

Region 12 Tourism Overview

Ministry of Tourism, Culture and Sport

Fall 2014

Agenda

- Tourism Research Unit
- Region 12 Tourism Statistics

Tourism Research Unit

Objectives of the Tourism Research Unit

- Official tourism statistics for Ontario and its 13 tourism regions
- Monitor current performance indicators
- Forecast Ontario tourism trends
- Special research projects to address new and emerging tourism issues or Ministry needs
- Open access to our data via website, publications, user friendly tools, consultations

Tourism Research Partners

Most tourism research projects that the Ministry undertakes are done in partnership with one or more of the following:

- Ontario Tourism Marketing Partnership Corporation (OTMPC)
- Canadian Tourism Commission (CTC)
- Statistics Canada
- Provincial and Territorial Ministries and agencies
- Department of Canadian Heritage
- Parks Canada
- FedNor
- Regional Tourism Organizations (RTOs e.g. Tourism Toronto)

Tourism Research Data Sources

- Travel Survey of Residents of Canada (TSRC)
 - Supplement to monthly Labour Force Survey
 - Methodology changes in 2006 and 2011
- International Travel Survey (ITS)
 - Distributed at land and air entry points
 - Methodology changes in 2013
- Travel Intentions Survey (TI)
- Industry statistics
- Consumer statistics
- Occasional studies


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Tourism research

In the following pages you will find:

- Market reports
- Medium-term forecasts
- Economic impact studies
- Newsletters (quarterly and monthly)
- Seasonal travel intentions
- Historical statistics
- Performance indicators
- Models and software that you can use on your own
- Resources that include maps, definitions and questionnaires

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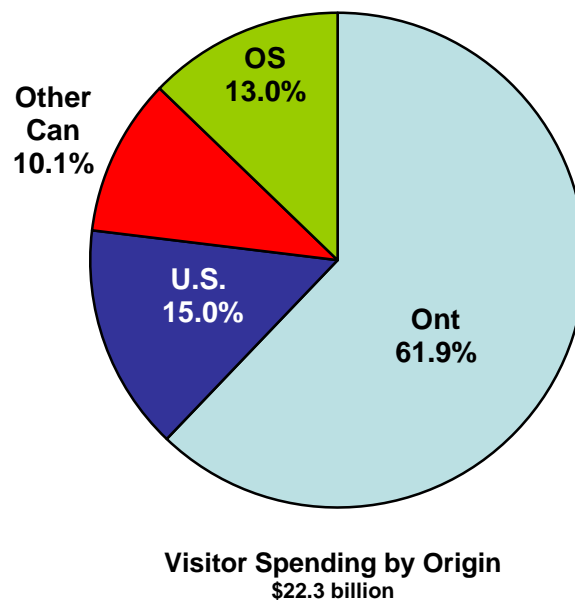
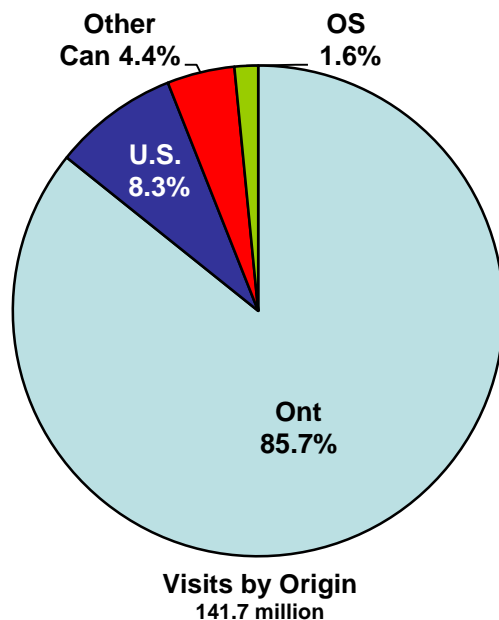
www.ontario.ca/tourismresearch

Ontario Tourism

Economic Impact of Tourism in Ontario 2012

- Tourism receipts totalled **\$28.1 billion**
- Total GDP (direct, indirect and induced) generated by tourism related spending amounted to **\$24.7 billion**, 3.9% of Ontario's GDP
- The total tourism employment impact (direct, indirect and induced) of tourism receipts reached **361,000 jobs**, accounting for 5.2% of Ontario's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$12.1 billion**. \$6.0 billion were federal tax revenues, \$4.9 billion were provincial and \$1.2 billion were municipal
- Tourism is an important export industry, contributing **\$6.2 billion** to Ontario's foreign earnings

