

CITY OF TORONTO  
Premier-Ranked  
Tourist Destination  
Project

Research Summary and Recommendations

“MAKING TORONTO THE BEST IT CAN BE”

December 2007

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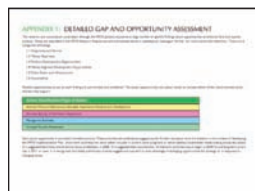
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This project was facilitated in partnership with the City of Toronto, Employment Ontario and funded in part by the Government of Canada and the Ontario Ministry of Tourism



## ABOUT THIS REPORT

This report has been written based on the findings from Toronto's extensive Premier-ranked Tourist Destination (PRTD) process which began in January and concluded in December 2007. The destination audit, a thorough inventory of Toronto's tourism assets, was completed by a twelve person audit team over a period of 11 months. The detailed findings from the audit are contained in a companion report entitled Toronto's Premier-ranked Tourist Destination Project – Research Report, dated December 2007. A comprehensive bibliography is contained in this report that details the sources of information that were used to complete the PRTD process and write the Summary Report. We have not included all sources of information in Summary Report, any definitive statements or statistical data can be supported by extensive data included in the full Research Report.

The consultant to the process and author of this report is familiar with the PRTD process having completed it in 14 other Ontario destinations over the past 36 months. However, in undertaking the assignment in Toronto it was necessary that he supplement the process with additional consultation and dialogue in order to gain a thorough understanding of Toronto's tourism offering and deal with the enormity of the opportunities and issues facing its tourism industry.

As a result, the report, while attempting to remain true to the process, includes information derived from extensive industry dialogue. Small group consultation and one on one dialogue with Toronto's tourism industry leaders took place and proved valuable in gaining full understanding of the opportunities and challenges that exist. This additional dialogue and research was required in order to ensure the process delivered the results Toronto's tourism industry was looking for.

The observations and conclusions reached along with the specific recommendations and actions have been validated along the way by industry stakeholders at a number of levels.

The City of Toronto, Tourism Section, was responsible for the implementation of the process with ultimate accountability to Toronto's Tourism Leadership Group, Chaired by the Assistant Deputy Minister Tourism, for the Province of Ontario. This group heard the preliminary findings in a presentation made on December 7th. All members of the Leadership Group were present and unanimously endorsed the findings of the PRTD project. It will be the responsibility of the Leadership Group to accept the final report and put in place a process for implementation of the stated recommendations.

Finally, the Co Chairs of the PRTD Project Steering Committee, John Houghton, Vice President at Metro Toronto Convention Centre and Gino Giancola, Senior Vice President at Tourism Toronto, as well as the lead staff at the City of Toronto, Judy Morgan and Ned Sabev all played a significant part in both the execution of the process and the outcomes contained in this report. Their commitment and contribution to the process was significant, they added value along the way and provided leadership and guidance.

The underlying theme of the Toronto's PRTD project is "Making Toronto the Best It Can Be." As a result of understanding the opportunities presented, and successfully implementing the identified strategies Toronto will become a desirable place for not only those who visit but also for those who live here, those who work here and those who have come to call Toronto home.



# EXECUTIVE SUMMARY

What is the Premier-ranked Tourist Destination Framework?

The PRTD was developed by the Ontario Ministry of Tourism to provide a means for tourism destinations to define their competitive position within the tourism marketplace. Premier-ranked is not a formal tourism designation but, rather an internal tourism goal to help destinations become “better than the rest” by improving their viability and competitiveness as a place people want to visit.

## THE THREE DIMENSIONS OF TOURISM ASSESSMENT

### 1. The Product Dimension

This dimension looks at the features that enable a destination to provide a high quality tourist experience. This is validated through examining the following:

- Distinctive Core attractors
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- An Accommodations Base.

### 2. The Performance Dimension

The performance dimension looks at the destination’s success in providing a quality tourist experience. This is validated by examining:

- Visitation
- Occupancy and Yield
- Critical Acclaim.

### 3. The Sustainability Dimension

Sustainable tourism is vital to any destination. In this dimension, the process looks at the destination’s ability to thrive from tourism into the future and its sustainability through:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities.

The process involves several critical steps along with a serious commitment of time by industry partners. This investment of time and energy is rewarded with specific insights and direction.

## THE PRTD PROCESS

The PRTD process was designed to guide the industry through several key steps including database design and collection, evaluation, interpretation and planning.

- A database of tourism businesses was created and 2588 questionnaires were delivered to companies representing the accommodation, food and beverage, attraction, heritage and cultural, parks and recreation, marinas, golf, transportation, retail, events and festivals, winery and breweries and meeting venue/planner sectors.
- 847 surveys were completed, representing a response rate of 33%.
- Of the 2588 database it was determined a total of 1069 were key core tourism businesses, 446 surveys were completed from this group representing a better response rate of 42%

- Secondary research was gathered and used to help shape the current picture of the destination.
- The survey data and secondary research was accumulated, entered, clarified, analyzed and evaluated using the PRTD workbook and the Tourism Resource Opportunity Matrix.
- A comprehensive “PRTD Research Report” was completed by the audit team; it contains the detail research that supports this report.

## SUMMARY OF FINDINGS

### Starting From a Position of Strength

Toronto is starting from a position of strength when it comes to improving its status as an attractive tourism destination. This must not be underestimated as the industry puts in place plans to moving to the next level. Its strengths include:

- Breadth and depth of visitor experiences
- Excellent air access with extensive improvements to Pearson International Airport
- Significant new cultural product in the form of performance venues, galleries, museums
- Attractors have quality & critical acclaim as ranked by known tourism authorities
- Accommodation base is excellent, offering a wide range of options for visitors
- Significant annual visitation, an envy of many cities in North America
- A large new Canadian resident population that fuels VFR traffic and activity
- Engaged tourism industry who have a track record of working together
- The Destination Marketing Organization that is strong with resources required to market & sell, Tourism Toronto is the recognized and respected DMO
- Significant product and experience development projects are already in play that will have positive impact on Toronto’s ability to increase visitation into the future.

## EVALUATION

The PRTD measurement criteria rates the destinations status related to its performance for its Product, Performance and Sustainability dimensions. After completing the Destination Performance Summary using the data provided through industry surveys and supplementary information it has been determined that the destination is lacking in a number of fundamental areas.

**PRODUCT** – A Tourist Destination provides a high quality tourist experience, enabled through the destination’s offerings of:

- Distinctive Core Attractions
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- An Accommodations Base.

According to the Guidelines in the Workbook, the City of Toronto’s tourism product does not reach its full potential and therefore was rated as “Almost Premier-ranked,” as a result of deficiencies and gaps in the “Accessibility” and “Satisfaction and Value” elements.

**PERFORMANCE** – The quality of the tourist experience and the destination’s success in providing it is validated by:

- Visitation
- Occupancy and Yield
- Critical Acclaim.

According to the Guidelines in the Workbook, the City of Toronto’s tourism performance does not reach its full potential and therefore was rated as “Almost Premier-ranked,” as a result of deficiencies and gaps in the “Occupancy and Yield” and “Critical Acclaim” elements.

**SUSTAINABILITY** – Ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities.

According to the Guidelines in the Workbook, the City of Toronto’s tourism sustainability does not reach its full potential and therefore was rated as “Almost Premier-ranked,” as a result of deficiencies and gaps in the “Managing within Carrying Capacities” and “Product Renewal” elements.

**Note:** “Almost Premier-ranked” — The affirmation can almost be made and supported, one to several key efforts / investments will enable affirmation.

## GAPS AND DEFICIENCIES

Under the three dimensions of assessment model and process the following gaps or deficiencies have been identified:

- Distinctiveness of the Destination
- Hospitality and Service
- Memorable Experiences
- Visitors' Perception of Value
- Signage / Way Finding
- Accessibility and Accommodating Travellers with Special Needs
- Stability of Market Demand
- Consideration as a "Must See/Must Do" Destination
- Intentions to Travel to Toronto
- Product Renewal
- Underdeveloped and/or Underperforming Assets
- Geographic distribution of tourism assets within Toronto
- Labour Pool
- Road, Transit, Parking and Trail Capacity.

## OBSERVATIONS

### • Toronto Does Not Have a Common Vision to Improve It's Competitiveness

The PRTD process has identified that while there are many efforts to improve the viability of Toronto in general and its tourism industry specifically, no common vision to develop the destination into the future is currently present. As a result energy and resources are expended on a series of fragmented efforts that don't collectively build to impact the gaps that exist in Toronto's tourism experiences and products.

The following observations have been made as a result of the PRTD process:

- Lack of consensus among the tourism industry on what needs to be addressed
- Work is already being done on a number of fronts but is being done in isolation and in some cases without a tourism perspective
- The tourism industry reacts very well when faced with challenges however it has no cohesive plan in place related to future destination development
- Future growth for tourism depends on being proactive, not only reactive
- The process has revealed what needs to be done and identifies the specific areas where improvements are needed.

### • Toronto's Value Proposition can be Improved

Efforts must be made to improve Toronto's "Value Proposition." A series of specific initiatives have been identified that when implemented will deliver significant value to those who visit Toronto and therefore impact their willingness to return and to talk positively about their experience.

### • A Collective Process to Manage Toronto's Tourism Business into the Future Does Not Exist

In order to succeed as a viable tourism destination and to grow visitation numbers and revenue a proactive business management model or process should be established to help manage Toronto's tourism business. This forward looking process attempts to better organize the industry in order that it is more successful. It attempts to maximize the industry's collective efforts to grow the business. The model looks to the future to determine opportunities and challenges and identifies proactive strategies to address the issues. It can become a mechanism to improve industry communications and relations. It attempts to get all involved, on the same page and reduces the propensity for the creation and implementation of one-off activity.

### • Low Awareness of the Importance of Tourism among Torontonians

Increasing the awareness of the importance of tourism among Torontonians in general and among influencers, specifically the media and business, will positively impact the tourism industry's ability to attract more visitors. The notion that tourism is good for a destination is recognized in many destinations. This awareness can affect public policy in positive ways while at the same time improve the services local residents come to enjoy. The industry must work together to address the lack of awareness of the tourism impact on the city. A series of specific steps must be identified to overcome this situation.

## RECOMMENDATIONS

### • Create a Formal Tourism Destination Development Plan for Toronto

- Address Toronto's Product and Experience Deficiencies and Improve Its Value Proposition
- Establish an Annual Tourism Business Management Model
- Increase the Awareness of the Importance of Tourism to Toronto.



## SPECIFICALLY

### Improve the Value Proposition

Through the PRTD process it has been determined that focus should be given to improving the Quality of the Visitor Environment and Experience Renewal and Development. By addressing these key areas it is believed Toronto will improve its value proposition and deliver superior value to all those who visit as well as to all those who call Toronto home.

#### Quality of the Visitor Experience:

- Hospitality Excellence: adopt a “We’ve Been Expecting You” Attitude
- Raise Service Standards – at all visitor touch points
- Destination Animation – create a “buzz”
- Improve Visual Appeal – work with Clean & Beautiful City Office
- Improve Availability of Visitor Information
- Improve Visitor Way Finding and Signage
- Reduce Traffic Congestion and Transportation Enhancements
- Become More Motor Coach Friendly.

#### Experience Renewal and Development:

- Waterfront Development
- Ontario Place Revitalization
- Exhibition Place Development
- Blockbuster Exhibits AGO/ROM – Attract the exhibits that demand visitation
- Attract Major Events – when we need them
- Upgrade Heritage Sites – better tell the Toronto heritage story
- Mass Entertainment Complex – a year round attractor.

### Implement an Annual Business Management Model

Put in place/strengthen the mechanisms for collective destination management including improved industry communications, cooperation between sectors and related partners, long term business building strategies (attract business in need periods with new reasons to visit), training and information sharing. Establish an annual proactive business management process designed to enhance the destinations opportunities to positively attract more visitors and increased revenue.

### Increase the Awareness of the Importance of Tourism

Specifically it is recommended that the following strategies be undertaken in order to positively impact tourism awareness levels.

- Identify and Quantify Positive Impacts of Tourism to Toronto
- Effectively Communicate the Facts and Speak With One Voice
- Utilize the City’s Prosperity Agenda to Reinforce the Message
- Mobilize Residents – Make Them Tourism Ambassadors.

## NEXT STEPS

The Premier-ranked Tourist Destination project has provided a clear appraisal of Toronto’s position in the tourism marketplace. It has also set out clear direction to take the destination to the next level. Under the direction of Toronto’s Tourism Leadership Group a specific implementation plan will be developed. This implementation plan will be done in cooperation with tourism industry partners, the City of Toronto and the Ontario Ministry of Tourism.



# BACKGROUND

The Premier-ranked Tourist Destination program is an initiative developed by the Ontario Ministry of Tourism in 2001. The goal of the PRTD program is to help destinations across Ontario identify areas for development related to tourism, assess their competitive tourism advantage and ultimately improve to become a destination of choice. Being a Premier-ranked Tourist Destination indicates that “here is a place more attractive than the rest, a place the potential visitor should consider first in making travel plans.” To be clear, Premier-ranked is not a formal tourism designation but rather is an internal tourism goal for a destination to work towards as it relates to becoming “better than the rest”.

To assist municipalities with assessing and developing their tourism product, the Ministry of Tourism established a tool called the Premier-ranked Tourist Destination Framework. This framework assists jurisdictions in assessing their tourist assets, attractions and amenities and allows them to identify opportunities in tourism development. The Ministry of Tourism provides financial assistance to regions that successfully apply to undertake the PRTD process.

The Toronto PRTD project is an initiative facilitated by the City of Toronto in partnership with, the Ontario Ministry of Tourism, Service Canada (now Employment Ontario), and tourism industry stakeholders. The funding for the project came from three sources – City of Toronto, Employment Ontario and the Ontario Ministry of Tourism.

