

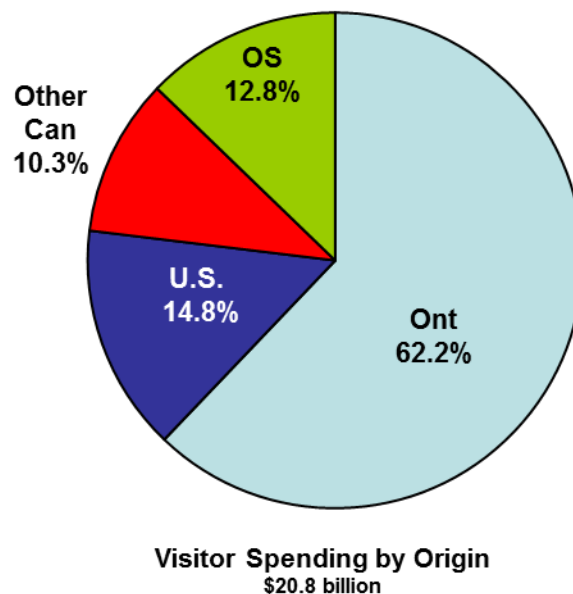
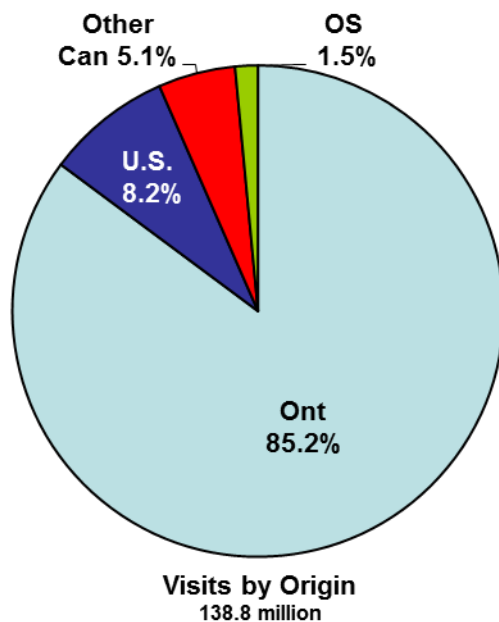
Tourism Statistics Region 12

Tourism Research Unit
Fall 2013

Note: due to changes in Statistics Canada's survey methodology, 2011 domestic data is not comparable to prior years

Ontario Tourism

Visits and Spending

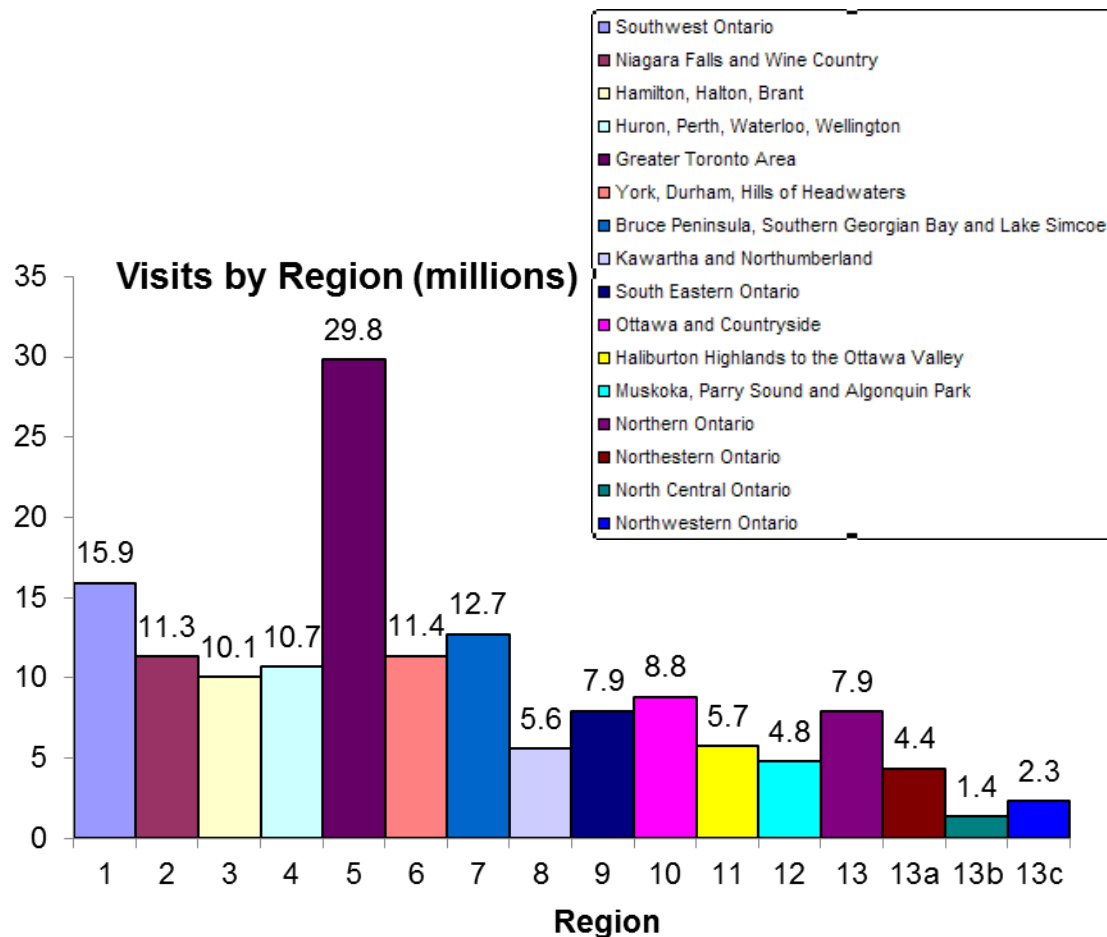


- In 2011, there were 138.8 million visits in Ontario and visitors spent \$20.8 billion
- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 8% of visits and 15% of expenditures
- Overseas visitors account for 2% of visits and 13% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits and Spending by Region

2011	Visits (millions)	Visitor Spending (\$ billions)
Ontario	138.8	20.8
Region 1	11.5%	7.0%
Region 2	8.2%	8.0%
Region 3	7.3%	3.7%
Region 4	7.7%	5.2%
Region 5	21.5%	32.3%
Region 6	8.2%	4.0%
Region 7	9.2%	5.9%
Region 8	4.0%	2.3%
Region 9	5.7%	3.9%
Region 10	6.4%	7.3%
Region 11	4.1%	2.1%
Region 12	3.4%	2.9%
Region 13	5.7%	6.8%



Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Ontario Summary

- In 2011, there were 138.8 million visits in Ontario and visitors spent \$20.8 billion
- Ontario residents accounted for the majority of visits (85%) and spending (62%)
- U.S. visitors represented 8% of visits and 15% of expenditures
- Overseas visitors accounted for 2% of visits and 13% of spending
- Region 5 (GTA) is the largest Region representing 22% of visits and 32% of spending
- Visitors spent an average of \$150/trip in Ontario

Ontario Summary

- The largest proportions of expenditures were spent on Transportation (35%) and Food & Beverage (28%)
- 77% of U.S. visitors came from border states with 32% from New York and 29% from Michigan
- Ontario's 9 target overseas markets (U.K., Japan, Germany, France, Mexico, India, China, South Korea and Brazil) represented 51% of overseas visitors to Ontario. The U.K. was by far the leading overseas source market at 16% of overseas visits
- 65% of visits were same-day visits driven by Ontario residents
- Most trips were to visit friends and relatives (46%) or for pleasure (31%)
- The majority of overnight visitors stayed in private homes (65%) except U.S. visitors who are more likely to stay at a hotel/motel (46%)

Region 12 Tourism

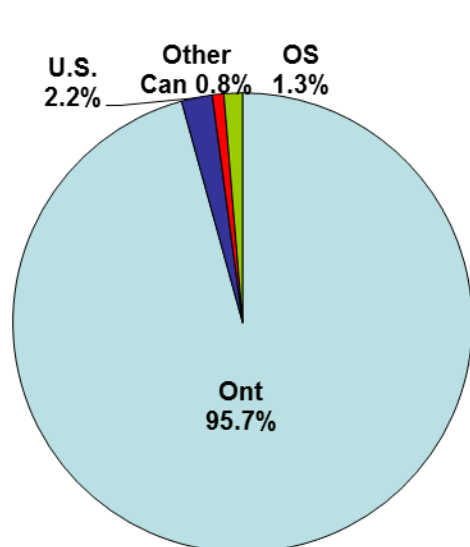
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario	138.8	20.8
Region 12	4.8	0.6
Region 12 proportion of Total Ontario	3.4%	2.9%

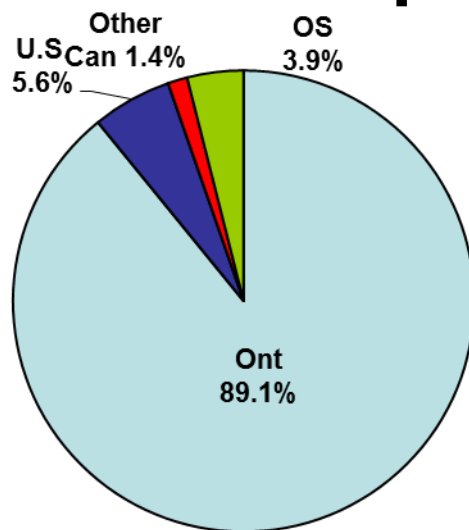
- In 2011, there were 4.8 million visits in Region 12, representing 3.4% of total visits in Ontario
- Visitors in Region 12 spent \$598 million, accounting for 2.9% of total visitor spending in Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits and Spending



Visits by Origin
4.8 million



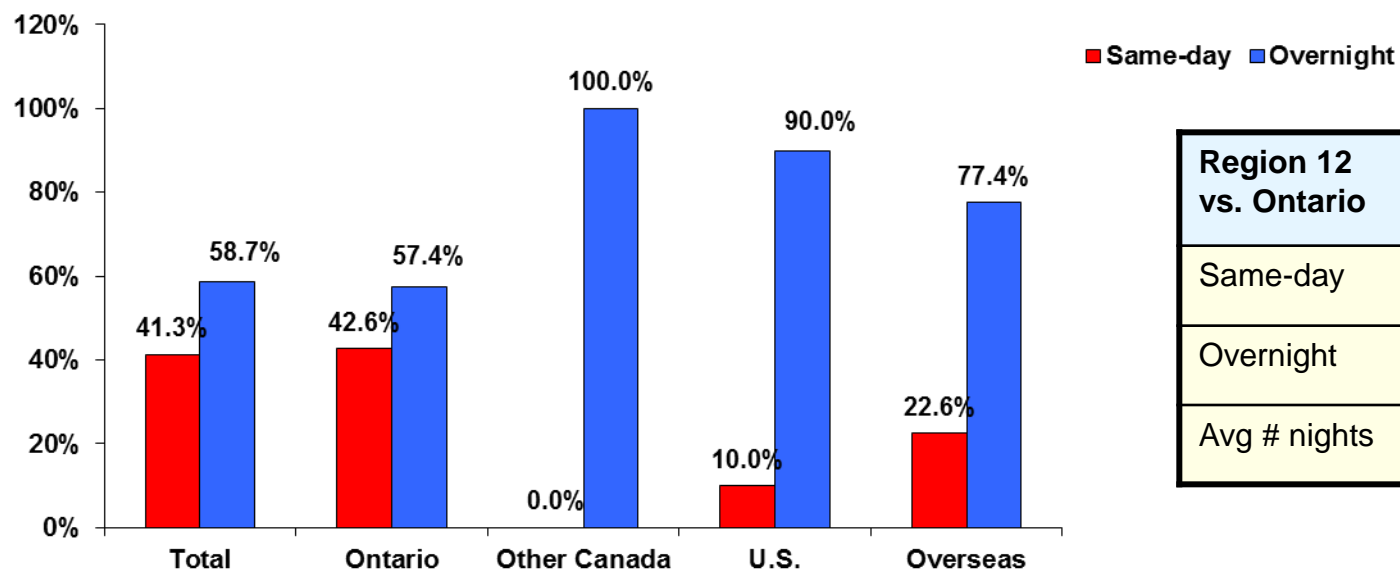
Visitor Spending by Origin
\$598 million

Region 12 vs. Ontario	Visit Index	Spending Index
Ontario	112	143
U.S.	26	38
Other Canada	16	13
Overseas	87	31