Visits and Spending

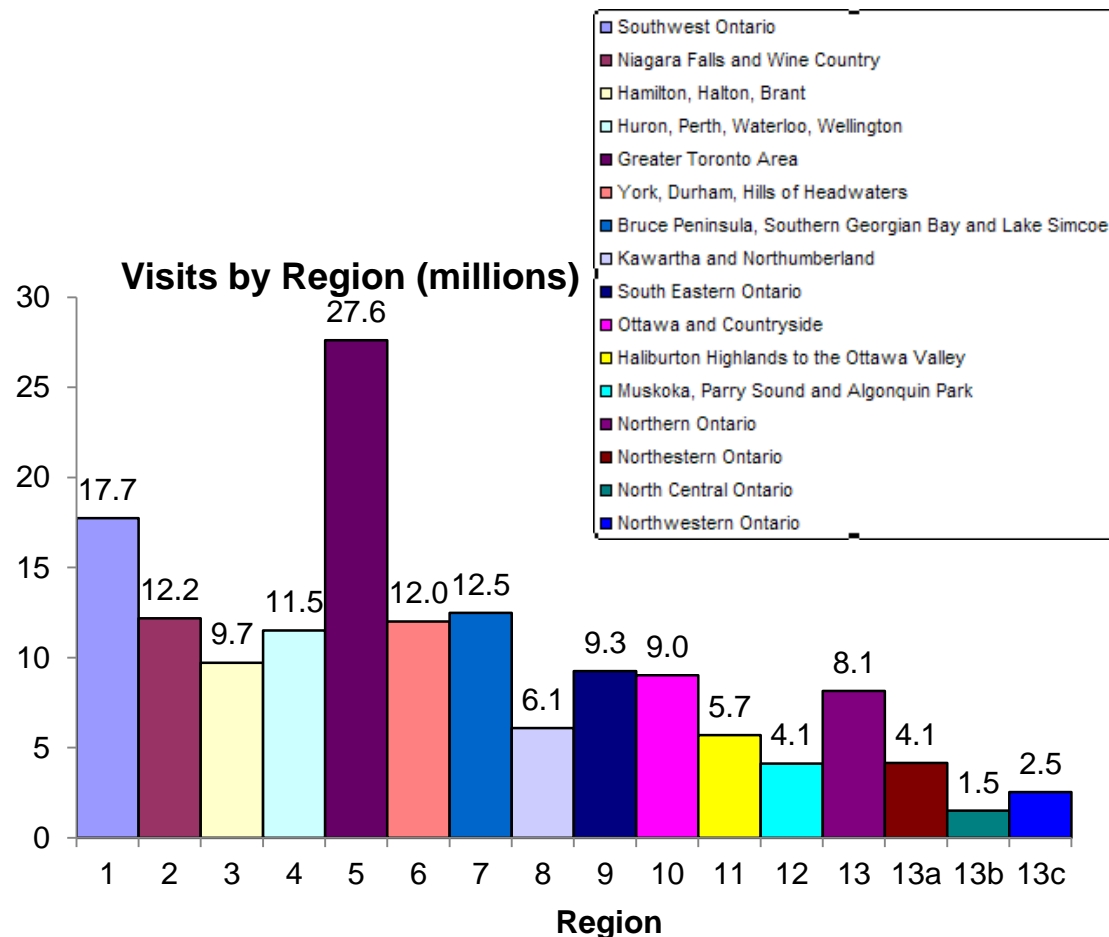


- In 2012, there were 141.7 million visits in Ontario and visitors spent \$22.3 billion
- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 8% of visits and 15% of expenditures
- Overseas visitors account for 2% of visits and 13% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Visits and Spending by Region

2012	Visits (millions)	Visitor Spending (\$ billions)
Ontario	141.7	22.3
Region 1	12.5%	7.7%
Region 2	8.6%	8.0%
Region 3	6.9%	3.0%
Region 4	8.1%	4.8%
Region 5	19.5%	30.2%
Region 6	8.5%	4.0%
Region 7	8.8%	6.2%
Region 8	4.3%	2.6%
Region 9	6.5%	4.4%
Region 10	6.4%	7.9%
Region 11	4.0%	2.7%
Region 12	2.9%	2.7%
Region 13	5.8%	6.9%



Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Ontario Summary

- In 2012, there were 141.7 million visits in Ontario and visitors spent \$22.3 billion
- Ontario residents accounted for the majority of visits (86%) 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
- RTO 5 (GTA) is the largest RTO representing 20% of visits and 30% of spending
- Visitors spent an average of \$158/trip in Ontario
- The largest proportions of expenditures were spent on Transportation (35%) and Food & Beverage (28%)

Ontario Summary

- 67% of Other Canada visitors came from Quebec with 44% from Montreal
- 77% of U.S. visitors came from border states with 31% 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 52% of overseas visitors to Ontario. The U.K. was by far the leading overseas source market at 14% of overseas visits
- 65% of visits were same-day visits driven by Ontario residents
- Most trips were to visit friends and relatives (45%) or for pleasure (34%)
- The majority of overnight visitors stayed in private homes (62%) except U.S. visitors who are more likely to stay at a hotel/motel (47%)

Region 12 Tourism

Economic Impact of Tourism in Region 12

- Visitor Spending totalled **\$596 million**
- Total GDP (direct, indirect and induced) generated by visitor spending amounted to **\$366 million**, 9.0% of Region 12's GDP
- The total tourism employment impact (direct, indirect and induced) of visitor spending was **6,400 jobs**, accounting for 13.4% of Region 12's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$194 million**. \$96 million were federal tax revenues, \$81 million were provincial and \$17 million were municipal

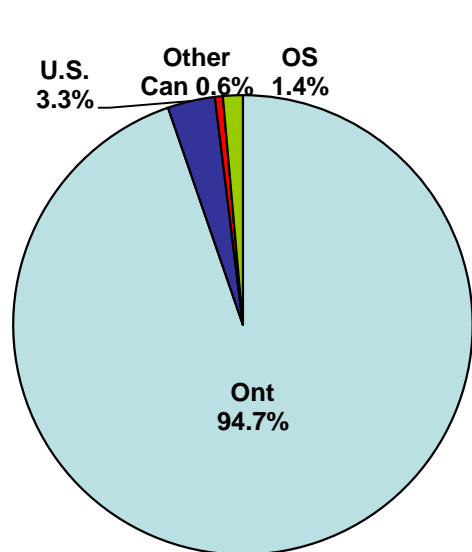
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario	141.7	22.3
Region 12	4.1	0.6
Region 12 proportion of Total Ontario	2.9%	2.7%

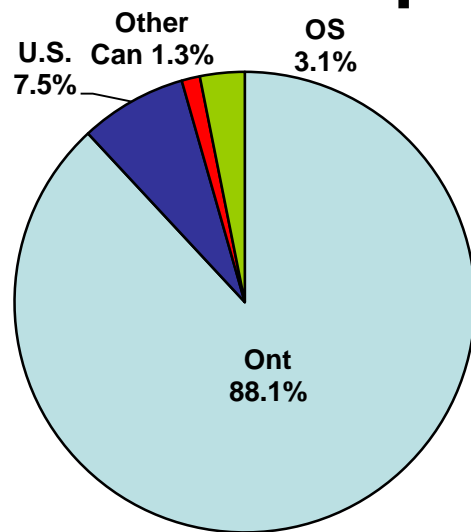
- In 2012, there were 4.1 million visits in Region 12, representing 2.9% of total visits in Ontario
- Visitors in Region 12 spent \$596 million, accounting for 2.7% of total visitor spending in Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism , Culture and Sport

