

TOURISM IN MONTRÉAL

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Prepared by Tourisme Montréal, 1555 Peel Street, Suite 600, Montréal, Québec, H3A 3L8. Telephone (514) 844-5400, fax (514) 844-5757. Produced by Marie-Thérèse Guérin. www.tourisme-montreal.org/stats



Population in 2006

| | |
|---------------------------------|-----------|
| Greater Montréal Area | 3,606,700 |
| Montréal agglomeration (island) | 1,813,000 |
| City of Montréal | 1,584,000 |

Average temperatures

| | °C | °F |
|-----------|------|------|
| January | -8.9 | 16.0 |
| February | -7.2 | 19.0 |
| March | -1.2 | 29.8 |
| April | 7.0 | 44.6 |
| May | 14.5 | 58.1 |
| June | 19.3 | 66.7 |
| July | 22.3 | 72.1 |
| August | 20.8 | 69.4 |
| September | 15.7 | 60.3 |
| October | 9.2 | 48.6 |
| November | 2.5 | 36.5 |
| December | -5.6 | 21.9 |

Languages spoken in 2001

| | City of Montréal % | Greater Montréal % | Province of Québec % |
|------------------|--------------------------|--------------------------|----------------------------|
| French | 52.1 | 68.0 | 81.2 |
| English | 16.9 | 12.5 | 8.0 |
| Other | 30.0 | 15.5 | 10.8 |
| French & English | 1.0 | 1.0 | 0.8 |

Number of visitors – Greater Montréal

| | 2002 | 2003 | 2004 | 2005* |
|------------------------|------------|------------|------------|------------|
| Overnight ¹ | 7,711,000 | 6,900,000 | 7,339,000 | 7,748,000 |
| Same-day ² | 6,434,000 | 6,932,000 | 6,653,000 | 6,765,000 |
| Visitors | 14,145,000 | 13,832,000 | 13,992,000 | 14,243,000 |

¹ Stayed 24 hours or longer; travelled 80 km or more each way.

² Stayed less than 24 hours; travelled 80 km or more each way.

* estimates

Visitors' Expenditures – Greater Montréal

| | 2002 | 2003 | 2004 | 2005* |
|------------------------|-----------------|-----------------|-----------------|-----------------|
| Overnight ¹ | \$2,526,320,000 | \$2,132,586,000 | \$2,462,370,000 | \$2,568,000,000 |
| Same-day ² | \$338,558,000 | \$347,967,000 | \$307,684,000 | \$321,000,000 |
| Visitors | \$2,864,878,000 | \$2,480,553,000 | \$2,770,054,000 | \$2,889,000,000 |

¹ Stayed 24 hours or longer; travelled 80 km or more each way.

² Stayed less than 24 hours; travelled 80 km or more each way.

* estimates

Overnight Visitors to Montréal

Overnight Visitors' Origin by Purpose of Trip 2004

| | Leisure | Business & Convention | Friends & Relatives | Other | All Markets |
|-------------------------|-----------|-----------------------|---------------------|---------|-------------|
| Québec | 957,000 | 401,000 | 1,628,000 | 278,000 | 3,264,000 |
| Canada (outside Québec) | 696,000 | 373,000 | 727,000 | 185,000 | 1,981,000 |
| United States | 729,000 | 258,000 | 265,000 | 82,000 | 1,334,000 |
| Other countries | 381,000 | 165,000 | 188,000 | 26,000 | 760,000 |
| TOTAL | 2,763,000 | 1,197,000 | 2,808,000 | 571,000 | 7,339,000 |

