



2011 TD TORONTO JAZZ FESTIVAL

Economic Impact Study

Toronto, Ontario
June 24-July 3, 2011



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Methodology

DATA COLLECTION

Survey technique
Sample size
Days surveyed

On-site surveys
500 completed on-site surveys
All 10 days of festival

ECONOMIC MODELING

Tourism expenditure inputs
Operational expenditure inputs
Economic modeling

On-site survey
Accounting records
Ontario TREIM Model



1. Total economic impact of festival estimated at \$22.7M

- Impact derived from spending by non-locals and event operations
- Estimate includes direct, indirect and induced impacts

2. Local employment supported by event

- Festival-related spending supported equivalent of 298 full-year jobs
- Spending also supported tax revenue at all three levels of government

3. Festival attracts tourists from many regions

- Approximately one-third of attendees resided beyond 40km
- Among non-locals 12% resided outside Ontario

4. Local residents spent \$20.5M related to event

- While not economic impact, demonstrates local support for festival
- Locals spent \$5.8M on restaurants, bars, and clubs

5. Celebrate Ontario funding resulted in additional \$2.6M spending in region

- Aretha Franklin concert, festival mobile website and restaurant and club guide influenced many non-locals to attend
- Spending by these attendees who attended specifically for these programs contributed to increase

6. Sponsors recalled and appreciated by attendees

- TD Canada Trust by far most recalled sponsor
- Movado, JAZZ.FM91 and The Toronto Star also recalled by almost one-quarter of attendees

7. Attendees believe event enhances quality of life and deserves government funding

- 92% agree event enhances quality of life for residents
- Vast majority feel event deserves additional government funding

8. Festival's web site, radio, print articles/ads and signs or posters most popular information sources

- Almost half consulted the festival's website
- Approximately one-third obtained information from radio news, print articles, signs or posters and print ads

9. Event highly rated by attendees

- Majority rated quality and variety of entertainment, atmosphere and cleanliness as excellent
- Sponsors support an event with exceptional visitor satisfaction



Section 1: Economic Benefits**EVENT ATTENDANCE**

Total number of visits	524,000
Average visits per person	2.5
Total unique attendees	210,000

Percentage local (up to 40km)	68%
Percentage non-local (beyond 40km)	32%

Number of locals (up to 40km)	142,800
Number of non-locals (beyond 40km)	67,200
Total unique attendees	210,000

CELEBRATE ONTARIO-RELATED ATTENDANCE

Number of non-locals (beyond 40km)	67,200
Non-locals attributable to Celebrate Ontario programs	6,250
Estimated non-locals in absence of program	60,950

ECONOMIC IMPACT

	Toronto	Ontario
Initial expenditures	\$22.7M	\$22.7M
<i>Spending by non-local attendees</i>	<i>\$21.2M</i>	<i>\$21.2M</i>
<i>Event operations</i>	<i>\$1.5M</i>	<i>\$1.5M</i>

GDP

	Toronto	Ontario
GDP	\$16.7M	\$0.2M
<i>Direct</i>	<i>\$11.4M</i>	<i>\$0M</i>
<i>Indirect</i>	<i>\$3.0M</i>	<i>\$0.1M</i>
<i>Induced</i>	<i>\$2.3M</i>	<i>\$0.1M</i>

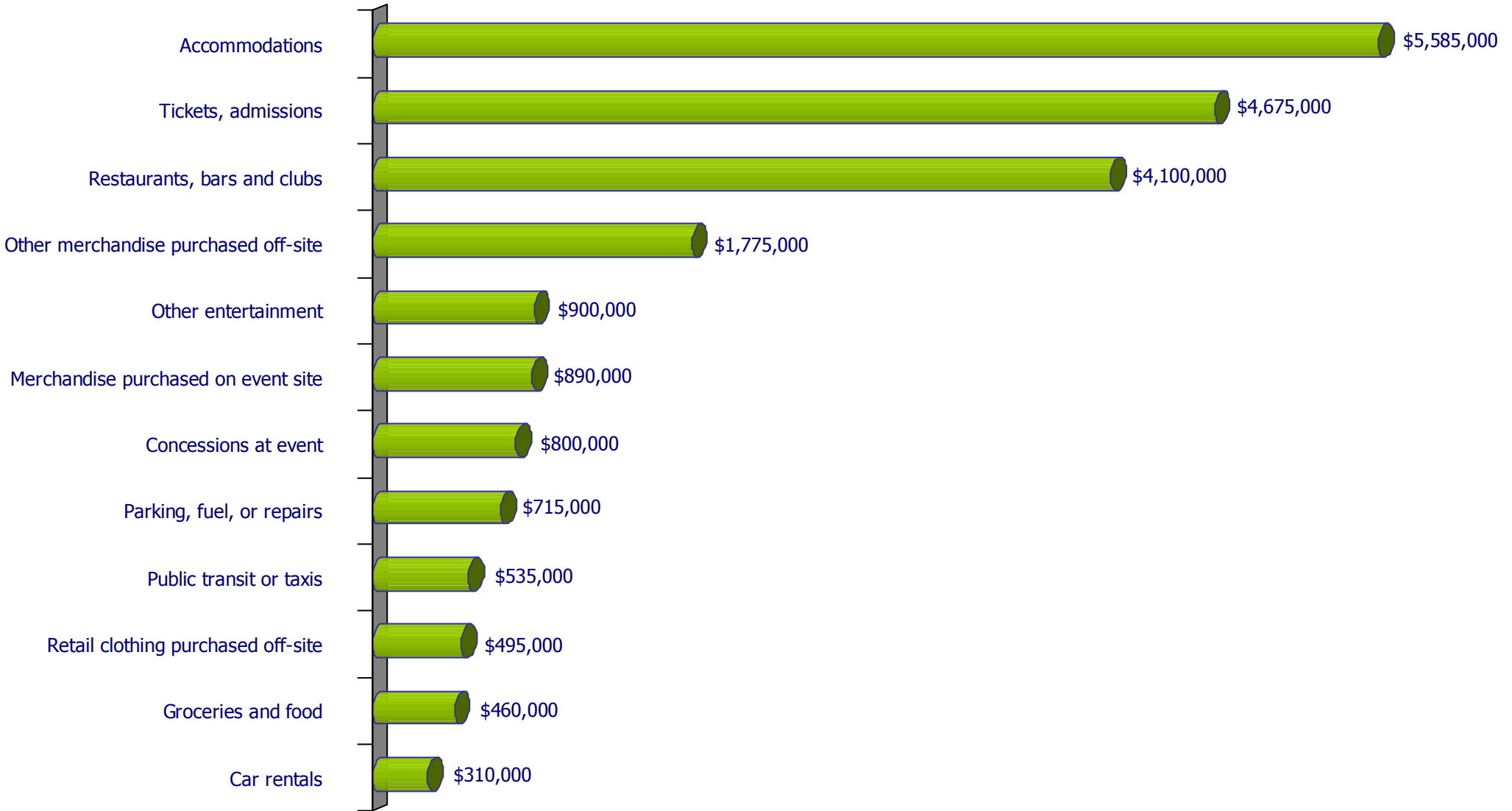
EMPLOYMENT SUPPORTED

Full year job equivalents	298	59
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TAXES GENERATED