Visits and Spending



Visits by Origin
4.1 million



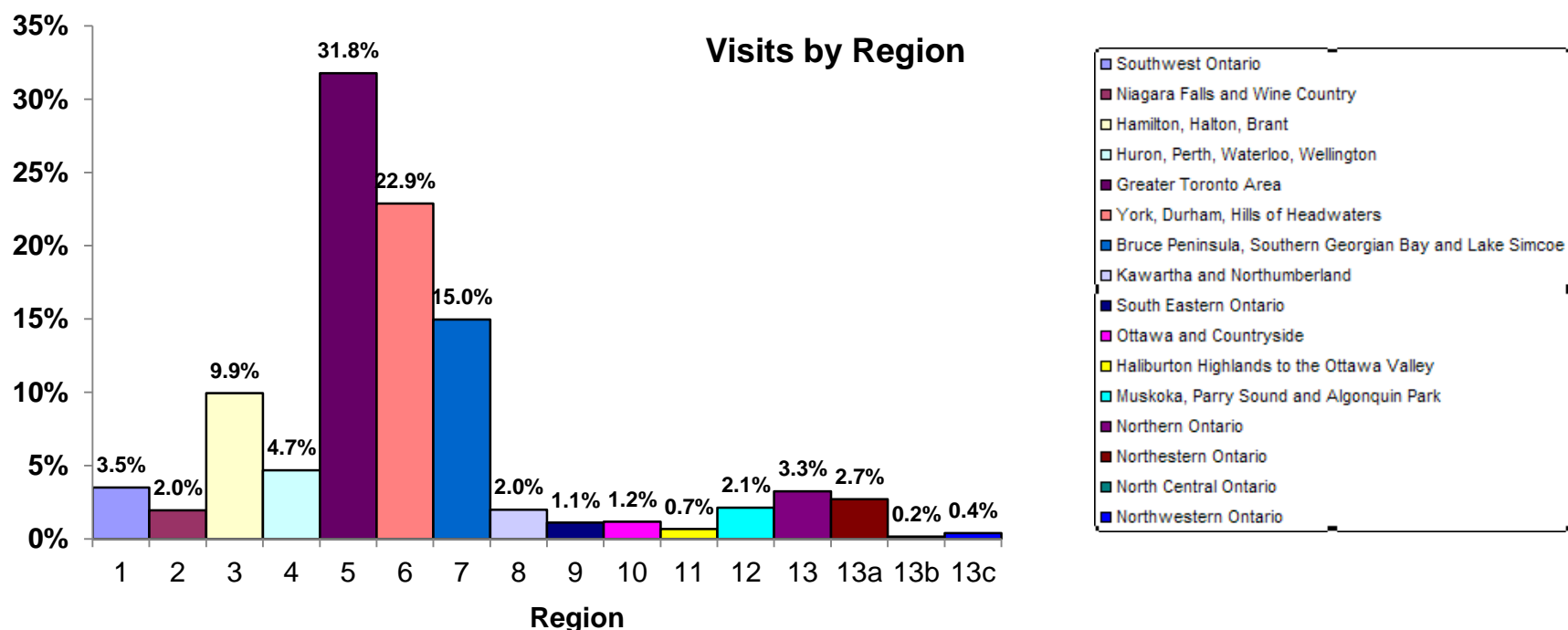
Visitor Spending by Origin
\$596 million

Region 12 vs. Ontario	Visit Index	Spending Index
Ontario	110	142
U.S.	40	50
Other Canada	12	13
Overseas	90	24

- Ontario residents accounted for the vast majority of visits (95%) and spending (88%)
- U.S. visitors accounted for 3% of visits and 8% of expenditures.
- Visitors from Other Canada made up 1% of visits and spending
- Overseas visitors accounted for 1% of visits and 3% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Ontario Visitors to Region 12 by Region of Residence