The successful implementation of the recommendations is based on a thorough understanding, appreciation, engagement and endorsement from both the private and public sector partners. This is not an initiative of government, at any level. It is a shared process undertaken by industry and government.

Both must accept the accountability for delivery if it is to be viewed as productive over the long term.

A Premier-ranked Tourist Destination Steering Committee, made up of senior representatives of the tourism industry was established in 2006 to help direct and guide the development of the overall project. The members are listed in Appendix 2. Pre-project planning meetings with the Steering Committee were held on September 12 and December 13, 2006.

To assist the PRTD Steering Committee with the process, facilitation of the industry consultations and the preparation of the final report, a tourism industry consulting firm was retained in December 2006. The consultants, BRAIN TRUST Marketing & Communications, worked with the PRTD Steering Committee and City of Toronto staff to establish the project parameters and facilitate the information gathering process. They monitored the project process and provided direction and guidance. Once the resource audit was complete they reviewed the results, assessed industry strengths, weaknesses, attributes, gaps, and conditions that impact existing and future development plans and identified potential opportunities.

The PRTD project was introduced to Toronto’s tourism industry at a presentation held at George Brown College on February 28, 2007. Representatives from all sectors of the industry were present. An overview of the process was presented followed by a working session to discuss the various aspects of the project and to enlist industry representatives to serve as industry advisors throughout the process.





The Steering Committee met throughout the process, on December 13, 2006, January 22, June 19, September 19, October 19, and December 4, 2007.

Formal industry consultations with representatives from the accommodation, attraction, retail, food and beverage, culture, heritage, meeting/convention/trade show, transportation and sightseeing sectors were held on April 3, September 26 and October 25, 2007. Additional consultations were held with a representative group from the meetings and convention sector on October 23, with Tourism Toronto senior staff on October 31 and with senior representatives from several hotel chains on October 18 and 29, 2007.

A presentation was made to several City of Toronto Councillors on November 6, 2007. A series of one-on-one meetings, facilitated by the consultant, also took place in September, October and November.

Having completed these meetings a presentation was made to Toronto's Leadership Group on December 7, where DRAFT recommendations were presented. This group was established in 2006 to understand the challenges that, at the time, were

facing Toronto's tourism industry. It is comprised of senior representatives from the Ministry of Tourism, City of Toronto, Tourism Toronto, the Greater Toronto Hotel Association, Toronto Board of Trade, Metro Toronto Convention Centre, Ontario Restaurant, Hotel and Motel Association, Attractions Ontario, and Ontario Tourism Marketing Partnership Corporation. It was this group that commissioned the implementation of Toronto's Premier Ranked Project.

Finally, on December 10, 2007 findings and DRAFT recommendations were presented at an industry wide meeting held at the Metro Toronto Convention Centre. Recommendations were validated via a survey distributed to attendees. The vast majority of those in attendance agreed with the recommendations and findings.

It can be safely said that as a result of this consultative process the tourism industry in Toronto has endorsed the recommendations contained in this report. It is the culmination of many hours of diligent work, dialogue and discussion. This report contains actions that if implemented, will have a positive impact on all of those who live, work and visit the City of Toronto.



# STARTING FROM A POSITION OF STRENGTH

The PRD process is designed to identify areas where improvements in a destination's tourism products and experiences are required. That being said, this work has been done in Toronto against the backdrop of a destination that is starting from a position of strength, these include:

- Breadth and depth of visitor experiences
- Excellent air access with extensive improvements to Pearson International Airport
- Significant new cultural product in the form of performance venues, galleries, museums
- Attractors have quality & critical acclaim as ranked by known tourism authorities
- Accommodation base is excellent, offering a wide range of options for visitors
- Significant annual visitation, an envy of many cities in North America
- A large new Canadian resident population that fuels VFR traffic and activity
- Engaged tourism industry who have a track record of working together
- The Destination Marketing Organization that is strong with resources required to market & sell, Tourism Toronto is the recognized and respected DMO
- Significant product and experience development projects are already in play that will have positive impact on Toronto's ability to increase visitation into the future.

## TORONTO'S CRITICAL ACCLAIM

- 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
- Identified a leading city in the world in terms of reducing carbon emissions by the Carbon Group
- 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.



# PRODUCT

## DISTINCTIVE CORE AND SUPPORTING ATTRACTORS

**Core Attractor:** 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. Core attractors can differ from season to season, as in for example golf vs. skiing at a four seasons resort destination. They can overlap or be distinctly different for differing visitor segments, e.g., taking in a Toronto Blue Jays baseball game vs. attending a major convention; or mass vs. niche segments, e.g., visiting the CN Tower or Hockey Hall of Fame vs. attending a performance of the Canadian Opera Company.

A core attractor can also be a cluster of assets all relating to a specific theme, e.g., dining, shopping, entertainment and night life in the Entertainment District; or an experience enabled by clustering, e.g., a cultural experience like visiting galleries, museums, the symphony and accommodations at a distinct boutique hotel.

**Supporting Attractor:** The features 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 generally distinguished from core attractors by their smaller number of visitors.

The evaluation process has identified Toronto's core attractors, their distinctiveness, and the nature and size of the visitor markets to which they are considered to be attractive. This section assesses:

- o What it is about a destination that makes it stand out as distinct in the marketplace
- o How the attractors are distinguished
- o How the attractors are relevant to market wants.

### Toronto's Core Attractors:

- Culture & Heritage — Performing Arts, Festivals Events, Art Galleries, Museums, Historic Sites
- Theme and Amusement Parks
- Meetings, Conventions, Trade and Consumer Shows
- Residents Hosting Friends and Relatives

### Culture & Heritage — Performing Arts, Festivals / Events, Art Galleries, Museums, Historic Sites

- Annually there are 5,614 musical theatre performances, 1,684 ballet / other dance, 1,009 classical music/opera performances, 151 rock & roll concerts by artists with global appeal, 1,742 comedy shows
- 45 mid-sized facilities (151 – 500 seats), 20 large venues (501+ seats) total of 38,682 seats in performing arts venues
- 24 annual music, 91 annual non-music, 38 arts/crafts festivals/events held annually
- 7,430 local, 926 provincial, 33 national historic sites, 11 living history sites, 64 aboriginal sites, 6,803 architectural heritage sites, 26 museums, 19 art galleries

The Travel Activities and Motivation Study (TAMS) on the Canadian and American traveller 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.

Forty-three per cent of Canadian travellers and 38.5 per cent of U.S. travellers participated in various performing arts related activities while on vacation. Seventeen per cent of Canadian travellers and 14.7 per cent of American travellers reported that participation in various performing arts related activities motivated some of their overnight trips. (TAMS, 2006)

Forty-three per cent of Canadian travellers and 41.5% of U.S. travellers participated in a festival or event while on vacation. Sixteen per cent of Canadian travellers and 15.3 per cent of American travellers reported that attending festival and events motivated some of their overnight trips. (TAMS, 2006)

Fifty-seven per cent of Canadian travellers and 54.3 per cent of U.S. travellers went to exhibits, observed architecture, and visited historic sites while on vacation. Seventeen per cent of Canadian travellers and 18.1 per cent of American travellers reported that such activities motivated some of their overnight trips. (TAMS, 2006)

### **Theme and Amusement Parks**

- Nine amusement parks, 11 gardens and conservatories, two zoos, two animal farms, an observation tower, a water park, five specialty cinema venues, a science centre and a garden theme park
- CN Tower, Ontario Place, Hockey Hall of Fame, Exhibition Place, Downsview Park, Toronto Zoo, Centreville, Ontario Science Centre, Toronto Music Gardens.

Forty-six per cent of Canadian travellers and 52.4 per cent of U.S. travellers visited a theme park while on vacation. Fifteen per cent of Canadian travellers and 23.9 per cent of American travellers reported visiting a theme park motivated some of their overnight trips. (TAMS, 2006)

### **Meetings, Conventions, Trade and Consumer Shows**

- Three major convention/trade show facilities, (plus another just outside the boundaries of the City)
- 145 meeting service companies
- 30+ hotels — meeting space exceeding 1,263,815 sq. ft.
- More than 50 special event venues

- 45 major conventions confirmed for the period of 2007–2015, more than 700,000 room nights and 360,000 attendees.

Toronto's share of the Meetings and Conventions business is significant both domestically and within the North American market. In 2004, Toronto attracted 653,000 business convention visitors or 53 per cent of the total 1,302,000 business convention visitors to Ontario. 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. In 2006, Toronto hosted 13 city-wide conventions (a city-wide convention is one that uses a minimum of 6,000 room-nights and three or more hotels) accounting for 242,000 room nights and 104,000 attendees. Forty-five major conventions have been confirmed for the period of 2007–2015, which accounts for more than 700,000 room nights and 360,000 attendees.

Meetings and Incentive Travel 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 per cent), with Vancouver (34 per cent) and Montreal (34 per cent), Calgary (33 per cent) and Ottawa (20 per cent) trailing behind.

### **Residents Hosting Friends and Relatives**

- 35 per cent of all visitors to Toronto in 2004 said the main purpose of trip was to visit friends and relatives (VFR).
- VFR represented 6.7\* million person visits in 2004 (most recent date of available tourism statistics)  
\*Statistics Canada, CTS/ITS 2004

The visiting friends and relatives (VFR) market is consistently being reported as one of the major motivations for domestic pleasure travel. VFR travellers also constitute a considerable segment of the international travel market, particularly for regions with a strong immigration tradition (like the City of Toronto).

### **Toronto's Supporting Attractors:**

- **Spectator Sports – Professional & Amateur**
  - 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, eight per cent of overnight visitors to the City of Toronto attended sports events.

#### • Shopping

- Shopping, though not usually a trip motivator is an important activity for 66 per cent of U.S. travellers and 70 per cent 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, 2006)
- U.S. and Ontario travellers indicated the importance of shopping at the trip-planning stage: 15 per cent of adult Canadians and 16% of adult Americans rated “great shopping opportunities” as a highly important aspect when choosing a pleasure destination. (TAMS, 2006)

#### • Dining and Night Life

- 566 licensed ethnic restaurants, 206 unlicensed ethnic restaurants, 1500 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.
- 56 per cent of Canadian travellers and 56.5 per cent of U.S. travellers participated in dining in restaurants that offer local ingredients. Five per cent of Canadian travellers and 5.8 per cent of American travellers reported such activities motivated some of their overnight trips.

#### • Neighbourhoods

- Toronto’s diverse neighbourhoods are ideal for such on-theme activities as shopping, dining, clubbing and related experiences. Many neighbourhoods are supported by one of the 61 Business Improvement Areas (BIAs). BIAs help create safe, unique, and thriving business areas that attract shoppers, diners and tourists.

#### • Outdoors Cluster - Parks, Trails, Golf Courses, Marinas

- 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. The city is an urban forest containing more than 3 million trees. There are 1,500 street trees, as well as 500,000 city-owned street trees.

### PRODUCT STRENGTHS

- Breadth and depth of visitor experiences
- Significant new cultural product in the form of performance venues, galleries, museums
- Attractors have quality & critical acclaim as ranked by known tourism authorities
- Accommodation base is excellent, offering a wide range of options for visitors.

## GAPS AND DEFICIENCIES

The following gaps and deficiencies exist among Toronto's products and experiences:

### **Distinctiveness of the Destination, Memorable Experience and Hospitality**

The assessment of the extent to which Toronto is considered to be a distinctive and hospitable destination with memorable experiences significantly relies on two research sources: The Travel Intentions Research undertaken by the Ministry of Tourism and studies undertaken for Tourism Toronto by the University of Guelph in 1998 and 2006.

The Travel Intentions Research is a series of studies whose goal is to measure intent to travel to Ontario and specific Ontario destinations within key US and domestic markets. People living in key US and Canadian markets were interviewed over the telephone. 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).

The University of Guelph study distributed surveys to overnight visitors at 21 participating hotels in the Greater Toronto Area. This 2006 study replicated to a large extent research that was conducted during 1998 in partnership with Tourism Toronto and Where Magazine.

Travel Intention Research suggests that Toronto is not perceived as a "Must See/Must Do" destination among American and Canadian tourists, which implies that Toronto's product is not seen as being superior or distinct from the competition. From the University of Guelph study respondents who rated their experience as "very satisfied" decreased from 69 per cent in 1998 to 47 per cent in 2006. A similar drop in service performance occurred: 30 per cent of respondents felt that the levels had exceeded their expectation in 1998, but only 17 per cent expressed the same answer in 2006.

The same study identified gaps in the way that Toronto is viewed in terms of hospitality. Canadians identify hospitality as one of Toronto's weaknesses. However 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.

### **Visitors' Perception of Value for Money in Toronto**

In terms of value the University of Guelph study found visitors believed that events and hotels did not offer enough value for the money. Visitors found event prices (45.7 per cent), hotel prices (38 per cent), and attractions prices (35.7 per cent) high. While 27.6 per cent considered sales taxes high, only 1.4 per cent of respondents rated sales taxes as low. In addition, the Travel Intentions Research indicated one of the top three issues that made Canadians less inclined to visit the city was that it was perceived as expensive.

### **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 exits, along with the road names, and services available such as hotels, restaurants, gas stations, etc.

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 study; respondents indicated that they perceive that signage was an issue that requires improvement.

### **Accessibility and Accommodating Travellers with Special Needs**

Toronto generally scores positively on Accessibility. Toronto is very accessible to other nearby cities as well as regional and international gateways by a variety of travel modes and price options. However, accessibility to, and within, the City is increasingly problematic on major highways and arterial roads. Congestion results in significant delays for motorists and motor coach passengers. While it is acknowledged that the public transportation is good, especially within the city served by the TTC, 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 to meet future demand. In addition, public transit infrastructure and service is strongly oriented to serving peak hour commuter demand. It can be challenging to travel between suburban locations by public transit, or use it during the weekends, holidays and evenings.