- Ontario residents accounted for the vast majority of visits (96%) and spending (89%)
- U.S. visitors accounted for 2% of visits and 6% of expenditures.
- Visitors from Other Canada made up 1% of visits and spending
- Overseas visitors accounted for 1% of visits and 4% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits by Length of Stay



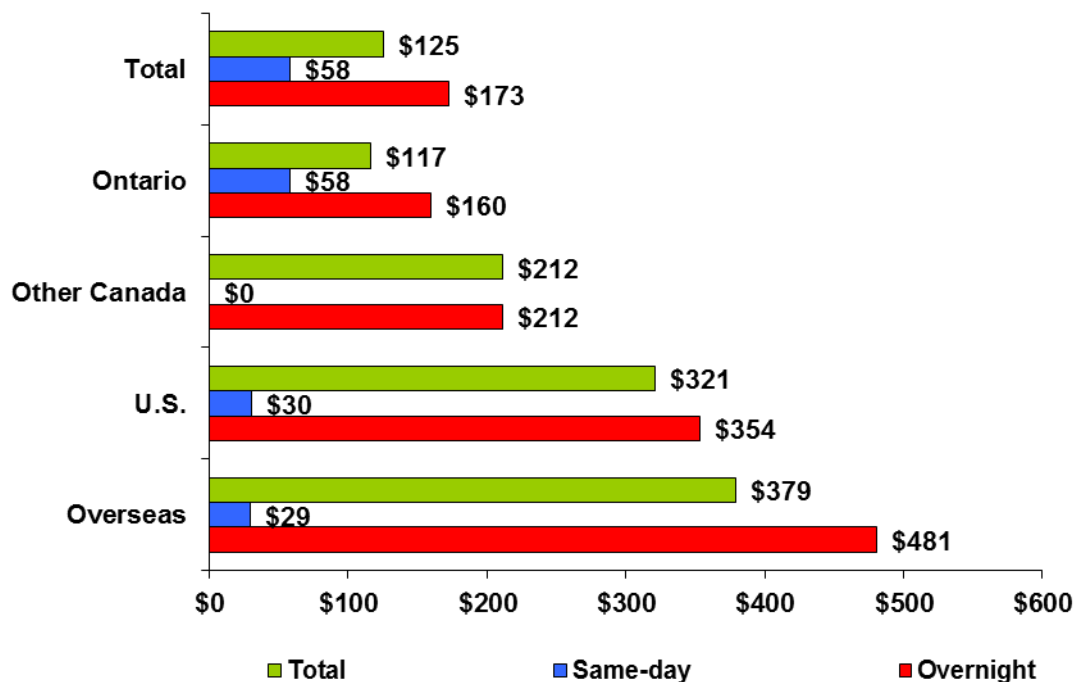
Region 12 vs. Ontario	Length of Stay Index
Same-day	64
Overnight	168
Avg # nights	101

Average # of nights	2.9	2.8	3.4	4.8	5.7
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- The majority (59%) of visits to Region 12 were overnight visits. For comparison, 35% of visits in Ontario were overnight visits
- The average number of nights spent in Region 12 was 2.9, on par with Ontario's average of 2.9 nights

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

\$/Trip by Length of Stay

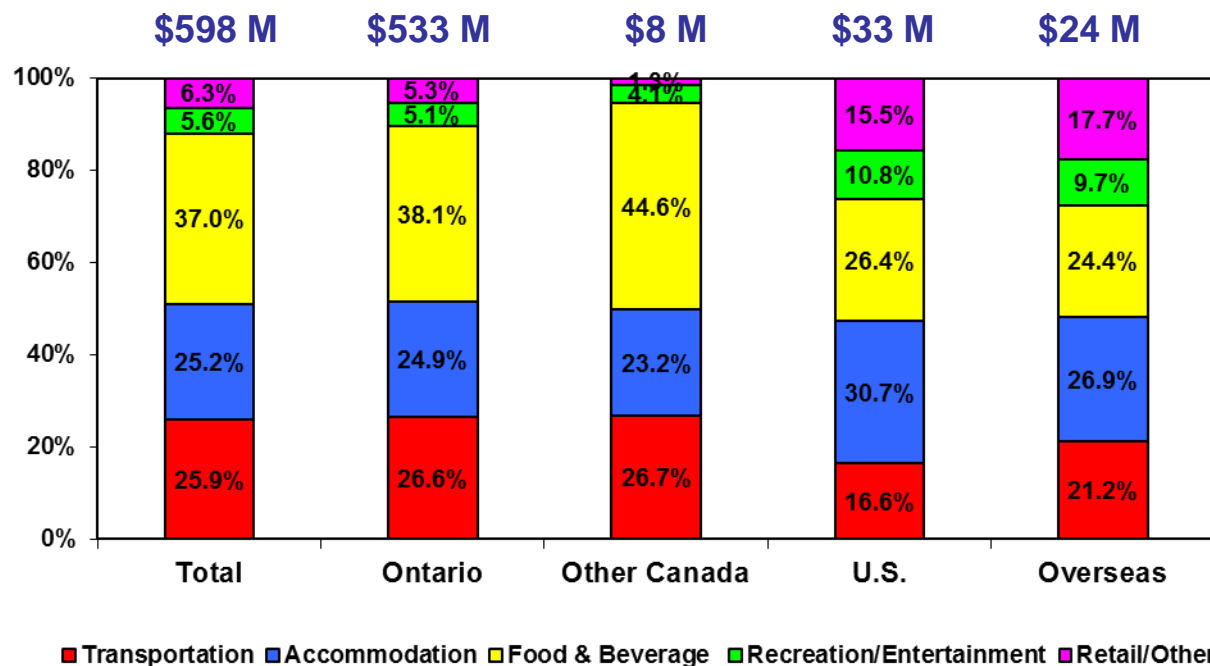


Region 12 vs. Ontario	\$/Trip Index
Total	84
Ontario	107
Other Canada	70
U.S.	119
Overseas	30

- Visitors spent an average of \$125/trip in Region 12 (\$150/trip for Ontario)
- On average, overnight visitors spent 3 times as much as same-day visitors

