – Pickering – Ajax – Whitby - Oshawa)
- Georgetown – Toronto Union
- Milton – Toronto Union
- Bradford – Toronto Union
- Richmond Hill – Toronto Union
- Stouffville – Toronto Union

[1] Source: Toronto Transit Commission (TTC). (2003, March). *Ridership Growth Strategy*. Retrieved August 2007, from http://www.toronto.ca/ttc/pdf/ridership_growth_strategy.pdf
[2] Source: GO Transit. *What is GO?* Retrieved August 2007, from http://www.gotransit.com/PUBLIC/aboutgo/whatisgo.htm

Only the Lakeshore line operates full service, 7 days a week. Trains run from approximately 5:00am – 6:00am to approximately 1:00am, Monday through Friday. During the morning and afternoon rush hours, trains run every 20 – 30 minutes, and once every hour at other times. On Saturday, Sundays and holidays, hourly service is offered from approximately 7:00am to 1:00am.

Service on the Georgetown line is Monday through Friday only. Service is primarily during the rush hours, with only a few trains scheduled between the rush hours, and only as far as Brampton/Bramalea.

The other four lines are scheduled only for those intending to commute inbound into downtown Toronto in the morning and return outbound in the afternoon.
They have only limited Monday through Friday rush hour service, meaning that in the morning rush hour, there are only inbound trains to Union Station and in the afternoon rush hour, there are only outbound trains from Union Station. [1]

Regional Transit Systems

The Regions and Cities surrounding the City of Toronto have their own transit systems which operate bus routes throughout their municipality and also provide inter-regional services, including connections with TTC bus routes and subway stations, and GO Transit stations. These systems are: Mississauga Transit, Brampton Transit, Durham Region Transit and York Region Transit. York's system includes the innovative VIVA rapid transit bus network that serves a number of high volume hubs within the City of Toronto, such as York University and the TTC's Finch subway station.

Motor Coach Operators

The Ontario Motor Coach Association (OMCA) is one of the largest travel and tourism-related associations in Canada, and the voice of private sector bus operators, inter-city bus lines, charter and coach tour companies in Ontario.
Motor coach travel and tourism generates hundreds of millions of dollars per year in economic activity, making it one of the most important sectors in the tourism industry in North America.[2]
Brian Crow, the OMCA's President and CEO, has identified the following issues that the OMCA's members believe negatively impact their ability to effectively serve their customers (i.e. tourists to Toronto), causes negative perceptions of Toronto as a tourist-friendly city, as well as possibly jeopardizing their profitability and growth potential:

1) Parking enforcement related issues. As was called out by other tourism stakeholders, there is a perception that there is inadequate convenient parking available, and enforcement of the parking by-laws is overly aggressive and arbitrary.

2) There is a concern that the proposed airport-downtown rail link will make the existing airport express bus service to the downtown area uncompetitive.

3) According to Brian Crow, motor coach companies have to be licensed by the Province of Ontario to operate any service that crosses a municipal boundary. There is a $400 application fee that must be paid by any US motor coach tour operator that wants to bring

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[1] Source: GO Transit. *Schedules.* Retreived October 2007, from http://www.gotransit.com/PUBLIC/schedule/default.htm
[2] Source: Ontario Motor Coach Association (OMCA). Driving Member Success through Advocacy, Awareness and Education. Retrieved October 23, 2007, from www.omca.com

a tour group to Toronto. Attempts by the OMCA to persuade the provincial government to reduce this disincentive have been unsuccessful.

4) Congestion problems on Toronto's roads and highways seriously compromise the ability of tour and charter buses to make scheduled pick ups and arrivals at Toronto's hotels, tourist venues and convention centres. This may even result in the tour group missing a pre-arranged arrival time to a scheduled event, which was the purpose of their trip to Toronto.

5) According to Brian Crow, it is illegal for charter or tour buses to use the HOV/bus-only lanes in Toronto, which could have been used as means to avoid the road congestion.

Roads and Expressways

Toronto's arterial road network is based on a north-south, east-west grid, which feed into interchanges with the expressways leading in and out of the City of Toronto. The main approach routes from the west and south are Highway 401, the Queen Elizabeth Way (QEW)/Gardiner Expressway, and Highway 407, the ETR toll road, which runs from Burlington in west to Durham Region in the east. The closest border crossing point is at Niagara Falls and is about a 90 minute drive on the QEW. Highway 401 is Canada's busiest highway and runs from Windsor, Ontario, through Toronto and east to the Quebec border, en-route to Montreal. Highway 401 also serves Pearson International Airport by way either Highway 409 or Highway 427, which runs north from the QEW into York Region, north of Toronto. The QEW (known as the Gardiner Expressway within the City of Toronto), runs right through the downtown core (elevated) and then connects with the Don Valley Parkway (DVP), which runs north to Highway 401, for those wishing to travel to points to and from east of Toronto. North of Highway 401, the DVP is known as Highway 404. The main northbound highway is Highway 400, which connects with Highway 401 and runs north, eventually connecting with the Trans Canada Highway for traffic to and from western Canada and northern Ontario.

Taxi Services

Toronto has a taxi fleet of 4,960 vehicles, operated by private companies under three categories: 1) Ambassador cabs; 2) Standard taxi cabs; 3) Accessible taxi cabs, which are specially equipped vehicles offering dedicated service for people with disabilities.[1]

Cycling

The City of Toronto has a number of programs in place to encourage the use of cycling as a means of transportation, in the context of the Toronto Bike Plan of 2001. Toronto's bike trail system is 125 km long and there are about 50 km of bicycle lanes on city streets. Toronto has approximately 40 km of signed bicycle routes. The City of Toronto has zoning by-laws in place requiring all new developments over 2,000 square m to provide secure bicycle parking, and over 11,000 bicycle racks have been installed.[2]

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[1] Source: Resource Audit

[2] Source: Toronto Bike Study Team. (2001). *Toronto Bike Plan – Shifting Gears.* Retrieved July 2007, from http://www.toronto.ca/cycling/bikeplan/pdf/bike_plan_full.pdf

Pedestrian Sidewalks and Walkways

The Toronto Pedestrian Charter, adopted in May 2002, is the first pedestrian charter approved by a municipality in North America. The Charter sets out the basic principles necessary to ensure walking is a safe and convenient mode of urban travel. Most streets have sidewalks and many have curb cuts to allow barrier free access. The City of Toronto is in the process of developing a Walking Strategy. The Strategy will lay out the policy, infrastructure and program elements needed to create a "culture of walking" in the City and establish the appropriate tools to measure its success.[1] The most extensive walkway system in Toronto is the underground PATH network. It links 27 km of shopping, services and entertainment. The system facilitates pedestrian linkages to public transit, accommodating more than 100,000 daily commuters and thousands of tourists and residents travelling to sports and cultural events. It provides pedestrians with a safe haven from the winter cold and the summer heat.

Parking

Toronto Parking Authority

- Total number of off-street parking places: 20,000 (10,000 in garages; 10,000 in 140 surface lots).
- Total number of on-street, metered spaces: 17,500.

TTC Commuter Parking

- The TTC operates 29 commuter parking lots with a total of 13,818 spaces.

GO Transit Commuter Parking

- There are 12 GO train stations within the City of Toronto that have on-site parking with a total of 5,837 spaces.

Privately Operated Parking Lots

- There are private parking lots available throughout the City of Toronto, both outdoor and indoor, with rates set by the private operator. For further details please see page 86.

[1] Source: City of Toronto. Toronto Walking Startegy. Retreived November 2007 from http://www.toronto.ca/transportation/pedestrian/walking_strategy/

Major Transportation Gateways

Union Station

- No parking available.
- Wheelchair accessible.
- 2004 data:
  - 43 million passengers annually (GO Transit – 41 million train and bus); Via Rail - 2.34 million.
  - On a daily basis (Mon.-Fri), 130,000 GO train passengers (weekday train trips 181) and 30,000 GO bus passengers (weekday bus trips 420); 44 Via trains on average per day, to and from Montreal, Ottawa, Windsor, Sarnia, Niagara Falls, Vancouver and including 2 via Ontario Northland (ONR) to and from Cochrane and 2 via Amtrak to New York.
  - The TTC's Union subway station handles 75,000 per day (Mon-Fri); the TTC's 4th busiest station.

Toronto Coach Terminal (Bay & Dundas)

- Ontario Northland: 4 arrivals and departures to Cochrane, 14 to North Bay, 6 to Sudbury, 6 to Timmins; also a stop at Yorkdale GO bus/TTC station.
- Greyhound Canada: 10 arrivals and departures to Windsor, 20 to Ottawa, 6 to Vancouver, 5 to Chicago, 9 to Detroit, 8 to Buffalo, 5 to New York, 30 to London, 26 to Guelph, 40 to Kitchener, 6 to Kingston; additional stops at Front St./Royal York Hotel, University and Wellington.
- Coach Canada: 17 arrivals and departures to Montreal, 14 to Buffalo, 38 to Niagara Falls.

GTAA (Pearson Airport)

- Passenger activity at Toronto Pearson in 2006 was up 3.5% from 2005, processing 31 million passengers, placing it at number 29 in the world ranking. North American Market Position: 17th in North America for passenger traffic; 3rd in North America in terms of international traffic (16 million), behind New York (JFK) and Los Angeles; 1st in North America when comparing international traffic as percentage of total traffic (almost 56%). The newly constructed Terminal 1 replaced the former Terminals 1 and 2, and together with the construction of other new facilities and infrastructure, represented a $4.4b investment. The project plan is to build facilities that will accommodate the anticipated 50 million passengers per year forecast by 2025. A significant portion of this projected increased volume is expected to come from European travellers. Recently, the European Commission has been given the official mandate to hold talks with the Government of Canada for the purpose of negotiating an Open Skies Agreement. According to a study conducted by the European Commission, the number of passengers annually travelling between the European Union and Canada would increase from 8 million to 14 million by 2011 and that such as an agreement would generate consumer benefits of at least $110 million through lower fares.
- Service Highlights: flights to and from 28 Canadian cities, representing every province; 40 flights per day to New York; 15 flights per day to the U.K.; 20 flights per day to Florida; 32 flights per day to Montreal; 50 flights per week to Asian cities.
- Public transit to Toronto Pearson is currently provided by: TTC routes to the Kipling Lawrence West stations, with overnight service provided to Eglinton Station and to

Danforth and Warden; Airport Express bus to the downtown area (Royal York Hotel/Union Station); Mississauga Transit; GO Transit's Brampton-York Mills Station bus route; shuttle services operated on behalf of regional hotels; taxi and limo service.
- Considered to be one of the most expensive airport in the world in terms of airline landing rights, and these cost are passed on to the travelling public by way of surcharges added to the ticket price.[1]

The proposed airport-downtown fixed rail link would connect the biggest airport in Canada with the busiest surface passenger transportation hub in the country (Union Station), handling approximately 80,000 and 200,000 passengers, respectively per day. It is estimated that the service would eliminate over 1.5 million car trips in the first full year of operation. The service is also expected to meet the following objectives:

- Increase mobility by providing a transportation service that is safe, accessible, convenient, and comfortable and that meets the needs of the public.
- Provide a direct, seamless and rapid passenger rail service between Union Station and Pearson Airport.
- Reduce road congestion by enhancing the movement of passengers and freight while taking advantage of existing rail corridors.
- Provide an efficient and environmentally responsible passenger rail service and improve health by reducing greenhouse gas and other emissions.
- Complement existing public transit systems and support intermodal transportation options within the GTA.
- Contribute to the economic development and well-being of the GTA.
- Promote the use of Intelligent Transportation Systems.
- Employ a public-private partnership approach to avoid the use of public funds.
- There is currently an Environmental Impact Assessment underway - the "Georgetown Pearson Study."[2] This study was in part necessitated by the opposition by the Weston Community Coalition, who believes that the expanded right-of-way through their community would have a serious, negative impact. The process is currently on hold pending the outcome of the Provincial election scheduled for October, 2007.

Toronto City Centre (Island) Airport (Toronto Port Authority)

- Porter Airlines operates: 12 arrivals and departures per day to Montreal; 12 to Ottawa; 8 to Halifax.
- Plans to inaugurate service to New York (Newark) in Q1 of 2008.
- The current number of take offs and landings for all air traffic annually is 120,000.
- Passenger/car ferry makes the 120 metre crossing of the Western Channel every 10-15 minutes during airport operating hours (one of the world's shortest ferry rides).
- There is a free shuttle service connecting the airport to Union Station.

Outer Harbour Marina (Toronto Port Authority)

- 636 slips for boats 20 to 100 ft.
- Wide ultra-stable docks.
- 30 and 50 amp power.

[1] Source: CBC News. (2005, November 16). Landing fee hike makes Toronto's Pearson airport the world's costliest. Retrieved August 2007, from http://www.cbc.ca/money/story/2005/11/15/gtaa-051115.html
[2] Source: Georgetown Pearson Study: Environmental Assessment Process. Retrieved August 2007, from http://www.georgetownpearsonstudy.ca/georgetownpearsonstudy/envAtPro.asp

- Easy access fuel and pump out dock.
- Washrooms, showers and laundry facilities.
- Picnic tables and ample green space.
- Secure, easy access winter storage.
- 35 ton Travelift, 8 ton mast crane and 5 tone fork lift.
- 10 minutes east downtown Toronto, adjacent to Tommy Thompson Park (the "Leslie St. Spit").
- Free parking nearby.

Significant Future Growth Plans

GO Transit Rail Improvement Program

GO Transit's overall expansion program is worth a billion dollars. The Government of Canada, the Province of Ontario, and the municipalities in the GTA all play a role in the funding which comes from the Canada Strategic Infrastructure Fund. Projects include an additional new track on the Lakeshore and Georgetown lines, overpasses that will separate GO trains from freight trains, an extension of the Bradford line to Barrie, as well as an extensive renewal program for Union Station, which will double the station's capacity to 80 million passengers per year, improve train operations and reliability, and reduce operating costs.[1]

TTC Extension of the Spadina Subway to York University and York Region

The Province of Ontario announced in its March 23, 2006 budget, provincial funding of $670 million for the Spadina Subway Extension Project. In its March 19, 2007 budget, the Government of Canada announced up to $962 million in funding to help fund five transit projects in the Greater Toronto Area (GTA), including the extension of the Spadina subway line. The plan calls for an extension of the Spadina subway from its current northern terminus at Downsview Station, to York University and beyond to the envisioned Vaughan Corporate Centre at Highway 7 and Jane Street in York Region. This would become the first TTC subway line to extend beyond the City of Toronto.

The Provincial Environmental Assessment for the City of Toronto portion of this project to Steeles Avenue West has been approved. The section north of Steeles Ave.West in York Region had a separate Environmental Assessment approved in 2006. However, since York Region's submission was made before the final decision on the TTC's proposed alignment of the subway line's crossing of Steeles Ave.West, York Region was required to make an additional submission, an alignment optimization report, which is currently awaiting approval.[2]

MoveOntario 2020

The projects described above are planned to be supported by the Province of Ontario's *MoveOntario 2020* rapid transit plan. A $17.5 billion dollar rapid transit plan, it is the largest transit investment in Canadian history. By 2015, two-thirds of construction for *MoveOntario 2020* will be completed, with nearly full completion of the plan in 2020. The Province of Ontario is contributing up to $11.5 billion dollars and is calling on the federal government to cover at least one third of the costs, expected to be $6 billion. The Province will cover the balance of the capital costs and the Province and municipalities will continue to share operating

[1] Source: GO Transit. GO Transit Rail Improvement Program. Retrieved August 2007, from http://www.gotransit.com/gotrip/index.asp
[2] Source: Toronto Transit Commission. Welcome. Retrieved September 2007, from http://www.toronto.ca/ttc/spadina_extension/general.htm

costs through the existing Provincial gas tax program. The Greater Toronto Transportation Authority (GTTA) has been asked to report back with an implementation plan for these projects by early 2008.[1]

Redesign of Subway Stations – "Arts on Track"

The Toronto Community Foundation is spearheading the "Arts on Track" program, by taking philanthropic leadership to finance through a private public partnership, the redesigning of the Museum subway station with a ROM - related theme. Construction is currently underway with completion expected by December, 2007. The platform is being redesigned by Diamond + Schmitt Architects into a hall inspired by classical architecture, with the columns transformed into artefacts from the ROM. There are also proposals to redesign the St. Patrick Station with a theme related to the nearby Art Gallery of Ontario, and another at Osgoode Station, with a theme related to the adjacent Four Seasons Centre for the Performing Arts.[2]

Feasibility Study for New Inter-Regional Bus Terminal

The Greater Toronto Transportation Authority (GTTA) board decided at its August 24, 2007 board meeting to proceed with a six-month study to evaluate the business case, conceptual site plans, and policy and planning rationale for a new inter-regional bus terminal at 90 Harbour Street, a Government of Ontario landholding and former OPP headquarter building. This site is located immediately south of the Gardiner Expressway/Lakeshore Blvd. corridor (approximately 380 m south of the main passenger concourse at Union Station). The existing Toronto Coach Terminal located at Bay and Dundas is owned by the TTC and used by carriers such as Greyhound and Coach Canada. But the space and the location have long been considered inadequate, with insufficient room for buses to park so passengers can board and disembark.