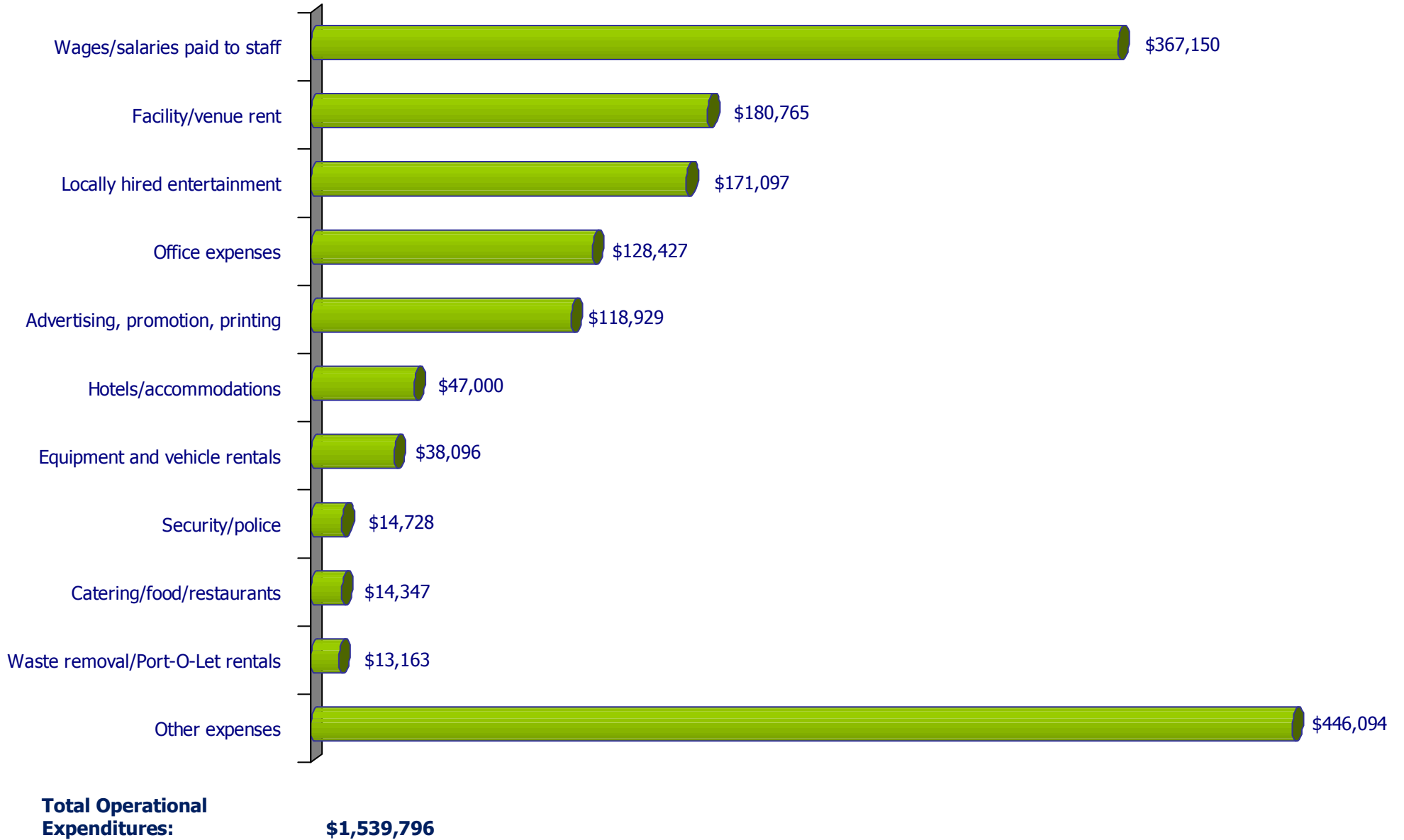
	Toronto	Ontario
Taxes generated	\$8.7M	\$1.9M
<i>Federal</i>	<i>\$4.7M</i>	<i>\$1.0M</i>
<i>Provincial</i>	<i>\$3.9M</i>	<i>\$0.8M</i>
<i>Municipal</i>	<i>\$0.1M</i>	<i>\$0.1M</i>

Spending estimates by non-locals

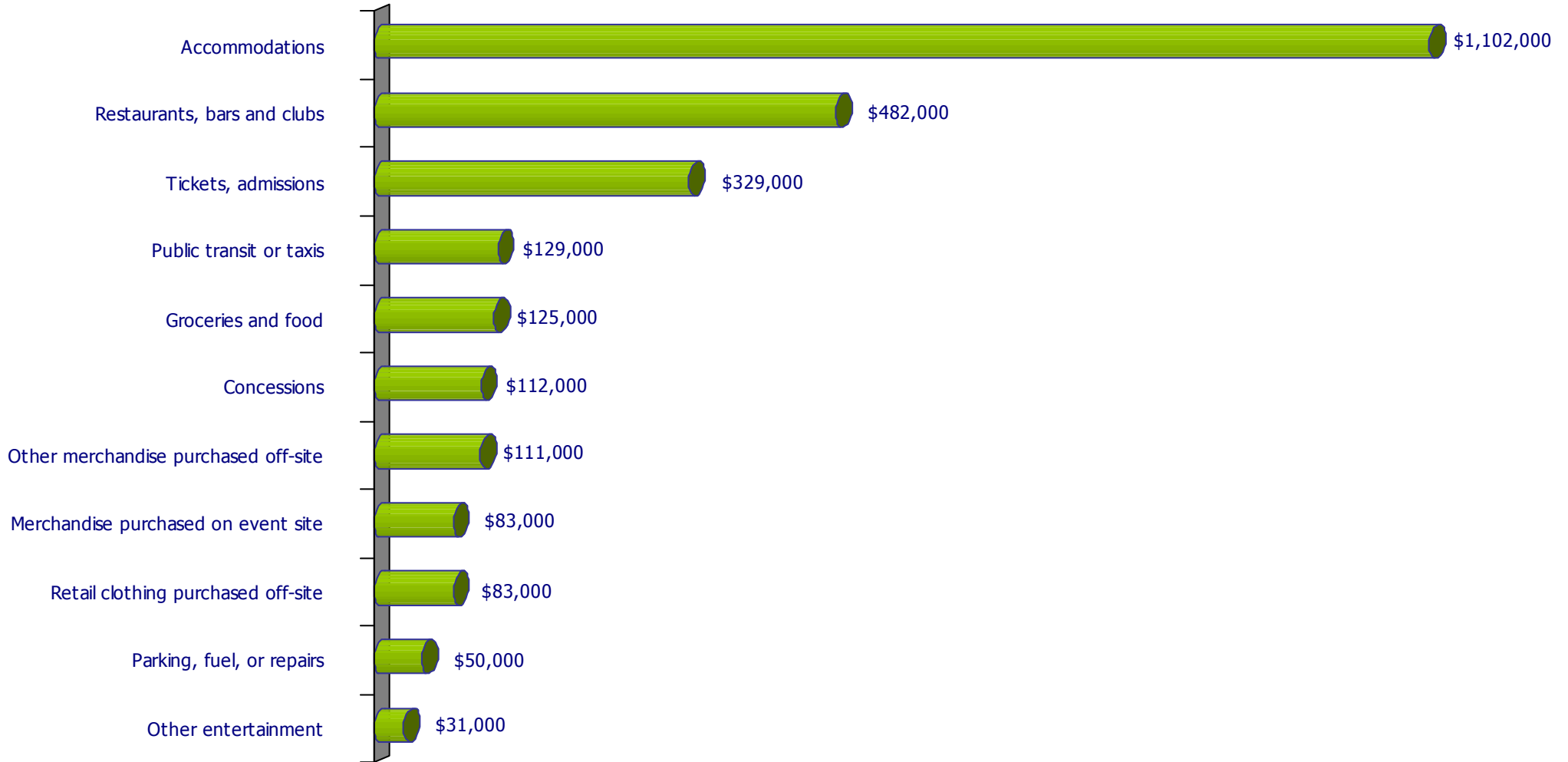


Total spending by non-locals: \$21,240,000

Operational Spending



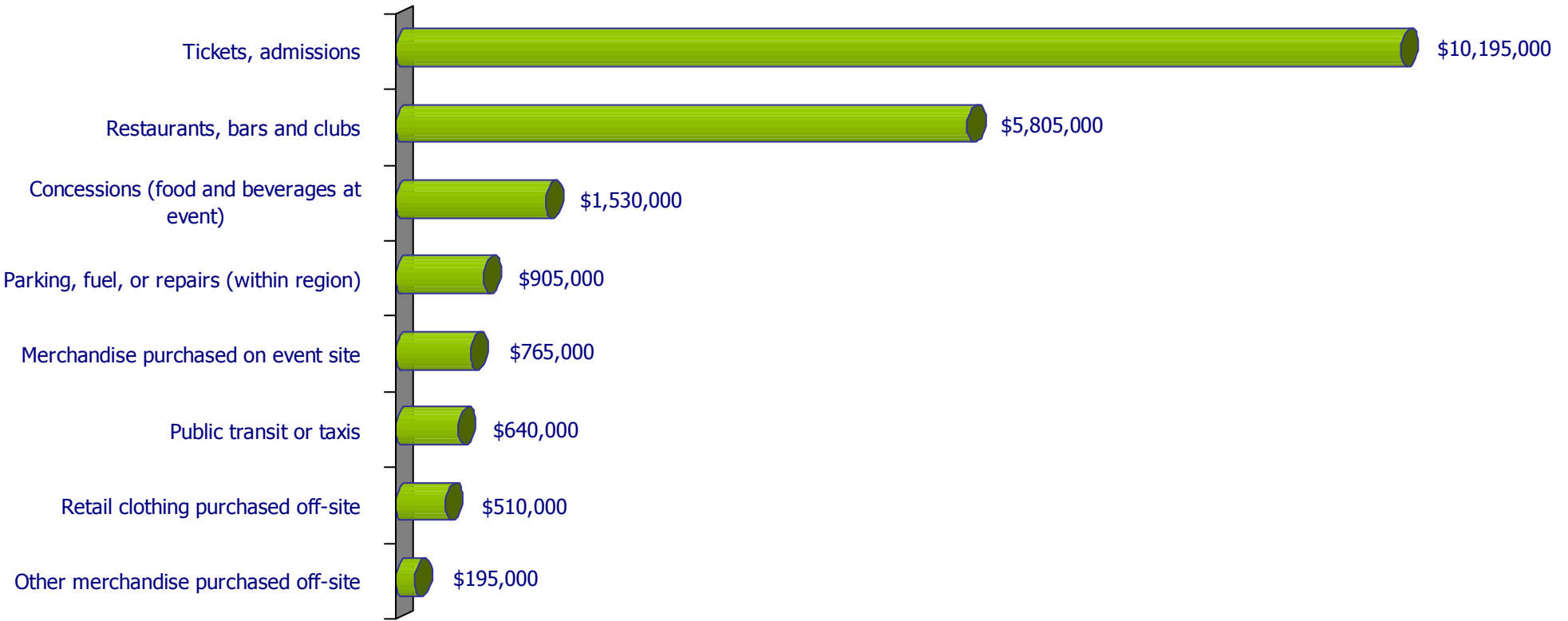
Proportion of spending by non-locals attributable to new attractions funded by Celebrate Ontario