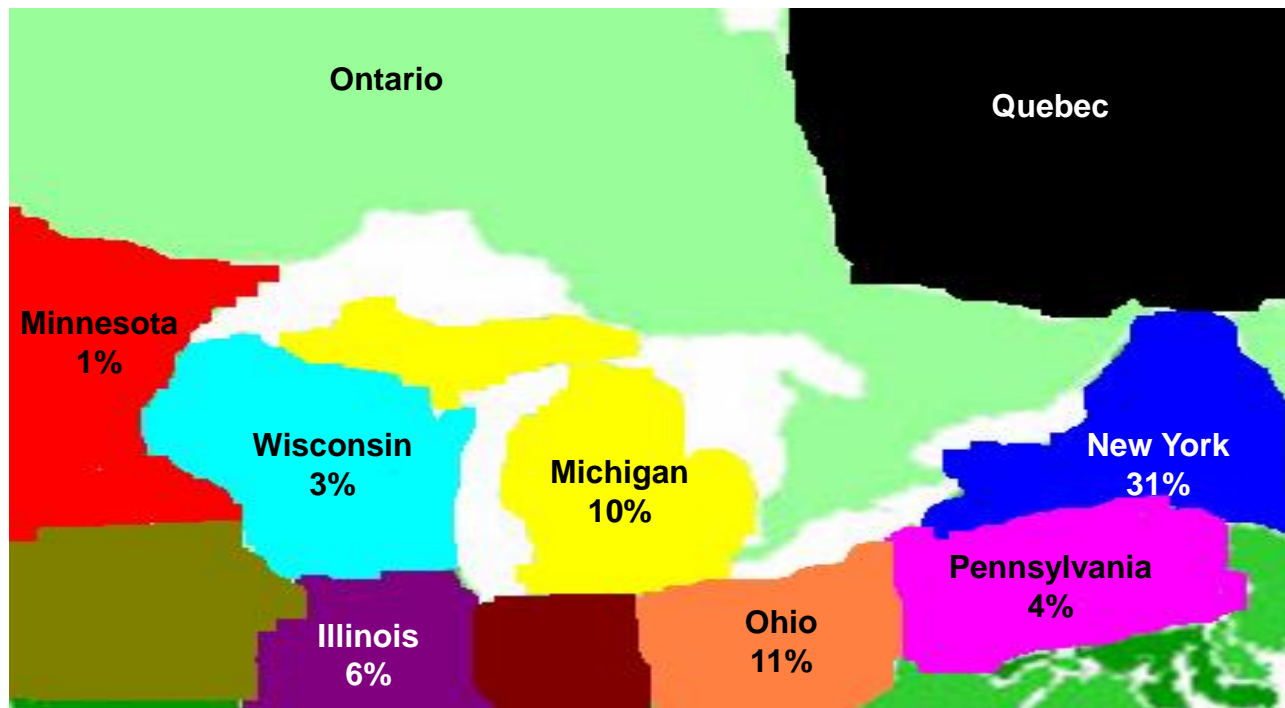


- 32% of Ontario visitors to Region 12 reside in Region 5 and 23% in Region 6

Note: Ontario visitors to Region 12 represented 95% (3.9 M) of total visits and 88% (\$525 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

U.S. Visitors by State of Residence

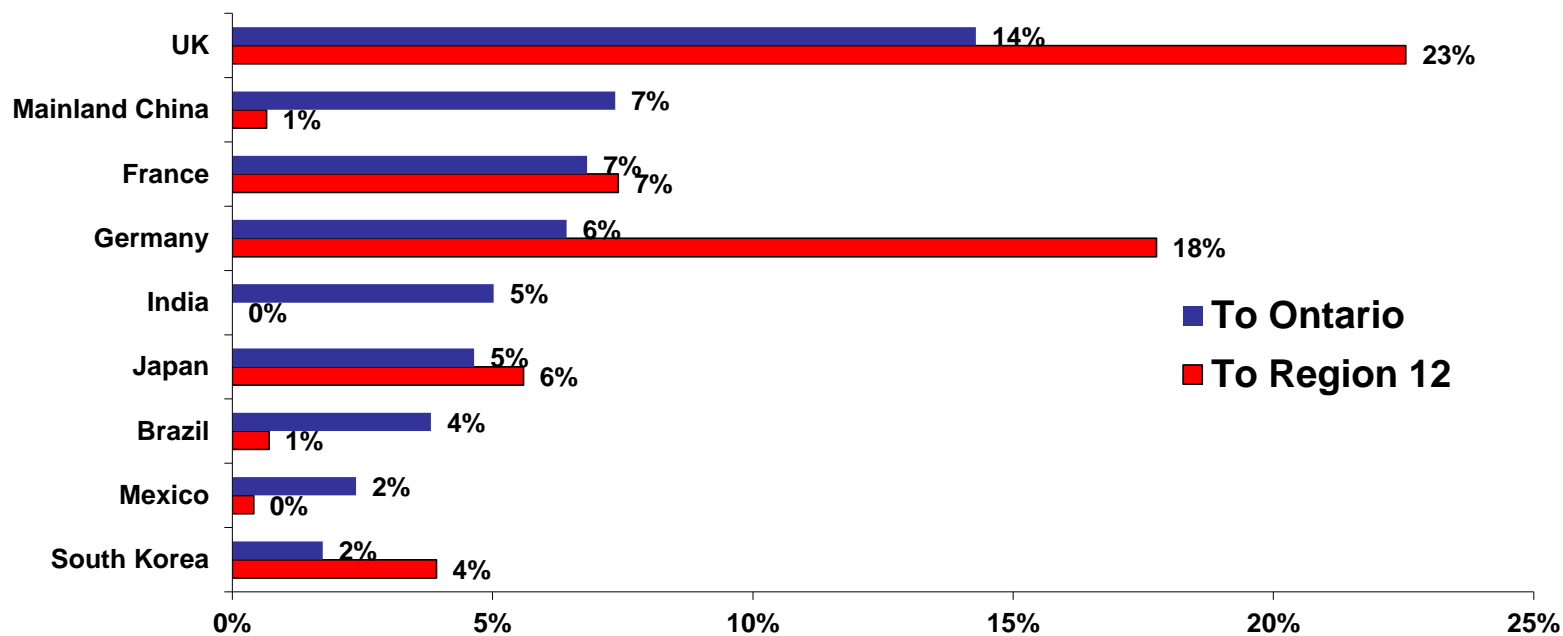


- 67% of U.S. visitors came from border states with 31% from New York

Note: U.S. visitors to Region 12 represented 3% (138,000) of total visits and 8% (\$45 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Overseas Visitors by Country of Residence



- Ontario's 9 overseas target markets represent 59% of overseas visitors to Region 12

Note: Overseas visitors to Region 12 represented 1% (58,000) of total visits and 3% (\$19 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