A GTTA report recommends the transit authority take the lead in incorporating an intercity bus terminal into the Union Station hub. It also suggests the GTTA signal interest in the Harbour Street property, just south of the Gardiner, before the site is eaten up by burgeoning residential and commercial development. The GTTA study would consider the possibility of building a covered walkway between the Harbour St. site and Union Station and integrating that with tunnels that link to office towers farther north. The study would also look at rapid bus access to the Gardiner Expressway and the Don Valley Parkway, including links to proposed dedicated bus lanes on the DVP.[3]

Transit City

The City of Toronto Official Plan, the TTC Ridership Growth Strategy, the Building a Transit City Plan, and Mayor Miller's "Transit City" Platform (2006), have been distilled and consolidated into one high-level plan for light rail for Toronto – Toronto Transit City – Light Rail Plan.

The plan is premised on developing a widely-spaced network of electric light-rail lines, each on its own right-of-way. The lines reach all across Toronto, all connecting with the city's existing and planned rapid transit routes.

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[1] Source: Ontario Ministry of Transportation. (2006, April 24). McGuinty Government Creates Landmark Transportation Agency. Retrieved from http://www.mto.gov.on.ca/english/news/provincial/2006/060424.htm
[2] Source: Toronto Community Foundation (TCF). Toronto Dialogues-Arts on Track: Unprecedented Public/Private Partnership. Retrieved September 2007, from http://www.tcf.ca
[3] Source: Kalinowski, Tess. (2007, August 7). Study may spur bus terminal move. *Toronto Star*. Retrieved from http://www.thestar.com/article/248617

In total, 120 km of service will be added over the entire city. By 2021, the new lines would carry 175 million riders per year. The estimated cost including vehicles is $6 billion.

The seven corridors suggested for the Toronto Transit City Plan – Light Rail are (and can be seen in Figure 6.8 on the following page):

- Don Mills – Steeles Avenue to Bloor-Danforth Subway
- Eglinton Crosstown – Kennedy Station to Pearson Airport
- Etobicoke-Finch West – Yonge Street to Highway 27
- Jane – Jane Station to Steeles West Station
- Scarborough Malvern – Kennedy Station to Malvern/Morningside
- Sheppard East – Don Mills Station to Morningside Avenue
- Waterfront West – Union Station/Exhibition to Long Branch

Figure 6.8[1]
Toronto Transit City Light Rail Plan

[1] Source: Toronto Transit Commission, Transit City. See the Map. Retrieved September 2007, from http://www.transitcity.ca/index.php?option=com_content&task=view&id=16&Itemid=30

Political Will

In recognition of tourism importance to the city's economy, a dedicated Tourism Section was formed in the Economic Development Division within the City of Toronto (2002). Its mandate is to position Toronto as a dynamic and culturally vibrant year-round international destination. The Tourism Section also fosters the development and rejuvenation of attractions, facilities, and globally significant events and festivals.

The presence of political will was further demonstrated by the fact that in 2003, City of Toronto Council adopted a *Five-Year Action Plan* for strengthening Toronto's tourism industry. The plan identified five key areas for action: leadership in the tourism sector; raising the sector's public profile; enhancing Toronto's attractiveness to tourists; improving the sector's ability to attract new investment; and increasing the marketing reach and impact (see page 124 for further details on goals and accomplishments to date).

In 2005 City Council endorsed the City's participation in the PRTD Framework process, and approved an increase to the EDCT-Tourism Section budget to support the research.

PERFORMANCE SUMMARY

The Workbook provides guidelines as to how to determine whether Toronto is a “Premier-ranked Tourist Destination”. Being a Premier-ranked Tourist Destination requires success across the Product, Performance and Futurity dimensions. Each dimension is supported by elements, denoted by the letters A to K. Each element has a series of consecutively number criteria as in A1, A2 etc. Each criterion is supported by measures, denoted by lower case roman numerals.

The Performance Summary Form was completed by evaluating Toronto’s performance through each of the three dimensions by weighing the extent to which Toronto fulfills the stated expectations. The completed Form can be seen in Appendix “J”.

The Product dimension is evaluated by the extent to which Toronto fulfills expectations, through providing a high quality tourist experience as enabled by its offering’s elements. Its elements are as follows:

- “A” Element: Distinctive Core Attractions
- “B” Element: Quality and Critical Mass
- “C” Element: Satisfaction and Value
- “D” Element: Accessibility
- “E” Element: An Accommodation Base

A “Yes” affirmation for the Product dimension requires “Yes’s” for the A, B and C elements. Since Toronto was scored “Almost” for the “C” Element (Satisfaction and Value), Toronto scored “Almost” for the Product dimension.

The Performance dimension is evaluated by the extent to which Toronto fulfills expectations, through providing a high quality tourist experience validated by its performance elements. Its elements are as follows:

- “F” Element: Visitation
- “G” Element: Occupancy and Yield
- “H” Element: Critical Acclaim

A “Yes” affirmation for the Performance dimension requires “Yes’s” for both the F and H elements. Since Toronto was scored “Almost” for the “H” Element (Critical Acclaim), Toronto scored “Almost” for the Performance dimension.

The Futurity elements, criteria and measures identify the extent to which Toronto is investing in its future as a place with a viable and continuing attractiveness to evolving markets. Its elements are as follows:

- “I” Element: Destination Marketing
- “J” Element: Product Renewal
- “K” Element: Managing Within Carrying Capacities

A “Yes” affirmation for the Futurity dimension requires “Yes’s” for each of it’s I, J, and K elements. Since Toronto was scored “Almost” for the “K’ Element (Managing Within Carrying Capacities), Toronto scored “Almost” for the Futurity dimension.

The determination of whether Toronto is a Premier-ranked Tourist Destination requires a score of “Yes” for each of the three dimensions. Since Toronto received a score of “Almost” for all three dimensions, Toronto could not be given the status of Premier-ranked.

A discussion of the issues and scoring for each dimension is provided below.

Product

According to the Guidelines in the Workbook, the City of Toronto’s tourism product was rated as “Almost”, as a result of deficiencies and gaps in the “Satisfaction and Value” element, as described below.

As one would expect for a city the size of Toronto, the elements Quality and Critical Mass, and Accommodation Base were found to be met. Toronto offers a wide breadth of core and supporting attractions that appeal to wide range of market segments and various price points. An extensive range of dining and shopping options are available, as are a wide variety of accommodation across a range of types, quality levels and price points.

Toronto generally scores positively on the Accessibility element. Toronto is very accessible to other nearby major cities as well as regional and international gateways by a variety of travel modes and price options.

However, accessibility to, and within, the City of Toronto is subject to increasingly problematic congestion on the major highways and arterial roads, especially during the peak rush hour periods. This congestion results in significant delays both for motorists and for bus passengers. While it is acknowledged that the public transportation infrastructure is currently good, especially within the central city served by the TTC subway. There is a general awareness that the transit network, both intra-city (e.g. the TTC network) and inter-city commuter service (e.g. GO Transit) needs to be significantly extended and enhanced if it’s to meet future demand. However, there is currently a major political debate taking place as to if and how the various long range plans and proposals can be achieved within the current funding arrangements between the three levels of government and the TTC.

The Distinctive Core Attractors element had mixed results. While the attractors were found to be relevant to the expectations of identified market segments, Toronto was not considered to stand out as distinct from its competition, nor was Toronto’s offering considered superior with respect to guest experience.

Satisfaction and Value was the element where Toronto was perceived to have the most negative impressions and room for improvement. There were mixed reviews from visitors, tour operators and travel agents as to whether they experienced the feeling that Toronto is a welcoming, friendly and hospitable city. With respect to Toronto offering a highly satisfying experience to its guests, there have not been regular guest satisfaction surveys carried out and the most recent one reported deterioration in visitor satisfaction.

In the critical area of offering value for money spent, Toronto was NOT considered to be “good value” or “expensive but worth every cent”, nor is visitation trending upward.

Performance

According to the Guidelines in the Workbook, the City of Toronto's tourism performance was rated as "Almost", as a result of deficiencies and gaps in the "Occupancy and Yield" and "Critical Acclaim" elements, as described below.

Toronto's market performance on the Visitation criteria and measures was found to be positive. Toronto draws a significant share of Ontario's total travel to attractors of its type, draws from multiple market segments and over more than one season.

The responses in the Critical Acclaim element exposed a number of issues in need of improvement. While Toronto was viewed as having a role in branding/marketing Ontario and/or Canada, and its attractions were ranked "best in class" in consumer or industry rankings, it was NOT considered to be a "must see/must do" destination.

With respect to "Occupancy and Yield", while the actual hotel occupancy rate was 66.4%, it was below the industry benchmark of 70% for adequate viability. Furthermore, occupancy is not spread evenly throughout the year. Toronto did not have its share of day trips equal to or greater than the provincial average, expressed either in terms of average expenditure per capita, or by dollar share of expenditures. Toronto does, though, achieve these measures for overnight trips.

Futurity

According to the Guidelines in the Workbook, the City of Toronto's tourism futurity was rated as "Almost", as a result of deficiencies and gaps in the "Managing within Carrying Capacities" element, as described below.

Toronto's Destination Marketing efforts are managed and coordinated by Tourism Toronto, which is the official destination-marketing organization for Toronto's tourism industry. Officially operating as a not-for-profit agency; Tourism Toronto has over 1,000 members and is a partnership of public and private sectors. However, Tourism Toronto has been challenged by major events beyond their control; 9/11 and SARS, and more recently, the appreciation of the Canadian Dollar making Toronto's prices less competitive, and a perception that increased border security issues will act as a barrier to tourism. While visitation levels have modestly increased since 2003 they are only now returning to 2001 levels.

While in general, there has been reinvestment and new investment in enhancing, revitalizing, or developing facilities to improve the quality of the tourist experience, significant underdeveloped and underperforming assets such as the waterfront, the cultural and arts sector and sports infrastructure remain.

Labour supply issues were identified as a gap that requires addressing. Currently, no plan exists to resolve the labour pool constraints. It is worth noting that of all the sectors, it was only the Food and Beverage sector that indicated that the labour pool was deemed to be insufficient to accommodate current and projected levels of visitation.

While Toronto's infrastructure was found to be adequate to accommodate current or projected levels of demand without exceeding carrying capacities, there are deficiencies in the transportation sector. Traffic volumes often exceed the current road and public transit infrastructure's capacity, resulting in serious rush hour road and transit congestion problems.

GLOSSARY: BASIC CONCEPTS AND TERMS

There are some fundamental concepts about tourism and successful tourism destinations that underpin the Framework and Report. These are set out below, and are followed by definitions for key words that are used in the criteria and measures.

- Tourists travel to gain experiences that are not available at home, experiences which are therefore out-of-the-ordinary.

- Tourists' satisfaction with their experiences is shaped by their expectations for those experiences, which are different for each individual.

- The key to success in the tourism marketplace is to offer an out-of-the-ordinary experience "product" which exceeds those expectations.

- Tourism products exist only when they provide something so valued by potential visitors that they will actually travel to experience them.

- A destination's success in a competitive marketplace requires that it offers distinctive experiences tied to resources or programs unique to that destination, and delivered with high service quality. In so doing, it contributes to the development of sustainable competitive advantage through the creation of non-replicable assets.

- Success over time in a context of evolving visitor expectations requires an ongoing commitment to understanding those expectations, re-investing to exceed them, and ensuring that the attractiveness and viability of core resources are maintained.

- The most successful destinations layer and cluster a wide variety of experiences on and around their core attractions, offering a variety of ways for a variety of market segments to experience them.

These basic truisms are reflected in the Report's use of the terms defined below. The defined terms are printed in **bold type** where they occur in the Report. The terms tourist, visitor and guest are used interchangeably, however the use of "guest" highlights the way visitors to the destination should feel and be treated.[1]

Glossary

Accommodation: Built lodging (bed and breakfast, hostels, hotels, condo/hotel, motel/inn, university and college residences) and dedicated camping/recreational vehicle land created for overnight, out-of-town stays.

City of Toronto: Refers to the former Regional Municipality of Metropolitan Toronto which consisted of the former Cities of Toronto, Etobicoke, North York, Scarborough, York and the Borough of East York. On January 1, 1998, these six municipal jurisdictions were amalgamated to create the new City of Toronto.

[1] Note: Modified glossary preamble from Premier-ranked Tourist Destinations: A Self-Guided Workbook, 2nd ed., Investment & Development Office, Ministry of Tourism and Recreation, May 2003, pp vi, x.

CMA (Census Metropolitan Area): Refers to the municipalities considered by Statistics Canada "to have a high degree of integration with the City of Toronto, as measured by commuting flows derived from census place of work data." The Toronto CMA is slightly smaller than the GTA and is comprised of the City of Toronto plus 23 other municipalities: Ajax, Aurora, Bradford West Gwillimbury, Brampton, Caledon, East Gwillimbury, Georgina,Georgina Island, Halton Hills, King Township, Markham, Milton, Mississauga, Mono Township, Newmarket, Tecumseth, Oakville, Orangeville, Pickering, Richmond Hill, Uxbridge, Whitchurch-Stouffville and Vaughan.

Convention Venues: Facilities and dedicated spaces which permit large assemblies of visitors (trade or consumer) to gather for defined activities. Conference/convention centres, multifunctional large venues, municipal squares, concert halls, and live theatre/performing arts facilities are classified as convention venues for this destination.

Core Attractors: The feature(s), facility(ies), and/or experience which act as the primary motivators for most travel to the destination; the attractions with the most tourist visits in the destination. Core attractors can differ from season to season, can overlap or be distinctly different for differing visitor segments.

CTS: Canadian Travel Survey

Destination Retail: Visitor shopping excursions made to stores or shopping malls known to offer products and services (e.g. jewellery, commercial galleries, spas) having brand name recognition, acclaim or uniqueness.

DMO: Destination Marketing Organization – a generic term for any agency with a mandate to promote and develop tourism in a geographic area.

FAM: Familiarization tour – a sponsored tour for travel writers, agents and other influencers to introduce them to a new or refined tourism experience/facility.[1]

Festivals & Events: The cluster of annual single-day or multiple-day celebrations or activities with a theme, often featuring special guests, food, entertainment, vendors and on-site attractions. Film and literary festivals, music festivals, fairs, religious celebrations, ethnic festivals, parades, firework displays and consumer shows (shows open to the public) are within this cluster.

FIT: Fully Independent Travel market – visitors making their own plans and travel arrangements.

Food and Beverage: The eating and drinking choices (i.e. ethnic restaurants, licensed or unlicensed establishments), as well as service delivery formats (i.e. quick service-takeout or street vendor, informal service-family restaurant, formal service-acclaimed chef-run restaurant with fine tableware and linens), available to guests at the destination.

Foodie: A person who has an ardent or refined interest in food.

GTA (Greater Toronto Area): Refers to the City of Toronto plus the surrounding regions of Durham, York, Peel and Halton which include 24 municipalities: Ajax, Aurora, Brampton, Brock, Burlington, Caledon, Clarington, East Gwillimbury, Georgina, Halton Hills, King

[1] Source: Tourism Company, The. (2001). *Selling Through The Travel Trade: A Handbook for Tourism Suppliers.* Cited in Ontario Ministry of Tourism and Recreation, Investment and Development Office. (2003). *Premier-ranked Tourist Destinations: A Self-Guided Workbook, 2nd ed.*

Township, Markham, Milton, Mississauga, Newmarket, Oakville, Oshawa, Pickering, Richmond Hill, Scugog, Uxbridge, Whitby, Whitchurch-Stouffville and Vaughan.[1]

Historic and Heritage Sites: Buildings or structures (e.g. bridges or waterworks) with historical connections to the famous residents, architectural styles, or significant events of the destination. The sites are designated by local, provincial, and national heritage organizations, as well UNESCO.

High Quality Tourist Experience: A travel experience which exceeds the guest's expectations.[2]

ITS: International Travel Survey

Land-Based Recreation Opportunities: Activities or facilities (e.g. bird watching, downhill skiing, golf courses, sports facilities, playgrounds, equestrian stables, gyms) that require dedicated land or purpose-built space to permit recreational activity outdoors or indoors. Tournaments and events with permits and sports groups/organizations are included in this category.

Memorable Tourist Experience: A satisfying travel experience that lasts in the guest's memory, typically because he or she was engaged in a deep and lasting (i.e., in an out-of-the-ordinary) manner by their experience of the destination. A high quality tourist experience will be memorable for all the right reasons.

Multifunctional large venues: facilities capable of using different floor surfaces (i.e. wooden floor, turf, ice) and setups to hold a variety of large-scale concerts, sports activities, events or shows.

Niche Segments: Smaller market segments with a travel-motivating interest in a particular type of experience, e.g., a specific interest in good boardsailing opportunities vs. the mass market interest in a more generic sun and sand destination.

On-Theme Activities: Activities (uses made of features or facilities) that are related to the core attractor(s). For example, if the core attractor is live theatre, on-theme activities could be: dining in the Entertainment District, shopping for theatre books, and taking a theatre tour.