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Spending by Category

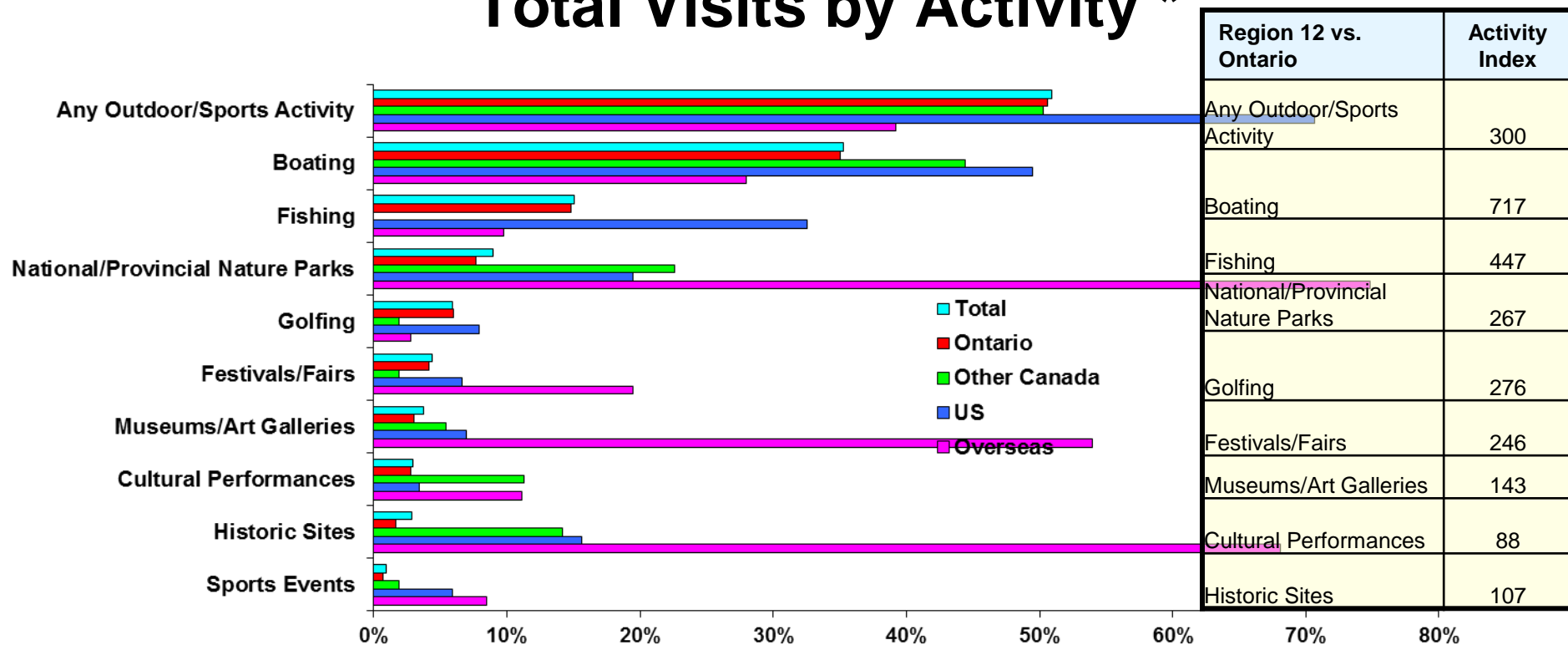


Region 12 vs. Ontario	Spending Index
Transportation	74
Accommodation	165
Food & Beverage	133
Rec./Entertain.	67
Retail/Other	47

- The largest proportions of expenditures were spent on Food & Beverage, Transportation and Accommodations
- Ontario visitors in Region 12 spent 61% of their Food & Beverage dollars at stores and 39% at restaurants. This compares to 26% at stores and 74% at restaurants for Ontario visitors travelling anywhere in Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Total Visits by Activity *

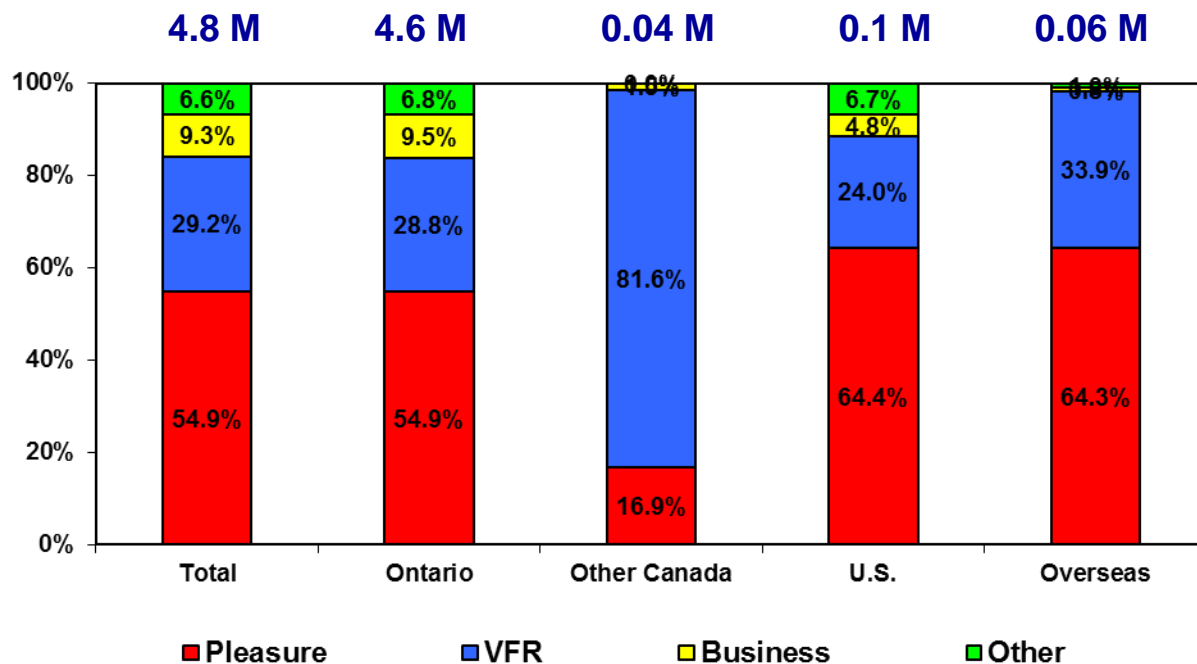


- In general, visitors to Region 12 demonstrated a higher rate of participation in activities compared to visitors to other regions
- outdoor activities are most popular among visitors to Region 12
- Overseas visitors are more likely to visit historic sites and parks