Accessibility can also refer 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. 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. It is important to point out that those interested in accessibility are not only the disabled, but also the growing numbers of seniors. Families also may be concerned about the ease of travelling with young children in strollers.

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 per cent answered "Yes" to this question, the 28.6 per cent who answered "No" actually represents a substantial number of popular tourist sites. This means that a tourist with special needs will find that nearly one in three 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 per cent had an entrance ramp, 58.6 per cent had wheelchair accessible washrooms and only 49.5 per cent offered wheelchair accessible food and beverage services.

## OTHER GAPS AND DEFICIENCIES

These observations are from representatives of the travel trade. They include tour operators, wholesalers and travel agents who send clients to Toronto.

### Lack of Multi-Lingual Services at Attractions

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

### Tour/Sightseeing Guides

Travel trade representatives noted that some sightseeing guides do not refresh their scripts frequently enough. It is noted that tour guides are not certified or licensed in Toronto. There is a shortage of guides with multilingual skills.

### Specialized Tours

Consumers are looking for specialized tours but few are offered by receptive operators, destination management companies or attractions. They're new product available but it's not Group ready.

### City Infrastructure

Road conditions continue to deteriorate. Road construction in the summer gives a bad impression to tourists and makes getting around the city challenging. Garbage is another issue that has become a growing problem in the past five years. Travel trade staff indicated they do not schedule Familiarization Tours on Saturday or Sunday mornings because garbage has not yet been picked up in the downtown core. The decline in visual appeal of the city, the increased number of homeless people and (aggressive) panhandling has a negative impact on the tourists' perception of the city.

### Motor Coach 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.



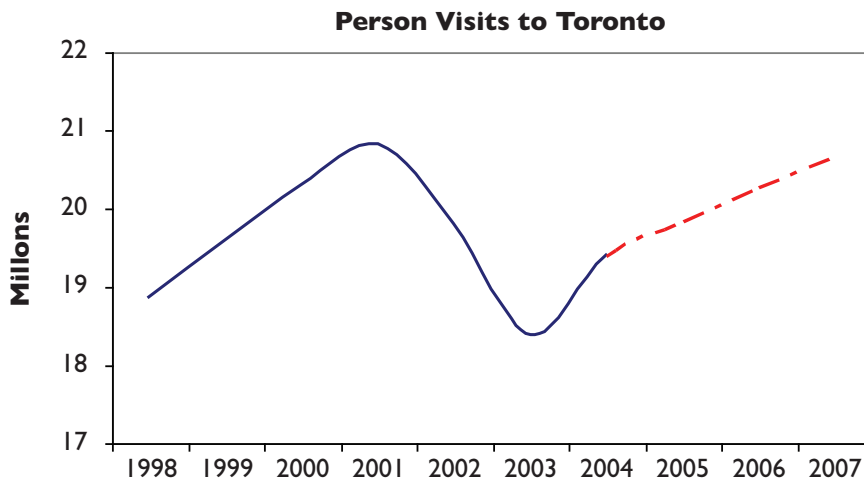
# PERFORMANCE

The Performance measures identify the extent to which Toronto is successful and recognized in the marketplace. By comparing Toronto's performance attributes in terms of hard data, conclusions can be determined as to its actual performance against its primary competitors and in a competitive marketplace context. Visitation statistics, accommodation occupancy levels, and critical acclaim are all industry standards to measure performance.

The quality of the tourist experience and the destination's success in providing it is validated by:

- Visitation
- Occupancy and Yield
- Critical Acclaim

Data used in this section is from Statistics Canada's Canadian Travel Survey and International Travel Survey (CTS/ITS). 2004 is the most recent year for which official statistical information about 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 of 2005 data. All information released since 2004 by various organizations regarding total visits are estimates and projections. (See chart below Person Visits to Toronto) 2005 and 2006 estimates by the City of Toronto were derived from analysis of PRTD 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.



Note: 2005, 2006 – estimates, 2007 – forecast



## PERFORMANCE STRENGTHS

- Significant annual visitation, an envy of many cities in the world

## VISITATION

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.

Toronto is the most important destination in Canada receiving 8.7 per cent of total trips to Canada. The nearest competitor is Montreal which receives 6.5 per cent of total Canadian trips. Toronto Business trips represent 15.6 per cent of total business trips in Canada compared to Montreal's 9.8 percent. This emphasizes Toronto's importance as a business centre. VFR visits to Toronto are also substantial as they represent 9.9 per cent of total VFR visits to Canada. Toronto's share of tourists coming to Canadian destinations for Pleasure and Personal/Other reasons are only slightly ahead of its competitors.

### Major Cities' Share of Total Canadian Visits

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%

## CRITICAL ACCLAIM

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

### International Ranking and Acclaim

Ranking	Source	Year
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



## GAPS AND DEFICIENCIES

The following gaps and deficiencies exist in Toronto's performance as a tourism destination.

### Visitation

Actual visits in 2004 were still below 2001 levels by almost 7 per cent 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 can lure more Canadians to substitute a trip to Toronto with a trip outside Canada. 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 for U.S. and Canadian residents. Toronto is perceived as a "been there/done that" destination and that other destinations offer more attractive tourism product.

### Intentions to Travel to Toronto — Stability of Market Demand

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

## OCCUPANCY AND YIELD

With respect to "Occupancy and Yield," the hotel occupancy rate in 2006 was 66.4 per cent. However, a consultation

with hotel industry experts has revealed that generally, the industry is looking for occupancy to be in the 70 per cent range to have a chance at viability. There also is a seasonal variation in occupancy, with the rate falling to 58.6 per cent in the first Quarter

### Quarterly Occupancy Rate\*

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

\*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.

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

According to the Travel Intentions study that was conducted in February, 2007, 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.

The Travel Intentions Research identified the following perceived Issues for Visitation to Toronto:

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

- "Issues of violence/crime"
- "Too much traffic"
- "Cost/Expensive"

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

- "Passport requirements"
- "Difficulty/delays at the border"
- "Bad weather"



# SUSTAINABILITY

Sustainability identifies the extent to which Toronto is investing in its future as a place with viable and continuing attractiveness to evolving markets. It includes the activities in place to raise awareness for the destination as well as the degree in which new investment in the form of capital dollars will be made to enhance its product offering. It also determines its capacity in a number of physical measures such as infrastructure.

The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities.

## SUSTAINABILITY STRENGTHS

- Tourism Toronto is strong with resources to market and sell. Tourism Toronto 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
- Engaged tourism industry who have a track record of working together and are committed to constant improvement
- Significant product and experience development projects already in play that will have positive impact on Toronto's ability to increase visitation into the future
- A City that is adequately managing the majority of demands placed on its infrastructure especially as it relates to carrying capacities

## DESTINATION MARKETING

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 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. Successful marketing depends on the size of the yearly budget. Forty-four per cent 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, which involves a dedicated sales force marketing Toronto as a convention destination.

## PRODUCT RENEWAL

The Resource Audit indicated that Toronto's tourism industry is committed to reinvestment and new investment to revitalize facilities relevant to the quality of the tourist experience. Seventy-one per cent of businesses indicated that they had reinvested capital into their respective businesses in the past five years. Sixty-two per cent of those said that the capital was invested in the past two years.

### Future Hotel and Hotel/Condo Investments

Hotel inventory grows 2008 - 2011 +1,566 rooms

\*City of Toronto Estimate

- To reach 66% (current level) need to sell 377,250 more room nights
- To reach 70% need to sell 791,000 more room nights

Hotel/Condo	Year	Total Investment	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

### Managing Within Carrying Capacities

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, 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.

Tourism is but one sector in Canada's largest city and most diverse economy. As a result the city has significant capacity to manage any growth in tourism visitation. In addition, there are many monitoring programmes that track the City's ability to meet current and future demands. An assessment of these monitoring programmes has determined that no significant issues exist in terms of the city's ability to manage within its carrying capacities. The one exception may be related to adequately handling transportation needs within the current roads and public transit systems.

### GAPS AND DEFICIENCIES

The following gaps and deficiencies exist for Toronto and impact its ability to thrive into the future:

#### Product Renewal

Twenty-nine per cent of the audit respondents have not invested in new or upgraded existing product and experiences. A closer look suggests that many of the cities core

attractors, in particular not for profit and public performing arts and heritage organizations have been unable to improve their venues. It is reported that heritage and cultural venues require significant investment (with the exception of the lead cultural and performing arts attractors). In terms of the lead cultural facilities (AGO, ROM) while significant investment has been made in upgrading facilities, investment has not been made in programming. Neither has there been new investment in the form of a new major mass entertainment complex, which would go a long way to attracting new visitation. As it relates to convention facilities the last major expansion occurred in 1997 at the Metro Toronto Convention Centre. There is evidence to suggest an expanded or new convention facility could attract organizations who are too large to meet in the current space.

### Underdeveloped and/or Underperforming Assets

#### Waterfront

Toronto's harbour lands are, and have been for several decades, an underdeveloped 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 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).



### Culture and Heritage Sites

As reported in both the PRTD Audit process and thorough industry consultations Toronto's culture and heritage attractions are underdeveloped. While icon facilities like the ROM, AGO and the Opera House have received much attention smaller not for profit and public sector facilities have had little or no attention for many years. Many of Toronto's not for profit theatre venues are in need of repair and renovations. Toronto's historical sites also require investment in both their facilities and in programming. Development of these facilities represents a significant opportunity to grow tourism within Toronto.

### Sports Facilities

Sports development is important when thinking of adding benefits to Toronto's tourism industry. The opening of the Air Canada Centre in 1999 and the BMO Field in 2007 brought a new sense of enthusiasm for sports in the city. However, there are insufficient sports venues and facilities to attract a growing number of amateur sports events and tournaments to Toronto. The most critical gap is a lack of sport facilities at the district level. Evidence suggests there are not enough clusters of district level facilities to be attractive to tournament organizers. The loss of opportunities to host amateur sport tournaments has a negative economic impact to Toronto and the hotels, restaurants and entertainment venues that this market supports.

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 improved district and regional level sport facilities in the city. Twenty-seven per cent of Toronto's recreation facilities are over 40 years old and the regional public facilities like the large fields, larger community centres and high school facilities are in a severe state of disrepair. Work needs to be done and investments made to improve these facilities if Toronto wants to capitalize of the lucrative sports tourism market.

Tourism Toronto has recently established a sport tourism/ event hosting group. However, this group's effectiveness is hampered by the restricted inventory of facilities as well as the lack of a database capable of identifying the details and locations of sport facilities that could be used by event organizers to plan tournaments.

### Culinary Tourism

Toronto has a very extensive and diversified inventory of restaurants as well as unique micro-breweries and several dozen annual culinary events and festivals. From value-priced to high end, ethnic to local, Toronto's restaurants are highly regarded and plentiful, satisfying the taste of experienced foodies. Its multi-cultural range of culinary experiences is especially noteworthy and distinctive. However, 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 PRTD 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.

The Ontario Ministry of Tourism developed the new Culinary Tourism in Ontario, Strategy and Action Plan 2005-2015 — a plan to make Ontario a leader in culinary tourism by profiling authentic regional cuisine. Research has confirmed that opportunities to experience local cuisine do motivate travel. The Resource Audit indicated that though the majority of dining establishments use and serve local ingredients, wines and beers, few actually promote this fact. Toronto dining establishments are not capitalizing on the locally grown cache that many destinations are using to raise profile and increase revenues in the F&B sector.



## Green Tourism

There is a growing, world-wide trend of environmentally conscious travellers who choose their destinations accordingly. They look for cities which offer “green” themes, such as cycling or walking on nature trails, the availability of hotels and restaurants that offer organic food, and environmentally conscious operations (e.g., recycling energy efficient power systems), as well as an efficient public transit system to get around the city. Cities that are internationally recognized as being an “urban green tourism” destination 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.

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.” Greater attention should be paid to these initiatives by Toronto’s tourism industry; they offer significant future potential given Toronto’s leadership status in a number of areas related to environmentally consciousness.

### New Major Demand Generator/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 of pleasure visitors if the type of attractor was built. The chart is specifically for Toronto and indicates that the addition would be beneficial from a pleasure visitor standpoint.

Attractor	Average Impact on Pleasure Visitors
3-Star Amusement Park (e.g., SeaWorld Adventure Park, Universal Studios)	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

Ontario Ministry of Tourism and Recreation (2004, June) Factors Influencing Visitor's Choices to Visit Urban Destinations, Prepared by Global Insight Inc. 3-Star quality ratings refers to "Highly recommended/Worth a Journey" as defined by the Michelin Guide's star system

### Distribution of Tourism Activity Within Toronto

Benefits are not balanced within the municipal borders since the majority of the tourism assets are located in the downtown core. More specifically 64 per cent of survey participants were located within the central area bounded by Dufferin St., Eglinton Ave., Bayview Ave., and Harbourfront. However hotels and attractions are located outside the downtown core area, which presents an opportunity for visitors to explore more of the city. Attractions like the Ontario Science Centre, Pioneer Village, Woodbine Racetrack, and the Zoo are reasons for visitors to travel and stay outside the downtown core.



### **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. Together with the relatively strong economy of Toronto and a favourable rate of unemployment, a major factor contributing to this optimistic assessment is immigration, which is averaging 101,600 immigrants to Toronto per year.

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 concerns and demographic trends that may result in labour related issues arising in the future. It would seem that Toronto's tourism industry is not preparing for this likelihood.

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.

### **Road, Transit, Parking and Trail Capacity**

Gridlock has become a daily reality in Toronto and is becoming a competitive disadvantage for the city. 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 per cent longer than it would in free-flowing conditions. By 2031, that will rise to 40 per cent. 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.