Determining whether an activity is on-theme or not is often more grey than black and white. For purposes of using this framework, activities can be considered "on-theme" when they offer a different way of experiencing the core attractor or derive some of their attractiveness from their physical or logical relationship with the core attractor.

OTMP: Ontario Tourism Marketing Partnership – the partnership, between the provincial government and the tourism industry, responsible for marketing tourism in and to Ontario.

Package: A tour that combines prepaid transportation, accommodations or other tour elements, such as meals, sightseeing admissions or car rental.[3]

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[1] Source: City of Toronto, Toronto Economic Division. (2007, August). *Economic Indicators: August 2007*. Retrieved October 5, 2007, from http://www.toronto.ca/business_publications/indicators.htm
[2] Note: As expressed by S. Riley & J. Cunningham in their: The Magic of Your Success presentation to the Tourism Federation of Ontario Conference, March 28, 2001.
[3] Source: Ontario Ministry of Tourism and Recreation. (2004, June 14). *Ontario Tourism Strategy: More to Discover*. Retrieved September 26, 2007, from http://www.tourism.gov.on.ca/english/tourism_strategy/ont_tourism_strategy-e.pdf .

Parks & Trails: Natural or landscaped green spaces (e.g. parks designated by local, provincial, and national park authorities), major paved trails, gardens and conservatories, and related interpretive programs and walks.

Person Trip:
1. Domestic Trip: A domestic trip is defined by Statistics Canada as travel to a Canadian destination at least 80 km one-way from home for any reasons except:
• Travel to and from work or school (i.e. commuting);
• One-way travel involving a change of residence;
• Travel of operating crew members of buses, aeroplanes, boats, etc;
• Travel in an ambulance to a hospital or clinic; and
• Those whose trips do not originate in Canada.
Ontario's statistics also include as domestic trips the Canadian residents whose destination is outside Canada, but who have an overnight stop in Ontario en route to their international destination.

- Same-Day Domestic Trip: "Visitors who do not spend the night in a collective or private accommodation in the place visited" (WTO). A same-day trip does not include a night away from home (Statistics Canada). In addition, Ontario imposes the restriction that the same day visitors from Ontario must have travelled at least 40 km one-way from home in order to reach their destination, while same day visitors from other parts of Canada must have travelled 80 kms or more one-way away from home.
- Overnight Domestic Trip: "Visitors who stay at least one night in a collective or private accommodation in the place visited" (WTO). An overnight trip includes at least one night away from home (Statistics Canada). Ontario does not impose any restrictions on overnight travellers with respect to the minimum distance travelled to reach their destination.

2. International Trip: An international trip is defined by Statistics Canada as travel for less than 12 months for any reason by anybody except: immigrants, former residents, military personnel, diplomats and dependants and crews, arriving or returning to Canada who are cleared through a Customs and Immigration point of entry. In addition to the restrictions imposed in the above definitions, Ontario excludes the following types of international travellers:
• Commuters to work; and
• Visitors whose main trip purpose is to study.

Person visit: All persons visiting an area during their trips are registered as having made one person-visit in the area. The total of person-visits for all census divisions (or travel regions) is greater than the province person-visit since more than one census divisions (or travel region) may be visited during a provincial visit.

Performing Arts: The cluster of staged performances covering ballet or other dance, classical/symphonic concerts, opera, musical theatre, theatre, live jazz or popular music concerts, comedy shows and variety shows.

Product Positioning Statement: A brief description of what a product or service does, and its benefits using terms which set it apart from its competitors.

Receptive Tour Operator: A travel operator who specializes in packaging travel to the market area in which it is situated, for sale generally to visitors from other geographic market areas.

Spectator Sports: Sport activities involving amateur or professional athletes in regularly-scheduled games, tournaments or competitions (e.g. professional baseball games, horse races, amateur ice hockey) and exhibition matches that permit viewers to watch the action from the stands or the sidelines.

Supporting Attractors: Features or facilities that draw guests to the destination area by giving additional, secondary reasons to travel there. Supporting attractors can be primary travel motivators (i.e. **core attractors**) to some markets (typically **niche segments**). They are generally distinguished from core attractors by their smaller number of visitors.

TAMS: Travel Activities and Motivations Survey. TAMS examines recreational activities and travel habits of Canadians and Americans. TAMS provides detailed information on travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns and helps identify existing and potential travel markets in North America.[1]

Tourism: "Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes" (WTO - Recommendations on Tourism Statistics)

Tours and Excursions: Guided outings by foot, bicycle, coach, boat or helicopter featuring narration about the destination's people, places and history.

Transportation: The methods of travel (by air, land, rail, and water) available to/from the destination, as well as <u>within</u> the destination.

Travel Trade: People and companies that resell travel product to the visitor that they have bought and reserved from other parties.[2]

Travel Agent: An individual or firm licensed under the Travel Industry Act to offer travel advice and bookings. The travel agent is an important resource in developing packaged travel opportunities in a destination area.

UNESCO: United Nations Educational, Scientific, and Cultural Organization. An agency of the United Nations, UNESCO seeks to encourage the identification, protection and preservation of cultural and natural heritage around the world considered to be of outstanding value to humanity.[3]

VFR: Visiting friends and relatives – an important motivator for tourism travel. It also highlights the importance of marketing to local and regional residents.

Water-Based Recreation Opportunities: Activities or facilities (e.g. beaches, swimming pools, water sports clubs, fishing, marina-boating developments) requiring water access for recreational use.

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[1] Source: Ontario Ministry of Tourism. Travel Activities and Motivations Survey (TAMS). Retrieved August, 27 2007, from http://www.tourism.gov.on.ca/english/research/travel_activities/index.html.
[2] Source: Ontario Ministry of Tourism and Recreation. (2004, June 14). *Ontario Tourism Strategy: More to Discover*. Retrieved September 26, 2007, from http://www.tourism.gov.on.ca/english/tourism_strategy/ont_tourism_strategy-e.pdf .
[3] Source: UNESCO. World Heritage. Retrieved August 27, 2007, from http://whc.unesco.org/en/about/.

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Stakeholder Committees and Consultations

Premier-ranked Tourist Destination Steering Committee:

Sector	**Representative**
City of Toronto:	Councillor Michael Thompson, Ward 37 Scarborough Centre
Tourism Toronto and Committee Co-Chair:	Gino Giancola, VP Industry Relations
Meeting Venues and Committee Co-Chair:	John Houghton, VP Sales & Marketing, MTCC
Greater Toronto Hotel Association (GTHA):	Terry Mundell, President
Accommodations:	Jeff Waters, General Manager, Renaissance Toronto Airport
Attractions Ontario:	Troy Young, President, Attractions Ontario
Attraction Operators:	Shanna Young, Executive Director Marketing & Communications, Toronto Zoo
Attraction Operators:	Jack Robinson, Chief Operating Officer, CN Tower
Ontario Restaurant Hotel & Motel Association (ORMHA):	Rob Evans, President & CEO
Restaurants:	Mike O'Connor, Vice President, Joe Badali's Ristorante Italiano & Bar
Education:	Joanne Gellatly, Academic Coordinator, Hospitality Operations Management, George Brown College
Sight Seeing Tours:	John Ryan, President, Toronto Tours
Transportation:	Brian Crow, President, Ontario Motor Coach Association
Retail:	Susan Williams, Director, National Research and Marketing, The Cadillac Fairview Corporation Limited
Performing Arts/ Entertainment:	Jacoba Knaapen, Executive Director, Toronto Association of the Performing Arts (TAPA)
Neighbourhoods:	John Kiru, Executive Director, Toronto Association of BIAs
Festivals & Events:	Michael Downey, President, Tennis Canada
Visitor Services:	Amy Collier, Head Concierge, The Hazelton Hotel
Nightlife/ Entertainment Venues:	Nick Di Donato, President & CEO, Liberty Entertainment Group

Ontario Ministry of Tourism Representatives

Michael Kurts, Assistant Deputy Minister (as of April 2007)
Gary Commeford, Assistant Deputy Minister (until March 2007)
Michael Langford, Director, Investment & Development Office (IDO)
Debbie Jewell, Manager, Investment & Development Office (IDO)
Caroline Polgrabia, Tourism Industry Advisor, GTA, Regional Services Branch / Central Region
Robert Sweeting, Senior Business Advisor, Investment & Development Office (IDO)
Larissa Deneau, Senior Consultant, Investment & Development Office (IDO)
Jackie Ma, Senior Research Officer

Attractions and Festivals & Events Working Group

Attractions:
Dan Brambilla, CEO, Sony Centre (Hummingbird Centre)
Jim Roe, General Manager, St. Lawrence Centre for the Performing Arts
Kelly Meehan, Manager, Event Marketing & Sponsorship, Maple Leaf Sports & Entertainment
Bob Hunter, Executive Vice President Venues and Entertainment, Maple Leaf Sports & Entertainment
Diane Young, General Manager & CEO, Exhibition Place
Bruce Hutchinson, Director, Marketing & Media Relations, Harbourfront Centre
Julianne Baragar, Associate Producer, The Second City
Iain Newbigin, Director of Marketing, Soulpepper Theatre Company
Bob Singleton, Vice President, Parc Downsview Park
Susan Boyle, Promotions and Tourism, Art Gallery of Ontario
Bernard Gorecki, Director Marketing & Visitor Services, Ontario Science Centre
Jim Valentine, Director of Sales, Mirvish Productions
John Karastamatis, Director of PR & Communications, Mirvish Productions
Peter Jagla, VP Marketing, Hockey Hall of Fame
Jackie Schwartz, Marketing Manager, Hockey Hall of Fame
Lou Seiler, Director of Marketing, Casa Loma
Chuck Thibeault, Sales Manager, Ontario Place
Terry Caddo, Director of Marketing, Ontario Place
Mathew Rosenblatt, The Distillery District (CityScape Development Corp.)
Ania Kordiak, Director Commercial Development, ROM
Monica Kocsmaros, Marketing Manager, Downtown Yonge BIA
Mike Comstock, Chair, St. Lawrence Market/ Old Town Marketing Alliance
Kevin Smith, Vice President, The Helicopter Company
Janine Wallace, Director, Sales, Toronto Tours
Sandra Woloschuck, GrayLine Tours
Jamie Maxwell, Coordinator, TAP into TO, City of Toronto, Tourism
Allan Crawford, Youth Innovations, Parks, Recreation & Forestry, City of Toronto
James Dann, Manager, Island, Ferry & Golf Courses, Manager Parks & Recreation, Parks, Recreation & Forestry, City of Toronto
Denise Gendron, Manager, Heritage Preservation Services, City Planning Policy & Research, City of Toronto
Marisa Piattelli, VP, Government Relations, Toronto Waterfront Revitalization Corportation
Andrew Gray, VP East Bayfront, Toronto Waterfront Revitalization Corporation
Paul Oberman, Board Member, Rosedale Main Street BIA

Festivals & Events:
Rose Bellosillo, Director for Development, HotDocs
Karen Dubin, Conference Manager, IdeaCity Conference
Jane French, Program Development Officer, Culture Division, City of Toronto
Sue Graham Nutter, Founder and Director, Affinity Marketing and Public Affairs
Bruce Hutchinson, Director, Marketing & Media Relations, Harbourfront Centre
Kristen Juschkewitsch, Supervisor Program Design & Development, Culture Division, City of Toronto
Allison Kowalski, Conference Coordinator, IdeaCity Conference
Karyn Lynch, Marketing Manager, Canadian National Exhibition
Dave Nash, Event Director, The City Chase
Marilyn Nickel, Marketing Manager, Toronto Special Events, City of Toronto

Walter Oster, Chairman, Canadian National Sportsmen's Show
Jaye Robinson, Director, Toronto Special Events, City of Toronto
Steve Weir, PR, Toronto Caribbean Festival/Caribana
John Tracogna, Toronto International
John Yudelman, Toronto International

Retail and Food & Beverage Working Group

Briar de Lange, Executive Director, Bloor-Yorkville BIA
Subbu Chintaluri, Coordinator, Gerrard India Bazaar BIA
James Robinson, Executive Director, Downtown Yonge BIA
Deborah Etsten, Director, The Beach BIA
Robert Horst, Property Manager, Retail, Yorkdale Shopping Mall
Marie Picton, Executive Manager, Spa Services, Elmwood Spa
Jenny Seto, Special Events Manager, The Bay
Pam Setzke, Marketing Manager, Eatons Centre
Janice Solomon, Chairperson, Toronto Entertainment District Association
JJ Shier, Property Manager, Yorkdale Shopping Mall (now at Square One)
Mara Samardzic, Coordinator, West Queen West BIA
Dwayne Shaw, Coordinator, Church Wellesley BIA
Dan Donovan, GM, Jamie Kennedy Wine Bar
Kathleen Farley, Executive Director, Toronto Vegetarian Association
Sean Gogarty, Retail Manager, Steamwhistle Brewery

Accommodations and Venues Working Group

Accommodations:
Stephanie Delaurier, Program Manager, Roni Feldman & Associates
Ken Gruber, Director of Marketing, Delta Chelsea Downtown Toronto
Robert Housez, General Manager, Delta Chelsea Downtown Toronto
Kerry Ann Kotani, Director of Sales and Marketing, The Fairmont Royal York
Robert Lamoureux, General Manager, Comfort Suites City Centre
Bertil de Kloet, Chief Operating Officer, Interras Hotel Management
Tracy Lee Power, Executive Assistant, Interras Hotel Management, Days Hotel and Conference Centre

Venues:
Arlene Campbell, General Manager, Direct Energy Centre
Laura Purdy, Director of Sales & Marketing, Direct Energy Centre & Exhibition Place
Geoff Mak, Account Executive, Direct Energy Centre

Special Advisors

Tourism Toronto:
Tom Griffin, Tourism Business Analyst
Joel Peters, Senior Vice President, Chief Marketing Officer
Roseanne Longo, Vice President, Leisure Trade Sales
Joseph O'Neill, Director, North American FIT Travel, Leisure Trade
Brian Graziano, Director, North America Group Travel, Leisure Trade
Mark Crawford, Director, European Leisure Trade Sales
Natalie Caldwell, Manager, Consumer Marketing Programs

Pam Laite, Director, Member Care & Growth
Andrew Weir, Vice President, Communications
Justine Palinska, Travel Media Associate

Other Organizations and Individuals Consulted:
Jenna Bryant, VP Sales, Travel Week
Christina Dawidowicz, Director of Sales and Marketing, CTM
Kathryn Forgacs, Research Manager, Ontario Tourism Marketing Partnership Corporation (OTMPC)
J.J. Fueser, Research Analyst, UNITE HERE Canada (Hotel, Restaurant Employees Union, Local 75)
Fran Hohol, Principal, Pannell Kerr Forster Consulting
Michelle Maxwell, TourGreen Network Manager, Green Tourism Association
Sandra Parco, Publisher, WHERE Toronto
Judy Rogers, Principal, Research Resolutions
Toby Saltzman, Travel Writer, Editor, Photographer
Vicki Clarke, Manager, Sales and Product Planning, Jonview
Nancy Pogue, Marketing & Advertising Supervisor, GO Transit
Mike Ruby, President, Muskoka Language International
Angela Tsiampas, Advertising and Promotion Assistant, GO Transit
Kathleen Webb, Director, Programs and Development, CR5 Technology Corp.
Marion Joppe, PhD, Director, School of Hospitality and Tourism Management, University of Guelph
Chris Choi, PhD, Assistant Professor, School of Hospitality and Tourism Management, University of Guelph
Shari Simpson-Campbell, Director, Green Tourism Association
Tony Genco, President and CEO, Parc Downsview Park Inc.
Rita Scagnetti, Director of Public Affairs and Communications, Greater Toronto Transportation Authority (GTTA)

Other Key Stakeholder Interviews
Barry Smith, President and CEO, Metro Toronto Convention Centre
Stephen Foster, Sr. Vice President of Operations, Starwood Hotels
Chris Cahill, President, Fairmont Hotels & Resorts
Bill Knowlton, Vice President Marketing and Sales, Jonview

Destination Development Leadership Team
Michael Kurts, Assistant Deputy Minister, Ministry of Tourism
Michael Langford, Director, Investment and Development Office
Robert Sweeting, Senior Business Advisor, Investment and Development Office
David Whitaker, President and CEO, Tourism Toronto
Duncan Ross, Executive Director, Tourism Division, City of Toronto
Terry Mundell, President, Greater Toronto Hotel Association (GTHA)
Barry Smith, President and CEO, Metro Toronto Convention Centre
Rob Evans, President, Ontario Restaurant, Hotel, Motel Association (ORHMA)
Lou Seiler, Past President, Attractions Ontario
Carol Wilding, President and CEO Toronto Board of Trade
Bill Kenny, Vice President, Partnership & Sales, Ontario Tourism Marketing Partnership Corporation (OTMPC)

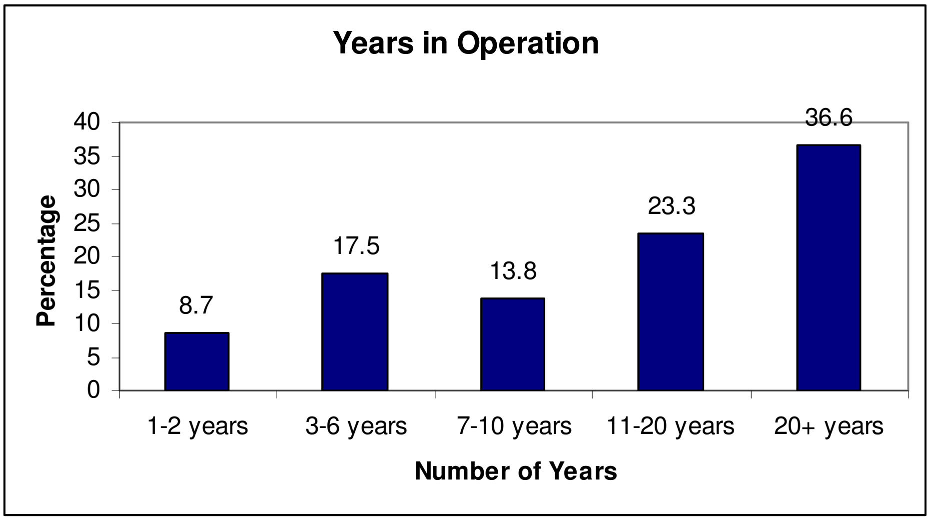
APPENDIX A[1]
Findings from PRTD Surveys

<u>Main Survey</u>

"How many years has your business been in operation?"