*activity may or may not have taken place in region

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Main Purpose of Visit

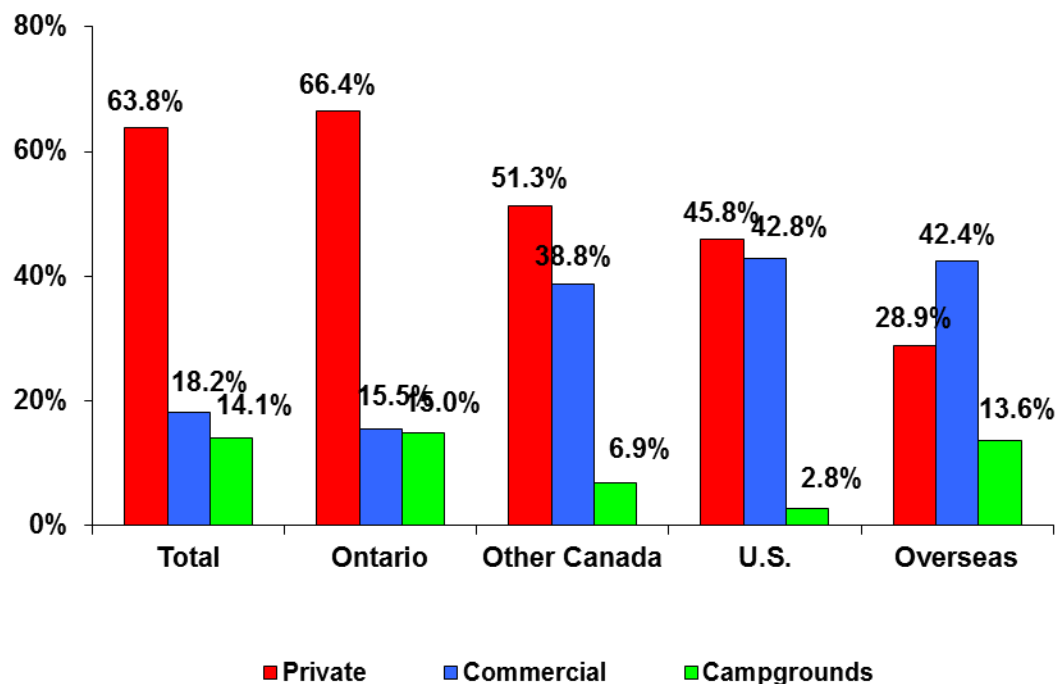


Region 12 vs. Ontario	Purpose Index
Pleasure	175
VFR	63
Business	88
Other	57
VFR: Visiting Friends and / or Relatives	

- Trips to Region 12 are mainly for pleasure
- Other includes shopping, medical, religious, hobby/trade show, etc.

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits by Accommodation Type

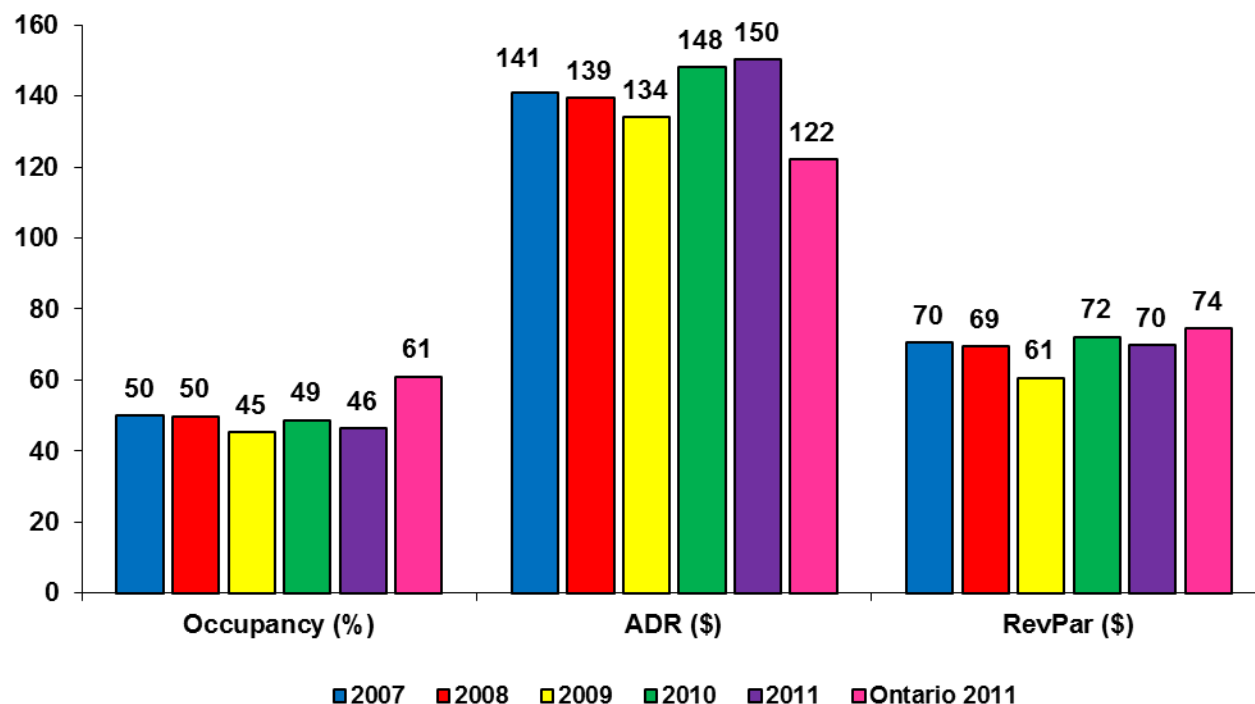


Region 12 vs. Ontario	Type Index
Private	99
Commercial	74
Campground	245

- The majority of overnight visits to Region 12 were spent at unpaid accommodations such as private homes and cottages
- Overseas visitors are more likely to stay in paid accommodations such as hotels and motels

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Hotel Statistics



Region 12 vs. Ontario	Hotel Stats Index 2011
Occupancy	76
ADR	123
RevPar	94
ADR = Average Daily Rate RevPar = Revenue per Available Room	

- In general, occupancy and RevPar dropped from 2010 to 2011, but ADR improved during the same time period
- Region 12 had lower occupancy and RevPar than total Ontario, but a higher ADR