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 accessibility and transportation was a key area that needs to be improved. Suggestions included: improving public transit (Rail link to airport, Light rail links across the city) and road infrastructure, improving parking, implementing customer service programs for taxi drivers, and assigning more pedestrian only streets.



# OBSERVATIONS

In discussing the results of the PRTD Audit with the industry stakeholders, a number of key observations were made as to why the current weaknesses that were uncovered exist. These also will constrain efforts to implement improvements unless they too are addressed.

## **1. Toronto Does Not Have a Common Vision for Destination Development**

Over the past several years significant efforts have been made to enhance Toronto's attractiveness by offering exciting things for both residents and visitors to see and do. These things have included building new or enhancing exiting attractions and adding new or improved infrastructure. They have included staging new events and increasing the excitement level of existing ones. This report and the PRTD Research Report details many new initiatives that have taken place over the past five years. It also indicates what new initiatives are planned for the future. In spite of this activity it can be said Toronto's plan for destination development does not share a common vision that moves it towards establishing a planned and strategic position in the marketplace.

While all positive, many of these initiatives could be viewed as a series of one-off projects, executed with the best of intentions but done without a bigger picture in mind. Having a common vision for destination development leads a destination to a place that, by design, ensures attractiveness, efficiency, notoriety and distinction. The tourism industry consultations associated with the PRTD

process revealed that there was significant agreement around this premise. It was recognized the tourism industry does have a number of organizations and individuals that have done a good job rallying the industry, especially in times of challenge. The industry is to be congratulated for having managed through many challenging and difficult circumstances. However, it was agreed those efforts have been reactive in nature. When it comes to a proactive and collective approach to development the industry appears to be fragmented and ineffective.

This will continue to be a challenge in the future. Through the PRTD process, no fewer than 93 specific opportunities for action have been identified, each of which would be good for tourism development. As has been the case in the past, one can anticipate that these 93 opportunities will compete with each other for resources and attention. We will run the risk of spinning a lot of wheels, but not driving anywhere in particular unless a mechanism is developed for discussing and reaching agreement as to what Toronto's common tourism development vision should be, and how the various possible actions contribute to its achievement.

## **2. Toronto's Value Proposition can be Improved**

The PRTD research revealed that there has been a negative shift in how visitors view the value of a Toronto experience. Toronto's "value" proposition has diminished the past several years. A destination's "value proposition" is defined by whether visitors feel that "they've received





more than they expected.” The destinations that score the highest are those that deliver more than the guest expected especially against a backdrop of dollars spent for that experience. Value is determined by, among other things, high calibre experiences, attractions and entertainment, as well as by excellent accommodation, dining, the friendliness of the people, the cleanliness of the streets, the aesthetics of the destination, and the ease and comfort with which people can get around to experience the destination.

A number of factors have contributed to the erosion of Toronto’s perception as a “good value” destination. Certainly the gained strength of the Canadian dollar over the past several years has increased the price of a Toronto experience compared with international competitors, especially for U.S. Therefore Toronto needs to increase the value it offers visitors to compensate for this change.

Perceptions of Toronto as a thriving theatre destination have waned as the number of unique blockbuster productions on stage has decreased. Perceptions related to Toronto’s infrastructure and appearance connected to traffic congestion, homeless people on the sidewalks, trash on the streets and the apparent belief that Torontonians and front line workers in the service and hospitality industry are not welcoming and friendly all have negatively impacted Toronto’s value proposition.

### **3. No Collective Process Exists to Manage Toronto’s Business Into the Future**

Sectors of the industry do currently operate excellent planning processes. For example, Tourism Toronto has adopted a business planning approach to destination

marketing. It establishes both annual and multi-year goals, and marks its progress against well defined objectives and performance measures. Industry members participate in the planning process through sub-committees, and effectively offer industry intelligence to guide staff decision-making.

What is lacking is a similar approach to broader destination development.

In order to succeed as a viable tourism destination and to grow visitation numbers and revenue a proactive business management model or process should be established. Such a forward looking process would attempt to better organize the industry in order that it can become more successful. It would also attempt to maximize the industry’s collective efforts to grow the business. The model would look to the future to determine opportunities and challenges and then identify proactive strategies to address the issues. It also would become a mechanism to improve industry communications and relations. It would attempt to get all involved on the same page and reduces the propensity for the creation and implementation of one-off activity. It should be established to eliminate the fragmented efforts that have been evident in Toronto’s recent past.

### **4. The Importance of Tourism to Toronto is Not Widely Recognized**

While tourism continues to grow globally and the economic impact of tourism reaches record levels, in Toronto, the impact of the industry is lost on many. The PRTD report documents the positive impacts that tourism brings to the City of Toronto. These impacts are realized in increased GDP, employment, and tax revenues.



In addition, developing the tourism industry enhances the quality of life for Torontonians in general. More attractions, entertainment, shopping, and dining options can be supported because of visitors. And a sense of pride in community is engendered by visitors enjoying themselves in our city and increasing our international profile. As demonstrated in destinations around the globe, a flourishing tourism market generates positive outcomes for most every destination. When tourism to a destination grows, so does its economic well being.

The lack of awareness regarding the importance and the positive impacts of tourism to the City of Toronto impacts the tourism industry, and its ability to thrive. People who understand the importance of tourism tend to be predisposed to go out of their way to be nice to strangers and to take the time to answer their questions or explain how things work. If people have a high level of knowledge about the community, they can be very effective “tourism ambassadors.” They can make suggestions about things to see and do, where to stay or eat dinner, and how to get from place to place. Average citizens, as well as the front line workers in the hospitality industry, stores, restaurants, taxis, police, transit and parking lot operators all have a potential role to play.

Within the public realm decisions that impact tourism directly or indirectly are being made without the knowledge or understanding of the importance of tourism. Examples include matters related to beautification, street closings, policing, public transit, maintenance and roads and traffic. Consideration is typically given to the residents and local businesses. As a result public policy and bylaws can present barriers for the tourist and the tourism industry.

For example the desire to promote the use of public transit and discourage automobile use sometimes results

in limited parking being provided at venues. Visitors traveling from beyond the city’s boundaries may find it difficult to use transit, especially on holidays and weekends when less frequent service is provided. Motor coaches bringing visitors from outside the city often run into difficulty with parking and no-idling regulations when they stop for their passengers.

The PRTD Audit revealed that most businesses in Toronto are highly oriented to serving the local market. This is not surprising when one considers that at 5.1 million people, the GTA market represents one of the most concentrated and affluent markets in North America. However, this advantage creates a challenge for developing tourism experiences and taking them to market since the focus of most businesses is on developing and marketing experiences for their local clientele. While it is encouraging that 92% of the survey respondents saw tourism as a growth opportunity for their businesses, only about 40% currently actively market or participate in tourist-oriented packages or promotions. Raising business’ awareness of the opportunities afforded by tourism and making it easier for them to develop and tourist-ready product would increase the depth of Toronto’s product experiences that are accessible to tourists.

Raising the awareness of the importance of tourism might be considered a starting point to moving towards becoming a premier ranked tourist destination. Greater understanding of the value of tourism by all individuals within the City of Toronto would make discussions about other areas of needed improvement easier and more efficient. Once local residents, business, elected officials, municipal staff, the media etc. understand and appreciate the upside opportunity tourism offers, then, and only then, will Toronto move to the next level as a desirable tourism destination.



# RECOMMENDATIONS

Based on the findings the following overarching recommendation has been developed in consultation with the Steering Committee, industry leaders and tourism stakeholders in Toronto.

## **Under the Direction of Toronto’s Tourism Leadership Group Create and Implement a Formal Tourism Destination Development Plan for Toronto**

The plan must focus on three specific areas of importance:

1. Address Toronto’s Product and Experience Deficiencies and Improve Its Value Proposition
2. Establish an Annual Tourism Business Management Model
3. Increase the Awareness of the Importance of Tourism to Toronto

The PRTD process has identified a need to develop a tourism destination development plan, a plan that is definitive in nature, has a common vision and encompasses all aspects of Toronto’s product, experience and infrastructure gaps. The plan becomes the road map for future development and works in tandem with the City of Toronto’s Prosperity Agenda and the Province of Ontario’s Competitive Framework. It establishes agreed action priorities that the tourism industry can embrace and support. It engages a multitude of stakeholders, those directly involved in tourism and those who provide related services. It identifies short term strategies that will have immediate impact on Toronto’s tourism offering as well as a list of medium to long term initiatives that will build the destination’s attractiveness into the future.

The plan should capitalize on work that is already being done, though currently often in isolation from tourism sector stakeholders and without explicit regard for the impact on destination development. It is recommended that the tourism industry establish mechanisms for keeping up-to-date with the various initiatives and identify opportunities for making strategic interventions. This will serve several purposes including building higher levels of understanding, engagement, and support and taking advantage of synergistic opportunities to support tourism while accomplishing other city-building goals. Current initiatives that offer strong potential for immediate impact on tourism destination development include:

- Waterfront development
- Union Station redevelopment and rail link to Pearson Airport
- The City’s initiatives to enhance the visual appeal through the “Clean & Beautiful City” office
- Various transportation enhancement projects
- The City’s initiatives to address homelessness and panhandling.

## **I. Demonstrate Toronto’s Superior Value By Addressing the Experience Deficiencies**

Toronto’s tourism industry has a tremendous desire to improve Toronto’s status as an attractive and thriving tourism destination. It once enjoyed notoriety as an exciting and desirable place to visit, whether for pleasure or business. It could be said a trip to Toronto was “good value.” Recently, however, many factors have negatively impacted Toronto’s ability to maintain momentum in this area and specifically its desire and ability to be among the best. Toronto’s “value proposition” has diminished to the point where it is impacting its ability to compete consistently and successfully in the tourism marketplace.

It is recommended that the industry adopt as its goal for the future that Toronto deliver more as a tourist destination than the guest expected. No matter what the experience, no matter where they went or what they did, we should want visitors to leave saying “I got more than I expected.” We will then know that they got “good value.”

This can only be achieved if Toronto’s tourism industry leads a collective effort to address its deficiencies and improve on the delivery of its tourism offering. The key component to the success of this strategy is that the effort be a collective one. All aspects of the Toronto the visitors experience must be positive. This will require moving beyond the traditional tourism products and services and to locations, experiences, activities that are broad and far reaching. Therefore this must become a Toronto effort not just a tourism effort.

As is summarized in Appendix I, the PRTD process identified a large number of potential actions that could be undertaken to increase Toronto’s value proposition. It is recommended that the first focus be given to the elements that impact the most visitors. By addressing these key areas it is believed Toronto will deliver superior value to all those who visit as well as to all those who call Toronto home.

### Quality of the Visitor Experience

- Hospitality Excellence: adopt a “We’ve Been Expecting You” Attitude
- Raise Service Standards — at all visitor touch points
- Destination Animation — create a “buzz”
- Improve Visual Appeal — work with Clean & Beautiful City Office
- Improve Availability of Visitor Information
- Improve Visitor Way Finding and Signage
- Reduce Traffic Congestion and Transportation Enhancements
- Become More Motor Coach Friendly

### Experience Renewal and Development

- Waterfront Development
- Ontario Place Revitalization
- Exhibition Place Development
- Blockbuster Exhibits AGO/ROM — Attract the exhibits that demand visitation
- Attract Major Events — when we need them

- Upgrade Heritage Sites — better tell the Toronto heritage story
- Mass Entertainment Complex — a year round attractor

## MORE SPECIFICALLY:

### Quality of the Visitor Experience

- **Hospitality Excellence: adopt a “We’ve Been Expecting You” attitude**

Implement a program that positively addresses the perception that visitors to Toronto don’t feel welcomed. The initiative will start within the hospitality industry and be expanded to include any individual that could encounter a visitor. It is all about attitude. The belief is that if Torontonians adopt an attitude that suggests they were expecting visitors they would take a more caring and accommodating approach greeting and servicing that particular guest.

- **Raise Service Standards – at all visitor touch points**

Service training exists currently within individual businesses in Toronto. However, it appears the delivery of consistent service is the issue. We need to “raise the bar” and eradicate poor service levels by promoting “best practices” and investigating ways of addressing poor service standards.

In the implementation phase of the plan, more specific strategies should be developed, such as employee accreditation, employee and business recognition programs, improved training tactics for small business, and encouraging an enhanced customer service orientation amongst service providers and enforcement agencies.

- **Destination Animation – Create a “Buzz”**

Adding value is about getting more than expected. Destination animation delivers on this objective by surprising people with entertainment, opportunities to interact, and interesting things to experience as they move around the city. When visitors sense there is a “buzz” in a destination and that they are part of that buzz, they experience a positive emotional response.

Achieving higher degrees of destination animation in Toronto won’t be difficult. The City and the BIAs already delivers on this — for example through its many street festivals, programming its public squares and encouraging public art installations. The notion here is to do this more frequently at those locations visitors congregate outside a formal event or festival setting.



Destination animation can take on many forms. At its root is some form of entertainment found in locations where visitors congregate. Street musicians and buskers are common examples of the entertainment offered and performing in public spaces are perfect venues for such animation. In the implementation phase of the plan more specific strategies for animation should be developed

- **Visual Appeal**

Interviews with stakeholders in the travel trade sector identified the deterioration of Toronto's visual appeal as a deterrent to repeat visitation. Visual appeal is a relative term that means different things to different people. However, the point here is that poor visual appeal has only recently emerged as a concern. Toronto traditionally has enjoyed a reputation for being clean, green and safe, but that is not the case any longer. It is recommended as part of the Destination Development Plan that an industry task team be formed that begins to identify and address the key issues that are feeding this perception. The PRTD research identified the actions that the City has begun to undertake to address visual appeal issues. The industry task team should begin by establishing closer liaison with the City officials responsible for these efforts

- **Visitor Information**

Providing relevant information to visitors once they are in the destination is key to ensuring they have a enjoyable experience. It is recommended that an extensive review of the current levels of visitor information distribution mechanisms be undertaken. Once

this is complete, specific strategies can be developed to address the gaps in this area. The City of Toronto's Tourism Section has been active in this area, and it is suggested they spearhead this initiative and incorporate the needed strategies into the implementation phase of the Destination Development Plan.