60% of businesses servicing Toronto's tourism industry have been in operation for more than 10 years which is indicative of a relatively stable tourism industry over the past decade.

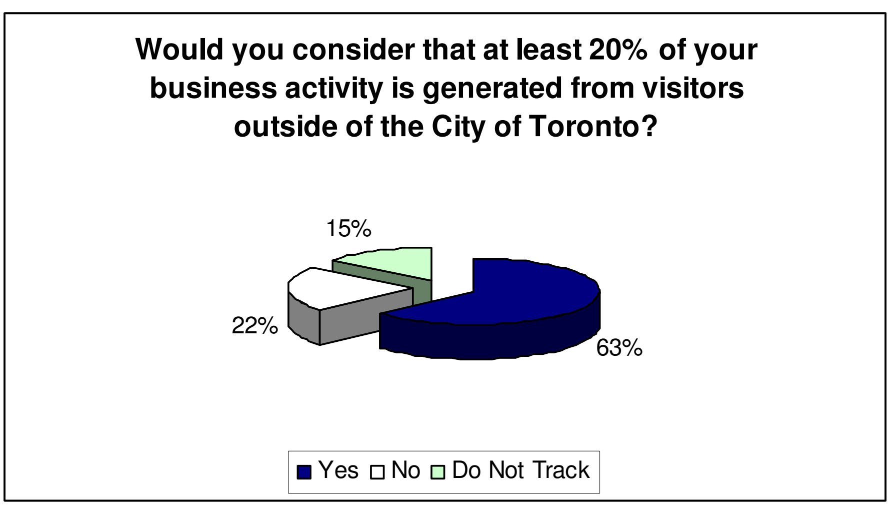
Figure 1



"Would you consider that at least 20% of your business activity is generated from visitors outside the City of Toronto (Outside area codes 416 and 647)?"

The majority of respondents (63.5%) indicated that they considered 20% of their business activity to be generated from visitors outside of the City of Toronto.

Figure 2

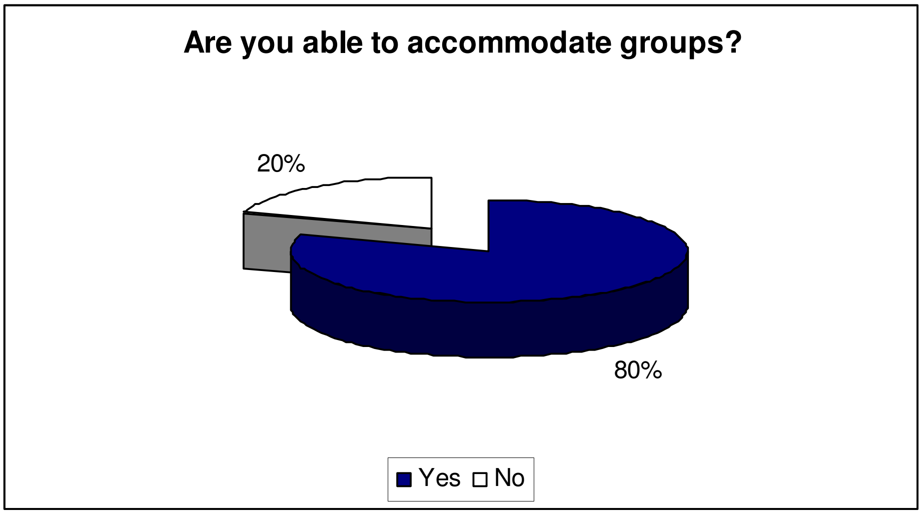


[1] Source: Resource Audit

"Are you able to accommodate groups?"

80.1% of respondents, accounting for six hundred and six tourism related businesses, expressed the ability to accommodate groups.

Figure 3



"Do you offer meeting, conference, convention, trade show, or banquet facilities?"
and
"Do you provide services to the meetings, convention or trade show markets?"
and
"Do you have a dedicated sales-staff that targets the meeting, convention or trade show markets?"

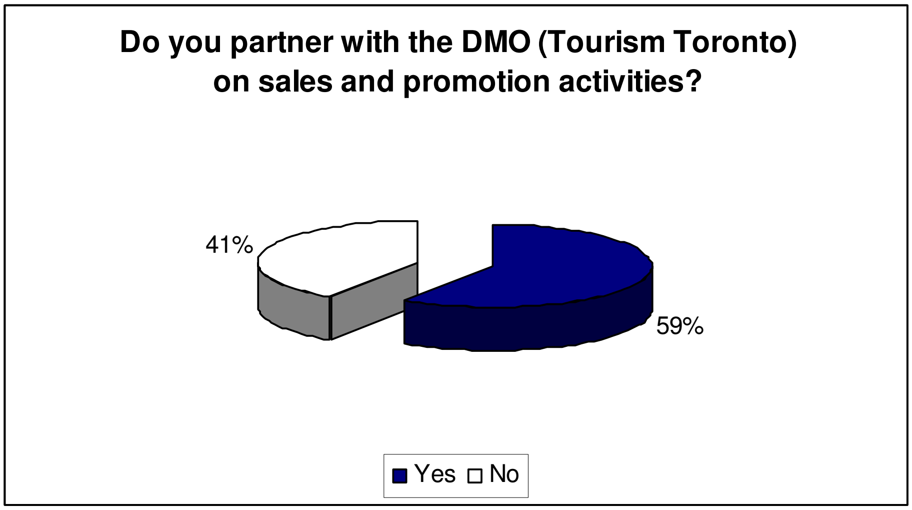
Table 1

	Do you offer meeting, conference, trade show and banquet facilities?		Do you provide services to the meetings, convention or trade shows markets?		Do you have a dedicated sales staff that targets the meeting, convention or trade show markets?	
	# of Responses	**Percent**	**# of Responses**	**Percent**	**# of Responses**	**Percent**
Yes	251	29.6%	300	35.4%	145	17.1%
No	507	59.9%	434	51.2%	190	22.4%
No Response	89	10.5%	113	13.3%	512	60.4%

"Do you partner with the Destination Marketing Organization (Tourism Toronto) on sales and promotion activities?"

Almost 6 out of 10 of respondents indicated that they currently partner with Toronto's destination marketing organization (DMO), Tourism Toronto.

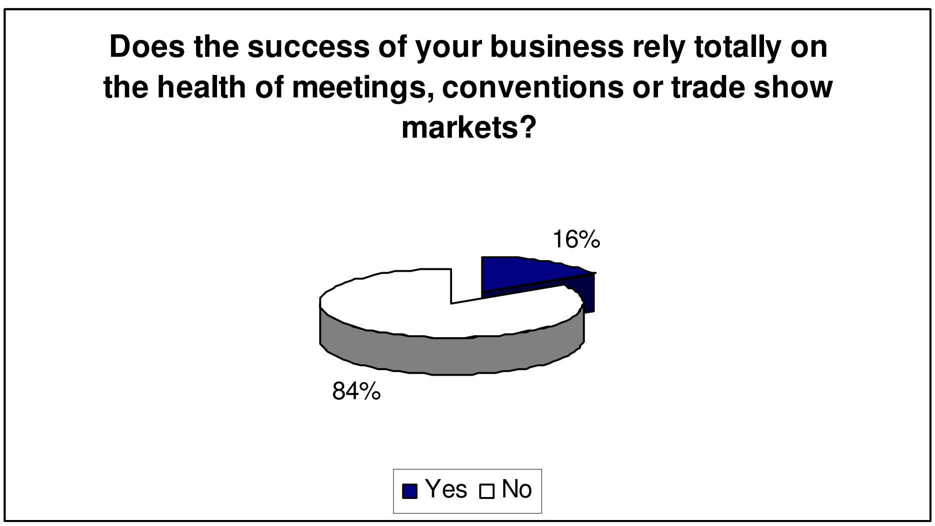
Figure 4



"Does the success of your business rely totally on the health of meetings, convention or trade show markets?"

83.6% of respondents indicated that the success of their business does not rely totally on the health of meetings, conventions or trade show markets.

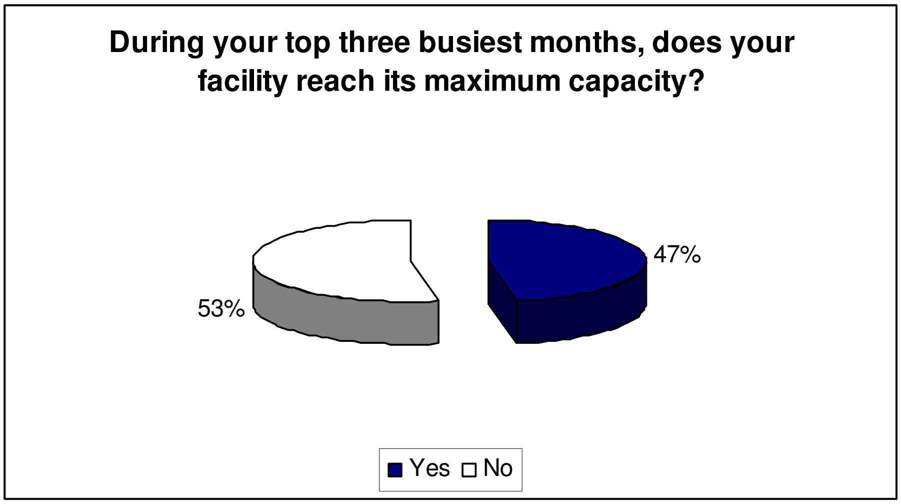
Figure 5



"During your top 3 busiest months, does your facility reach its maximum capacity?"

Roughly half (52.8%) of respondents stated that during their top three busiest months, their respective businesses do not reach maximum capacity (see Figure 6 on the following page). This result is both positive and negative news for Toronto's tourism industry. Focusing on the positive aspect, if roughly half of respondents do not reach full capacity during their three busiest months, it can be deduced that there is potential for them to develop in the future.

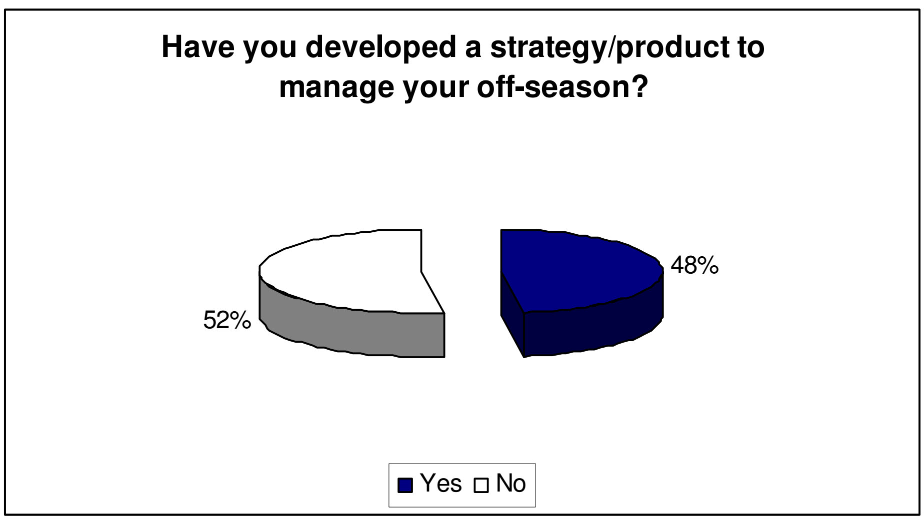
Figure 6



"Have you developed a strategy/product to manage your off season?"

52.2% of respondents indicated that they do not have a strategy/product currently in place to manage their off-season.

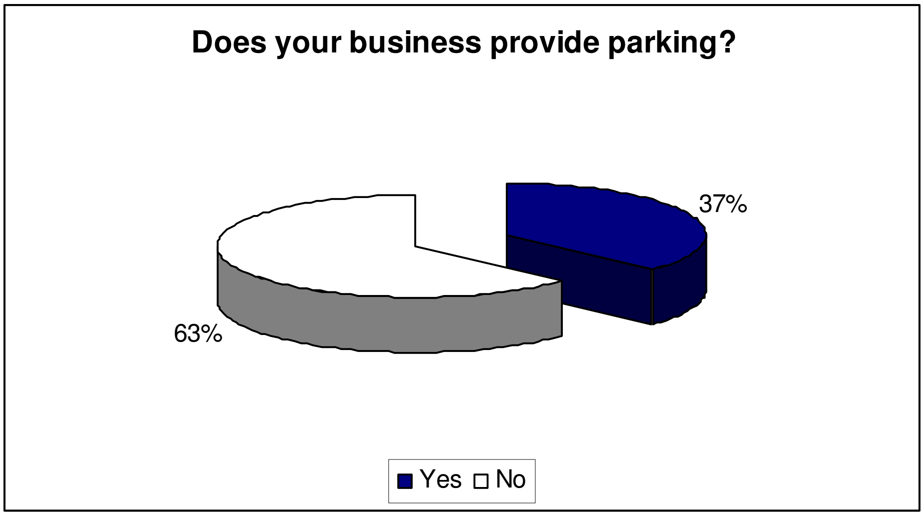
Figure 7



"Does your business provide parking?"

The majority of respondents (63.1%) stated that they did not provide parking to their customers, suggesting that they rely on public parking facilities (see Figure 8 on the following page).

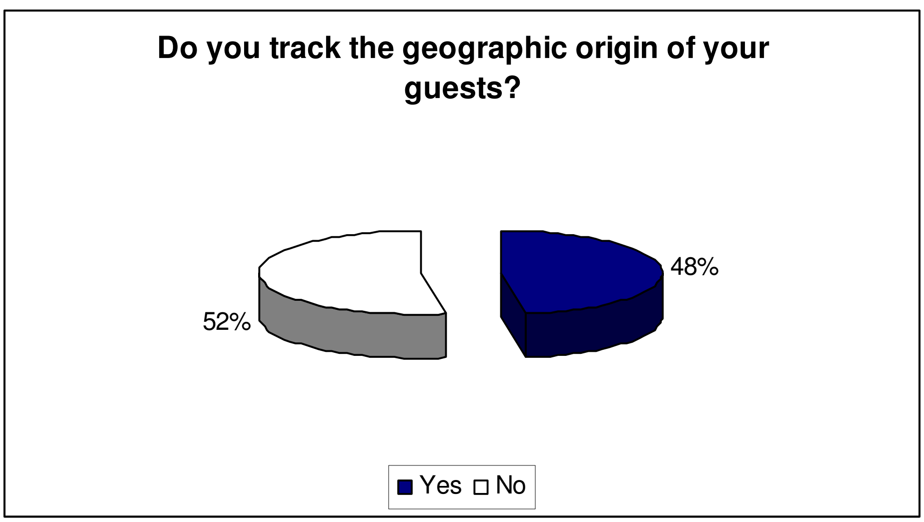
Figure 8



"Do you have a specific tracking strategy in place for determining the origin of your visitors?"

Roughly half of respondents (52.5%) indicated that they did not have a specific tracking strategy in place for determining the origin of their visitors.

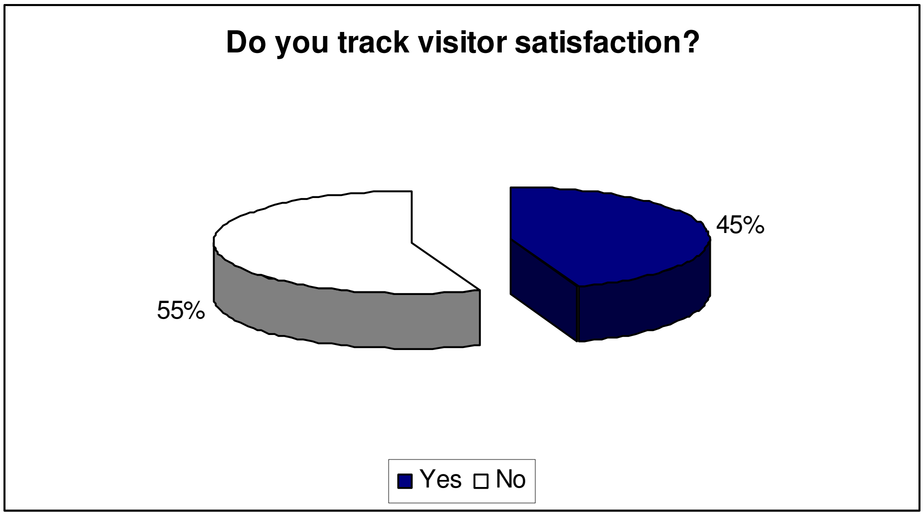
Figure 9



"Do you track visitor satisfaction?"