Source: PKF Consulting, Ministry of Tourism and Culture

Park Statistics

Park	# Developed Campsites	Interior Camper-Nights	Visitors	Day Use	Bus Permits	Camper-Nights	Campers	July/Aug % Occupancy
Algonquin	1,330	245,655	818,696	213,312	433	347,126	89,007	77%
Killbear	880		355,964	17,364	38	335,397	49,323	88%
Grundy Lake	485	702	115,594	1,848	0	110,111	23,937	73%
Arrowhead	378		117,411	24,368	1	93,043	28,195	79%
Restoule	286		58,846	5,090	0	50,387	9,161	48%
Six Mile	217		60,386	6,659	17	53,727	14,139	70%
French River		16,319	16,319					
The Massasauga		40,451						
Oastler	148		37,760	1,808	0	35,952	9,717	71%
Mikisew	248		34,674	1,245	0	32,365	8,091	43%
Sturgeon Bay	80		16,015	232	0	15,783	4,932	65%
Total	4,052	303,127	1,631,665	271,926	489	1,073,891	236,502	
% of Ontario	21%	63%	17%	7%	37%	22%	18%	

- Algonquin is the most popular camping destination in Region 12, with the largest number of visitors and overall nights spent

Source: Ontario Parks 2011

Tourism Related Establishments

Type of Establishment	# 2011*	% of Ontario
Accommodations	243	5%
Arts, Entertainment, Recreation	193	2%
Food & Beverage	243	1%
Transportation	45	0%
Travel Services	14	1%
Retail	649	1%
Other Services	279	1%
Total	1,666	1%

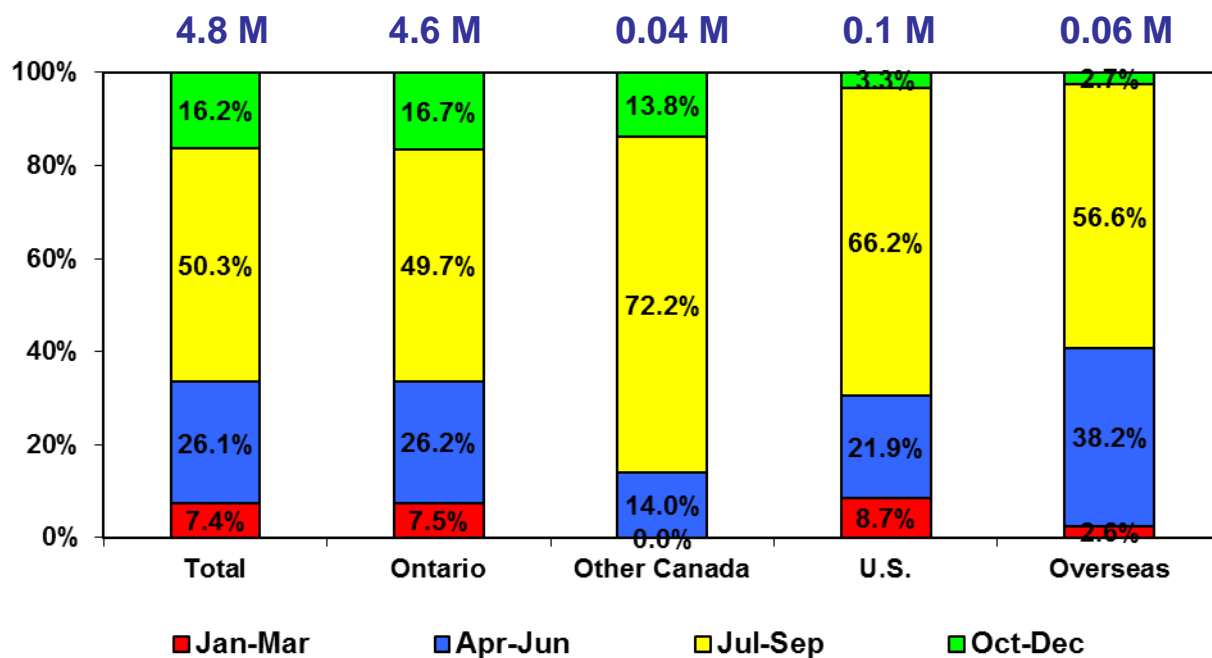
- Region 12 accounts for 1% of Ontario's tourism related establishments

Note: Region 12 represented 3% (4.8 M) of total visits and 3% (\$598 M) of visitor spending