- **Visitor Wayfinding/Signage**

Gaps exist in Toronto tourism signage and wayfinding. Destinations that have effective visitor wayfinding and signage offer visitors a more enjoyable and efficient experience. More specific study is required to determine the best strategy for improvement. It is recommended that a specific industry led task team be established to identify an action plan. City staff must be part of the strategy, and it is understood work in this area has already begun.

- **Traffic Congestion**

This is not a new challenge. Significant time and energy has been expended to help alleviate this growing problem. It is recommended senior tourism officials begin to participate in discussions around improving and dealing with Toronto's accessibility challenges. The belief among the industry is that there is not a tourism perspective being presented in the context of discussion and planning. In addition the tourism industry must identify what it needs and wants related to growing traffic congestion issues in order to positively affect its ability to compete more successfully. The Development Plan must identify a mechanism for this to happen.

- **Become More Motor Coach Friendly**

With leadership from the Ontario Motor Coach Association, the Destination Development Plan must identify the specific issues that are having a negative impact on motor coach operators who travel to and within Toronto. The City has been successful in understanding and dealing with some of the issues. However, barriers still exist for motor coach operators. It is recommended, once the issues are identified, that an industry led task group work with City officials to tackle the remaining issues.

## **Experience Renewal and Development**

- **Waterfront Development — connect to tourism experiences**

It is recommended that private sector leaders become active participants in discussions and planning around Toronto's waterfront development. Significant opportunities exist but currently it is perceived that a "tourism perspective" is missing.

- **Ontario Place Revitalization and Exhibition Place Development**

These two assets are probably Toronto's most significant underdeveloped opportunity for creating an exciting attractor. Ontario Place is a Government of Ontario owned asset on the Toronto's waterfront which holds potential for development as a new, year round visitor attraction. It is recommended under the Destination Development Plan, that formal steps be taken to explore a strategy to revitalize Ontario Place. Similarly, the ongoing development of Exhibition Place offers a major future opportunity. This City of Toronto owned asset already has taken steps to intensify its use and activity levels, but it is believed further opportunities may exist, especially within the context of any new development plans for Ontario Place.

- **Blockbuster Exhibits AGO/ROM — attract exhibits that demand visitation**

It is recommended that a more strategic and coordinated approach be taken to identifying key international blockbuster opportunities and attracting them to a Toronto venue. At the present time, each venue undertakes this activity on its own. Toronto's key venues capable of hosting a large scale blockbuster exhibition include the recently renovated ROM and AGO, as well as the Ontario Science Centre and Toronto Zoo. Creative cooperative partnerships among venues might also be considered, thereby expanding our hosting capacity.

- **Attract Other Major Events**

The industry is encouraged to work with City Tourism staff as well as others, to secure events that are demand generators for visitors. The City enjoys a track record for attracting significant events. Its larger annual "home grown" events such as the Toronto International Film Festival, International Car Show, Royal Agricultural Fair, and Caribana are significant tourist draws. However, an ongoing proactive and strategic approach should be considered. The Business Management Model speaks to attracting exhibits and events in the years, and at the time of year, when incremental tourism business is most needed.

- **Upgrade Heritage Sites — tell the Toronto heritage story**

Toronto has a rich heritage that is celebrated in any number of historic sites located throughout the City. Unfortunately those sites have, for the most part, been underdeveloped in terms of their ability to present compelling experiences and attract large numbers of tourists. It is recommended that under the Destination Development Plan, action be taken to identify those facilities that offer the greatest potential to attract visitors and that a strategy be developed to enhance those properties. The Bicentennial of the War of 1812 offers an interesting opportunity to elevate the profile of Toronto's heritage story and build synergies and connections between individual attractions. The Province of Ontario is helping to coordinate a province-wide program for the years 2012-2014. Planning and community outreach has begun in many communities, including Toronto. An opportunity exists to use this occasion as a target date to have a select group of Toronto's historic attractions upgraded and offering enhanced experiences.

- **Mass Entertainment Complex — a year round attractor**

Continue to be proactive in attracting and pursuing the next major new visitor attraction. It has been several years since a new entertainment complex attraction was built in Toronto. The Ministry of Tourism's 2004 "Factors Influencing Visitor's Choices to Visit Urban Destinations" report (discussed earlier in this report) indicated that investing in a new entertainment complex would likely have a greater impact on visitation than investing in any other kind of attractor.



## 2. Establish an Annual Tourism Business Management Model

This model, when created, should form the basis for a collective strategic approach to growing tourism to Toronto. This model would strive to identify opportunities that offer the greatest potential for both short and long term visitation growth.

The primary components of the model include:

- A comprehensive Tourism Investment Strategy
- A 10 – 15 year forecast calendar that tracks major events, conventions, activities currently scheduled for the City
- A detailed and proactive plan to address gap periods in visitation as identified in the calendar
- Strategies to deal with labour shortages, capitalizing on work already being done with the tourism sector
- Strategies to ensure ongoing competitive advantage in attracting conventions, such as monitoring the need for and feasibility of expanded or new meeting and convention facility/venues.

In addition the model will establish mechanisms for collective destination management including improved industry communications, cooperation between sectors and related partners, long-term business building strategies (attract business in need periods with new reasons to visit), training and information sharing.

The goal is to establish an annual proactive business management process designed to enhance the destinations opportunities to attract more visitors and increased revenue. The plan will be long term, establishing 10-year,

5-year and 3-year goals and strategies. The Business Management Process will set priorities and targets, identify and monitor actions and tasks, and monitor progress in a collaborative fashion across the industry. The Plan would be refreshed on an annual basis to respond to new opportunities or challenges, and targets and tactics for the following year would be set.

### Tourism Investment Strategy

Significant investment has recently been made in Toronto’s tourism offering. The PRD report documents many of these initiatives. But going forward the success of Toronto in moving to next level will depend on implementing a proactive and strategic tourism investment strategy that helps address its current product and experience deficiencies. The goal of such a strategy would be as follows:

- Direct investment where it is needed most
- Direct investment initially where it will garner “quick wins”
- Maximize the effectiveness of attracting new investment by having collective agreement on what is needed
- Leverage public investment by “speaking with one voice”

### Forecast Calendar

In the past, Toronto’s tourism industry, specifically those businesses that benefit from the meetings and conventions market, have come together to increase the success rate of attracting major M&C business to the City. Understanding what business was available, when the business was needed in the city (specific



year) and what it would take to close a particular account increased the success rate to attract that business. In addition the industry and government came together and created the Convention Development Fund, monies used to overcome specific financial disadvantages Toronto had compared to destinations that were competing for the same meeting or convention. In a sense this was “business management.” This recommendation suggests that a similar proactive approach to business planning is warranted targeting all potential tourism markets. The goal would be to have a significant demand generator taking place during every season, and to avoid scheduling conflicts between demand generators.

### **Convention and Meeting Facility Expansion**

As part of the Business Management Model a process must be established to determine Toronto’s ability to compete in the meetings and convention market specifically related to capacity restrictions and configurations of its current facilities and venues. The tourism industry identified the need to explore the development of a plan to expand current convention space.

### **Labour Shortages**

Another key component of the Business Management Model deals with labour shortages Toronto’s tourism industry will encounter in the future. It should be noted that much has and is being done focusing on this area. The tourism industry is already engaged to one extent or the other in understanding the impact this challenge could have on its future ability to thrive. It is recommended those, and other activities

be part of this plan. It is suggested a formal task team be established under the plan that involves those already involved in the work and includes those leaders who also need to be at the table.

### **3. Increase the Awareness of the Importance of Tourism**

Tourism is the world’s fastest growing industry and in many communities around the world it is the number one source of economic impact and jobs. In Toronto tourism is big business and 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. In 2004 tourism Toronto created more than 57,000 jobs and \$1.7 billion in labour income. Tourists spent more than \$4 billion generating \$1.8 billion in taxes including \$105 million in municipal taxes. Unfortunately not enough Torontonians recognize the important role tourism plays in the health of our community, not only economically but also from a lifestyle perspective.

In order to enhance Toronto’s position as an attractive and exciting tourism destination an increased understanding of the industry’s importance to Toronto is needed. It is believed this understanding will pave the way for many of the needed improvement strategies identified in this report. Toronto’s ability to respond to these vital recommendations will only improve if, at all levels, a greater appreciation for tourism is garnered.

Specifically it is recommended that the following strategies be undertaken in order to positively impact tourism awareness levels.





- **Identify Positive Impacts of Tourism to Toronto**

- Create an up to date and accurate communication tool that details the facts about Toronto’s tourism industry
- Make this information readily available to all who are interested, initially to all those in the tourism industry and then to broader constituents who have a arms length relationship to tourism

- **Effectively Communicate and Speak With One Voice**

- It is crucial to tell a consistent tourism impact story ensuring that at every opportunity a standard message can be delivered, and through this consistent and frequent communication, awareness levels will increase
- Utilize the expertise of the tourism industry’s communications experts to develop a specific tourism awareness strategy that the industry understands and embraces
- Target Influencers including the general public, business leaders, elected officials, City staff

- **Utilize the City’s Prosperity Agenda to Reinforce the Message**

- Tourism is imbedded as a sector throughout the four pillars of the City’s Prosperity Agenda; it thereby provides a springboard to reinforce the importance of tourism messages that should continue to used as the implementation plans for both initiatives unfold

- **Mobilize Residents – Make Them Tourism Ambassadors**

- Educate local residents and equip them to be good hosts, active, proud, informed and engaged, inviting friends and relatives to visit the City’s tourism attractions
- Since 49% of Toronto’s population are new Canadians who may not know the city, we should create a resident based “experience Toronto” programme for first generation Canadians
- Toronto’s residents offer a significant opportunity to positively impact tourist’s experiences by capitalizing on the inherent notion of “pride of place”, enlist Torontonians to serve as ambassadors for tourism
- Develop an initiative that mobilizes this resident resource by giving them tools to support and promote their home as a place anxious to welcome visitors
- Utilize the experience gained when Toronto launched a similar program in the mid-nineties
- Incorporate the “We’ve Been Expecting You” theme (detailed earlier in this report) in all communications



# NEXT STEPS

The Premier-ranked Tourist Destination project has provided a clear appraisal of Toronto's position in the tourism marketplace. A critical finding in other Ontario jurisdictions that have implemented the recommendations arising from their PRTD projects is having tourism industry "buy-in" and more importantly, proactive industry involvement in future strategic planning is an imperative. In Toronto the industry is anticipating the release of the PRTD report. Under the direction of Toronto's Leadership Group a specific implementation plan will be developed.

In partnership with senior representatives from the Ontario Ministry of Tourism and the City of Toronto, the Leadership Group will undertake to understand the implications of the PRTD findings and create a process that will lead to an implementation strategy.

The implementation strategy should be developed using a combination of resources to do the work:

- Tourism industry partners
- Other sector partners
- Governments – Municipal, Provincial, Federal
- A combination of all of the above

# APPENDIX 1: DETAILED GAP AND OPPORTUNITY ASSESSMENT

The research and consultation undertaken through the PRTD project uncovered a large number of specific findings about opportunities to enhance Toronto's tourist product. These are described in the PRTD Research Report, but are summarized below in alphabetical "catalogue" format for more convenient reference. There are 6 categories of findings:

- 1.1 Hospitality and Service
- 1.2 Market Readiness
- 1.3 Product Development Opportunities
- 1.4 Market Segment Development Opportunities
- 1.5 Public Realm and Infrastructure
- 1.6 Sustainability

Possible opportunities to act on each finding are summarized and numbered. The action opportunities are colour coded to indicate which of the recommended action themes they support .

Action Classification/Type of Action
Address Product Deficiencies, Stimulate Experience Renewal and Development
Address Quality of the Visitor Experience
Manage the Business
Increase Tourism Awareness

Each action opportunity is accorded a timeline priority. These priorities are preliminary suggestions for further discussion with the industry in the context of developing the PRTD Implementation Plan. Short term priorities are items either included in current work programs or which address fundamental needs cutting across the sector. It is suggested that these should be the focus of attention in 2008. It is suggested that consideration of mid-term priorities would begin in 2009/10, and long term priorities in 2011 or later. It is recognized that these preliminary timeline suggestions may shift to take advantage of emerging opportunities for synergy or in response to changing issues.

## I.1 HOSPITALITY AND SERVICE

The PRTD process identified a number of specific areas where Toronto could improve the level of service it offers its visitors. This would increase visitors' levels of satisfaction, pleasure and perceived value.