Just over half of respondents (55.5%) indicated that they did not have a tracking strategy in place to monitor visitor satisfaction levels (see Figure 10 on the following page).

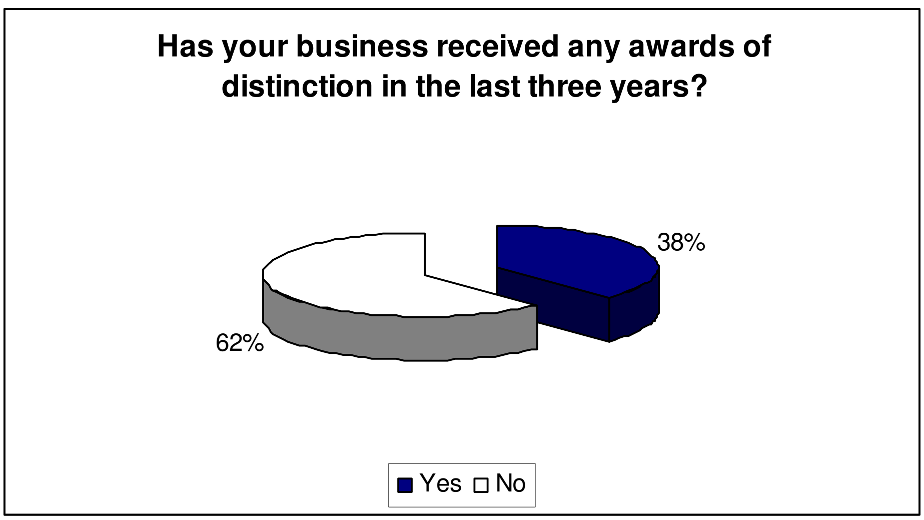
Figure 10



"Has your business received any awards of distinction in the last three years?"

37.8% of respondents stated that they had received an award of distinction in the last three years.

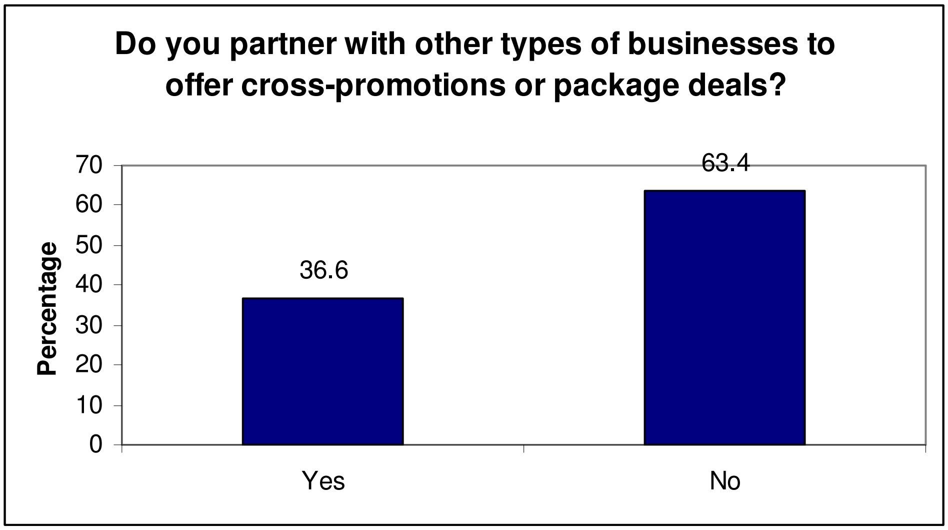
Figure 11



"Do you partner with other types of businesses to offer cross-promotions or package deals?"

63.4% of respondents stated that they do not currently partner with other types of businesses to offer cross-promotions or package deals to help attract a wider variety of tourists to their particular business (see Figure 12 on the following page).

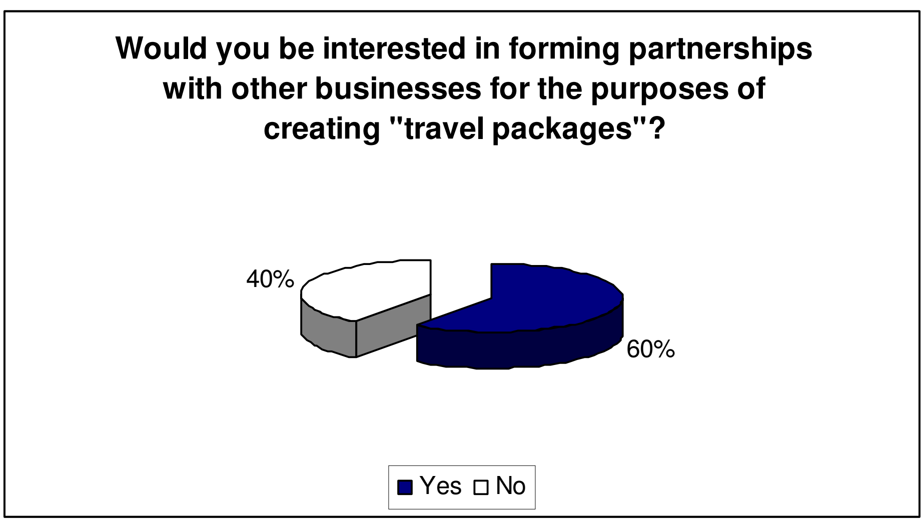
Figure 12



"If No, would you be interested in forming partnerships with other businesses for the purpose of creating 'travel packages'?"

While the majority of respondents (63.4%) indicated that they do not currently partner with other types of businesses to offer cross-promotions or package deals, 59.7% of respondents indicated interest in forming partnerships with other businesses in the future for the purpose of creating "travel packages".

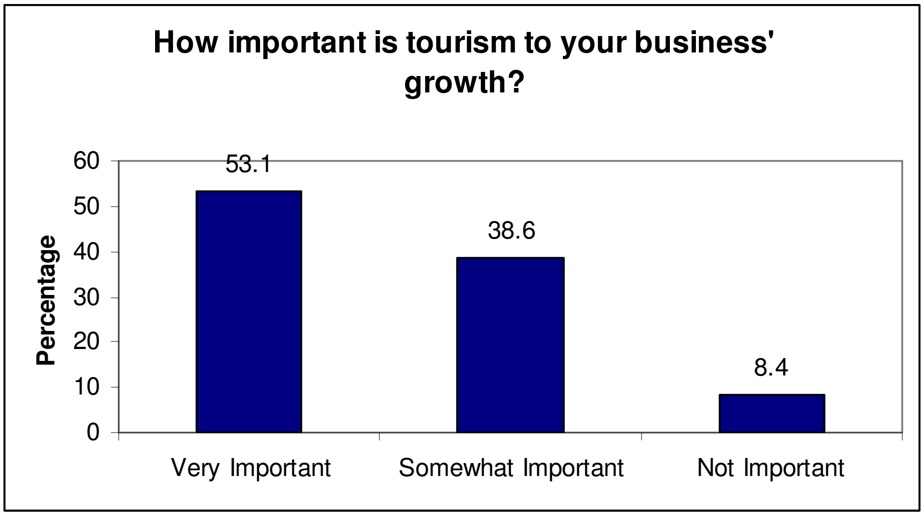
Figure 13



"How important is tourism to your business' growth?"

The majority of respondents (53.1%) stated that tourism is very important to the growth of their businesses, and further 38.6% said that tourism was somewhat important (see Figure 14 on the following page).

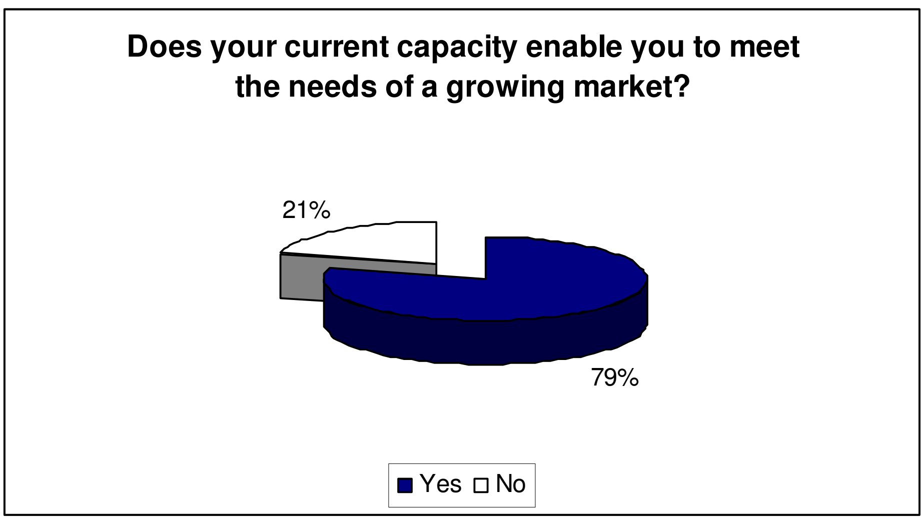
Figure 14



"Does your current capacity enable you to meet the needs of a growing market?"

79.1% of respondents stated that their current capacity enables their business to meet the needs of a growing market.

Figure 15



"Do you program special events or hands-on experiences for your visitors?"

Just under half of respondents (45.9%) indicated that they program special events or hands on experiences for their visitors (see Figure 16 on the following page).

Figure 16

Retail

"What best describes your shopping facility?"

Of all retail sector respondents, the highest percentage (34.3%) described themselves as fashion/clothing stores, followed by specialty/vintage shops (9.5%) and commercial galleries (8.1%). 26.2% indicated that their shopping facility should be classified as something 'other' than the given options, which may speak to the high level of full service shops over specialized shops that are present in Toronto.

Table 2

Types of Shopping Facilities		
	# of Responses	**Percent**
Antique Store	8	3.8
Commercial Gallery	17	8.1
Music/Technology	7	3.3
Department Store	2	1
Farmer's Market	1	0.5
Fashion/Clothing	72	34.3
Gift/Souvenir Shop	9	4.3
Sports Memorabilia	1	0.5
Jewellery	9	4.3
Bookstore/Newsstand	9	4.3
Specialty/Vintage Shop	20	9.5
Other	55	26.2

Accommodation

"What category best describes the type of accommodation property you operate?"

When asked to describe their type of accommodation property, 18.3% of respondents indicated that they were a bed and breakfast, 15.1% stated that they were considered full-service luxury and 15.1% said that they were classified as full-service mid-scale with a food and beverage option.

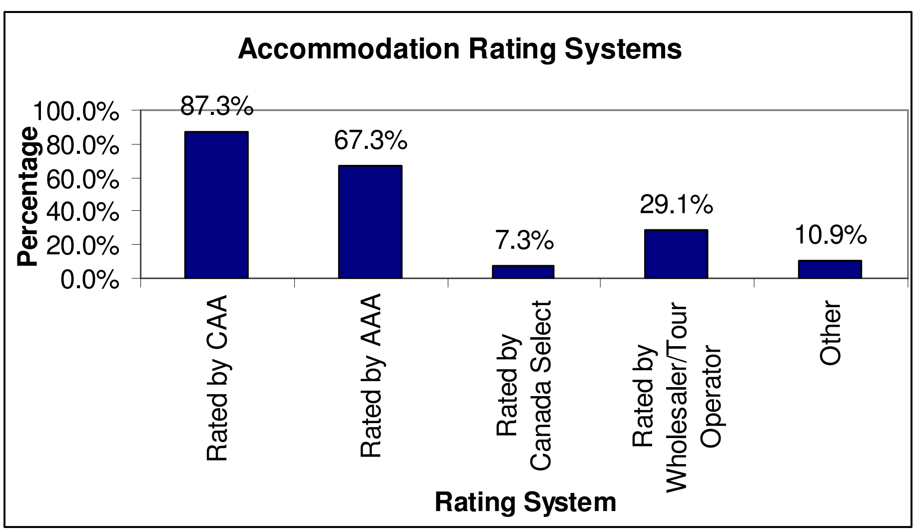
Table 3

Type of Accommodation Property		
	# of Responses	Percent
All-Suite Hotel	5	5.4
Extended Stay	5	5.4
Boutique Hotel	7	7.5
Full-Service Luxury	14	15.1
Inn	4	4.3
Full-Service Mid-Scale with F&B	14	15.1
Limited Service Economy Budget	10	10.8
Limited Service Mid-Scale without F&B	7	7.5
Hostel	2	2.2
Bed and Breakfast	17	18.3
Other	8	8.6

"Is this accommodation facility currently rated by or a member of any of the following systems?"

Of all accommodation properties surveyed, 87.3% stated that they were rated by CAA, 67.3% were rated by AAA and 29.1% were rated by a wholesaler or tour operator.

Figure 17



Festivals and Events

"What is the category or theme of your event?"

Toronto plays host for many different festivals and events every year. Of all festival and events surveyed regarding the themes of their respective event, 44.1% said that they were cultural in nature, 41.2% stated that they were music oriented followed by 39.7% indicating that they were classified in the celebration category.

Table 4

Event Themes		
	# of Responses	Percent
Film	11	16.2
Visual Arts/Crafts	23	33.8
Cultural	30	44.1
Culinary	13	19.1
Historic/Historical	14	20.6
Music	28	41.2
Celebration	27	39.7
Sports/Tournament	9	13.2
Consumer Shows	21	30.9
Performing Arts	20	29.4
Other	22	32.4

Note: Multiple responses were possible

"Is food available at the event?"

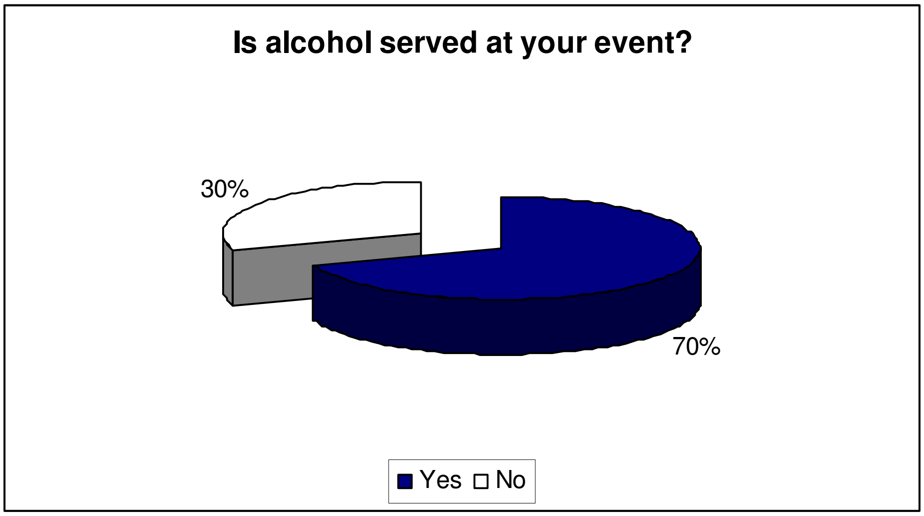
95.5% of respondents pointed out that food options were available at their event.

Figure 18

"Is alcohol served at the event?"

The majority of respondents (69.7%) stated they serve alcohol at their event.

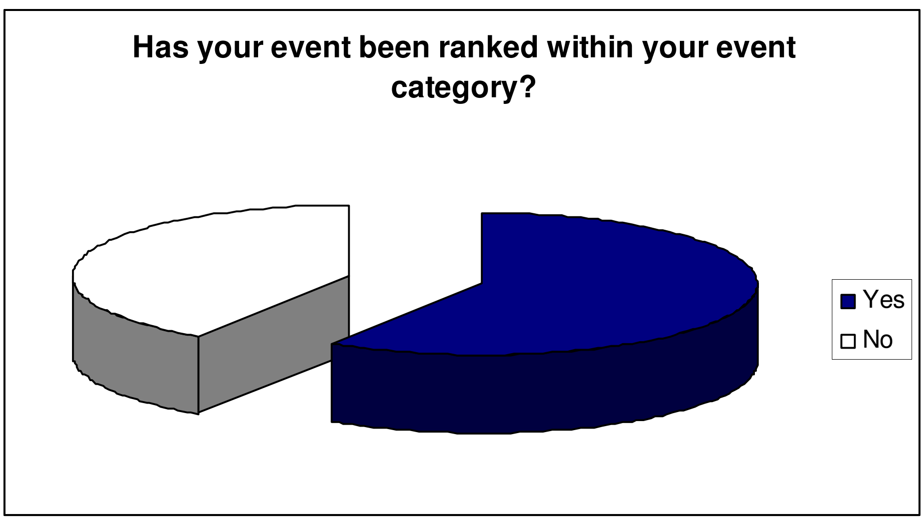
Figure 19



"Has the event been ranked within your event category?"