Total spending by non-locals: \$2,637,000

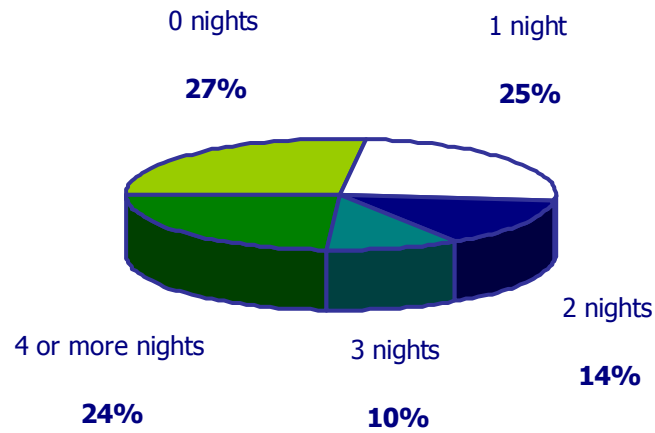
Spending estimates by locals

(not economic impact)



Total spending by locals: \$20,545,000

Overnight stays (among non-locals)



AVERAGE NIGHTS STAYED	Domestic beyond 40 km	International	All among non-locals
	1.3	5.1	2.4

OVERNIGHT STAYS (AMONG NON-LOCALS)

0 nights
1 night
2 nights
3 nights
4 or more nights

Domestic beyond 40km	International
37%	7%
31%	10%
17%	7%
7%	18%
8%	58%

All
27%
25%
14%
10%
24%

AVERAGE NIGHTS STAYED (AMONG NON-LOCALS)

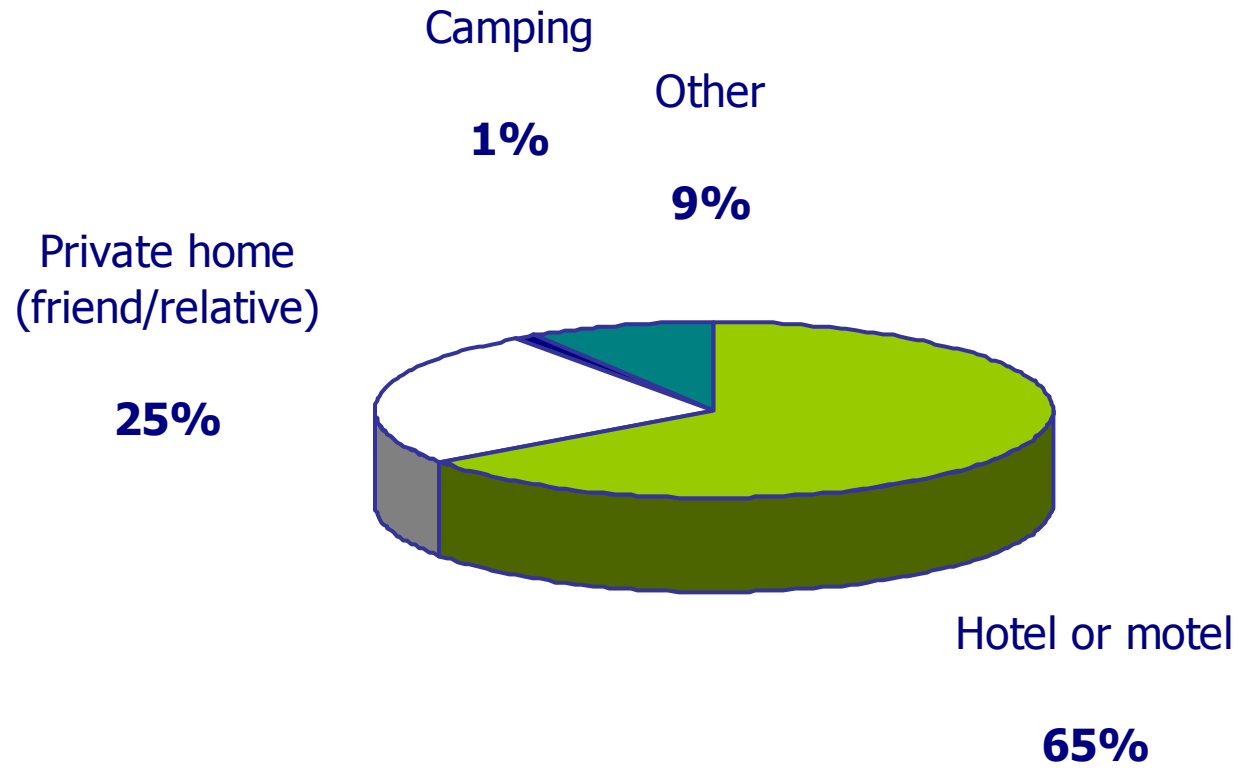
Average nights stayed

Domestic beyond 40km	International
1.3	5.1

All
2.4

Type of Accommodation

(among respondents who stayed overnight)

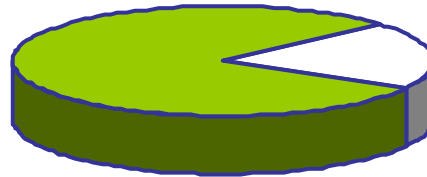


Section 3: Sponsorship

Sponsor recall

Could recall at least one sponsor

80%



Could not recall any sponsors

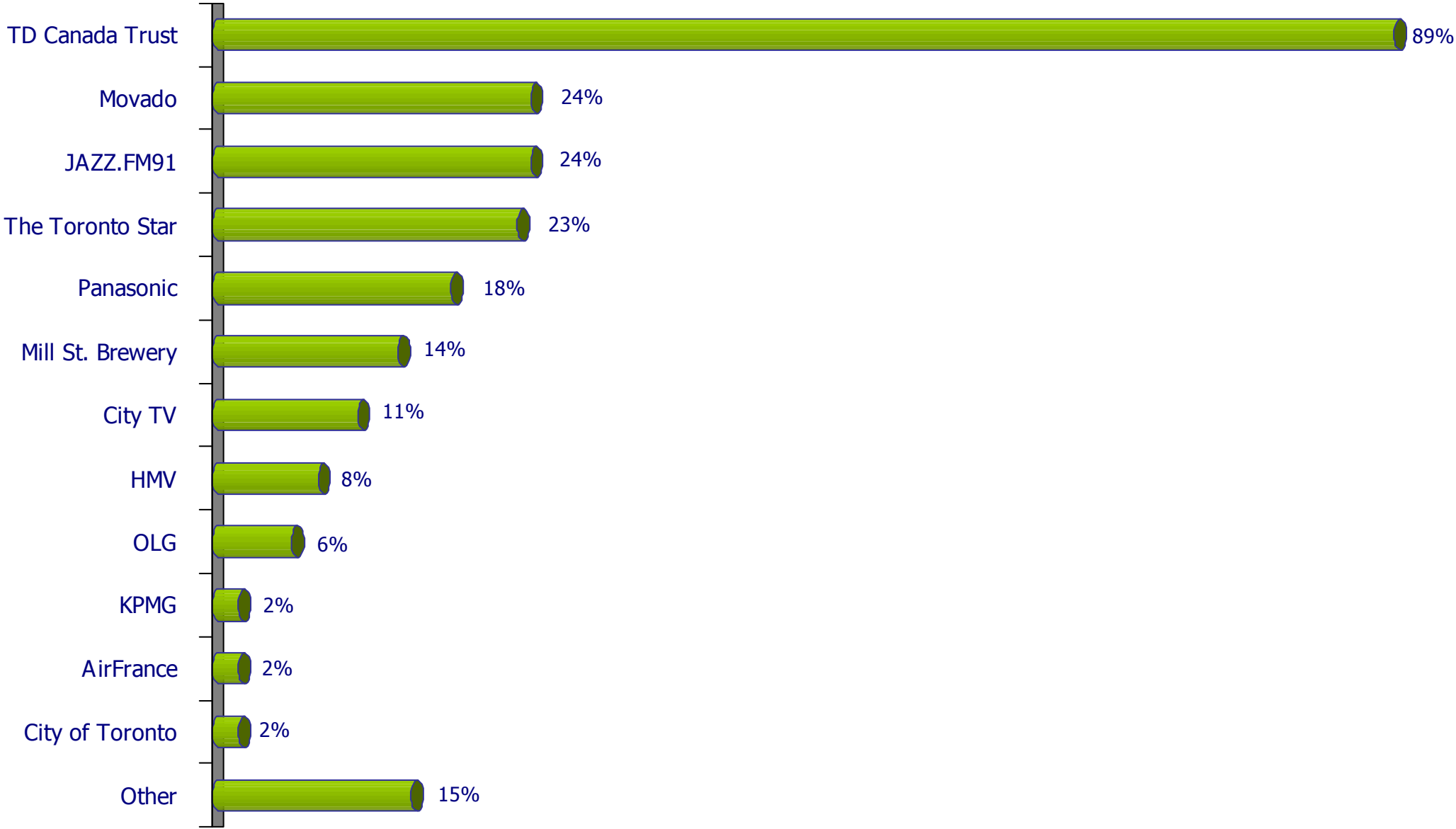
20%

SPONSOR RECALL

	Local	Non-local	Under 30	30-49	50 and over	All
Could recall at least one sponsor	80%	79%	79%	91%	86%	80%
Could not recall any sponsors	20%	21%	21%	9%	14%	20%