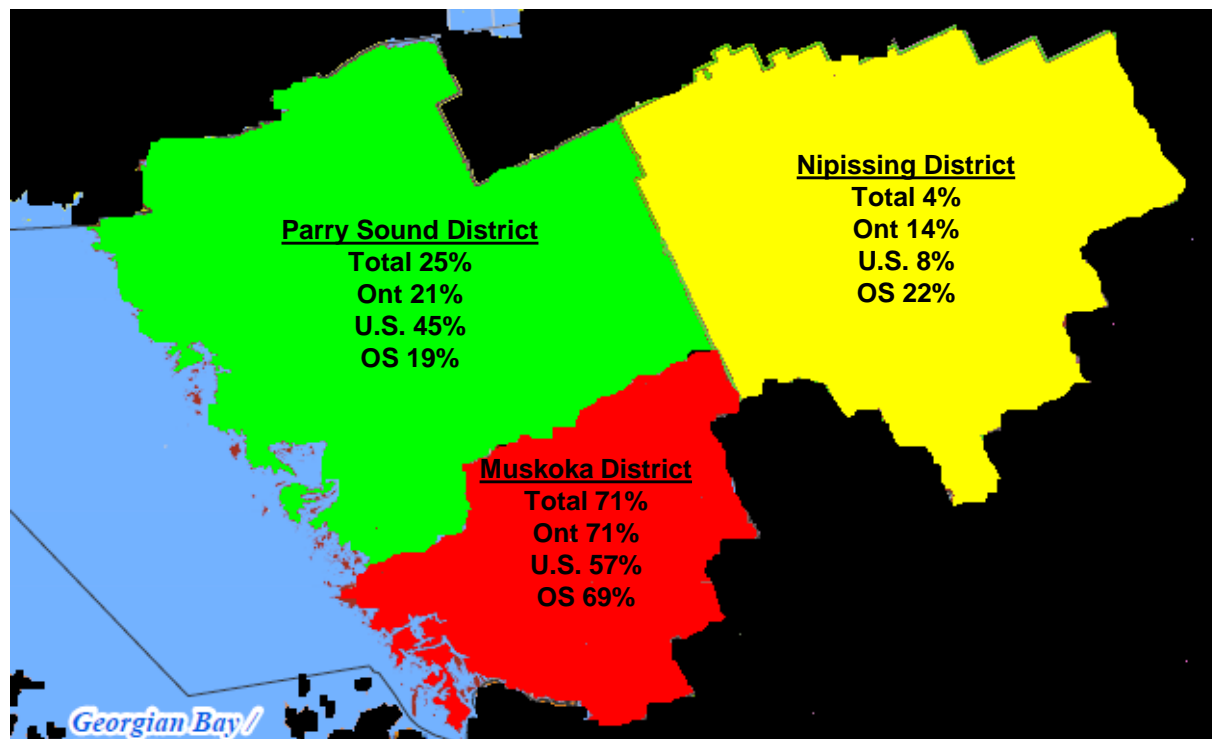
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ millions)
Region 12	4.1	596
Muskoka	2.9 (71%)	416 (70%)
Parry Sound	1.0 (25%)	133 (22%)
Nippissing	0.2 (5%)	47 (8%)

- Muskoka represented 71% of Region 12's visits and 70% of Region 12's spending while Parry Sound accounted for 25% of visits and 22% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism , Culture and Sport

Visitors by Origin by Census Division

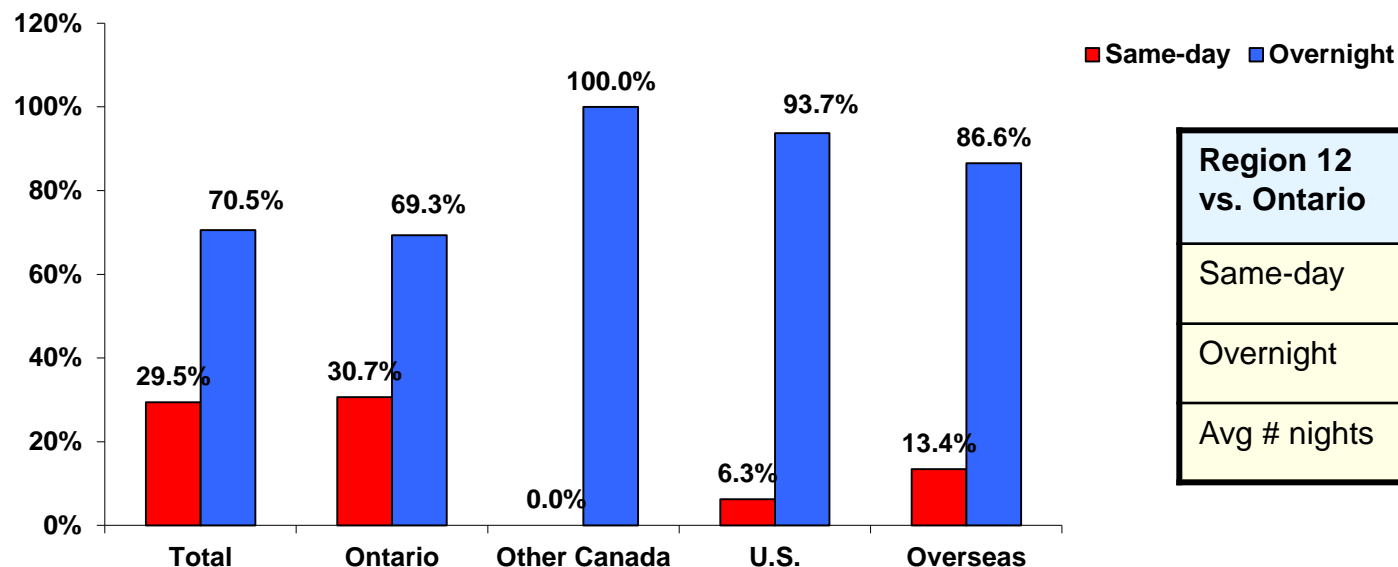


Origin	% of Visits	% of \$
Ontario	95%	88%
U.S.	3%	8%
Overseas	1%	3%
OS = Overseas		

- Muskoka District is the most visited census division in Region 12 receiving 71% 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 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Visits by Length of Stay