The majority of festivals and events respondents (59.1%) stated that they had been ranked within their event category.

Figure 20



Food and Beverage

"What is the style of cuisine served at your restaurant?"

Of all food and beverage operations surveyed, the highest percentage of cuisine types stated by respondents were Italian (23.7%), Bistro (21.1%) followed by International, Mediterranean and Seafood cuisines each comprising 18.9%.

Table 5

Cuisine type		
	# of Responses	Percent
African	1	0.5
American	29	15.3
Bar and Pub	27	14.2
Bistro	40	21.1
Café	29	15.3
Canadian	5	2.6
Caribbean	7	3.7
Chinese	11	5.8
French	31	16.3
Greek	7	3.7
Indian/Sri Lankan	18	9.5
International	36	18.9
Italian	45	23.7
Japanese	10	5.3
Korean	4	2.1
Kosher	1	0.5
Mediterranean	36	18.9
Middle Eastern	6	3.2
Mexican	6	3.2
Portuguese	3	1.6
Seafood	36	18.9
Spanish	7	3.7
Steakhouse	26	13.7
Thai	5	2.6
Vegetarian/Vegan	38	20
Other	44	23.2

Note: Multiple responses were possible

"Do you <u>serve</u> Ontario produced food and/or beverages?"
and
"Do you <u>identify</u> Ontario Products on your menu and promote their availability?"

95% of food and beverage respondents indicated that they serve Ontario produced food and/or beverages; however, under half of the respondents (42%) stated that they actually promote the availability of the Ontario product on their menu (see Figures 21 and 22 on the following page).

Figure 21

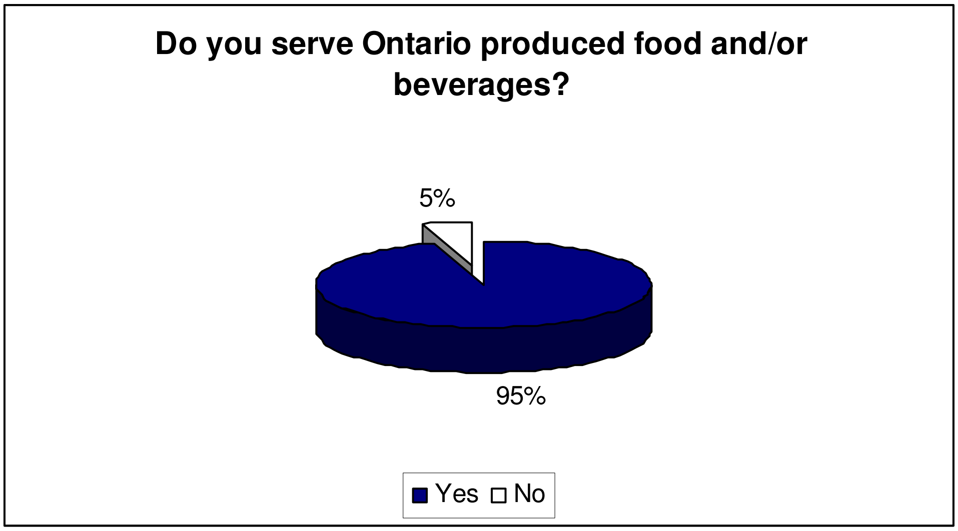
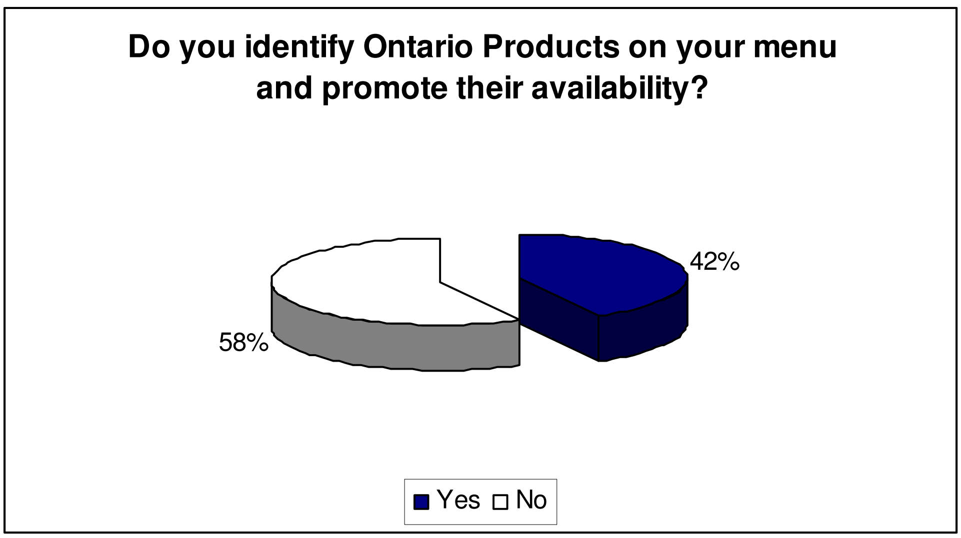


Figure 22



APPENDIX A-2
Content Analysis

Content analysis is a research tool used to determine the presence of certain words or concepts within texts or sets of texts. The table below summarizes the findings from the following open-ended question: *"Please give 3 suggestions to improve tourism in Toronto. Also list barriers to improvement"* that was included in the PRTD survey distributed to tourism related businesses. It outlines the most common categories and themes that emerged from the comments provided by respondents. Out of the 847 completed surveys, 451 respondents provided answers to the question.

Table 1[1]
Content Analysis of Open-ended Questions from the Resource Audit

Improvement	Barriers
Accessibility/Transportation • Improve public transit (e.g. Rail link to Pearson/Light Rail links across city) and revitalize Ferry service to US • More pedestrian only streets (e.g. Kensington and Yorkville) • Implement customer service programs for all taxi drivers • Improve parking (cost/number of spaces etc.), tackle aggressive parking enforcement • Universal transit pass for entire GTA (GO Transit, TTC, YRT, etc.)	• Congested streets (gridlock) • Constant construction and road closures • Road system (weak infrastructure) • Border crossings / Passport requirement
Cleanliness & Safety • Fix panhandling issue • Clean up the city: remove garbage, add more public washrooms, prosecute people who litter	• Pollution: air (quality; smog), water (unclean lake) etc. • Homelessness, drug addicts, panhandling • Dirty city (litter/graffiti)
Water Front Development • Build tourist attraction (e.g. aquarium, world-class contemporary art gallery, casino, marine museum, amusement park, etc.) • Accessibility and transportation to waterfront • More coffee shops and restaurants (European feel)	

[1] Source: Resource Audit

Improvement	Barriers
<u>Promotion /Advertising</u> • Promote neighbourhoods within the city • Increase number and types of tourist packages (city wide – all sectors) to meet travel trends & create more memorable tourist experiences • Memorable logo/brand (e.g. '*<u>I love New York'</u>*) • Better attraction signage, free neighbourhood maps, shopping tours, free tourist attraction magazines at airports, hotels etc. • Concentrated, focused advertising (international and domestic). "Toronto lacks a ring, drumbeat or focus" • Improve internet presence: create a sector-wide website that is interactive, has more neighbourhood information, photos and lists cross-sector packages offered to tourists.	
<u>Tax Incentives</u> • Remove GST & PST for visitors or implement genuine reimbursement incentive program • Lower taxes (airport landing fees, business property, alcohol, etc.)	• High business licensing fees • High Canadian dollar • PST and GST on (downtown) shopping
<u>Future Tourism Development</u> • Create UNIQUE Attractions/Festivals (like LuminaTO, Nuit Blanche) • Fund culturally specific neighbourhoods, beautification and experiences • Lobby for larger conventions and entertainment events • Consecutive summer festivals/events rather than concurrent • Focus on improving current facilities, rather than building new ones	• Lack of communication across all tourism sectors

APPENDIX B[1]
Demographic and Psychographic Profiles of Travellers

Table 1

Demographic Profile for Travellers Motivated by Performing Arts			
		Canada	**U.S.**
Gender	Male	48%	50%
	Female	52%	50%
Age	18-24 years old	14%	13%
	25-34 years old	19%	20%
	35-44 years old	20%	16%
	45-54 years old	20%	22%
	55-64 years old	15%	16%
	65 and over	12%	13%
Marital Status	Not married	54%	35%
	Married	46%	65%
Parental status	No children under 18	93%	77%
	Children under 18	7%	23%
Level of education	Less than high school	6%	0%
	High school diploma	23%	15%
	Some post-secondary	12%	28%
	Post-secondary diploma or certificate	23%	10%
	University degree	35%	44%
	Not stated	1%	1%

[1] Source: TAMS 2000

Table 2

Top 15 Activities Engaged in by Performing Arts Motivated Canadian Travellers	
Activity	**Percentage**
Dining - Restaurants Offering Local Ingredients and Recipes	64%
Shop Or Browse - Clothing, Shoes and Jewellery	64%
Shop Or Browse - Bookstore or Music Store	55%
Strolling Around a City to Observe Its Buildings and Architecture	52%
Sunbathing or Sitting on a Beach	50%
Went to Local Outdoor Cafes	50%
Live Theatre	47%
Rock & Roll/Popular Concert	45%
Shop Or Browse - Local Arts and Crafts Studios or Exhibitions	45%
Swimming in Lakes	44%
Went to the Movies/Cinema	42%
Dining - Other High-End Restaurants	38%
Nature Park - Visited National, Provincial / State Park	38%

Table 3

Top 15 Activities Engaged in by Performing Arts Motivated U.S. Travellers	
Activity	**Percentage**
Dining - Restaurants Offering Local Ingredients and Recipes	64%
Shop Or Browse - Clothing, Shoes and Jewellery	60%
Shop Or Browse - Bookstore or Music Store	50%
Went to a Casino	50%
Rock & Roll/Popular Concert	50%
Amusement Park	46%
Strolling Around a City to Observe Its Buildings and Architecture	44%
Went to the Movies/Cinema	42%
Well Known Historic Sites or Buildings	42%
Live Theatre	42%
Went to Local Outdoor Cafes	39%
Dining - Other High-End Restaurants	38%
Sunbathing or Sitting on a Beach	37%

Table 4

Demographic Profile for Travellers Motivated by Festivals & Events			
		Canada	**U.S.**
Gender	Male	49%	52%
	Female	51%	48%
Age	18-24 years old	14%	11%
	25-34 years old	20%	21%
	35-44 years old	20%	17%
	45-54 years old	20%	22%
	55-64 years old	14%	17%
	65 and over	11%	13%
Marital Status	Not married	56%	33%
	Married	44%	67%
Parental status	No children under 18	93%	75%
	Children under 18	7%	25%
Level of education	Less than high school	8%	0%
	High school diploma	26%	18%
	Some post-secondary	12%	29%
	Post-secondary diploma or certificate	22%	12%
	University degree	32%	39%
	Not stated	0%	1%

Table 5

Top 15 Activities Engaged in by Festivals Motivated Canadian Travellers	
Activity	**Percentage**
Dining - Restaurants Offering Local Ingredients and Recipes	63%
Shop Or Browse - Clothing, Shoes and Jewellery	63%
Shop Or Browse - Bookstore or Music Store	53%
Sunbathing or Sitting on a Beach	49%
Went to Local Outdoor Cafes	47%
Strolling Around a City to Observe Its Buildings and Architecture	47%
Swimming in Lakes	44%
Went to the Movies/Cinema	43%
Nature Park - Visited National, Provincial / State Park	39%
A Public Campground in a National, State, Provincial or Municipal Park	35%
Firework Displays	35%
Dining - Other High-End Restaurants	34%
Lakeside/Riverside Resort	31%
Amusement Park	31%

Table 6

Top 15 Activities Engaged in by Festivals Motivated U.S. Travellers	
Activity	**Percentage**
Dining - Restaurants Offering Local Ingredients and Recipes	64%
Shop Or Browse - Clothing, Shoes and Jewellery	57%
Shop Or Browse - Bookstore or Music Store	47%
Amusement Park	46%
Went to a Casino	45%
Strolling Around a City to Observe Its Buildings and Architecture	42%
Shop Or Browse - Local Arts and Crafts Studios or Exhibitions	41%
Well Known Historic Sites or Buildings	40%
Went to the Movies/Cinema	40%
Went to Local Outdoor Cafes	38%
Firework Displays	37%
Nature Park - Visited National, Provincial / State Park	36%
Other Historic Sites, Monuments and Buildings	34%
Zoos	33%

Table 7

Demographic Profile for Exhibits, Architecture, Historic Sites			
		Canada	**U.S.**
Gender	Male	48%	49%
	Female	52%	51%
Age	18-24 years old	15%	9%
	25-34 years old	15%	16%
	35-44 years old	18%	16%
	45-54 years old	21%	22%
	55-64 years old	16%	19%
	65 and over	15%	17%
Marital Status	Not married	51%	30%
	Married	49%	70%
Parental status	No children under 18	90%	75%
	Children under 18	10%	25%
Level of education	Less than high school	7%	0%
	High school diploma	22%	14%
	Some post-secondary	11%	27%
	Post-secondary diploma or certificate	20%	10%
	University degree	40%	46%
	Not stated	1%	1%

Table 8

Top 15 Activities Engaged in by Museum/Architecture/Historic Sites Motivated Canadian Travellers	
Activity	**Percentage**
Dining - Restaurants Offering Local Ingredients and Recipes	71.2%
Well Known Historic Sites or Buildings	70.6%
Strolling Around a City to Observe Its Buildings and Architecture	68.6%
Shop Or Browse - Clothing, Shoes and Jewellery	63.3%
Went to Local Outdoor Cafes	57.5%
Museum - General History or Heritage Museums	56.3%
Shop Or Browse - Bookstore or Music Store	54.7%
Shop Or Browse - Local Arts and Crafts Studios or Exhibitions	53.9%
Other Historic Sites, Monuments and Buildings	53.7%
Art Galleries	48.6%
Sunbathing or Sitting on a Beach	46.8%
Well Known Natural Wonders	43.8%
Nature Park - Visited National, Provincial / State Park	42.1%
Went to the Movies/Cinema	41.0%
Swimming in Lakes	39.9%

Table 9

Top 15 Activities Engaged in by Museum/Architecture/Historic Sites Motivated American Travellers	
Activity	**Percentage**
Well Known Historic Sites or Buildings	74.8%
Dining - Restaurants Offering Local Ingredients and Recipes	68.2%
Strolling Around a City to Observe Its Buildings and Architecture	58.4%
Other Historic Sites, Monuments and Buildings	57.3%
Shop Or Browse - Clothing, Shoes and Jewellery	57.2%
Shop Or Browse - Local Arts and Crafts Studios or Exhibitions	49.4%
Shop Or Browse - Bookstore or Music Store	49.1%
Museum - General History or Heritage Museums	48.5%
Amusement Park	45.6%
Went to a Casino	43.8%
Went to Local Outdoor Cafes	43.6%
Well Known Natural Wonders	41.3%
Nature Park - Visited National, Provincial / State Park	40.5%
Went to the Movies/Cinema	38.5%
Shop Or Browse - Antiques	37.6%

Table 10

Demographic Profile for Spectators Sports			
		Canada	**U.S.**
Gender	Male	61%	58%
	Female	39%	42%
Age	18-24 years old	18%	12%
	25-34 years old	19%	22%
	35-44 years old	23%	18%
	45-54 years old	21%	23%
	55-64 years old	11%	14%
	65 and over	8%	11%
Marital Status	Not married	61%	31%
	Married	39%	69%
Parental status	No children under 18	93%	70%
	Children under 18	7%	30%
Level of education	Less than high school	7%	0%
	High school diploma	31%	14%
	Some post-secondary	9%	28%
	Post-secondary diploma or certificate	22%	9%
	University degree	30%	46%
	Not stated	1%	1%

Table 11

Top 15 Activities Engaged in by Spectator Sports Motivated Canadian Travellers	
Activity	**Percentage**
Shop Or Browse - Clothing, Shoes and Jewellery	63.1%
Dining - Restaurants Offering Local Ingredients and Recipes	60.6%
Amateur Sports Tournaments and Competitions	53.3%
Sunbathing or Sitting on a Beach	50.8%
Swimming in Lakes	47.5%
Shop Or Browse - Bookstore or Music Store	45.9%
Strolling Around a City to Observe Its Buildings and Architecture	43.2%
Went to Local Outdoor Cafes	41.0%
Professional Ice Hockey Games	39.0%
Went to the Movies/Cinema	36.8%
A Public Campground in a National, State, Provincial or Municipal Park	36.8%
Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	35.7%
Amusement Park	35.6%
Went to a Casino	34.0%
Dining - Other High-End Restaurants	33.8%

Table 12

Top 15 Activities Engaged in by Spectator Sports Motivated U.S. Travellers	
Activity	**Percentage**
Dining - Restaurants Offering Local Ingredients and Recipes	65.5%
Shop Or Browse - Clothing, Shoes and Jewellery	58.2%
Went to a Casino	50.9%
Amusement Park	50.4%
Professional Baseball Games	44.9%
Shop Or Browse - Bookstore or Music Store	44.8%
Strolling Around a City to Observe Its Buildings and Architecture	41.2%
Went to the Movies/Cinema	39.9%
Well Known Historic Sites or Buildings	38.8%
Amateur Sports Tournaments and Competitions	38.5%
Sunbathing or Sitting on a Beach	38.3%
Swimming in Oceans	37.7%
Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	37.7%
Went to Local Outdoor Cafes	37.4%
Dining - Other High-End Restaurants	36.3%

APPENDIX C
BIA Listings with Associated Activities

Table 1
BIA Listings

Group	Activity	Location
Bloor By the Park BIA	• Murals • Graffiti Eradication	• Bloor St W. & Indian Rd.
Bloor Court Village BIA	• Cavalcade of Lights • Planting &Watering of Tree Planters and Flower Pots • Christmas Neighbourhood Street Decoration	• Bloor St W & Montrose Ave
Bloor Street BIA	• Bloor Street Transformation Project, a streetscape improvement plan involving the reconstruction of Bloor Street to provide wide granite sidewalks, decorative street lighting, new street furnishings, trees, raised planting beds, public art, and new parking lay-bys.	• Between Avenue Road and Church Street
Bloor Yorkville BIA	• Lush landscaping exquisite works of art • Widened sidewalks and elegant granite • Cutting edge architecture along corridor • Sante Wine Festival	• Avenue Rd. to Church St.
Church & Wellesley BIA	• Hanging baskets & signage on the poles • Streetscape:(lighting, murals banners, landscaping, street furniture)	• Along Church St. & Wellesley
Downtown Yonge BIA	• Safety - Additional policing • Social Improvement - Only : tourist area allowed to open on statutory holidays (i.e. New Years Day) • Owners repair deficiencies on their buildings	• Yonge-Church-Bay corridors. • Downtown Yonge
Hillcrest Village BIA	• Streetscape: (lighting, country garden murals) • Installing benches • Removing graffiti	• St. Clair Ave. from Christie St W.
Roncesvalles Village BIA	• Revitalization and rejuvenation of its streetscape in conjunction with TTC overhaul of streetcar tracks.	• Roncesvalles Avenue from Dundas St. to Queen St.