Unaided sponsor recall

(among those who could name sponsors)

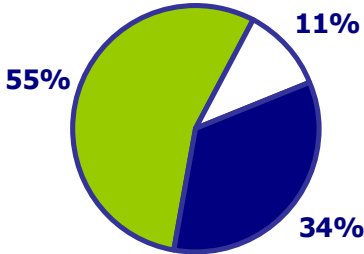


UNAIDED SPONSOR RECALL (AMONG THOSE WHO COULD NAME SPONSORS)

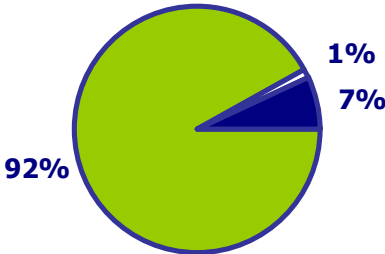
	Local	Non-local	Under 30	30-49	50 and over	All
TD Canada Trust	89%	90%	85%	88%	90%	89%
Movado	25%	22%	24%	21%	23%	24%
JAZZ.FM91	26%	20%	15%	16%	30%	24%
The Toronto Star	21%	25%	22%	18%	23%	23%
Panasonic	17%	20%	28%	20%	17%	18%
Mill St. Brewery	15%	13%	24%	18%	13%	14%
City TV	12%	9%	13%	9%	13%	11%
HMV	8%	8%	13%	5%	9%	8%
OLG	6%	5%	11%	7%	6%	6%
KPMG	3%	2%	0%	0%	6%	2%
Air France	3%	0%	2%	1%	2%	2%
City of Toronto	3%	2%	0%	5%	1%	2%
Other	14%	16%	9%	20%	14%	15%

Statements about event and sponsors

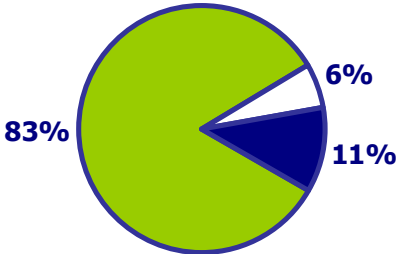
"All other things being equal, I choose to do business with companies that support this event"



"This event enhances the quality of life for people living in this region"



"Events like this need more funding from governments"

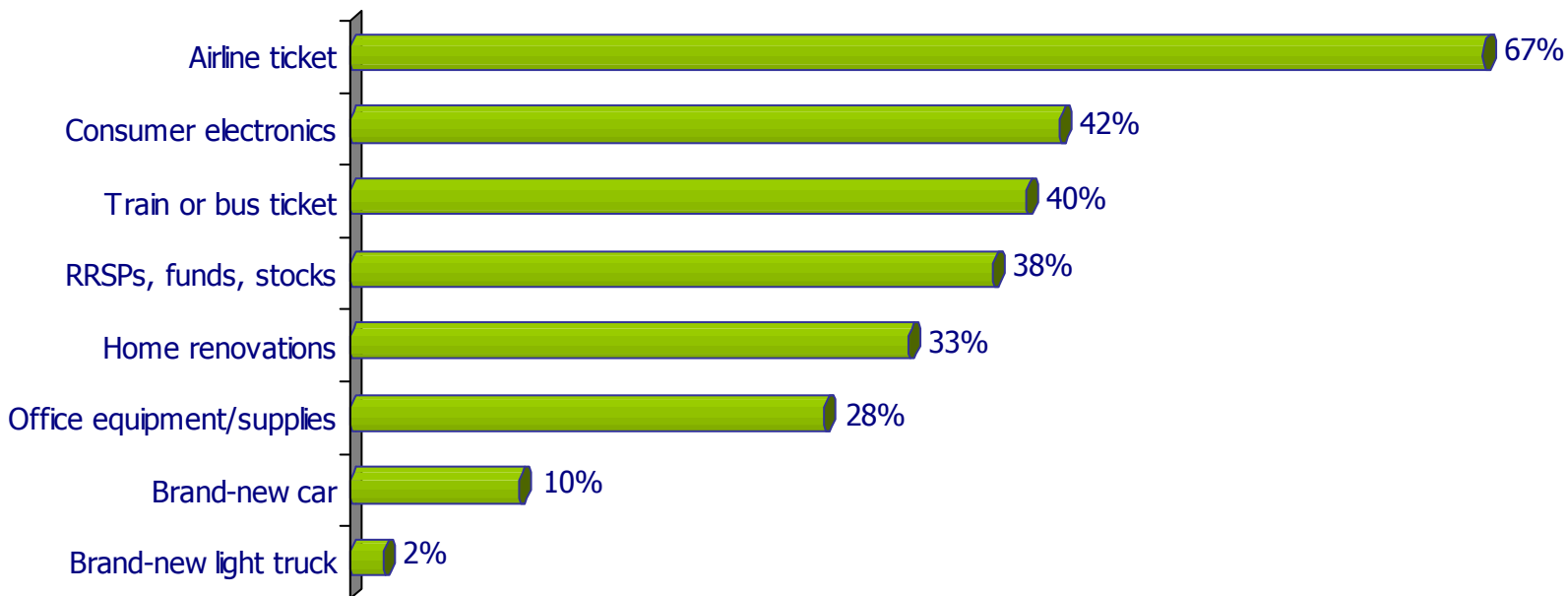


Legend: ■ Agree □ Disagree ■ Not sure

EVENT RATINGS

		Local	Non-local	Under 30	30-49	50 and over	All
"All other things being equal, I choose to do business with companies that support this event"	agree	55%	55%	47%	46%	60%	55%
	disagree	14%	6%	14%	15%	10%	11%
	not sure	31%	39%	39%	39%	31%	34%
"This event enhances the quality of life for people living in this region"	agree	93%	89%	89%	95%	93%	92%
	disagree	1%	2%	2%	0%	1%	1%
	not sure	6%	9%	9%	5%	6%	7%
"Events like this need more funding from governments"	agree	84%	82%	91%	78%	82%	83%
	disagree	5%	7%	2%	9%	6%	6%
	not sure	11%	11%	7%	14%	12%	11%

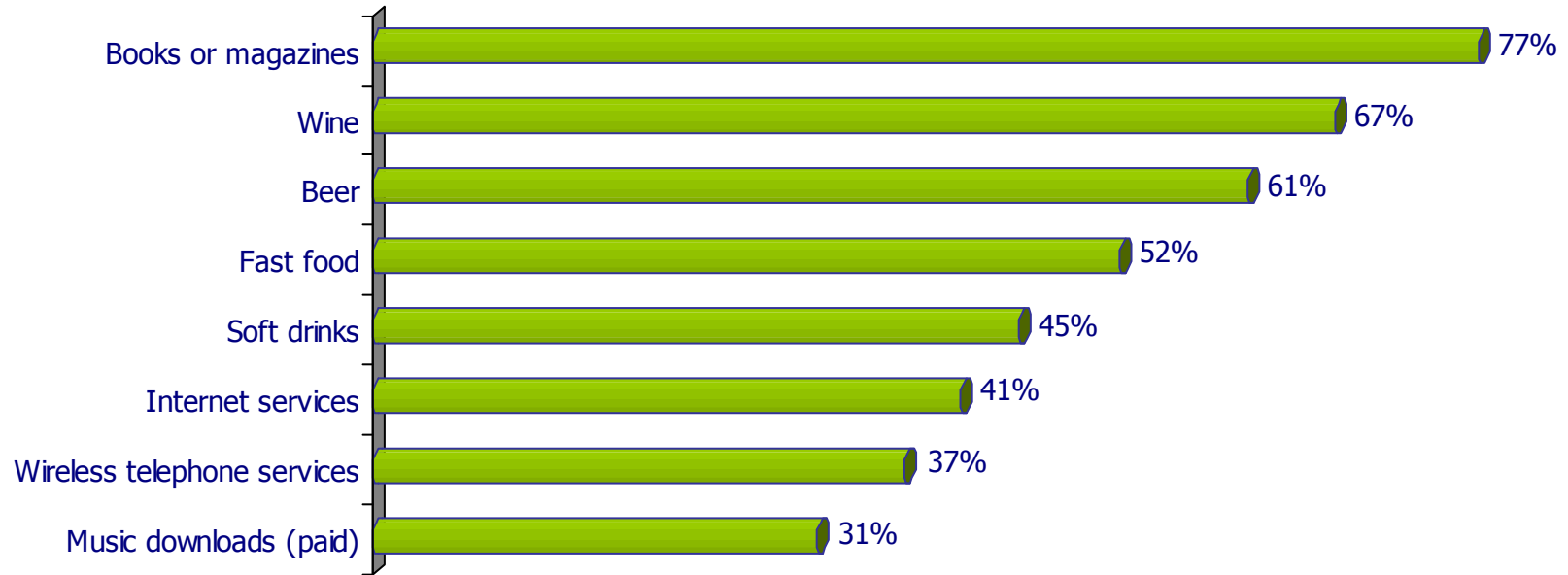
Purchase expectations within next 12 months