Overnight Visitors' Expenditures by Origin and Purpose of Trip in 2004

| | Leisure | Business & Convention | Friends & Relatives | Other | All Markets |
|-------------------------|---------------|-----------------------|---------------------|-------------|---------------|
| | \$ | \$ | \$ | \$ | \$ |
| Québec | 202,285,000 | 184,764,000 | 185,194,000 | 53,165,000 | 625,408,000 |
| Canada (outside Québec) | 298,637,000 | 201,965,000 | 137,846,000 | 75,782,000 | 714,230,000 |
| United States | 309,926,000 | 183,698,000 | 72,035,000 | 29,664,000 | 595,323,000 |
| Other countries | 198,202,000 | 170,895,000 | 106,388,000 | 15,924,000 | 491,409,000 |
| TOTAL | 1,009,050,000 | 741,322,000 | 501,463,000 | 174,535,000 | 2,426,370,000 |

Average Length of Stay by Origin and Purpose of Trip in 2004

| | Leisure | Business & Convention | Friends & Relatives | Other | All Markets |
|-------------------------|---------|-----------------------|---------------------|-------|-------------|
| Québec | 1.98 | 2.06 | 2.17 | 2.56 | 2.13 |
| Canada (outside Québec) | 3.04 | 2.24 | 2.92 | 2.23 | 2.77 |
| United States | 2.40 | 2.70 | 3.31 | 2.39 | 2.64 |
| Other countries | 5.04 | 5.56 | 11.99 | 6.58 | 6.93 |
| TOTAL | 2.78 | 2.74 | 3.13 | 2.62 | 2.89 |

Overnight Visitors to Montréal

Overnight Visitors' Daily Expenditures in 2004

| | Pleasure \$ | Business & Convention \$ | Friends & Relatives \$ | Other Purposes \$ | All markets \$ |
|-------------------------|----------------|--------------------------------|------------------------------|-------------------------|----------------------|
| Québec | 106.75 | 223.67 | 52.42 | 74.70 | 89.94 |
| Canada (outside Québec) | 141.14 | 241.72 | 64.93 | 183.69 | 130.18 |
| United States | 177.13 | 264.51 | 82.06 | 151.36 | 169.21 |
| Other countries | 103.31 | 186.09 | 47.16 | 256.26 | 93.35 |
| TOTAL | 131.33 | 226.19 | 57.07 | 116.66 | 114.22 |

Quarterly Breakdown of Overnight Visitors in 2004

| | Quarter I | Quarter II | Quarter III | Quarter IV | Total |
|-------------------------|-----------|------------|-------------|------------|-----------|
| Québec | 763,000 | 737,000 | 1,036,000 | 729,000 | 3,264,000 |
| Canada (outside Québec) | 421,000 | 527,000 | 586,000 | 447,000 | 1,981,000 |
| United States | 198,000 | 351,000 | 497,000 | 288,000 | 1,334,000 |
| Other countries | 84,000 | 185,000 | 359,000 | 132,000 | 760,000 |
| TOTAL | 1,466,000 | 1,800,000 | 2,478,000 | 1,596,000 | 7,339,000 |

Breakdown of Overnight Visitors' Expenditures in 2004

| | Total Expenditures (\$) | % | Average Daily Expenditure (\$) |
|-----------------------------|----------------------------|-------|-----------------------------------|
| Local public transportation | 84,069,000 | 3.5 | 3.88 |
| Private transportation | 276,568,000 | 11.4 | 13.02 |
| Accommodation | 764,445,000 | 31.5 | 35.98 |
| Meals | 661,407,000 | 27.3 | 31.18 |
| Entertainment, recreation | 222,293,000 | 9.2 | 10.51 |
| Miscellaneous | 417,588,000 | 17.2 | 19.65 |
| TOTAL | 2,426,370,000 | 100.0 | 114.22 |

Economic Impact

Economic Impact in 2004

| | |
|-----------------------------|-----------------|
| Tourism Expenditure in 2004 | \$2,426,370,000 |
| Total Jobs | 73,508 |
| Salaries | \$1,708,216,542 |
| Impact on taxes | \$1,424,327,056 |
| Local | \$169,063,510 |
| Provincial | \$673,398,861 |
| Federal | \$581,864,685 |