APPENDIX D[1]

Findings from PRTD Food and Beverage Survey that pertain to questions B6iii and B6iv from the Workbook

Table 1: Are your chefs/cooks accredited?

Accredited Chefs/Cooks		
	# of Responses	Percent
Yes	138	74.6%
No	47	25.4%
Total	185	100%

Table 2: Is your staff Smart Serve trained?

Smart Serve Training		
	# of Responses	Percent
Yes	180	95.7%
No	8	4.3%
Total	188	100%

Table 3: Is your restaurant/chef recognized outside of the GTA?

Is Your Restaurant/Chef Recognized Outside of the GTA?		
	# of Responses	Percent
Yes	132	72.5%
No	50	27.5%
Total	182	100%

[1] Source: Resource Audit

APPENDIX E

Toronto Imagery/Text in Media

Table 1[1]

Toronto Imagery/Text in Media in Comparison to Montreal and Vancouver

	MONTREAL	VANCOUVER	TORONTO
July/06	896.9 cm^2	28,765 cm^2	-
August/06	135 cm^2	4.6 cm^2	91.2 cm^2
September/06	650.3 cm^2	-	38.87 cm^2
October/06	-	201.1 cm^2	261.2 cm^2
November/06	50.6 cm^2	50.5 cm^2	68.3 cm^2
December/06	1022.7 cm^2	292.5 cm^2	87 cm^2
January/07	1424.2 cm^2	585 cm^2	337.2 cm^2
February/07	-	-	-
March/07	-	-	-
April/07	-	40,155.5 cm^2	16710.5 cm^2
May/07	16107.2 cm^2	21,033.1 cm^2	52859.9 cm^2
June/07	21.6 cm^2	186 cm^2	110590 cm^2
July/07	49.5 cm^2	-	99 cm^2
TOTAL	**20,358 cm^2**	**91,273.3 cm^2**	**136,200.97 cm^2**

[1] Sources: American Express Publishing. *Travel and Leisure*. Retrieved from http://www.travelandleisure.com/ and
CondéNet. *Condé Nast Traveller*. Retrieved from http://www.cntraveller.com/ and
National Geographic Society. *National Geographic Traveler*. Retrieved August 10, 2007, from http://www.nationalgeographic.com/traveler/

APPENDIX F
City of Toronto Tourism Industry 2007 Cluster Maps

Exhibit A

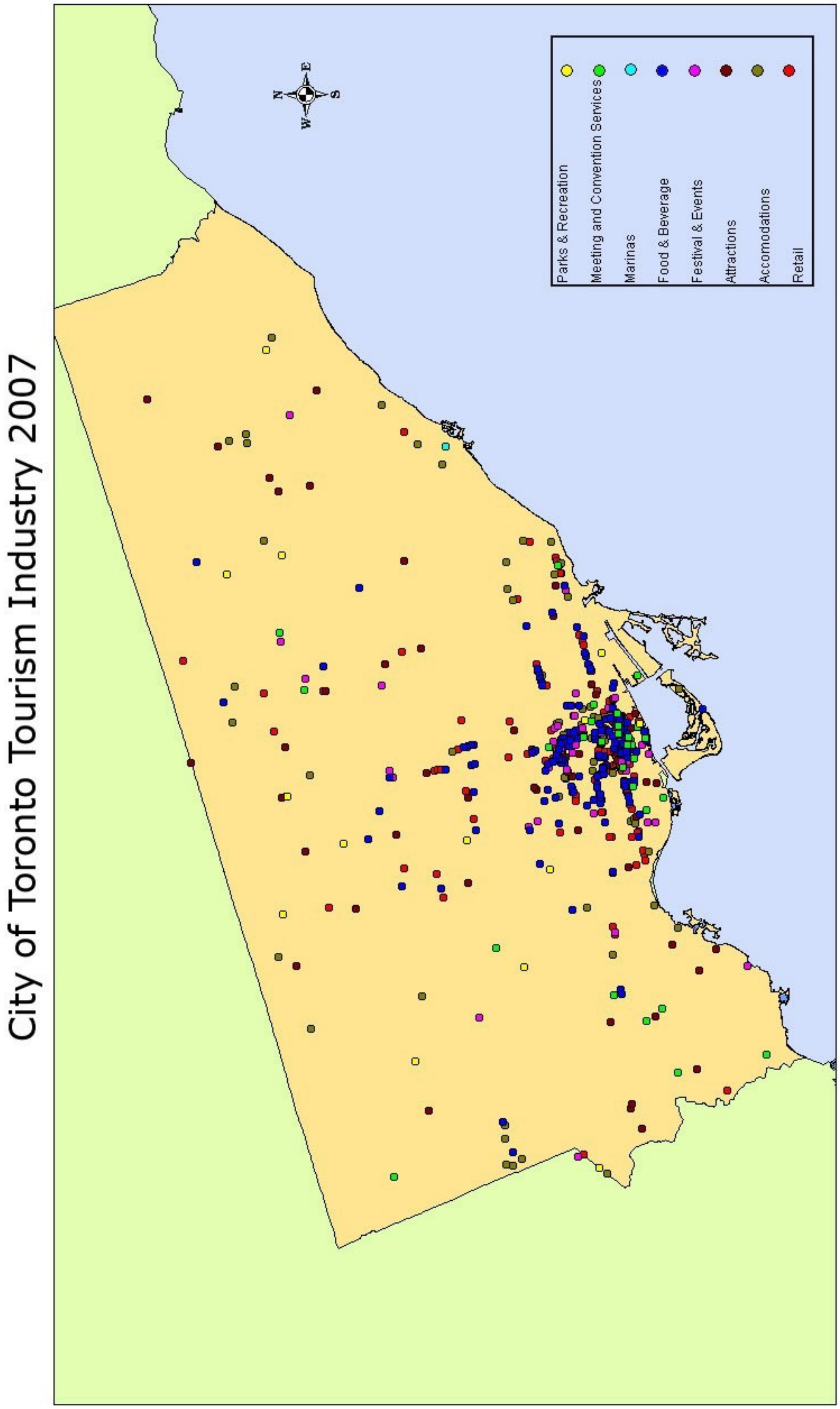
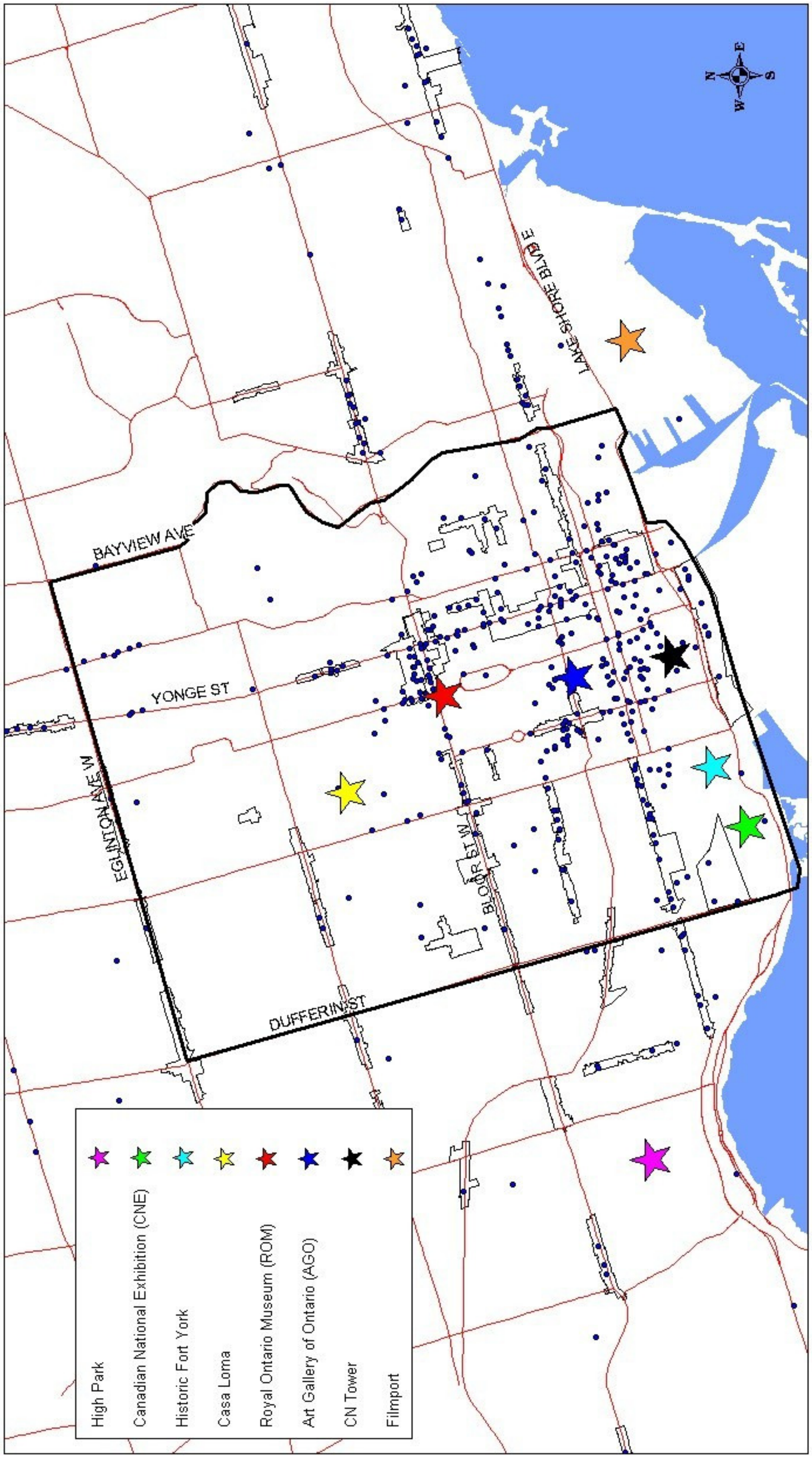


Exhibit B

Concentration of Tourism Assets in the Downtown Area of Toronto 2007



Source: Economic Development & Tourism Departments, City of Toronto 2007

APPENDIX G[1]
Housing Market Information

Figure 1

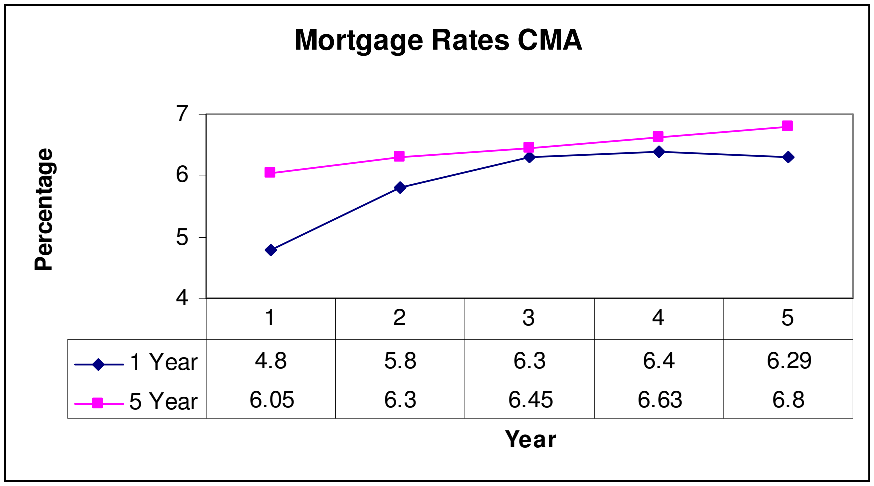


Figure 2

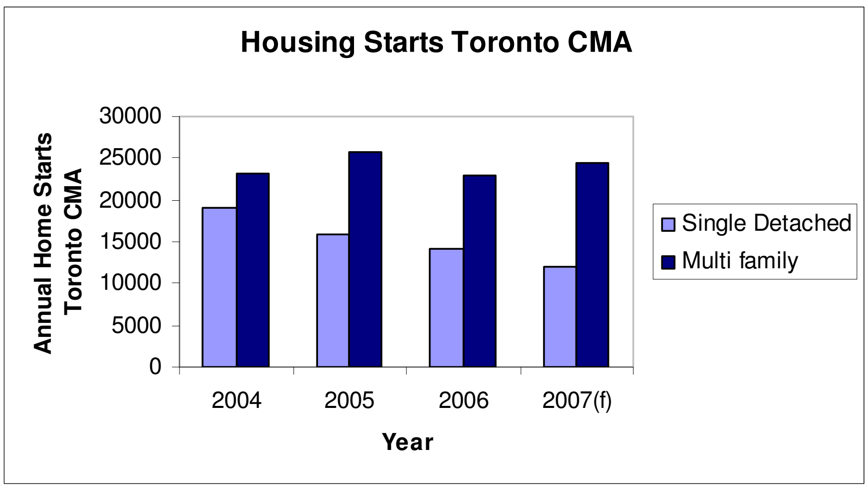
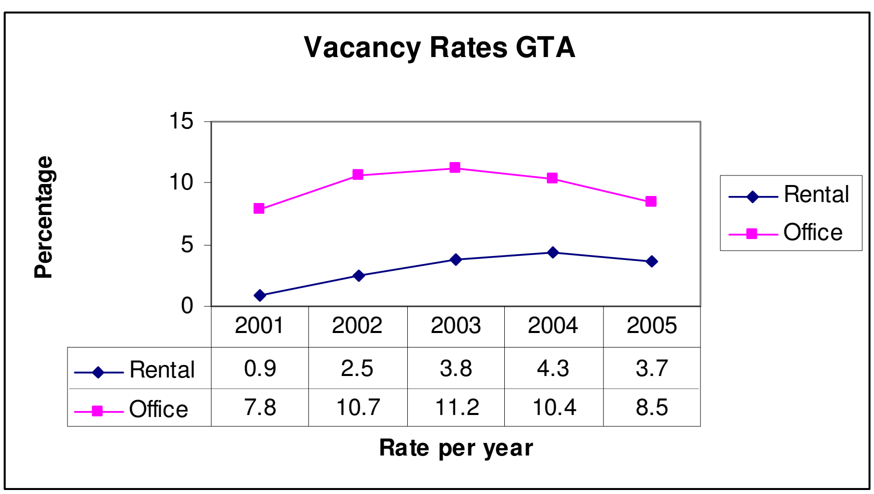


Figure 3[2]



[1] Source: Canada Housing and Mortgage Corporation. Housing Market Outlook. Retrieved September 18, 2007, from www.cmhc-schl.gc.ca/odpub/esub/64319/64319_2007_B01.pdf
[2] Source: City of Toronto. Profile Toronto. Retrieved September 18, 2007, from http://www.toronto.ca/demographics/pdf/2005officemarket.pdf

APPENDIX H
Internationally Recognized Artists

Table 1[1]
151 International Artists Who Performed in Toronto in 2006

Count	2006 Concert Date(s)	Artist(s)	Ticket Price Range* (CAD)
1	January 5-8	The Music of Andrew Lloyd Webber starring Michael Burgess	$40.00-75.00
2	January 19-21	Blue Rodeo	$35.00-45.00
3	January 20	Abbamania The Concert	-
4	January 21, 23, 24, 30	Bon Jovi	$66.25-125.00
5	January 22	Hilary Duff	$45.00-55.00
6	February 4	Colin James/Cowboy Junkies	$29.50-49.50
7	February 6	Il Divo	$59.50-89.50
8	February 6-7	INXS	$49.50-69.50
9	February 15	Art Garfunkel	$49.50-89.50
10	February 15	Nickelback with very special guest Live	$39.50-49.50
11	March 3	The Blind Boys of Alabama	$49.50-69.50
12	March 7	Vienna Philharmonic	-
13	March 8	Violent Femmes	$38.00-45.00
14	March 8	Celtic Woman	$45.00-85.00
15	March 10	Randy Weston	$39.50
16	March 11	Hayley Westenra	-
17	March 13	Donald Fagen	$55.50-75.50
18	March 16	Queen & Paul Rogers	$49.50-119.50
19	March 20	Oasis w/Arctic Monkeys	$49.00-71.00
20	March 21	James Blunt	$29.50-39.50
21	March 22	Dream Theatre	$42.50-52.50
22	March 22-23	Coldplay with Richard Ashcroft	$49.50-69.50
23	March 24	Amr Diab	$55.00-175.00
24	March 24	Buddy Guy	$49.50-69.50
25	March 25	Randy Newman	$48.50-54.50
26	March 25	Hawksley Workman	$29.50-34.50
27	March 26	Kris Kristofferson	$42.50-49.50
28	March 30	Ray Davies	-
29	April 4	Korn	$42.50
30	April 7	Cesaria Evora	$40.00-60.00
31	April 8	Ron Sexsmith	-

[1] Source: Toronto Star Newspapers Ltd. (2006). *Eye Weekly*. Print issues (36 weeks) were reviewed July 3 & 10, 2007.