PURCHASE EXPECTATIONS WITHIN NEXT 12 MONTHS

	Local	Non-local	Under 30	30-49	50 and over	All
Airline ticket	70%	60%	55%	73%	68%	67%
Consumer electronics	45%	35%	47%	53%	42%	42%
Train or bus ticket	41%	37%	60%	48%	35%	40%
RRSPs, funds, stocks	39%	37%	26%	43%	40%	38%
Home renovations	31%	38%	7%	31%	39%	33%
Office equipment/supplies	30%	21%	38%	28%	30%	28%
Brand-new car	9%	13%	9%	5%	10%	10%
Brand new light truck	1%	5%	2%	3%	0%	2%

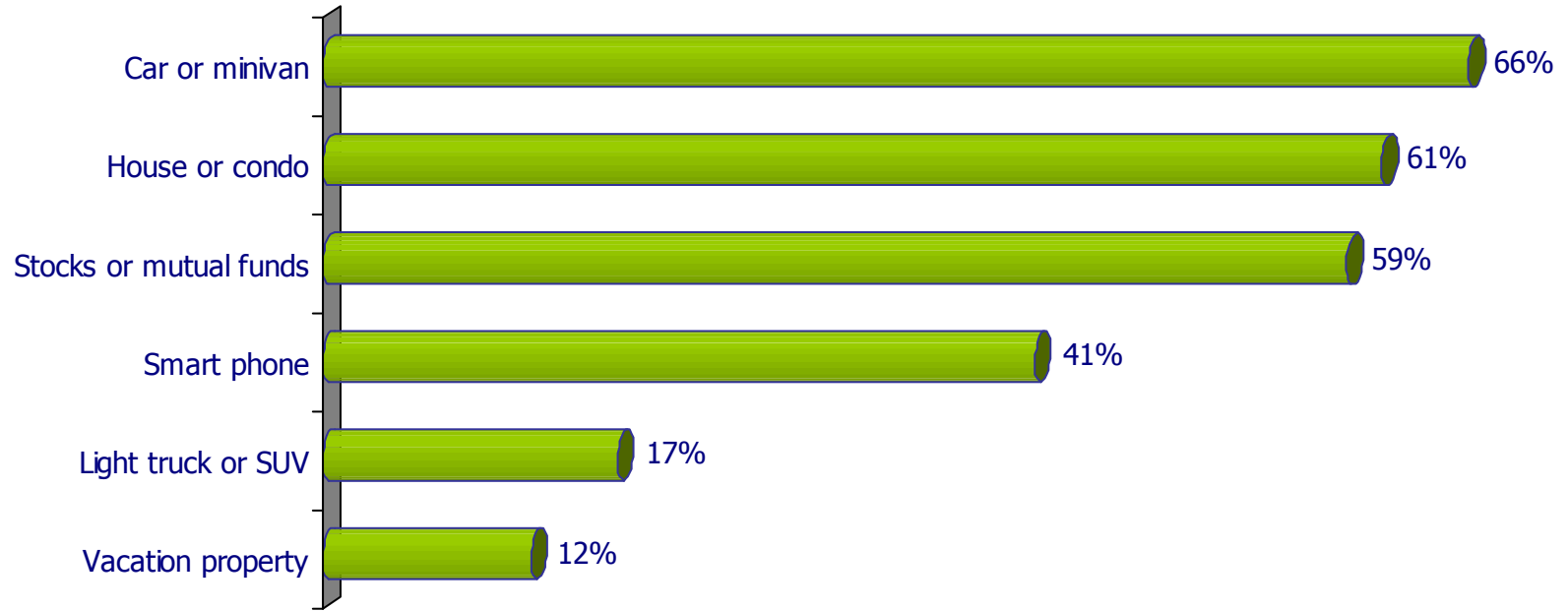
Purchase expectations within next 30 days



PURCHASE EXPECTATIONS WITHIN NEXT 30 DAYS

	Local	Non-local	Under 30	30-49	50 and over	All
Books or magazines	79%	72%	74%	73%	83%	77%
Wine	69%	65%	45%	64%	77%	67%
Beer	63%	60%	62%	68%	66%	61%
Fast food	51%	54%	67%	59%	53%	52%
Soft drinks	45%	44%	62%	55%	41%	45%
Internet services	44%	37%	29%	48%	42%	41%
Wireless telephone services	39%	32%	40%	44%	39%	37%
Music downloads (paid)	31%	32%	33%	44%	29%	31%

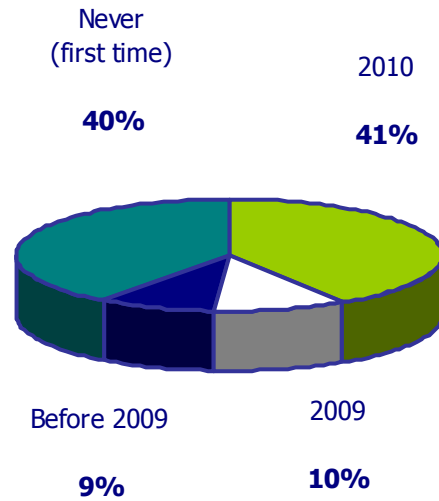
Items currently owned



ITEMS CURRENTLY OWNED

	Local	Non-local	Under 30	30-49	50 and over	All
Car or minivan	64%	72%	38%	59%	75%	66%
House or condo	59%	67%	10%	62%	77%	61%
Stocks or mutual funds	61%	55%	24%	53%	76%	59%
Smart phone	41%	43%	66%	57%	32%	41%
Light truck or SUV	12%	29%	3%	21%	19%	17%
Vacation property	10%	16%	5%	11%	16%	12%

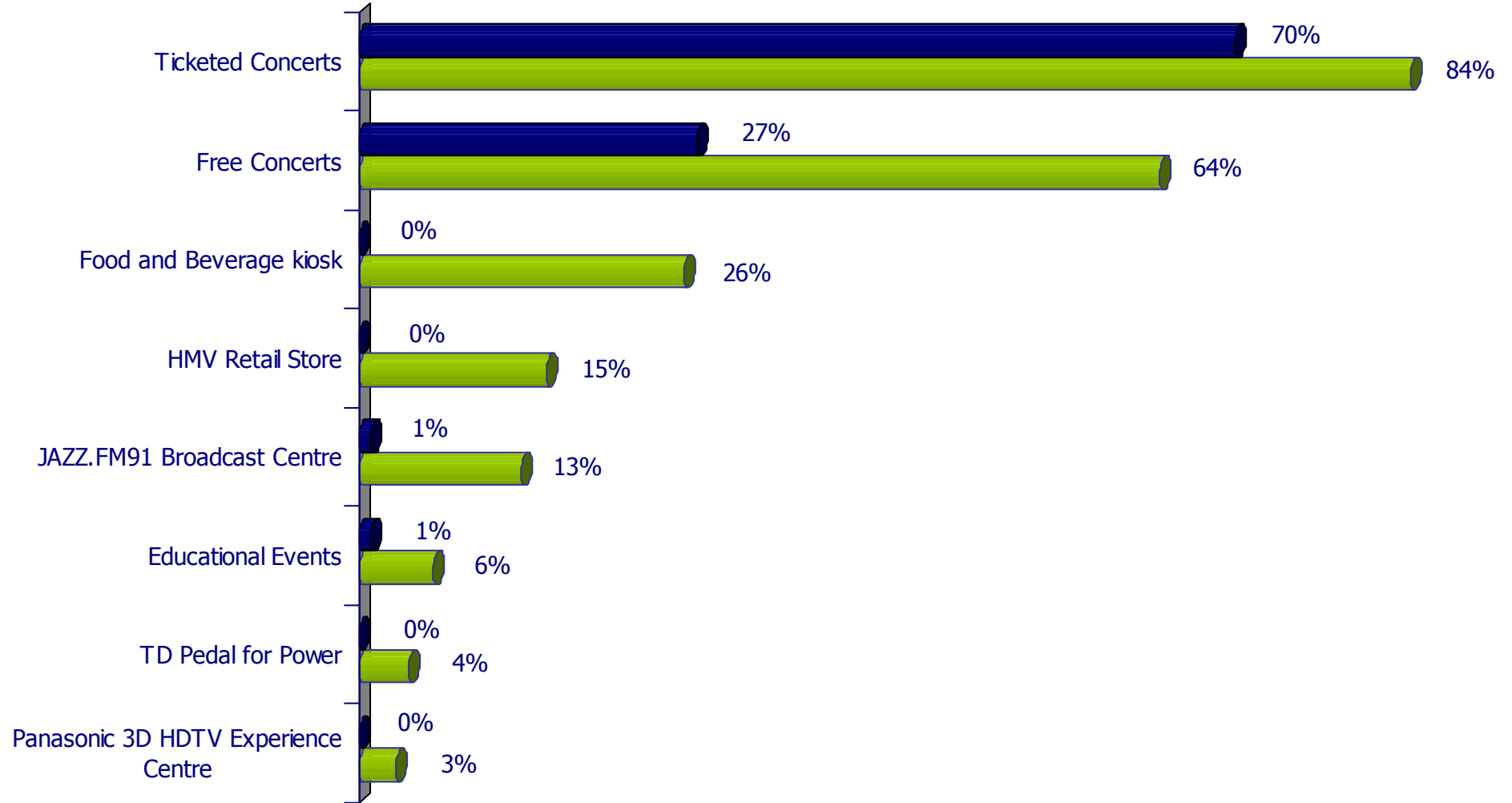
Last year attended festival



LAST YEAR ATTENDED FESTIVAL

	Local	Non-local	Under 30	30-49	50 and over	All
2010	49%	23%	19%	27%	53%	41%
2009	11%	9%	4%	10%	8%	10%
Before 2009	9%	9%	9%	10%	7%	9%
Never (first time)	31%	59%	68%	54%	31%	40%