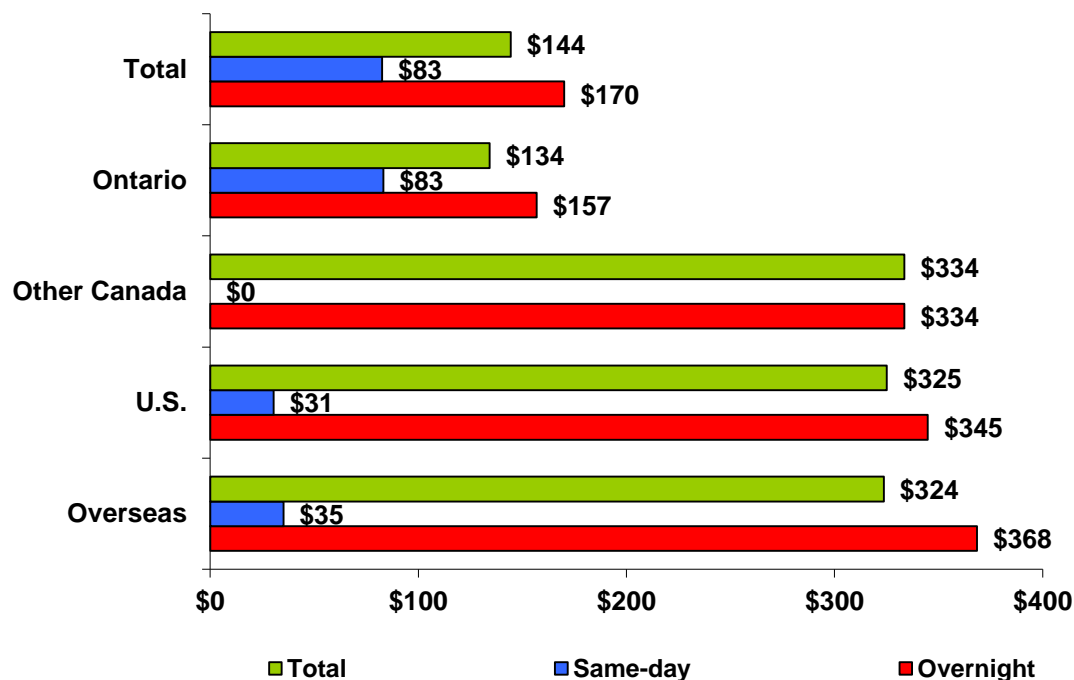
Region 12 vs. Ontario	Length of Stay Index
Same-day	45
Overnight	201
Avg # nights	101

Average # of nights	Total	Ontario	Other Canada	U.S.	Overseas
	3.0	2.8	5.7	6.0	4.6

- The majority (70%) 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 3.0, on par with Ontario's average of 3.0 nights

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

\$/Trip by Length of Stay

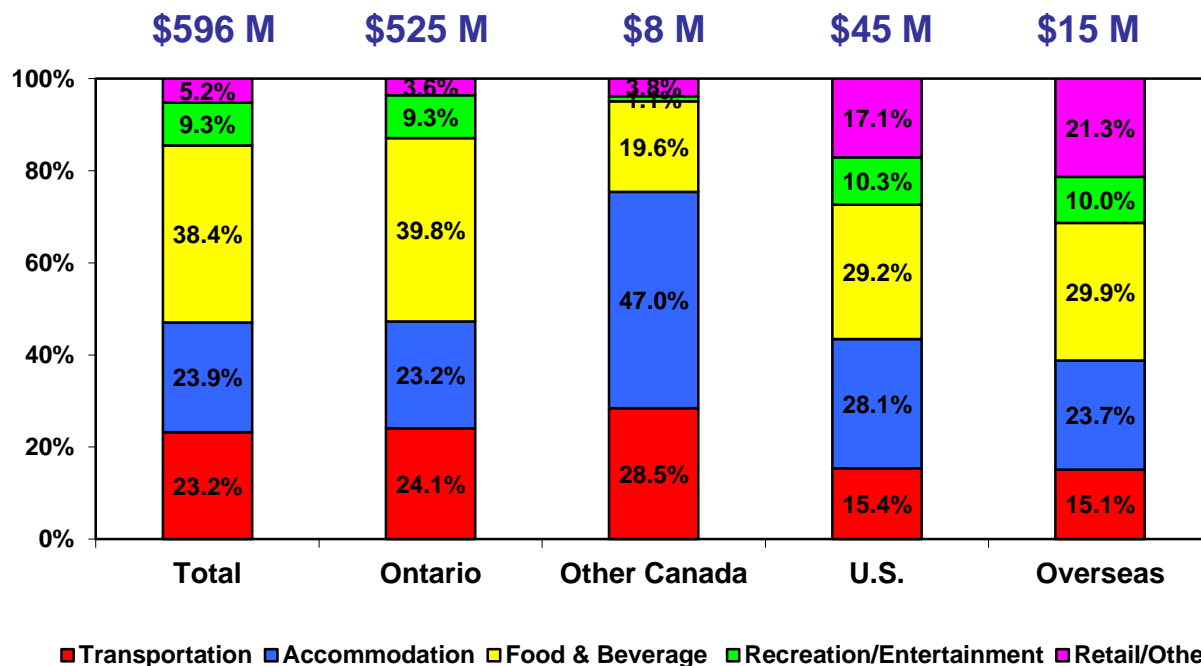


Region 12 vs. Ontario	\$/Trip Index
Total	92
Ontario	118
Other Canada	93
U.S.	114
Overseas	24

- Visitors spent an average of \$144/trip in Region 12 (\$158/trip for Ontario)
- On average, overnight visitors spent 2 times as much as same-day visitors