32	April 9-10	David Gilmour	-
33	April 11	UB40 with Elan	-
34	April 11	Nikolai Lugansky	-
35	April 12	Joe Satriani with Eric Johnson	-
36	April 20	Lam & Eason Crossover 2006	-
37	May 2	Willie Nelson with Nitty Gritty Dirt Band	-
38	May 6	Nana Mouskouri-The Farewell Tour	-
39	May 6	Jackie Mason-Freshly Squeezed	-
40	May 9-10	Pearl Jam	$60.50
41	May 9	Arlo Guthrie	-
42	May 13	Fallout Boy with All American Rejects & Hawthorne Heights	$34.50
43	May 13	Sigur Ros	-
44	May 14	INXS	$55.00-75.00
45	May 16	Dan Rather	-
46	May 16	Black Crowes	-
47	May 18	Depeche Mode	-
48	May 21	Rockstars 2006	-
49	May 25	Daniel O'Donnell	-
50	May 25	Maya Angelou & Amy Sky	-
51	May 30	Sumi Jo, Soprano	-
52	June 3	Tommy Emmanuel	-
53	June 3	Googoosh & Mehrdad	-
54	June 5-6	Robert Redford	-
55	June 6	Luciano Pavorotti-The Farewell Tour	-
56	June 7-8	Radiohead	SOLD OUT
57	June 7	Snow Patrol	-
58	June 10	Dennis De Young	$55.00-75.00
59	June 14, 15, 17	Ben Heppner	-
60	June 14	George Strait with Tracy Lawrence & Miranda Lambert	-
61	June 16	Zappa plays Zappa	$59.50
62	June 17	Arctic Monkeys/We Are Scientist	-
63	June 17	Lani Misalucha & Society of Seven	-
64	June 17	The Eels	-
65	June 21	The New Cars with Blondie	-
66	June 23	Bachman & Cummings	-
67	June 24	The Tragically Hip with The Weakerthans & The Saides	SOLD OUT
68	June 24	Nine Inch Nails with Bauhaus & Peaches	$33.25-63.25

69	June 26	The International Reggae Superstars	-
70	June 27	Etta James	$45.00-95.00
71	June 30	The Cat Empire	$20.00
72	June 30	Seu Jorge	$21.50
73	July 2	Ninaithalay Innikkum	-
74	July 3	Dave Brubeck	-
75	July 3	Slayer with Lamb of God	$40.00-50.00
76	July 8	Solomon Burke	$49.50-69.50
77	July 10	Bonnie Raitt	$49.50-69.50
78	July 10-11	Crosby Stills Nash & Young	$50.75-251.25
79	July 11	Sound of the Underground	$39.25-43.25
80	July 12	Buffy Sainte-Marie	$50.00
81	July 13	Tom Jones	$55.00-95.00
82	July 16	Edgefest 2	$39.25
83	July 17	Ashley Simpson with Ashley Parker Angel & The Veronicas	$35.00-49.50
84	July 24	Counting Crows/Goo Goo Dolls	$27.50-65.50
85	July 25	Ozzfest: System of a Down/Disturbed/Hatebreed/Lacuna Coil/Atreyu/Unearth/Bleeding Through/Norma Jean	-
86	August 2	Ben Harper/Damian Jr. Gong Marley/Bedouin Soundclash	-
87	August 8	Steal Pulse	-
88	August 8	Van Morrison	
89	August 12	Melissa Etheridge	-
90	August 13 & 29	Mariah Carey	-
91	August 14	Lyle Lovett	-
92	August 16-20	Bombay Dreams	-
93	August 20	Aap ka Suroor	-
94	August 20	Blue Rodeo	$16.25-65.50
95	August 23	Foo Fighters	SOLD OUT
96	August 27	Shakira	$19.50-87.50
97	August 28	Daryl Hall & John Oates with Geoff Byrd	-
98	September 1	Dr. Draw	-
99	September 2	Ben Harper & The Innocent Criminals	$28.75-53.25
100	September 8	Tom Petty & The Heartbreakers	$27.00-81.75
101	September 9	The Whispers	-
102	September 9	The Black-Eyed Peas	$22.50-65.50
103	September 13	Bela Fleck & The Flecktones	-
104	September 13	Snow Patrol with Augustana	$29.50
105	September 15	Ron White	-

106	September 15	Farewell Tour of Charles Aznavour	$79.50-115.50
107	September 16	John Prine	$39.50-56.50
108	September 19	Led Zepplica: The Led Zepplin Experience	-
109	September 20	Roger Waters-Dark Side of the Moon	-
110	September 20	Keane	$30.50-40.50
111	September 23	Bill Gaither	
112	September 23	Ravi Shankar- Anoushka Shankar	$49.50-99.50
113	September 24	Eric Clapton	$55.50-125.00
114	September 25-26	Red Hot Chili Peppers	$43.75-73.75 SOLD OUT
115	September 27	Colin Mochrie & Brad Sherwood	-
116	September 29-30	Anne Graham Lotz-Just Give Me Jesus	-
117	October 2	Aerosmith & Motley Crue	$69.50-149.50
118	October 3	James Blunt	$49.50-59.50
119	October 5	Dwight Yoakam	$42.50-49.50
120	October 6	Nana Mouskouri	$64.50-84.50
121	October 7	Sergio Mendes	-
122	October 8	Omid, Kamron & Hooman Michael & Shorhreh	-
123	October 12-13	Queen—It's A Kinda Magic	$58.00-78.00
124	October 13	Lewis Black	-
125	October 14	Randy Newman	-
126	October 16	Iron Maiden	$39.50-67.50
127	October 17, 20	Barbra Streisand	$85.00-550.00
128	October 18	Paul Simon	$45.50-125.00
129	October 19	Ladysmith Black Mambazo	-
130	October 20	Bruce Cockburn	$39.50-49.50
131	October 21	Pavlo in Concert	-
132	October 23	Ravi Shankar	-
133	October 28-29	Dixie Chicks	$69.50-89.50
134	October 30-31	Death Cab for Cutie	$32.50-42.50
135	October 30	Lionel Richie	-
136	November 4	Elton John	$50.00-150.00
137	November 7	Bob Dylan and his Band	$39.50-85.50
138	November 8	Imogen Heap	-
139	November 10	Los Lobos	-
140	November 10	An Evening with Deepak Chopra-*Life After Death*	-
141	November 11	Liel in Concert	-
142	November 15	Guns & Roses	-
143	November 16-19	Gordon Lightfoot	-

144	November 18	George Carlin	-
145	November 22	Billy Connolly	-
146	November 30	Sloan	-
147	December 1	The Australia Pink Floyd	-
148	December 4	The Who	-
149	December 4	McGarrigle Christmas	-
150	December 5	Twisted Sister: A Twisted Christmas	-
151	December 15-16	Andre Rieu	-

APPENDIX I[1]

Inventory of Tourism Assets in the City of Toronto

Tourism Resources Inventory Matrix		Count
Attractions	Amusement / Theme Parks	9
	Water Parks / Wave Pools	1
	Observation Towers	1
	Museums	28
	Galleries - Public	19
	Science & Technology-Related Establishments	1
	Zoos	2
	Horse Racing / Casinos	1
	Off-Track Gambling	12
	Major League Franchises	6
	Minor League Franchises	3
	Wineries / Breweries	6
	Specialty Cinema Venues	6
	Significant Sports Events	63
Tours & Excursions	Boat Tours	12
	City Tours (Coach / Bike)	12
	Helicopter Tours	2
	Tours / Walks - Cultural / Historical / Architectural	13
	Hot Air Balloon Tours	1
Historic & Heritage Sites	World Heritage Sites	0
	National Historic Sites	33
	Provincial Heritage Sites	926
	Local Heritage Sites	7430
	Aboriginal Heritage Sites	64
	Living History Sites	11
	Architectural Heritage Sites	6803
	Archives	29

[1] Resource Audit

Tourism Resources Inventory Matrix		Count
Performing Arts	Musicals / Live Theatre Performances	5614
	Live Theatre / Performing Arts Facilities	54
	Ballet / Other Dance Performances	1684
	Classical Music & Opera Performances	1009
	Major Rock & Roll / Popular Music Concerts	151
	Concert Halls & Venues	31
	Comedy Shows	1742
	Comedy Clubs	3
Festivals & Events	Aboriginal Celebrations	2
	Annual Musical Festivals	24
	Annual Non-Music Festivals	90
	Arts & Crafts Festivals & Events	38
	Consumer Shows	90
Parks & Trails	National Parks	1
	Provincial Parks	0
	Crown Land	0
	Conservation Areas	1
	Reserves	0
	Municipal Parks	16
	Municipal Parkettes	1350
	Major Paved Trails	50
	Gardens & Conservatories	11
	Interpretive Programs / Walks / Tours	12
Water-based Recreation Opportunities	Beaches	12
	Swimming Pools	2
	Water Sports Clubs (Sailing, Canoeing)	16
	Fishing	1
	Marinas & Yacht Clubs	13

Tourism Resources Inventory Matrix		Count
Land-based Recreation Opportunities	Golf Courses	8
	Skiing - Downhill Facilities	2
	Community Centres	136
	Arenas - Indoor & Outdoor	95
	Baseball Facilities	366
	Basketball Facilities	1
	Soccer Fields	238
	Tennis Courts	756
	Sports Fields	1469
	Playgrounds	833
	Animal Farms	2
	Equestrian Stables	4
	Archery Ranges	3
	Sports Gyms	1014
	Tournaments & Events By Permits	30,000
	Sports Groups & Organizations	2,900
	Birdwatching (In Parks)	12
Accommodation	Campgrounds / RV Parks	1
	Hotels - Chain	66
	Hotels- Independent	29
	Condominium Hotels	9
	Bed and Breakfasts	73
	Motels / Inns	34
	Hostels	6
	University & College Residences	11
Food & Beverage	Unlicensed Restaurants	789
	Unlicensed Ethnic Restaurants	206
	Licensed Restaurants	1500
	Licensed Ethnic Restaurants	566
	Pubs / Bars / Night Clubs	442
	Take-out / Fast Food / Donut Shops	1612
	Caterers	36
	Street Vendors By Permits	218

Tourism Resources Inventory Matrix		Count
Destination Retail	Shopping Districts / Neighbourhoods (BIA's)	63
	Factory Outlets / Shopping Malls (More Than 30 Stores)	104
	Department Stores	50
	Fashion / Clothing Stores	2866
	Antiques / Coins & Stamps / Memorabilia	273
	Arts & Crafts / Gifts & Novelties Stores	490
	Jewellery	481
	Fur / Leather / Leather Goods	165
	Electronics	743
	Ethnic Food / Specialties Shopping	453
	Spas / High-End Beauty Shops	159
	Galleries - Commercial	324
Convention, Meeting, & Special Event Venues	Conference / Convention Centres	3
	Meeting Facilities	34
	Meeting & Event Suppliers	106
	Multifunctional Large Venues	4
	Municipal Squares	5
	Multifunctional Events Venues	58
Transportation	Airports	2
	Scheduled Daily Flights to Toronto	1000+
	Rail (No. of Companies)	3
	Intercity Coaches - Private (# of companies)	3
	Coaches - Private (Pleasure Trips & Tours)	6
	Taxis (No. of Vehicles)	4960
	Major Taxi Companies	8
	Major Car Rental Companies	9
	Minor Car Rental Companies	33
	Car Rentals (No. of Vehicles, Approx. High Season)	50000
	Limousine Companies	15
	Limousines (No. of Vehicles)	650
	Subway / Light Rail Lines	4
	City Bus / Streetcar Routes	383
	Water Taxis	36
	Public Transit Systems (No. of Types)	5
Other Tourism Resources	English Language Schools	35
	Travel Information Centres	15
	Currency Exchange	141

APPENDIX J: Performance Summary for Toronto's PRTDF Project

Premier Ranked Tourist Destination	A

PRODUCT	A	PERFORMANCE	A	FUTURITY	A

PRODUCT

A. Distinctive Core Attractions	Y

A1	A
A1.i	Y
A1.ii	Y
A1.iii	Y
A1.iv	A
A1.v	A
A1.vi	A
A1.vii	A
A1.viii	N
A1.ix	N
A1.x	Y

A2	Y
A2.i	Y
A2.ii	Y
A2.iii	Y
A2.iv	Y
A2.v	Y

B. Quality and Critical Mass	Y

B1	Y
B1.i	A
B1.ii	Y
B1.ii	Y
B1.iv	Y

B4	Y
B4.i	Y
B4.ii	A
B4.iii	A
B4.iv	Y

B6	Y
B6.i	Y
B6.ii	Y
B6.iii	Y
B6.iv	Y

B2	Y
B2.i	Y
B2.ii	Y

B5	Y
B5.i	Y
B5.ii	Y

B7	Y
B7.i	Y
B7.ii	Y

B3	Y
B3.i	A
B3.ii	Y

C. Satisfaction and Value	A

C1	A
C1.i	A

C2	A
C2.i	A
C2.ii	A

C3	A
C3.i	N
C3.ii	Y
C3.iii	A

D. Accessibility	A

D1	Y
D1.i	Y
D1.ii	Y
D1.iii	Y
D1.iv	Y
D1.v	Y

D3	Y
D3.i	Y
D3.ii	Y
D3.iii	Y
D3.iv	Y

D4	A
D4.i	Y
D4.ii	A

D2	A
D2.i	A
D2.ii	A

E. An Accommodation Base	Y

E1	Y
E1.i	Y
E1.ii	Y
E1.iii	Y

PERFORMANCE

F. Visitation	Y

F1	Y
F1.i	Y
F1.ii	Y
F1.iii	Y
F1.iv	Y
F1.v	Y
F1.vi	Y
F1.vii	Y
F1.viii	Y

F2	Y
F2.i	Y

F3	Y
F3.i	Y

G. Occupancy and Yield	A

G1	A
G1.i	Y
G1.ii	A

G2	A
G2.i	N
G2.ii	Y
G2.iii	N
G2.iv	Y

H. Critical Acclaim	A

H1	N
H1.i	A
H1.ii	N

H2	Y
H2.i	Y

H3	Y
H3.i	Y
H3.ii	Y

FUTURITY

I. Destination Marketing	Y

I1	A
I1.i	Y
I1.ii	A

I3	Y
I3.i	Y
I3.ii	A

I5	Y
I5.i	Y

I2	Y
I2.i	Y
I2.ii	Y
I2.iii	A

I4	Y
I4.i	Y

I6	Y
I6.i	Y

J. Product Renewal	Y

J1	Y
J1.i	Y
J1.ii	Y
J1.iii	Y

J2	A
J2.i	Y
J2.ii	A

K. Managing w/ Carrying Capacities	A

K1	A
K1.i	Y
K1.ii	N

K4	Y
K4.i	Y
K4.ii	Y
K4.iii	A
K4.iv	Y

K6	A
K6.i	Y
K6.ii	Y
K6.iii	N
K6.iv	Y

K2	Y
K2.i	Y
K2.ii	N/A
K2.iii	Y
K2.iv	N/A

K5	Y
K5.i	Y
K5.ii	N/A
K5.iii	N/A

K7	Y
K7.i	Y
K7.ii	Y
K7.iii	Y

K3	N
K3.i	A
K3.ii	N
K3.iii	A
K3.iv	N

LEGEND

Yes	Y	Yes, the affirmation can be made and supported for the destination.
Almost	A	The affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation.
No	N	No, the affirmation cannot be made/supported for the destination.