Reasons for visiting event



REASONS FOR VISITING EVENT

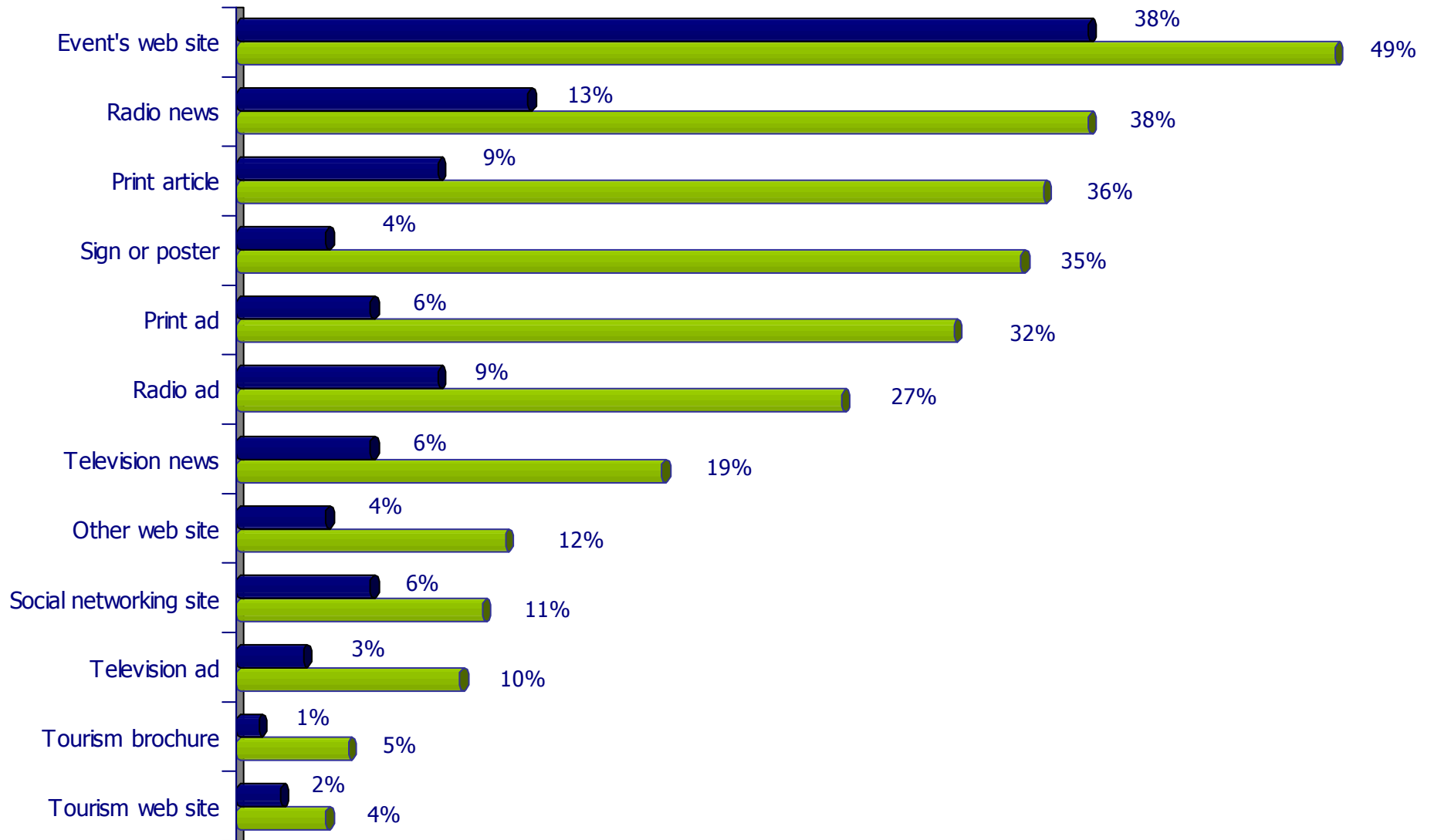
Ticketed Concerts
Free Concerts
Food and Beverage kiosk
HMV Retail Store
JAZZ.FM91 Broadcast Centre
Educational Events
TD Pedal for Power
Panasonic 3D HDTV Experience Centre

Locals		Non-locals	
One of reasons	Main reason	One of reasons	Main reason
83%	68%	85%	74%
68%	29%	56%	24%
26%	0%	27%	1%
16%	0%	15%	0%
14%	1%	12%	0%
6%	1%	6%	1%
3%	0%	6%	0%
2%	0%	5%	0%

Under 30		30-49		50 and over	
One of reasons	Main reason	One of reasons	Main reason	One of reasons	Main reason
83%	66%	85%	73%	85%	69%
69%	30%	60%	26%	67%	28%
38%	2%	26%	0%	29%	0%
19%	0%	15%	0%	17%	0%
14%	0%	8%	1%	16%	1%
7%	2%	7%	0%	7%	1%
5%	0%	1%	0%	4%	0%
7%	0%	4%	0%	3%	0%

All	
One of reasons	Main Reason
84%	70%
64%	27%
26%	0%
15%	0%
13%	1%
6%	1%
4%	0%
3%	0%

Sources of event information (past 30 days)



SOURCES OF INFORMATION (PAST 30 DAYS)

Event's web site	50%	37%	48%	39%
Radio news	41%	14%	31%	9%
Print article	40%	10%	27%	6%
Sign or poster	41%	4%	22%	4%
Print ad	35%	6%	26%	7%
Radio ad	28%	9%	26%	10%
Television news	21%	7%	14%	4%
Other web site	11%	2%	16%	8%
Social networking site	10%	5%	11%	7%
Television ad	11%	3%	7%	2%
Tourism brochure	5%	1%	5%	1%
Tourism web site	2%	1%	7%	3%

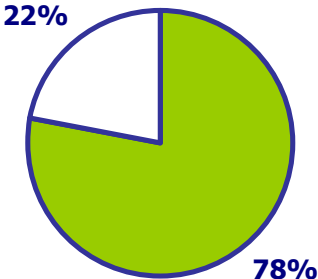
Locals		Non-locals	
Past 30 days	Preferred	Past 30 days	Preferred
50%	37%	48%	39%
41%	14%	31%	9%
40%	10%	27%	6%
41%	4%	22%	4%
35%	6%	26%	7%
28%	9%	26%	10%
21%	7%	14%	4%
11%	2%	16%	8%
10%	5%	11%	7%
11%	3%	7%	2%
5%	1%	5%	1%
2%	1%	7%	3%

Under 30		30-49		50 and over	
Past 30 days	Preferred	Past 30 days	Preferred	Past 30 days	Preferred
41%	29%	49%	42%	60%	44%
26%	10%	33%	10%	46%	12%
29%	4%	27%	10%	43%	8%
41%	12%	39%	5%	36%	1%
31%	0%	29%	5%	39%	9%
22%	4%	24%	10%	31%	11%
26%	6%	11%	3%	22%	5%
22%	4%	13%	1%	11%	3%
22%	20%	17%	8%	7%	1%
17%	10%	7%	3%	9%	3%
2%	2%	4%	0%	6%	1%
2%	0%	6%	3%	4%	2%

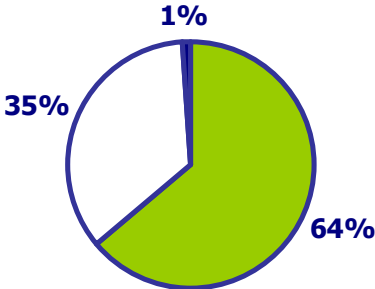
All	
Past 30 days	Preferred
49%	38%
38%	13%
36%	9%
35%	4%
32%	6%
27%	9%
19%	6%
12%	4%
11%	6%
10%	3%
5%	1%
4%	2%