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Spending by Category

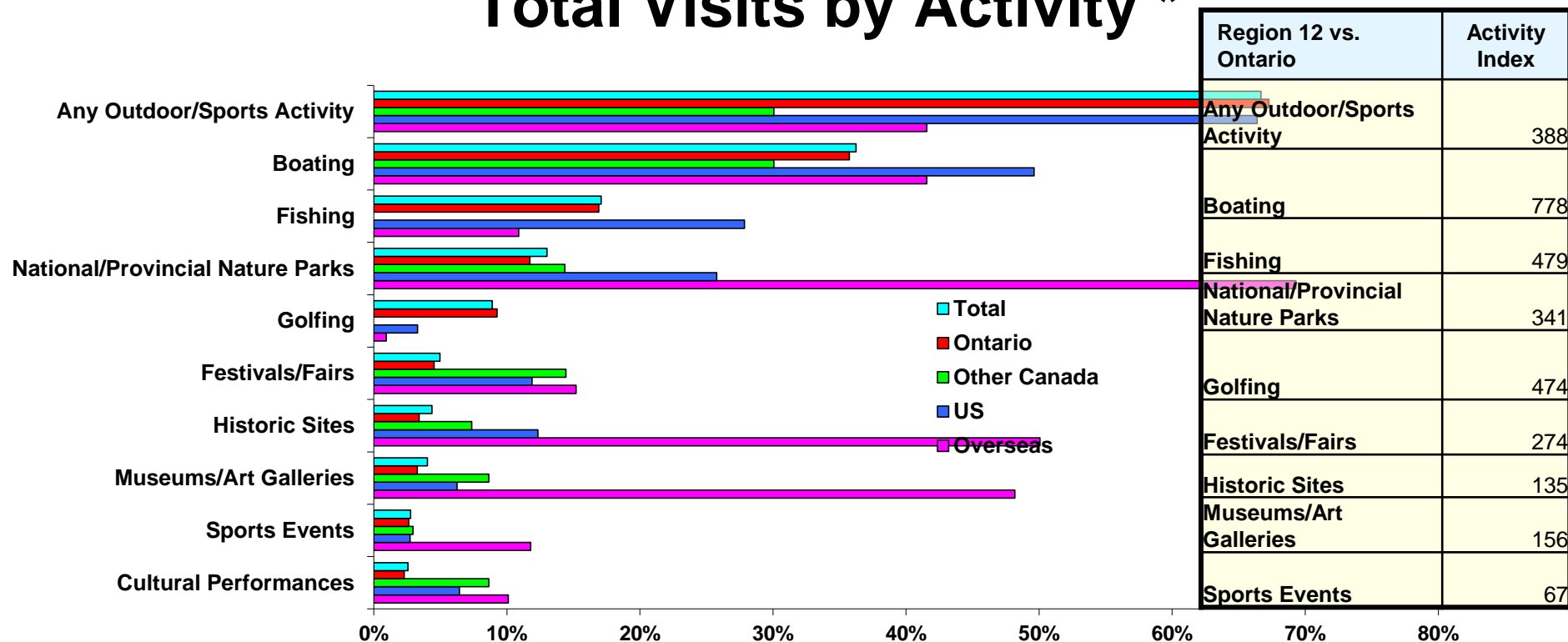


Region 12 vs. Ontario	Spending Index
Transportation	67
Accommodation	149
Food & Beverage	136
Rec./Entertain.	114
Retail/Other	40

- The largest proportions of expenditures were spent on Food & Beverage, Transportation and Accommodations
- Ontario visitors in Region 12 spent 48% of their Food & Beverage dollars at stores and 52% at restaurants. This compares to 30% at stores and 70% at restaurants for Ontario visitors travelling anywhere in Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism , Culture and Sport

Total Visits by Activity *

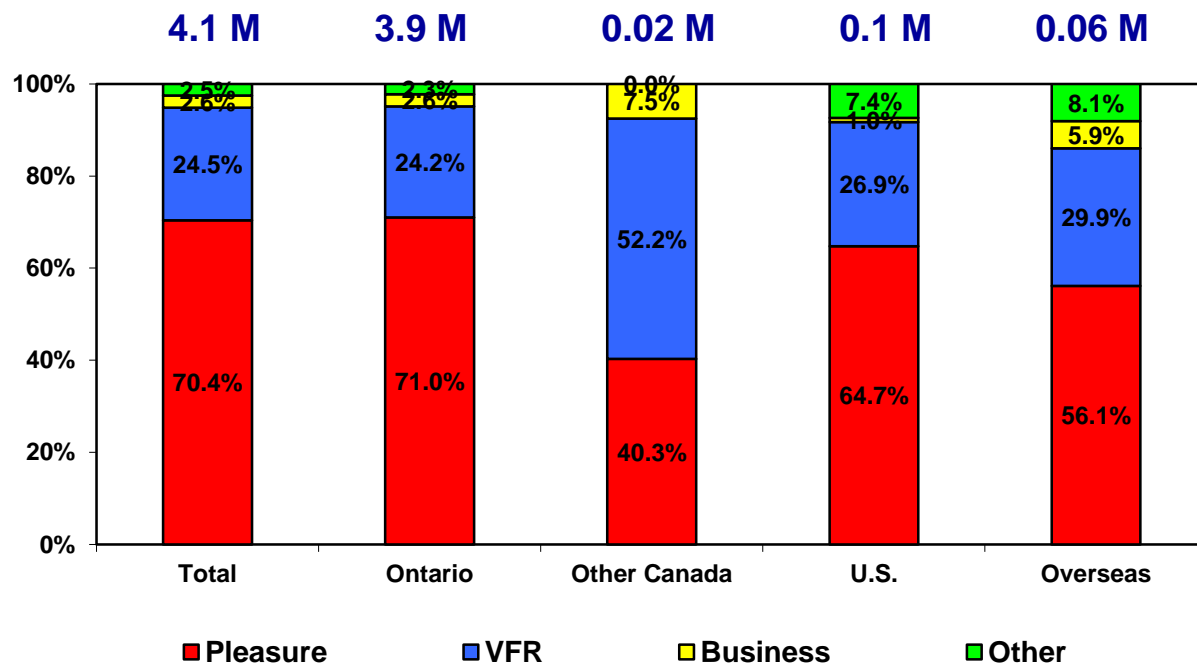


- In general, visitors to Region 12 demonstrated a higher rate of participation in activities compared to visitors to other regions
- Outdoor activities are most popular among visitors to Region 12
- Overseas visitors are more likely to visit historic sites and parks