Employment in 2004

| Sector | Full-year jobs |
|--|----------------|
| Socio-cultural and commercial services | 48,060 |
| <i>Accommodation</i> | 18,308 |
| <i>Restaurants</i> | 22,763 |
| <i>Entertainment and recreation</i> | 2,495 |
| <i>Other services</i> | 4,494 |
| Retail trade | 9,221 |
| Wholesale trade | 923 |
| Construction | 206 |
| Transportation & storage | 2,933 |
| Finance, insurance & real estate | 3,235 |
| Food services | 1,566 |
| Other sectors | 7,364 |
| TOTAL | 73,508 |

Montréal and other Canadian cities

Comparison of visitors in 2004 (overnight visitors)

| | Montréal | Québec | Toronto | Vancouver |
|-------------------------------------|-----------------|-----------------|-----------------|-----------------|
| Overnight visitors | 7,339,000 | 5,250,000 | 9,848,000 | 5,247,000 |
| Total expenditures | \$2,426,370,000 | \$1,477,488,000 | \$3,540,811,000 | \$2,538,171,000 |
| Origin | | | | |
| <i>Intra-provincial</i> | 44.5% | 66.7% | 45.9% | 23.8% |
| <i>Other Canadian provinces</i> | 26.9% | 12.3% | 18.6% | 20.5% |
| <i>United States</i> | 18.2% | 13.0% | 23.0% | 34.7% |
| <i>Other countries</i> | 10.4% | 7.9% | 12.4% | 21.0% |
| Average expenditure per person/stay | \$330.59 | \$281.44 | \$359.56 | \$483.70 |
| Average length of stay (nights) | 2.89 | 2.74 | 3.42 | 4.36 |

Accommodation

Number of establishments and number of rooms available in 2005

| Territory | Number of establishments | Number of rooms |
|-----------------------|--------------------------|-----------------|
| Greater Montréal Area | 525 | 26,620 |
| City of Montréal | 380 | 21,000 |

This is an estimate and the total does not include university residences.

Hotel occupancy rates – 2001 to 2006

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 |
|-----------|------|------|------|------|------|------|
| January | 50.7 | 47.7 | 48.4 | 47.4 | 44.4 | 45.3 |
| February | 60.0 | 56.4 | 57.3 | 52.7 | 55.2 | 55.4 |
| March | 63.3 | 59.3 | 58.0 | 61.4 | 56.0 | |
| April | 60.9 | 66.8 | 60.3 | 61.4 | 67.0 | |
| May | 74.5 | 75.6 | 68.0 | 75.6 | 66.9 | |
| June | 83.0 | 82.9 | 78.1 | 76.4 | 77.6 | |
| July | 79.7 | 78.5 | 70.0 | 79.7 | 81.4 | |
| August | 86.8 | 87.5 | 77.9 | 83.7 | 81.2 | |
| September | 73.8 | 77.9 | 73.6 | 79.9 | 82.8 | |
| October | 71.2 | 79.2 | 76.4 | 74.3 | 77.6 | |
| November | 63.7 | 62.9 | 59.6 | 61.9 | 66.4 | |
| December | 46.9 | 46.2 | 46.2 | 46.3 | 51.1 | |
| Year | 68.0 | 68.5 | 64.5 | 66.7 | 67.3 | |

Average daily room rates

| | |
|------|----------|
| 1998 | \$108.00 |
| 1999 | \$115.88 |
| 2000 | \$126.37 |
| 2001 | \$132.04 |
| 2002 | \$136.23 |
| 2003 | \$134.87 |
| 2004 | \$135.46 |
| 2005 | \$139.54 |

Conventions

Conventions in Montréal

| | 2002 | 2003 | 2004 | 2005 |
|------------------------|----------|----------|----------|----------|
| Number of events | 385 | 295 | 289 | 249 |
| Number of participants | 290,256 | 302,996 | 307,104 | 424,537 |
| Daily expenditures | \$345.92 | \$355.61 | \$362.72 | \$369.97 |
| Economic spin-offs | \$284 M | \$305 M | \$337 M | \$430 M |