Event Ratings

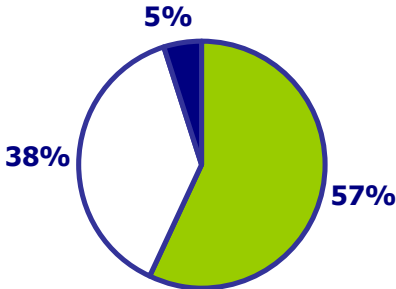
Quality of entertainment



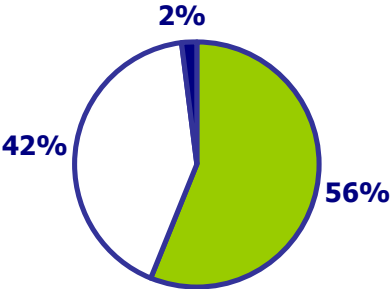
Variety of entertainment



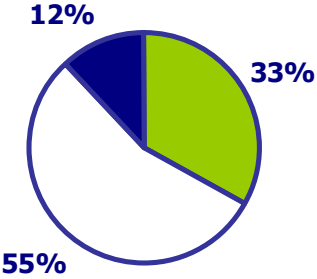
Atmosphere



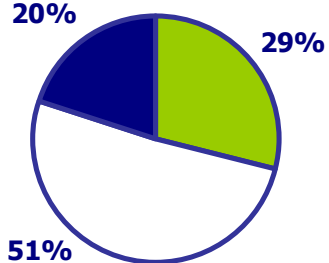
Cleanliness



Quality of food/beverage



Variety of food/beverage

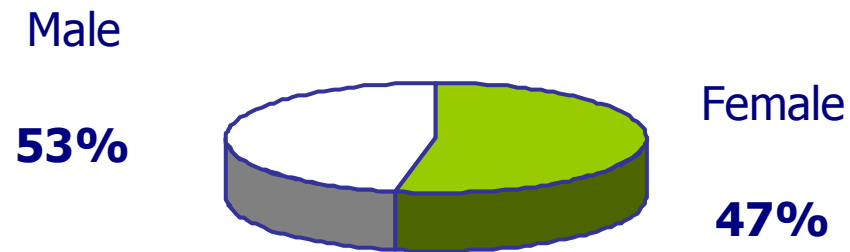


Legend: ■ Excellent □ Good ■ Poor

EVENT RATINGS

		Local	Non-local	Under 30	30-49	50 and over	All
Quality of entertainment	excellent	78%	77%	74%	77%	77%	78%
	good	22%	23%	26%	22%	23%	22%
	poor	0%	0%	0%	1%	0%	0%
Variety of entertainment	excellent	64%	64%	59%	59%	69%	64%
	good	34%	36%	41%	39%	31%	35%
	poor	2%	0%	0%	1%	0%	1%
Atmosphere	excellent	58%	56%	45%	51%	64%	57%
	good	37%	40%	51%	42%	32%	38%
	poor	5%	5%	4%	7%	4%	5%
Cleanliness	excellent	58%	53%	45%	48%	60%	56%
	good	41%	45%	51%	49%	38%	42%
	poor	1%	2%	4%	2%	2%	2%
Quality of food/beverage	excellent	34%	32%	36%	26%	38%	33%
	good	55%	56%	55%	61%	52%	55%
	poor	11%	12%	9%	13%	10%	12%
Variety of food/beverage	excellent	28%	30%	34%	17%	34%	29%
	good	50%	52%	51%	54%	49%	51%
	poor	21%	18%	15%	29%	17%	20%

Gender

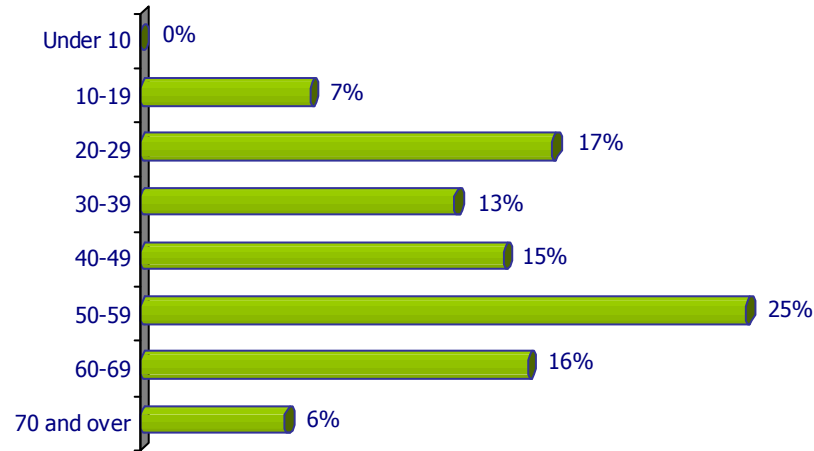


GENDER

	Local	Non-local	Under 30	30-49	50 and over	All
Male	52%	54%	61%	52%	50%	53%
Female	48%	46%	39%	48%	50%	47%

Note: gender includes respondent and members of party

Age Categories



AGE CATEGORIES

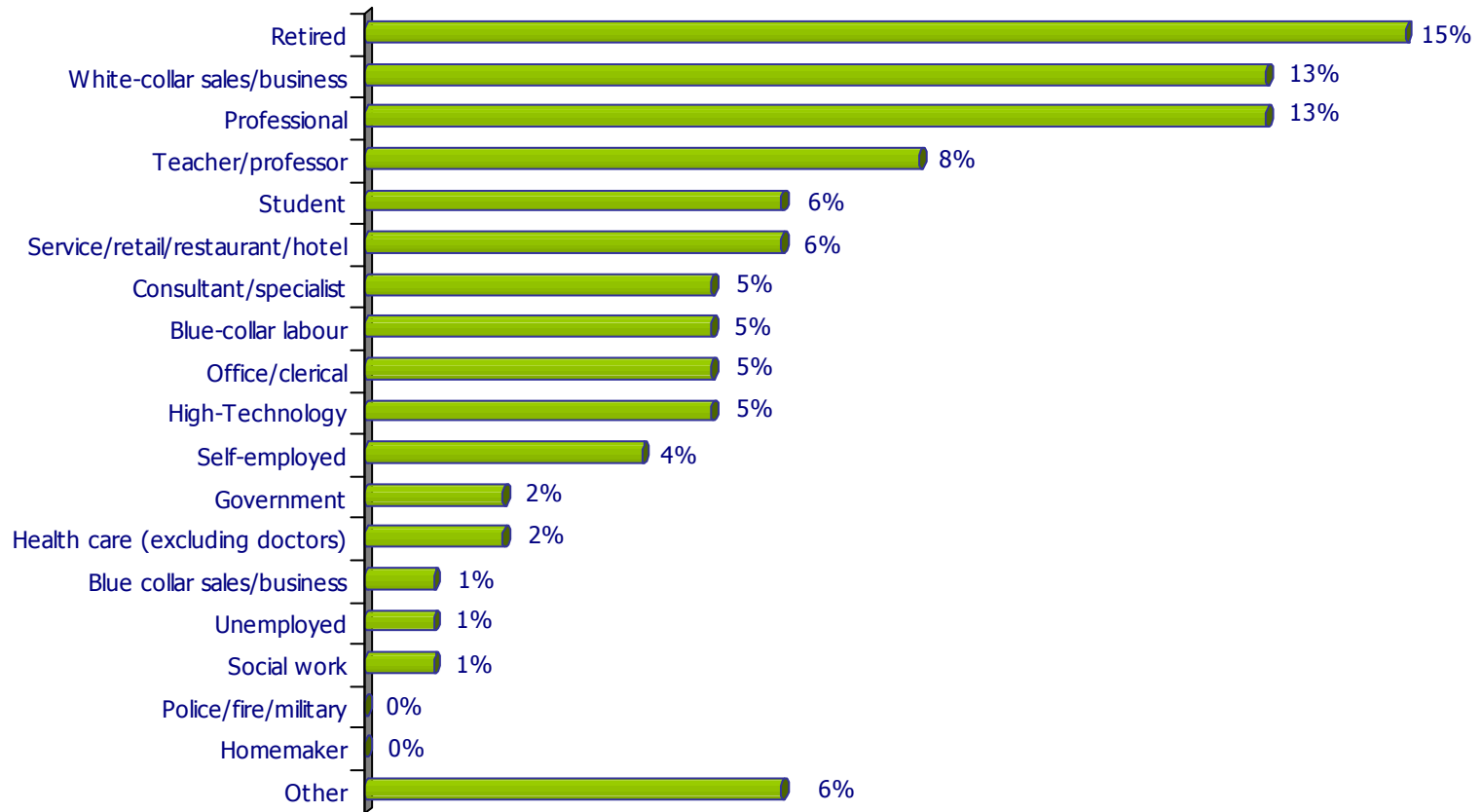
	Local	Non-local	Under 30	30-49	50 and over	All
Under 10	0%	0%	----	----	----	0%
10-19	4%	12%	----	----	----	7%
20-29	18%	17%	----	----	----	17%
30-39	14%	12%	----	----	----	13%
40-49	15%	13%	----	----	----	15%
50-59	25%	26%	----	----	----	25%
60-69	16%	17%	----	----	----	16%
70 and over	8%	4%	----	----	----	6%

AVERAGE AGE

	Local	Non-local	Under 30	30-49	50 and over	All
Average age	45	44	----	----	----	45