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
<ul style="list-style-type: none"> <li>Accessibility to people with special needs</li> </ul>	<ul style="list-style-type: none"> <li>Wheelchair accessibility an important consideration to 20-30% of travel market</li> <li>Toronto does not have a tourist-oriented accessibility guide or widely offer services such as short-term wheelchair rental; WheelTrans not accessible to visitors</li> <li>28% of operators do not accommodate wheelchairs, and many others offer only partial accommodation</li> </ul>	<ul style="list-style-type: none"> <li>Further explore gaps in consultation with City Accessibility Office and develop action plan</li> </ul>	<div style="background-color: yellow; width: 50%; height: 20px; margin-bottom: 5px;"></div> <div style="background-color: #e91e63; width: 50%; height: 20px;"></div>	1	Mid Term
Customer service	<ul style="list-style-type: none"> <li>Visitors are less satisfied with their experiences in Toronto today than a decade ago</li> <li>Many small operators with uneven access to training</li> <li>35% of audit respondents do not provide customer service training for their employees</li> </ul>	<ul style="list-style-type: none"> <li>Further explore service gaps and opportunities to address across sector, including service providers (e.g., taxi, transit) as well as attractions and commercial accommodation</li> </ul>		2	Short Term
Directional Signage	<ul style="list-style-type: none"> <li>Poorly developed in Toronto and second most important weakness in destination noted in visitor survey</li> </ul>	<ul style="list-style-type: none"> <li>“Coordinated Street Furniture” program will improve wayfinding for pedestrians in 2008/9; City EDCT-Tourism staff is developing information content</li> <li>Gaps remaining include directional signage from airport and to key destinations within city; Request City to develop strategy to address</li> </ul>	<div style="background-color: yellow; width: 50%; height: 20px; margin-bottom: 5px;"></div> <div style="background-color: #e91e63; width: 50%; height: 20px;"></div>	3	Short Term
				4	Mid Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Information Services	<ul style="list-style-type: none"> <li>Survey indicated that 85% of visitors who used counselling services were “very satisfied” with Toronto compared to 47% of general hotel guests</li> <li>Inadequacy of visitor information services a frequent comment during stakeholder consultations</li> </ul>	<ul style="list-style-type: none"> <li>City EDC-Tourism has begun several small scale services in recent years and is doing a business plan in 2008 in consultation with info service providers and Tourism Toronto</li> </ul>		5	Short Term
Rickshaws	<ul style="list-style-type: none"> <li>Many complaints have been received from visitors surprised by rickshaw charges and intimidation tactics sometimes used by operators</li> <li>Situation has significantly improved since 2006, when City introduced stricter regulations over “pedicab” operations, but incidents of regulation contravention continue to be reported</li> </ul>	<ul style="list-style-type: none"> <li>Monitor complaints and operators and work with City Municipal Licensing staff to increase enforcement levels as required</li> </ul>		6	Short Term
Taxi service	<ul style="list-style-type: none"> <li>Stakeholder consultation frequently recorded comments about uneven driver knowledge, customer service, levels of cleanliness; Ambassador Cabs are good, but the minority of operators</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that hotels, entertainment venues, etc., are aware of regulations and who to contact if they observe infractions</li> </ul>		7	Short Term
Tour Guide Quality Assurance	<ul style="list-style-type: none"> <li>Anyone can be a tour guide in Toronto; no regulations or requirements; Industry Association (CTGA) has requested City support for certification and licensing</li> <li>Interviews with travel trade representatives indicated challenge in finding specialty tour operators capable of accommodating large groups</li> <li>Guides don’t often provide multilingual services</li> </ul>	<ul style="list-style-type: none"> <li>Explore finding in greater detail in consultation with City Municipal Standards and Licensing and industry</li> </ul>		8	Short Term
		<ul style="list-style-type: none"> <li>CTGA is developing a proposal for standards and curriculum; EDC-Tourism will facilitate wider review and consultation within the industry and work with Municipal Licensing and Standards Division to act on Association request</li> </ul>		9	Mid Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Welcoming	<ul style="list-style-type: none"> <li>Visitors less satisfied with their experiences in Toronto today than a decade ago; Canadian visitors do not consider the city to be welcoming</li> </ul>	<ul style="list-style-type: none"> <li>Recent City EDCT-Tourism initiatives to increase visitor access to friendly well informed staff and residents have begun to address issue</li> <li>Explore opportunities to extend and expand approach, with the goal that the visitor feels well looked after and welcomed from arrival in Toronto to departure; Linked with Opportunity No. 2, 5 and 81.</li> </ul>		10	Short Term
WiFi	<ul style="list-style-type: none"> <li>Toronto Hydro Telecom and Wireless Toronto expanding hotspot networks across city</li> </ul>	<ul style="list-style-type: none"> <li>Explore current participation by tourist sector businesses and evaluate need to facilitate connections and promote this service availability more widely.</li> </ul>		12	Mid Term

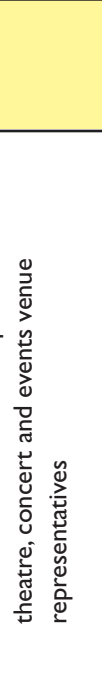
## 1.2 ADDRESSING MARKET READINESS

The PRTD process identified some areas in which the specific needs of the tourism sector are not well served by Toronto experiences. These limit the extent to which tourists are able to enjoy Toronto experiences.

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Multi-lingual services	<ul style="list-style-type: none"> <li>Poorly developed in comparison with other international destinations; potential impediment to attracting multi-cultural local residents as well as overseas visitors</li> <li>Some recent improvement in multilingual marketing with Tourism Toronto's development of four non-English websites, but in-city multilingual service is not widespread</li> </ul>	<ul style="list-style-type: none"> <li>Explore service gaps in more detail and develop cost effective strategies for facilitating improved levels of multi-lingual capacity of operators; possible link with Opportunity No. 14</li> </ul>		13	Mid Term
Packages & Multi-experience passes	<ul style="list-style-type: none"> <li>Audit respondents demonstrate a relatively low level of participation in working with DMO or developing packages or cross-promotions</li> <li>CityPass has been offered in Toronto since 2006; only multi-experience pass offered on a consistent basis, and includes only top six attractions;</li> <li>Tourism Toronto promotes member packages on website; typically 100+ individual offers</li> </ul>	<ul style="list-style-type: none"> <li>Strong interest demonstrated by audit respondents (92% said tourism development was important to business growth; 60% of operators who currently don't package would be interested in doing so)</li> <li>Further explore possible mechanisms and strategies for facilitating package development and other tourism development tactics for operators;</li> </ul>		14	Mid Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Price Competitiveness	<ul style="list-style-type: none"> <li>• “Value for Money” is #1 issue for visitors</li> <li>• Toronto considered a high priced destination; exacerbated by 2007 exchange rate adjustments and end of GST rebate</li> <li>• Audit revealed an upward pricing trend in all sectors but retail</li> <li>• Public museum and gallery admission is free in many other jurisdictions; international visitors surprised they have to pay</li> </ul>	<ul style="list-style-type: none"> <li>• Consultation revealed consensus that price competitiveness needs to be addressed by offering greater value; increasing value is the core objective of most opportunities identified</li> </ul>	<div style="background-color: yellow; width: 100px; height: 20px; margin-bottom: 5px;"></div> <div style="background-color: pink; width: 100%; height: 20px;"></div>	15	Short Term
Regional Partnerships	<ul style="list-style-type: none"> <li>• Cross-promotions and packages between Toronto and other destinations are relatively few</li> </ul>	<ul style="list-style-type: none"> <li>• Further explore opportunities and barriers</li> </ul>	<div style="background-color: pink; width: 100%; height: 20px;"></div>	16	Long Term
Sight seeing Tour Sales	<ul style="list-style-type: none"> <li>• Every operator is responsible for own sales distribution network; can be a barrier for newer, smaller companies, and confusing for consumer to investigate and find tour options</li> <li>• Illegal street vending by tour operators an issue</li> </ul>	<ul style="list-style-type: none"> <li>• Explore further in consultation with operators</li> </ul>	<div style="background-color: pink; width: 100%; height: 20px;"></div>	17	Mid Term
Store Closures on Holidays	<ul style="list-style-type: none"> <li>• Current legislation requires stores to close on eight holidays a year, often when visitors are taking long weekends in Toronto</li> </ul>	<ul style="list-style-type: none"> <li>• City EDCT-Tourism is undertaking policy review and bringing recommendations forward to Council in March 2008</li> </ul>	<div style="background-color: pink; width: 100%; height: 20px;"></div>	18	Short Term



Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
<p>Ticket access</p>	<ul style="list-style-type: none"> <li>Group travel can't reserve blocks of theatre or entertainment tickets far enough in advance; other cities have better distribution networks</li> <li>Shows and events with the most tourist draw potential can sell out in local market; not offered to tourists</li> <li>Box Office hours for smaller venues limited, although TO TIX and wider use of on-line and call centre ticket distribution systems are reducing importance of box office access</li> <li>44% of audit respondents don't have toll-free phone numbers</li> </ul>	<ul style="list-style-type: none"> <li>Discuss further with Group Travel and theatre, concert and events venue representatives</li> </ul>		19	Mid Term

### 1.3 PRODUCT DEVELOPMENT OPPORTUNITIES

The PRTD process revealed that Toronto currently is not widely considered to be a “must-see” destination in its core travel markets. “Excitement levels” about being in the city as reported by visitors have decreased since the late 1990’s. Yet the City has a wealth of product. The PRTD Audit and consultative process suggested that there is potential to further develop the following assets so that they can more successfully attract tourist audiences. For more convenient reference, they are listed in alphabetical order.