Breakdown of delegates' expenditures in 2004

| | |
|-------------------|------|
| Accommodation | 47 % |
| Meals | 25 % |
| Private transport | 10 % |
| Public transport | 5 % |
| Entertainment | 4 % |
| Other | 9 % |

Average length of stay of delegates in 2004

2.15 nights

Breakdown of conventions by sectors in 2004

| | |
|--------------------------------|------|
| Medical, pharmaceutical | 25 % |
| Administration, finance, legal | 13 % |
| Education | 12 % |
| Science, engineering | 9 % |
| Sales | 6 % |
| Industrial | 4 % |
| Government | 4 % |
| Communications, transportation | 2 % |
| Other | 26 % |

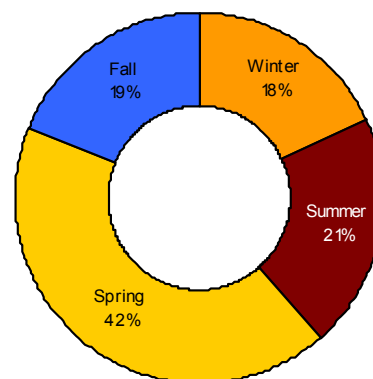
Origin of conventions in 2004

| | |
|-------------------------|------|
| Québec | 29 % |
| Canada (outside Québec) | 27 % |
| United States | 24 % |
| Other countries | 20 % |

Type of conventions in 2004

| | |
|-------------|------|
| Association | 70 % |
| Corporation | 30 % |

Breakdown of conventions by season in 2004



Tourism industry performance

Attractions attendance

| | |
|------|---------------------|
| 2005 | 18,234,000 visitors |
| 2004 | 18,417,000 visitors |
| 2003 | 21,700,000 visitors |
| 2002 | 22,200,000 visitors |
| 2001 | 23,000,000 visitors |

Passengers at airports

| | |
|------|-----------------------|
| 2005 | 10,889,054 passengers |
| 2004 | 10,336,628 passengers |
| 2003 | 8,941,867 passengers |
| 2002 | 8,806,990 passengers |
| 2001 | 9,541,157 passengers |

Requests at information booths

| | |
|------|------------------|
| 2005 | 154,882 requests |
| 2004 | 146,900 requests |
| 2003 | 156,400 requests |
| 2002 | 199,500 requests |
| 2001 | 201,500 requests |

Tourisme Montréal performance

Membership

| | |
|------|-------------|
| 2005 | 755 members |
| 2004 | 806 members |
| 2003 | 850 members |
| 2002 | 819 members |
| 2001 | 788 members |

Media Relations

| | |
|------|--------------------------|
| 2005 | 723 journalists welcomed |
| 2004 | 655 journalists welcomed |
| 2003 | 633 journalists welcomed |
| 2002 | 779 journalists welcomed |
| 2001 | 617 journalists welcomed |

Visitor satisfaction regarding destination

81% of the visitors surveyed said they were very satisfied with their stay in Montréal

99% of the visitors said they were very or somewhat satisfied with the overall hospitality of Montrealers

Overnight Visitors

68% of the visitors said they expect to come back to Montréal in the next several years

93% of the visitors said that the quality-price ratio of the destination was very or somewhat advantageous

Our sources of information

| | |
|---------------------------|---|
| Population, mother tongue | <i>Statistique Canada, Institut de la Statistique du Québec and Ville de Montréal</i> |
| Temperature | <i>Environnement Canada – McGill station</i> |
| Visitor statistics | <i>Statistique Canada – Tourism in Canadian cities 2004</i> |
| Accommodation | <i>Hotel Association of Greater Montréal, Tourisme Québec and Tourisme Montréal</i> |
| Conventions | <i>Palais des congrès de Montréal, Tourisme Montréal and Tourism in Canadian cities 2004</i> |
| Industry performance | <i>Compilation Tourisme Montréal</i> |
| Visitor satisfaction | <i>Étude quantitative auprès des touristes de passage dans la région de Montréal, Tourisme Montréal December 2002</i> |