Note: age categories include respondent and members of party

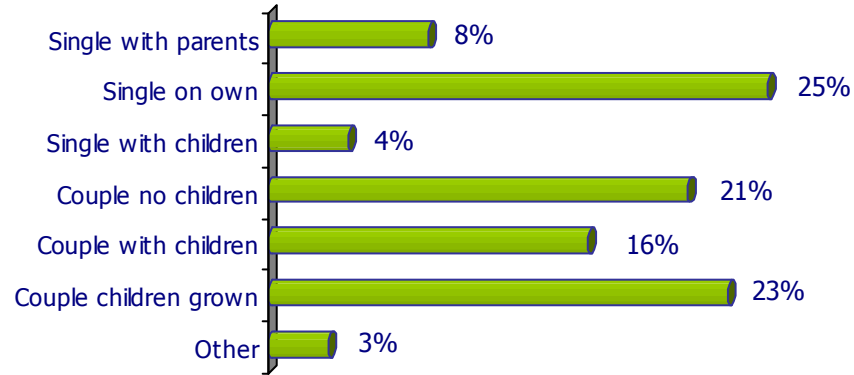
Occupation



OCCUPATION

	Local	Non-local	Under 30	30-49	50 and over	All
Retired	16%	14%	16%	14%	26%	15%
White-collar sales/business	12%	16%	12%	16%	12%	13%
Professional	14%	11%	14%	11%	16%	13%
Teacher/professor	7%	9%	7%	9%	7%	8%
Student	5%	7%	5%	7%	0%	6%
Service/retail/restaurant/hotel	6%	6%	6%	6%	6%	6%
Consultant/specialist	6%	2%	6%	2%	2%	5%
Blue-collar labour	4%	6%	4%	6%	2%	5%
Office/clerical	6%	4%	6%	4%	7%	5%
High-Technology	5%	4%	5%	4%	3%	5%
Self-employed	5%	4%	5%	4%	5%	4%
Government	2%	3%	2%	3%	3%	2%
Health care (excluding doctors)	1%	4%	1%	4%	1%	2%
Blue collar sales/business	1%	1%	1%	1%	0%	1%
Unemployed	1%	1%	1%	1%	0%	1%
Social work	1%	1%	1%	1%	1%	1%
Police/fire/military	0%	1%	0%	1%	1%	0%
Homemaker	1%	0%	1%	0%	0%	0%
Other	5%	8%	5%	8%	8%	6%

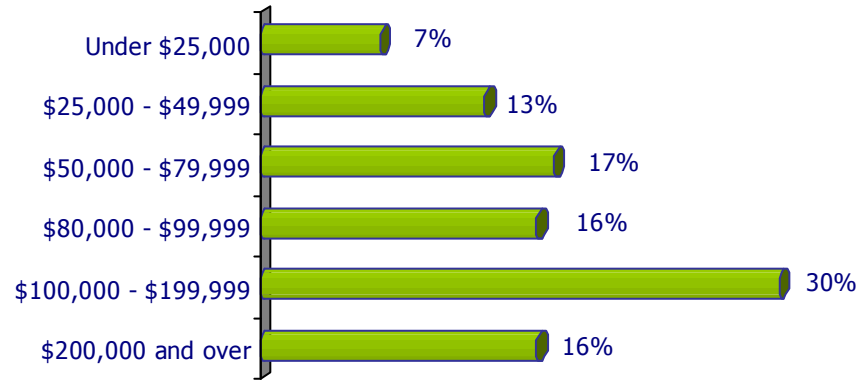
Current Living Situation



CURRENT LIVING SITUATION

	Local	Non-local	Under 30	30-49	50 and over	All
Single with parents	6%	11%	47%	1%	1%	8%
Single on own	30%	14%	31%	24%	18%	25%
Single with children	4%	3%	0%	5%	6%	4%
Couple no children	21%	22%	19%	37%	17%	21%
Couple with children	15%	17%	2%	27%	12%	16%
Couple children grown	21%	28%	0%	2%	43%	23%
Other	2%	5%	2%	4%	3%	3%

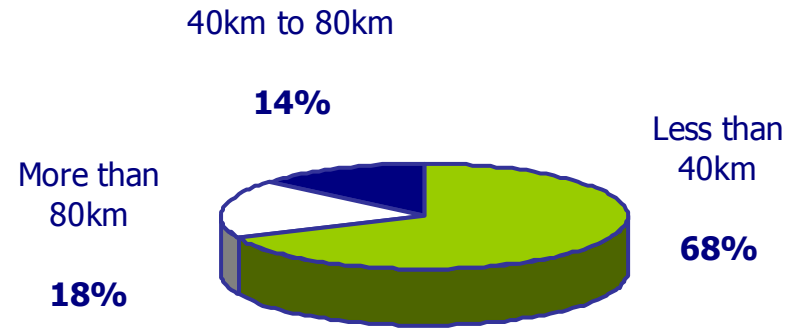
Household Income (before taxes)



HOUSEHOLD INCOME (BEFORE TAXES)

	Local	Non-local	Under 30	30-49	50 and over	All
Under \$25,000	5%	10%	25%	1%	1%	7%
\$25,000 - \$49,999	14%	10%	28%	15%	10%	13%
\$50,000 - \$79,999	16%	20%	17%	19%	17%	17%
\$80,000 - \$99,999	18%	12%	9%	18%	14%	16%
\$100,000 - \$199,999	29%	32%	15%	27%	35%	30%
\$200,000 and over	17%	15%	6%	20%	21%	16%

Distance Residing from Festival Site

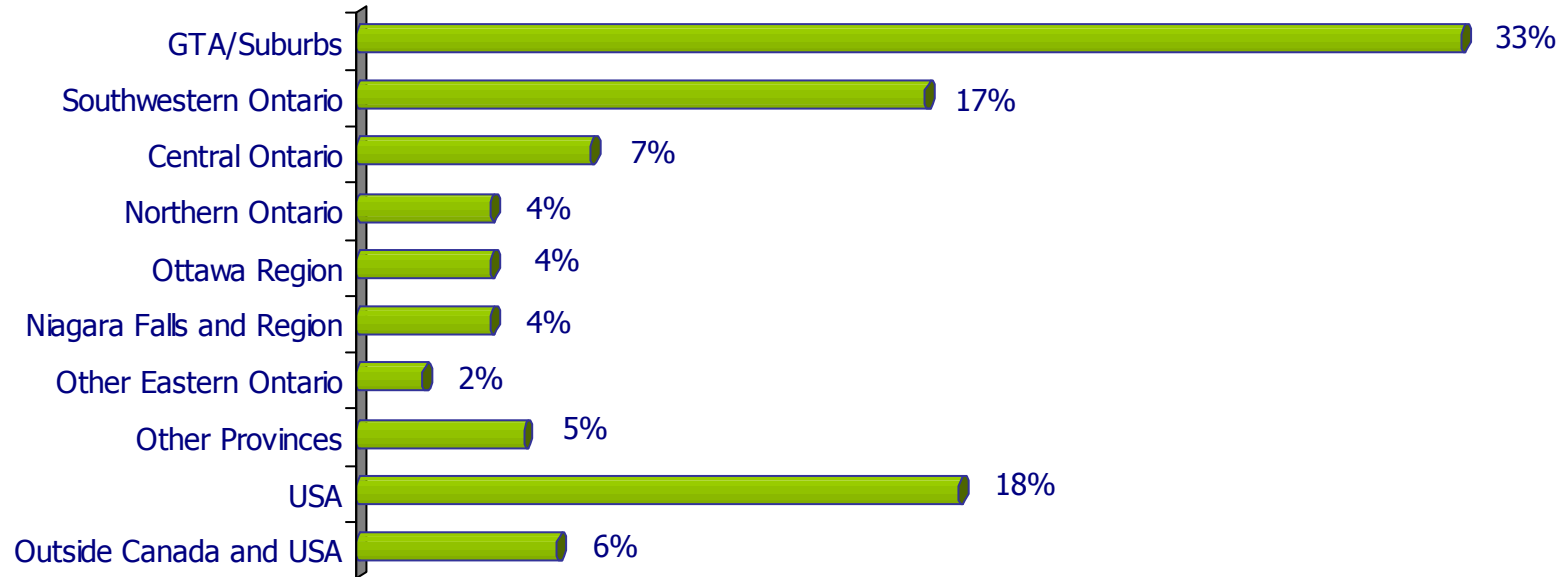


DISTANCE RESIDING FROM FESTIVAL SITE

	Local	Non-local	Under 30	30-49	50 and over	All
Less than 40km	100%	0%	60%	74%	66%	68%
40km to 80km	0%	43%	23%	8%	13%	14%
More than 80km	0%	57%	18%	18%	21%	18%

Place of Residence

(among those residing beyond 40km from festival site)



PLACE OF RESIDENCE (AMONG THOSE RESIDING BEYOND 40KM FROM FESTIVAL SITE)

	Under 30	30-49	50 and over	All
GTA/Suburbs	50%	18%	30%	33%
Southwestern Ontario	17%	24%	9%	17%
Central Ontario	8%	14%	9%	7%
Northern Ontario	0%	9%	4%	4%
Ottawa Region	4%	5%	4%	4%
Niagara Falls and Region	0%	0%	6%	4%
Other Eastern Ontario	9%	5%	0%	2%
Other Provinces	4%	5%	4%	5%
USA	8%	10%	26%	18%
Outside Canada and USA	0%	10%	8%	6%