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Archaeology	<ul style="list-style-type: none"> <li>Toronto has an interesting archaeological heritage currently not accessible to the general public; other destinations have turned archaeology into tourist product (e.g., Montreal’s Pointe-à-Callière)</li> </ul>	<ul style="list-style-type: none"> <li>Further investigate potential with stakeholders</li> </ul>		20	Long Term
Architecture	<ul style="list-style-type: none"> <li>Strong product offering and increased awareness due to new buildings by “landmark” architects</li> <li>Doors Open gets strong local participation each year</li> <li>Architectural experiences have not been developed for the general public or tourist audiences</li> </ul>	<ul style="list-style-type: none"> <li>An interest of the City’s Clean and Beautiful Office, which has started an annual Festival of Architecture and Design</li> <li>Further investigate potential with this Office and other stakeholders</li> </ul>		21	Mid Term
Arts & Live Music (galleries and clubs)	<ul style="list-style-type: none"> <li>Strong product offering, not oriented to tourist markets</li> <li>“Live with Culture” and “Nuit Blanche” programs have begun to elevate awareness of product</li> </ul>	<ul style="list-style-type: none"> <li>Further investigate potential with stakeholders</li> </ul>		22	Long Term
Blockbuster Programming	<ul style="list-style-type: none"> <li>13 of City’s cultural icons were extensively expanded or renovated between 2002/8; have enhanced physical capacity to mount major international exhibitions and programs, but need enhanced sources of financing</li> </ul>	<ul style="list-style-type: none"> <li>Strategic, destination-wide approach recommended; Manage a ten year calendar and collectively determine best opportunities to animate gaps; form cross-industry partnerships with public and corporate sector to focus resources on developing key opportunities</li> </ul>		23	Mid-Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Boating & Cruising	<ul style="list-style-type: none"> <li>Marinas, boat cruise opportunities, and recreational boating opportunities underperforming in tourist markets</li> <li>Limited dock wall in Central Harbour constraining expansion of marine activities</li> <li>Cruise Ship Terminal in Port has capacity for increased use</li> </ul>	<ul style="list-style-type: none"> <li>Further explore opportunities with stakeholders such as Toronto Waterfront, Port Authority, Queens Quay - Harbourfront BIA and Harbourfront as well as operators</li> <li>Continue to develop opportunities to bring the “Tall Ships” to Toronto</li> <li>Continue to work with and support the Great Lakes Cruising Coalition</li> </ul>		24	Long Term
Culinary Experiences	<ul style="list-style-type: none"> <li>Strong dining product including internationally renowned chefs, multi-cultural experiences, distinctive micro-breweries and several dozen annual culinary festivals and events not widely recognized outside of local area</li> <li>Experiences based on “local product” not well developed; other jurisdictions are motivating travel by featuring local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Continue to support the development of “local product” culinary experiences through the Ontario Culinary Strategy</li> <li>Continue to develop tourist-ready culinary experiences such as “Winterlicious/ Summerlicious” and as components of key festivals such as WinterCity and Sante.</li> <li>Further explore additional opportunities with stakeholders</li> </ul>		25 26 27 28	Short Term Short Term Short Term Short Term
Entertainment Venues	<ul style="list-style-type: none"> <li>Have not had the same level of recent investment as Toronto’s cultural venues (except for the Ontario Science Centre renovation); most recent significant mass entertainment venue to open was the Hockey Hall of Fame (1993)</li> <li>Ministry of Tourism research shows that mass entertainment complex would have greater impact on visitation than any other type of tourism investment</li> </ul>	<ul style="list-style-type: none"> <li>Consider opportunities to bring a major investment to fruition; linked with Opportunity No. 86</li> </ul>		29 30	Mid Term Long Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Festivals & Events	<ul style="list-style-type: none"> <li>Toronto has a strong array of festivals and major consumer shows, a significant travel motivator and activity enjoyed by over 40% of travellers</li> <li>Individual festivals may not be reaching their potential as tourist products for a variety of reasons, including lack of resources</li> </ul>	<ul style="list-style-type: none"> <li>City of Toronto EDCT Division is leading the development of an events strategy and “festivals alliance”; further consider tourism development potential in that context</li> <li>support more strategic approach to development of new festivals and events, with focus on off-peak periods of the calendar and festivals aligned with authentic Toronto product (e.g, the Arts, multi-cultural, culinary)</li> </ul>		31	Short Term
Film Tourism	<ul style="list-style-type: none"> <li>Toronto is a major location for filming; other destinations have leveraged this activity to create tourist product; the opportunity to observe stars and the international entertainers who frequently perform in Toronto is another possible attraction (to date realized at the Toronto International Film Festival)</li> </ul>	<ul style="list-style-type: none"> <li>Further explore opportunities</li> </ul>		32	Long Term
First Nations Experiences	<ul style="list-style-type: none"> <li>Toronto First Nations heritage is inaccessible to the general public</li> <li>International visitors have strong interest in First Nations culture and heritage,</li> <li>Many key sites are in public ownership (e.g., Parks, Conservation Authority</li> </ul>	<ul style="list-style-type: none"> <li>Consult with First Nations communities to explore opportunities for developing authentic experiences</li> <li>Planning for the 1812 Bicentennial and the Toronto Museum project may provide catalyst (Opportunity No. 35)</li> </ul>		33	Mid Term
Geographic Distribution	<ul style="list-style-type: none"> <li>Toronto’s tourist activity is heavily concentrated in the downtown area. Attractions, hotels, shopping districts and restaurants elsewhere in the city don’t benefit as much from synergistic activity</li> </ul>	<ul style="list-style-type: none"> <li>Explore ways of developing and promoting tourism in outlying neighbourhoods; could be related to leveraging visiting friends and relatives market (Opportunity No. 61), visitor information services (Opportunity No. 5) and package development/tourism development training (Opportunity No. 14 &amp; 59)</li> </ul>		34	Mid Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Heritage Experiences	<ul style="list-style-type: none"> <li>Toronto visitors are not finding our heritage experiences; Toronto story is not coherently told; properties, interpretation and programming are under-resourced</li> <li>some progress has recently been made: e.g., Casa Loma renovations, the Distillery District development; plan for Fort York visitor centre, St. Lawrence Complex and Old Town initiatives, on-line interpretation ( e.g., <a href="http://www.virtualmuseum.ca">www.virtualmuseum.ca</a>)</li> </ul>	<ul style="list-style-type: none"> <li>Monitor and support “Toronto Museum” and “1812 bicentennial” projects as good opportunities to elevate heritage product</li> <li>Monitor and support acquisition and development of “First Parliament Site.”</li> <li>Further investigate additional potential and tourism development requirements with operators and stakeholders</li> </ul>		35	Short Term
International Events	<ul style="list-style-type: none"> <li>Toronto’s success in attracting major international events is not as strong as other destinations; significant progress achieved since 2002 formation of City staff Unit, “Toronto International”</li> </ul>	<ul style="list-style-type: none"> <li>“Toronto International” Unit is leading the development of an international events strategy; further consider in that context</li> </ul>		37	Mid Term
Neighbourhoods	<ul style="list-style-type: none"> <li>Wealth of “Uniquely Toronto” experiences in neighbourhoods hard for tourists to discover</li> <li>BIAs provide community partners for developing and marketing tourist-ready experiences; some BIAs have begun initiatives (e.g. Yonge Discovery Walks)</li> <li>City “TAPinto TO!” program provides free personalized tours of neighbourhoods by volunteer residents</li> </ul>	<ul style="list-style-type: none"> <li>Further explore and develop opportunities with BIAs and other stakeholders</li> <li>Support expansion of TAPinto TO! Program and other tactics for facilitating neighbourhood discovery by visitors</li> </ul>		39	Mid Term
Nightlife	<ul style="list-style-type: none"> <li>Strong product differentiating Toronto from near-market competition</li> <li>Issues with late night security, congestion and noise creating conflict with hotels and residences, detracting from quality of experience and creating pressure for stricter regulation and enforcement</li> </ul>	<ul style="list-style-type: none"> <li>Monitor need for stronger industry voice to influence policy or to encourage operators to reduce conflict levels</li> </ul>		41	Mid Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Outdoor & Nature Experiences	<ul style="list-style-type: none"> <li>Toronto offers excellent outdoor experiences that currently are underperforming in tourist markets (scenic parks, wilderness areas, trails, beaches, golf courses)</li> </ul>	<ul style="list-style-type: none"> <li>Explore opportunities to elevate awareness and address tourism market readiness issues with stakeholders such as the Green Tourism Association and City Parks, Forestry and Recreation Division (which is doing an inventory of distinctive attractions in parks)</li> </ul>		42	Long Term
Same Sex Weddings	<ul style="list-style-type: none"> <li>Legal in Canada</li> <li>Tourism Toronto provides good information about wedding regulations and services on their website</li> <li>City Hall Wedding Chamber provides a somewhat basic setting for ceremonies</li> </ul>	<ul style="list-style-type: none"> <li>Explore opportunities to upgrade City Hall wedding chapel and address any other constraints or inconveniences associated with performing same-sex wedding ceremonies in Toronto (e.g., any capacity issues) Linked with Opportunity No. 51</li> </ul>		43	Short Term
Shopping	<ul style="list-style-type: none"> <li>Toronto has an enormous array of stores and shopping districts catering to a broad range of income levels, demographics and interests; however, visitor and traveller surveys suggest that international visitors do not consider Toronto to be a top shopping destination</li> </ul>	<ul style="list-style-type: none"> <li>Explore this finding in more detail with stakeholders; more information is needed to address</li> </ul>		44	Mid Term
Specific Site Developments	<ul style="list-style-type: none"> <li>Major under developed sites include Parc Downsview Park, Ontario Place, Exhibition Place (intensification taking place under approved master plan), Distillery District, St. Lawrence Hall and Market Complex, Woodbine (development plans recently announced)</li> </ul>	<ul style="list-style-type: none"> <li>Consider opportunities to intensify tourist-oriented experiences; possible link with Opportunity No. 30 and 86</li> </ul>		45	Short to Long Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Sports	<ul style="list-style-type: none"> <li>A significant opportunity that currently is constrained by gaps in sports facilities (some gaps have been closed in recent years – e.g., Western Beaches Watercourse, BMA Stadium, Varsity Stadium, Rexall Centre)</li> <li>Toronto doesn't have a comprehensive database of its sports infrastructure for use in developing bids and events</li> </ul>	<ul style="list-style-type: none"> <li>The City's "Toronto International" Unit and Toronto Sports Council are working on this area; further explore in consultation with them and other stakeholders; possible link to Opportunity No. 86</li> </ul>		46	Short Term
Street Animation and Vending	<ul style="list-style-type: none"> <li>City's public art program, street festivals, and programming on public squares currently support animation of city's public realm, especially in July/August</li> <li>A proactive, conscious approach to facilitating positive animation near tourist gathering spots would elevate the "buzz" and excitement levels experienced by visitors</li> </ul>	<ul style="list-style-type: none"> <li>Further explore potential in partnership with stakeholders such as BIAs, the City's "Street Foods" project, and major venues</li> </ul>		47	Short Term
Theatre	<ul style="list-style-type: none"> <li>Not motivating travel to the same extent as in the 1990's</li> <li>Smaller theatres and not-for-profit companies often can't afford good audience amenities</li> <li>Tourists may find it hard to get performance tickets or information about performances</li> </ul>	<ul style="list-style-type: none"> <li>Discuss findings with theatre sector and formulate action plan</li> </ul>		48	Mid Term
Waterfront	<ul style="list-style-type: none"> <li>Enormous development potential; Toronto Waterfront leading many development initiatives; concern by industry stakeholders that tourism development agenda may not have sufficient focus</li> </ul>	<ul style="list-style-type: none"> <li>Form stronger industry liaison with Toronto Waterfront and explore opportunities; consider doing a tourism development plan for waterfront</li> </ul>		49	Short Term

## I.4 MARKET SEGMENT DEVELOPMENT OPPORTUNITIES

People visit Toronto for many different reasons. The PRTD process identified a number of specific types of visitors where potential may exist to increase their tourism expenditures. These include the following, again listed in alphabetical order

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Business Travellers	<ul style="list-style-type: none"> <li>3.7 million people a year make a business trip to Toronto; improving their impressions and information about Toronto could motivate return visits for vacation</li> </ul>	<ul style="list-style-type: none"> <li>Explore further in context of visitor information service delivery (Opportunity No.5)</li> </ul>		50	Mid Term
Gay & Lesbian Travellers	<ul style="list-style-type: none"> <li>A lucrative and growing market where Toronto has strong competitive advantage; Tourism Toronto has been targeting and developing this market since 2006</li> </ul>	<ul style="list-style-type: none"> <li>Tourism Toronto is monitoring program and can bring any product development issues to attention of broader stakeholders as needed; opportunities to upgrade City Hall wedding chapel is one such initiative (Opportunity No.43 )</li> </ul>		51	Short Term
International Students	<ul style="list-style-type: none"> <li>Large number of international students attend Toronto universities, colleges and ESL schools; they are visited by family members; strong interest in experiencing tourist attractions</li> </ul>	<ul style="list-style-type: none"> <li>Explore opportunities to increase visitor information services and promotional activities targeting international students and their families in consultation with schools. Linked with Opportunity No.5</li> </ul>		52	Long Term
International Youth	<ul style="list-style-type: none"> <li>Growth market internationally, currently being developed by individual hostel operators and by efforts to attract student group travel by Tourism Toronto; FIT youth travel segment not being targeted</li> </ul>	<ul style="list-style-type: none"> <li>Explore additional opportunities to strengthen product appealing to this market and expand marketing efforts with stakeholders and Tourism Toronto</li> </ul>		53	Long Term
Luxury Visitors	<ul style="list-style-type: none"> <li>Five new five-star hotel properties under development</li> </ul>	<ul style="list-style-type: none"> <li>Explore opportunities and need to strengthen Toronto's offerings to luxury clientele in consultation with stakeholders</li> </ul>		54	Mid Term



Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Medical Visitors	<ul style="list-style-type: none"> <li>Large number of people and their families come to Toronto for medical appointments and treatments; are they an untapped market for tourism?</li> </ul>	<ul style="list-style-type: none"> <li>Explore further in context of visitor information services delivery (Opportunity No. 5)</li> </ul>		55	Long Term
Meetings and Conventions	<ul style="list-style-type: none"> <li>Strong competitive position critical to health of tourism sector; <ul style="list-style-type: none"> <li>currently Toronto is well positioned internationally, although facing regulatory challenges (e.g., Pharma Code, passport requirements)</li> </ul> </li> <li>But other destinations are upgrading their facilities and financial incentive packages; continual improvement needed to stay competitive</li> <li>Opportunity to encourage strong delegate registration, and to make delegates feel welcome and well informed about Toronto and its attractions; this motivates higher spending and return bookings by organization and visits by individuals</li> </ul>	<ul style="list-style-type: none"> <li>Monitor international competitiveness as a convention destination and identify any emerging issues; mobilize industry leaders to advocate; identify any emerging need for improved facilities and take appropriate steps to address (Linked with Opportunity No. 86)</li> </ul>		56	Short Term
		<ul style="list-style-type: none"> <li>City “Toronto International” and Tourism Toronto Client Services have been coordinating enhanced welcome programs for individual major conventions and events; a “hosting policy” is under development; possible link with Opportunity No. 5</li> </ul>		57	Short Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
<p>Motor Coaches and Group Travel</p>	<ul style="list-style-type: none"> <li>• Much of Toronto product is inaccessible to group travel because performance runs are too short, exhibits and events planned with too little lead time; facilities can't accommodate requirement for quick turn around of groups; many operators don't understand group travel needs</li> <li>• Motor coaches frequently experience difficulty with City regulations and enforcement when loading / unloading passengers</li> <li>• While recent improvements mean motor coach parking currently is adequate, this may change as demand increases</li> <li>• Decisions are sometimes made about road closures, etc., without regard for needs of sector</li> <li>• Ontario License requirements a disincentive to out-of-province coach companies who would otherwise occasionally bring in tours</li> <li>• Modern state-of-the-art bus terminal near expressway and transit hub would improve efficiency of operations and customer service levels</li> <li>• Motor coaches are not permitted access to bus-only lanes in city</li> </ul>	<ul style="list-style-type: none"> <li>• Further explore motor coach issues with key stakeholders such as the Ontario Motor Coach Association and City Transportation and Police Services; consideration might be given to establishing a facilitation service for large groups</li> <li>• Further explore potential and mechanisms for increasing pool of operators able to work with group travel; link with Opportunity No 14</li> </ul>	<p style="background-color: #f080f0;"></p> <p style="background-color: #66b3ff;"></p>	<p>58</p> <p>59</p>	<p>Short Term</p> <p>Mid Term</p>

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
RV Users	<ul style="list-style-type: none"> <li>Toronto currently has one RV camping facility, with a few others within an hour drive; at capacity during summer months</li> <li>RV industry does not consider Toronto to be “RV friendly”</li> <li>RVers constitute an affluent and increasing market segment</li> </ul>	<ul style="list-style-type: none"> <li>City EDC/Tourism published an analysis of RV Resort opportunities and requirements in 2007 and is making it available to private operators and landowners</li> </ul>		60	Long Term
Visiting Friends & Relatives	<ul style="list-style-type: none"> <li>About seven million people a year come to Toronto to visit friends and relatives; largely untapped potential for increasing their tourist experiences and expenditures</li> <li>May be especially effective entry to overseas markets, leveraging Toronto’s multicultural population</li> </ul>	<ul style="list-style-type: none"> <li>Mobilize residents to be informed, enthusiastic hosts to the city for their visiting friends and relatives</li> <li>Research residents’ needs and aspirations in hosting friends and relatives, especially first generation Canadians</li> </ul>		61	Short Term
				62	Mid Term



## I.5 PUBLIC REALM AND INFRASTRUCTURE

Toronto is a very easy city to get to from most parts of the world, with excellent air and rail service as well as InterCity Bus Service, a Port, several marinas and a Cruise Ship Terminal. It is a hub in the inter-regional highway network, enabling individual travellers to reach it easily by car. Within the city, there is an excellent public transit system, a well-developed road network and cycling rights of way. However, the PRTD process revealed a variety of issues with capacity limitations, congestion and levels of maintenance and service. It also identified concerns about the level of maintenance and appearance of the public realm in the city, and perception of public safety.