**Represents the actual number of establishments in that category*

Source: Statistics Canada, Business Register 2011

Visits by Time of Year

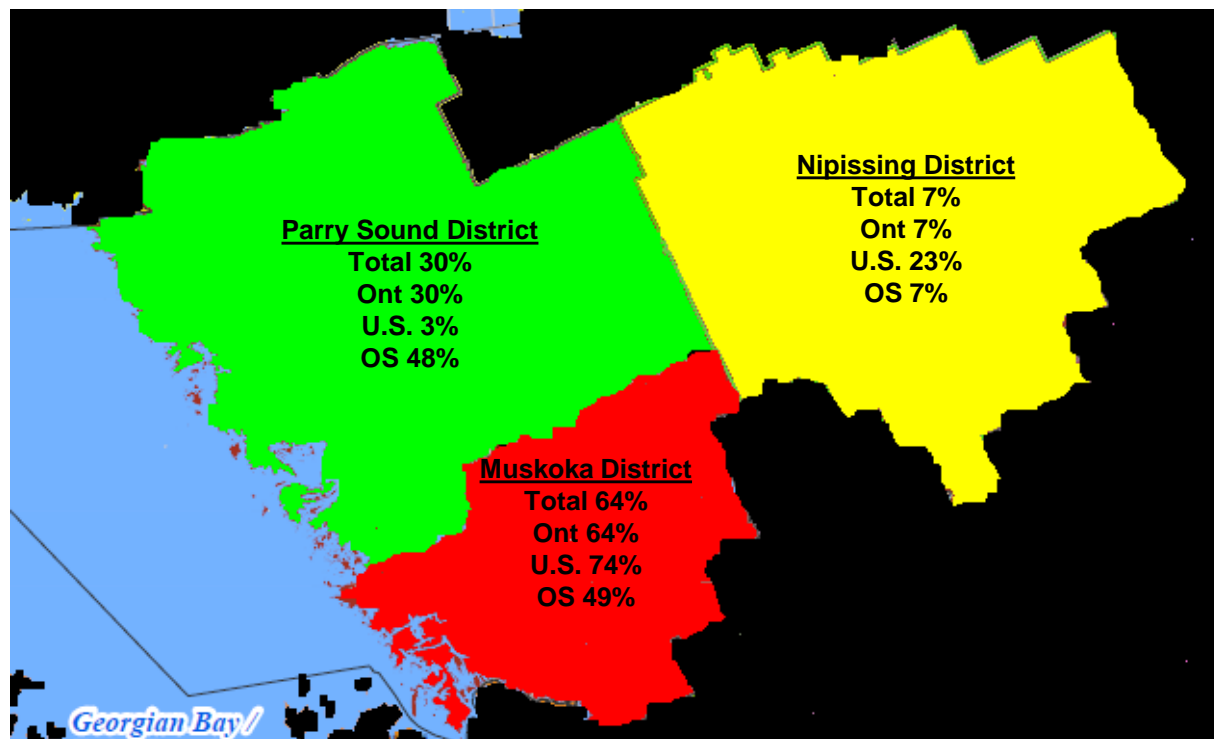


Region 12 vs. Ontario	Quarter Index
Jan-Mar	37
Apr-Jun	98
Jul-Sept	165
Oct-Dec	70

- The largest proportion of trips occur in the summer months, especially among visitors from outside Ontario
- The least number of trips take place in the winter months of January to March
- The region's seasonal pattern is more skewed to summer compared to total Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visitors by Origin by Census Division

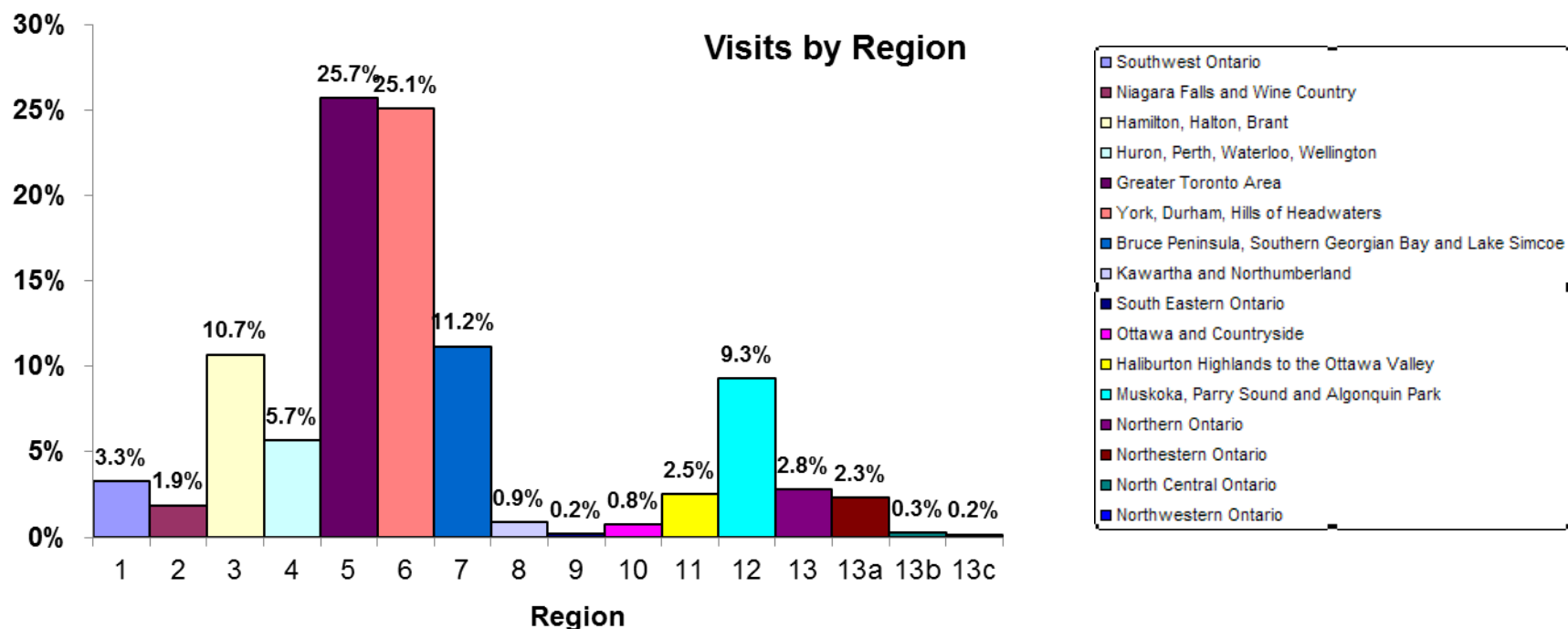


Origin	% of Visits	% of \$
Ontario	96%	89%
U.S.	2%	6%
Overseas	1%	4%
OS = Overseas		

- Muskoka District is the most visited census division in Region 12 receiving 64% of total visitors
- Most visitors only go to one census division per visit while visiting Region 12

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Ontario Visitors to Region 12 by Region of Residence

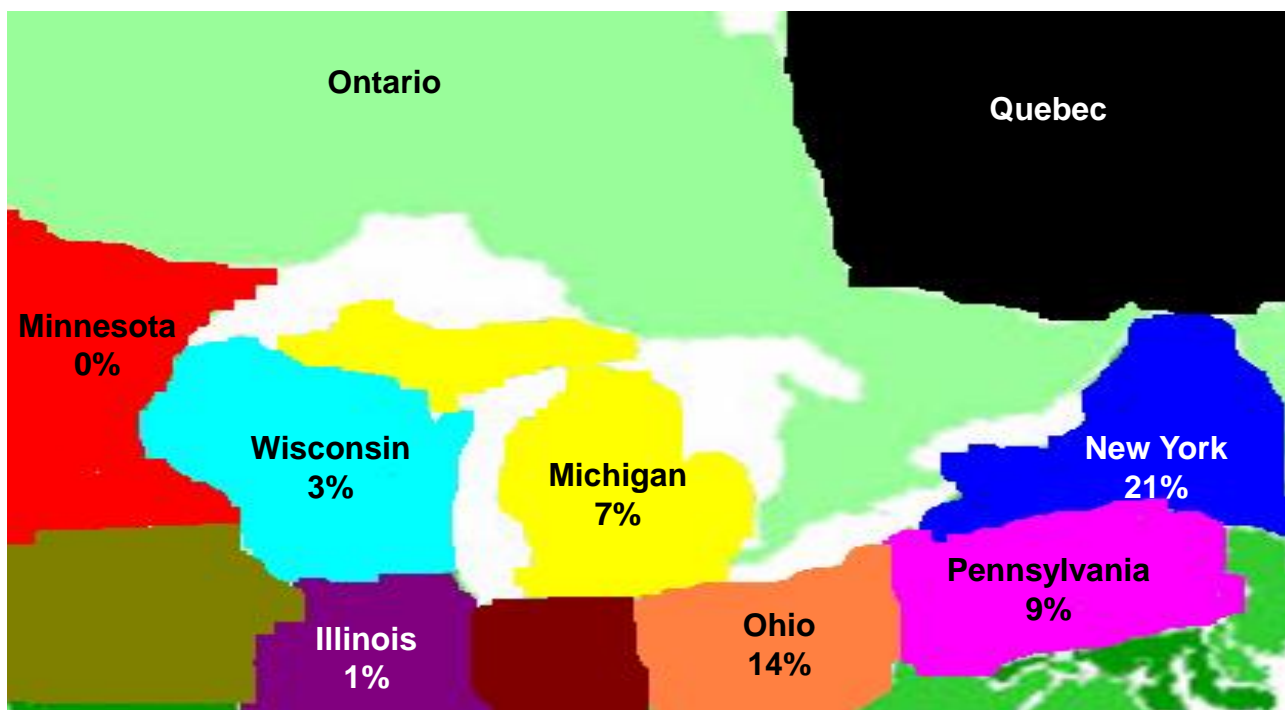


- 26% of Ontario visitors to Region 12 reside in Region 5 and 25% in Region 6

Note: Ontario visitors to Region 12 represented 96% (4.6 M) of total visits and 89% (\$533 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

U.S. Visitors by State of Residence

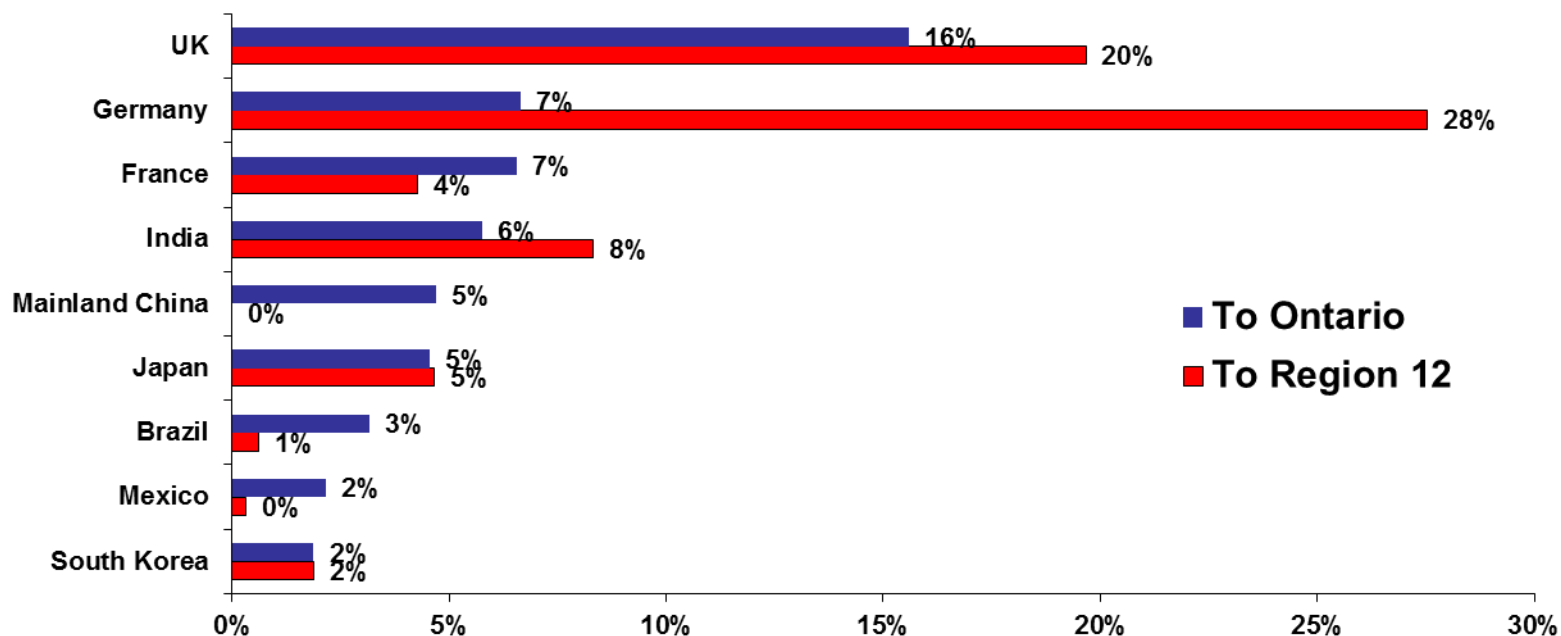


- 55% of U.S. visitors came from border states with 21% from New York

Note: U.S. visitors to Region 12 represented 2% (104,000) of total visits and 6% (\$33 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Overseas Visitors by Country of Residence



- Ontario's 9 overseas target markets represent 67% of overseas visitors to Region 12

Note: Overseas visitors to Region 12 represented 1% (62,000) of total visits and 4% (\$24 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Region 12 Summary

- In 2011, there were 4.8 million visits in Region 12, accounting for 3% of total visits to Ontario. Visitors to Region 12 spent \$598 million, or 3% of total visitor spending in Ontario
- Ontario residents accounted for the vast majority of visits and spending, residents of Other Canada accounted for 1% of visits and spending, U.S. visitors represented 2% of visits and 6% of expenditures, and Overseas visitors accounted for 1% of visits and 4% of spending
- Visitors spent an average of \$125/trip. Overnight visitors spent 3 times as much per trip as same-day visitors.
- The largest proportions of expenditures were spent on Food & Beverage, Transportation and Accommodations

Region 12 Summary

- 26% of Ontario visitors to Region 12 reside in Region 5 and 25% in Region 6
- 55% of U.S. visitors came from border states including 21% from New York State
- Ontario's 9 overseas target markets accounted for 67% of overseas visitors to Region 12
- The majority of visits were overnight
- Most trips were for pleasure trips
- The majority of overnight visitors stayed in unpaid accommodations

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