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Cycling	<ul style="list-style-type: none"> <li>Considerable strength in cycling infrastructure and support services, but primarily oriented to local residents</li> <li>City has had a "City Cycling" Committee and Office for two decades</li> </ul>	<ul style="list-style-type: none"> <li>Explore opportunities for increasing visitors' access to cycling in consultation with City Cycling Office and other stakeholders (e.g., Green Tourism Association)</li> </ul>		63	Mid Term
Destination Gateways	<ul style="list-style-type: none"> <li>Landing fees at Pearson the second highest in world</li> <li>Pearson \$2 charge for baggage carts a frequently mentioned irritant in stakeholder consultations</li> <li>GTAA cab licenses and policies for other taxis a concern within taxi industry</li> <li>Limited flights to some markets (e.g., Germany) constraining ability to attract overseas group travel</li> <li>Pearson is midway through a major expansion</li> </ul>	<ul style="list-style-type: none"> <li>Monitor key gateway infrastructure and formulate strategies to address issues in partnership with operators as needed</li> </ul>		64	Mid Term
		<ul style="list-style-type: none"> <li>Liaise with operators to identify and address customer service issues</li> </ul>		65	Mid Term
		<ul style="list-style-type: none"> <li>Consider development of improved information signage and services for arriving visitors</li> </ul>		66	Mid Term
		<ul style="list-style-type: none"> <li>GTAA made a formal presentation to City Economic Development Committee in October 2007, asking for a closer partnership with the City to address many of the issues raised in PRTD process; EDCT to report in 2008 on action plan</li> </ul>		67	Short Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
	<ul style="list-style-type: none"> <li>Union Station hasn't been significantly renovated for decades while several iterations of redevelopment plans have been discussed</li> <li>City approval of new Master Plan in December 2007 should lead to action</li> </ul>	<ul style="list-style-type: none"> <li>Liaise with operators to identify and address customer service issues</li> </ul>		68	Mid Term
		<ul style="list-style-type: none"> <li>Consider development of improved information signage and services for arriving visitors</li> </ul>		69	Mid Term
		<ul style="list-style-type: none"> <li>Support efforts to advance consideration of Fixed Rail link between Pearson and Union Station (begin Environmental Assessment)</li> </ul>		70	Short Term
	<ul style="list-style-type: none"> <li>Inter-city bus terminal has insufficient capacity and is not located adjacent to highway access</li> </ul>	<ul style="list-style-type: none"> <li>Metrolinx (Greater Toronto Transportation Authority) plans feasibility study for new terminal adjacent to Union Station</li> </ul>		71	Long Term
Panhandling & Homelessness	<ul style="list-style-type: none"> <li>PRTD Audit and stakeholder consultations revealed significant concern</li> </ul>	<ul style="list-style-type: none"> <li>City Shelter, Support &amp; Housing Division (SSH) has made significant progress in last two years in reducing homelessness</li> <li>SSH undertook a pilot project on panhandling in 2007, is consulting with industry and reporting on strategy in 2008</li> <li>Further investigate current initiatives and explore opportunities for additional action</li> </ul>		72	Short Term
Parking	<ul style="list-style-type: none"> <li>Parking tickets the #1 visitor complaint made to City officials</li> <li>Visitors don't understand "permit parking" system or pay and display pillars (from complaint analysis)</li> <li>Toronto Parking Authority (TPA) has very large inventory of public parking lots</li> </ul>	<ul style="list-style-type: none"> <li>Further explore issues and opportunities to make it easier for visitors to find legal options for parking their cars</li> </ul>		73	Mid Term
		<ul style="list-style-type: none"> <li>Identify key destinations with parking shortfalls and develop strategies to address</li> </ul>		74	Mid Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Pedestrian Realm	<ul style="list-style-type: none"> <li>Comments on PRTD Audit and consultations supported more amenities for pedestrians, such as car-free streets and walkways</li> <li>City has been working to promote walking, pedestrian safety and amenities since 1998 and has an Advisory Committee and dedicated staff Unit as well as a “Pedestrian Charter” and “Walking Strategy”</li> <li>PATH system links most buildings and subway stations in financial district with extensions to Eaton Centre and Convention Centre</li> </ul>	<ul style="list-style-type: none"> <li>Further explore opportunities to enhance pedestrian environment for visitors in consultation with the City Pedestrian Office, BIAs and other stakeholders</li> </ul>	<div style="background-color: yellow; width: 100%; height: 15px;"></div> <div style="background-color: pink; width: 100%; height: 15px;"></div>	75	Mid Term
Public Transit	<ul style="list-style-type: none"> <li>TTC services operating beyond capacity</li> <li>Service highly oriented to commuter peaks; lower service levels on weekends and evenings when visitors' demand occurs</li> <li>Inadequate regional integration of transit systems</li> <li>TTC Day and Weekly passes good for visitor market, but not widely promoted to them; visitors don't find it easy to find out about or use transit</li> <li>TTC investigating feasibility of introducing SMART CARD technology, already being used in many other jurisdictions</li> </ul>	<ul style="list-style-type: none"> <li>Greater Toronto Transportation Authority (Metrolinx) formed in 2007 to address regional integration; investigate initiatives further and consider opportunities for sector involvement</li> <li>Explore opportunities and need for sector to add its voice to ongoing activities directed at encouraging transportation improvements</li> <li>Explore opportunities to help reduce visitor dependency on cars by making it easier for them to access public transit system</li> </ul>	<div style="background-color: pink; width: 100%; height: 15px;"></div> <div style="background-color: lightblue; width: 100%; height: 15px;"></div>	76  77  78	Short Term  Short Term  Short Term
Safety	<ul style="list-style-type: none"> <li>Travel intentions and visitor surveys have revealed Canadian markets' increased concerns about safety in Toronto, although facts confirm that Toronto is among the world's safest cities</li> </ul>	<ul style="list-style-type: none"> <li>All levels of government have escalated anti-crime initiatives;</li> <li>Monitor and consider need for industry action (e.g. advocacy, communications)</li> </ul>	<div style="background-color: pink; width: 100%; height: 15px;"></div>	79	Mid Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Traffic Congestion	<ul style="list-style-type: none"> <li>Travel Intentions research indicated that traffic is the #2 reason Canadians are not inclined to visit Toronto</li> <li>Gridlock has become a competitive disadvantage for the city; demand exceeds capacity for both road and transit</li> <li>Weekend highway and road closures for special events, races &amp; construction impact visitors</li> </ul>	<ul style="list-style-type: none"> <li>Explore opportunities and need for sector to add its voice to ongoing activities directed at encouraging transportation improvements</li> <li>Explore opportunities to help reduce visitor dependency on cars by making it easier for them to access public transit system</li> </ul>		80	Short Term
Visual Appeal & Cleanliness	<ul style="list-style-type: none"> <li>Visitor surveys, PRTD Audit and stakeholder consultation revealed significant concern about level of maintenance and visual appeal of the public realm</li> </ul>	<ul style="list-style-type: none"> <li>“Clean and Beautiful City” Office formed in 2006</li> <li>Project underway in City Planning to recommend public realm improvements near cultural icons</li> <li>Coordinated street furniture program will begin to replace plethora of street elements with a well-designed visually coherent system in 2008</li> <li>Further investigate these current initiatives and explore opportunities for further action</li> </ul>		81	Short Term
				82	Short Term

## I.6 SUSTAINABILITY

The PRTD process identified a number of issues which may limit the strength of the industry and its ability to grow in the future.

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Awareness of tourism	<ul style="list-style-type: none"> <li>Many decisions in public sector are made without regard for impact on tourism</li> <li>Most audit respondents are primarily focused on developing local markets, not tourism</li> </ul>	<ul style="list-style-type: none"> <li>Explore ways of raising and sustaining awareness of tourism's significance to the economy and community and its requirements; targets are public sector, the media, businesses and employees, and local residents</li> </ul>		83	Short Term
Capacity to Accommodate Growth	<ul style="list-style-type: none"> <li>79% of audit respondents said that current capacity meets needs of growing market</li> <li>53% do not reach full capacity during busiest three months</li> <li>planned hotel development will add 1850 rooms between 2008 and 2011 (7% increase)</li> </ul>	<ul style="list-style-type: none"> <li>Acting on opportunities identified by PRTD will build demand</li> </ul>		84	Mid Term
Education and training	<ul style="list-style-type: none"> <li>Stakeholder consultation revealed that there are few opportunities for sharing information or providing operator training about new trends/best practices</li> </ul>	<ul style="list-style-type: none"> <li>Further investigate gaps and explore opportunities for addressing</li> </ul>		85	Mid Term
Environmental Sustainability	<ul style="list-style-type: none"> <li>Increasing environmental awareness by consumers is starting to make "green practices" a decision-making criterion</li> <li>Work by Green Tourism Association over last decade, individual companies, Tourism Toronto's recent launch of an "eco-friendly" section of website and City's leadership in environmental sustainability initiatives gives Toronto an international edge in being a "green destination"</li> </ul>	<ul style="list-style-type: none"> <li>Explore and support additional opportunities to promote and facilitate green practices and experiences in consultation with stakeholders</li> <li>Explore value in developing sector linkages with the City Environmental Office and Green Economic Development Strategy</li> </ul>		86	Mid Term
				87	Short Term



Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Investment Strategy	<ul style="list-style-type: none"> <li>29% of audit respondents have not invested capital in last five years</li> <li>Province has recently given the City of Toronto the power to provide some investment incentives</li> <li>Most investment decisions are made without regard for impact on overall attractiveness of Toronto as a destination</li> </ul>	<ul style="list-style-type: none"> <li>Undertake a tourism investment strategy to identify opportunities and barriers &amp; direct investment to address key tourism development priorities; linked with Opportunity No. 30, 45, 46, 49, and 56</li> </ul>	<div style="background-color: #FFD700; height: 20px; width: 100%;"></div> <div style="background-color: #FF69B4; height: 20px; width: 100%;"></div>	88	Mid Term
Labour Market	<ul style="list-style-type: none"> <li>Labour market research indicates that tourism sector has issues with low job satisfaction and high turnover; widely considered entry jobs for youth and recent immigrants, with poorly developed career ladders</li> <li>66% of Audit respondents expressed belief that there was a sufficient labour pool to support their business in the long term, out of sync with other broader labour market analyses</li> </ul>	<ul style="list-style-type: none"> <li>Consider how strategic financial incentives can best be used to encourage most needed sector investments, and any other actions needed to remove investment barriers</li> </ul>	<div style="background-color: #FFD700; height: 20px; width: 100%;"></div> <div style="background-color: #FF69B4; height: 20px; width: 100%;"></div>	89	Mid Term
Leadership Forum	<ul style="list-style-type: none"> <li>Labour market research indicates that tourism sector has issues with low job satisfaction and high turnover; widely considered entry jobs for youth and recent immigrants, with poorly developed career ladders</li> <li>66% of Audit respondents expressed belief that there was a sufficient labour pool to support their business in the long term, out of sync with other broader labour market analyses</li> <li>Current industry associations and committees represent only sub-sectors of the broader tourism industry, or are focused on marketing</li> <li>Stakeholder consultation revealed widespread comments about how synergistic opportunities are missed by “silo” approach to destination development</li> </ul>	<ul style="list-style-type: none"> <li>Further explore findings and consider need for action to sustain adequate labour market for sector in the future</li> <li>Capitalize on tourism sector work being done Provincially and Nationally</li> </ul>	<div style="background-color: #6495ED; height: 20px; width: 100%;"></div>	90	Mid Term
		<ul style="list-style-type: none"> <li>Consider options for enabling more effective cross-sectoral discussion, cooperation and leadership and put appropriate committee structure in place</li> </ul>	<div style="background-color: #6495ED; height: 20px; width: 100%;"></div>	91	Short Term

Alphabetical Catalogue	Findings	Opportunities for Action	Type of Action	Opp. No.	Priority
Research	<ul style="list-style-type: none"> <li>Research gaps include limited information on competitive advantage or performance of Toronto compared to other international destinations; no regularized program for monitoring visitor satisfaction; over 50% of operators do not track guest origins or satisfaction</li> <li>Ministry of Tourism and Tourism Toronto use different research sources and definitions; different numbers are published about Toronto performance levels and trends</li> <li>Statistics Canada changed survey methodologies in 2005, and has not released domestic travel data since 2004</li> </ul>	<ul style="list-style-type: none"> <li>Further consider gaps and issues and determine strategies for addressing</li> </ul>		92	Mid Term
Seasonality	<ul style="list-style-type: none"> <li>52% of audit respondents do not manage their low season</li> <li>Hotel occupancy falls to 58% in first quarter</li> </ul>	<ul style="list-style-type: none"> <li>Consider strategies for increasing hotel occupancy during low seasons</li> </ul>		93	Mid Term

# Appendix 2: PRTD Steering Committee

## SECTOR

City of Toronto:

Tourism Toronto and Committee Co-Chair:

Meeting Venues and Committee Co-Chair:

Greater Toronto Hotel Association (GTHA):

Accommodations:

Attractions Ontario:

Attraction Operators:

Attraction Operators:

Ontario Restaurant Hotel & Motel Association (ORMHA):

Restaurants:

Education:

Nightlife/ Entertainment Venues:

Sight Seeing Tours:

Transportation:

Retail:

Performing Arts/ Entertainment:

Neighbourhoods:

Festivals & Events:

Visitor Services:

## REPRESENTATIVE

Councillor Michael Thompson, Ward 37 – Scarborough Centre

Gino Giancola, VP Industry Relations

John Houghton, VP Sales and Marketing, MTCC

Terry Mundell, President

Jeff Waters, General Manager,

Renaissance Toronto Airport

Troy Young, President, Attractions Ontario

Shanna Young, Executive Director Marketing &

Communications, Toronto Zoo

Jack Robinson, Chief Operating Officer, CN Tower

Rob Evans, President and CEO

Mike O'Connor, Vice President, Joe Badali's Ristorante Italiano

Joanne Gellatly, Academic Coordinator, Hospitality

Operations Management, George Brown College

Nick Di Donato, President & CEO, Liberty Entertainment Group

John Ryan, President, Toronto Tours

Brian Crow, President, Ontario Motor Coach Association

Susan Williams, Director, National Research and Marketing,

The Cadillac Fairview Corporation Limited

Jacoba Knaapen, Executive Director,

Toronto Association of the Performing Arts (TAPA)

John Kiru, Executive Director, Toronto Association of BIAs

Michael Downey, President, Tennis Canada

Amy Collier, Head Concierge, The Hazelton Hotel