*activity may or may not have taken place in region

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Main Purpose of Visit

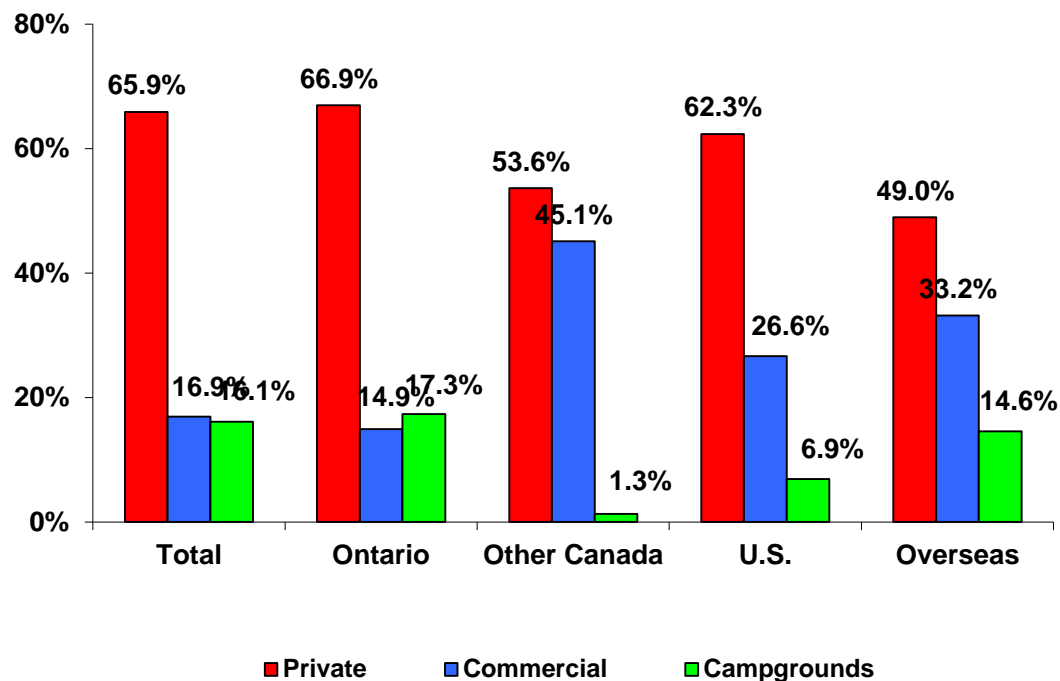


Region 12 vs. Ontario	Purpose Index
Pleasure	206
VFR	55
Business	125
Other	24
VFR: Visiting Friends and / or Relatives	

- 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 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Visits by Accommodation Type

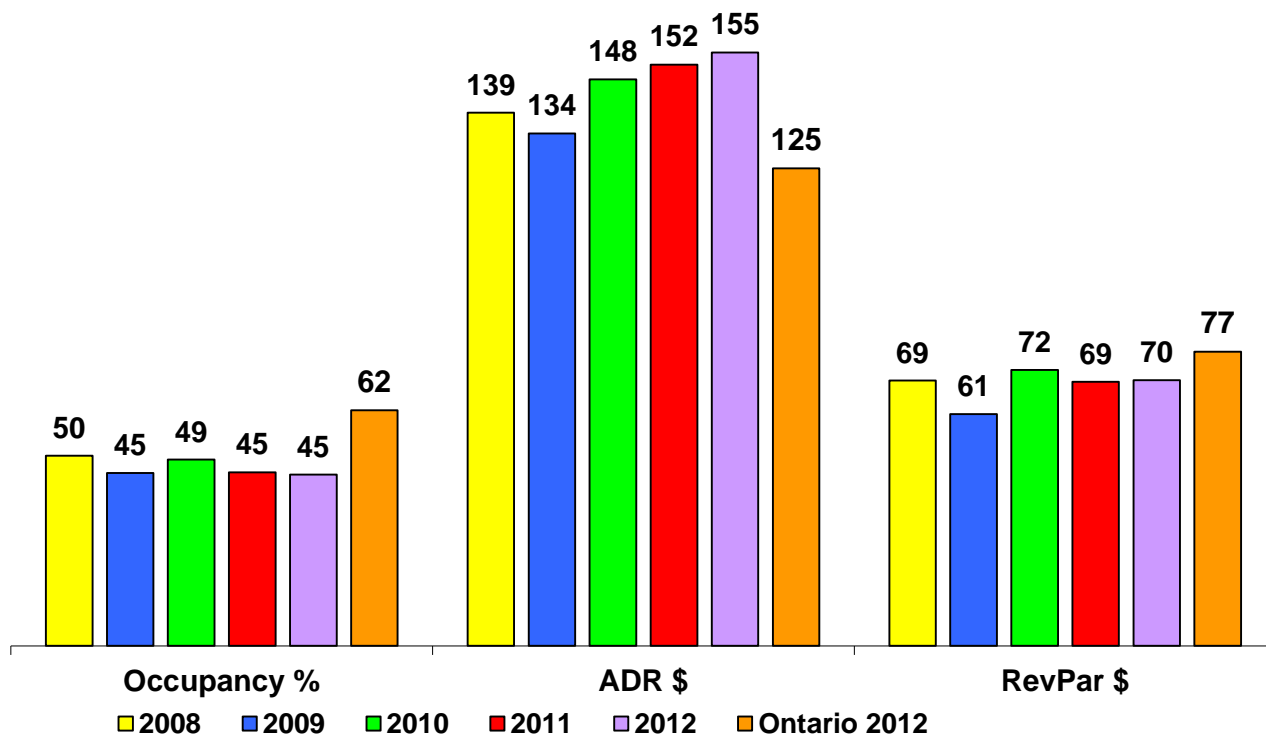


Region 12 vs. Ontario	Type Index
Private	106
Commercial	66
Campground	247

- The majority of overnight visits to Region 12 were spent at unpaid accommodations such as private homes and cottages

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012, Ontario Ministry of Tourism , Culture and Sport

Hotel Statistics



Region 12 vs. Ontario	Hotel Stats Index 2012
Occupancy	73
ADR	124
RevPar	90
ADR = Average Daily Rate RevPar = Revenue per Available Room	

- In general, ADR has been growing while occupancy and RevPar have been flat
- Region 12 had lower occupancy and RevPar than total Ontario, but a higher ADR

Source: PKF Consulting, Ministry of Tourism, Culture and Sport

Park Statistics

Park	# Developed Campsites	Interior Camper-Nights	Visitors	Day Use	Bus Permits	Camper-Nights	Campers	July/Aug % Occupancy
Algonquin	1,330	240,524	828,372	204,536	357	370,664	102,962	73%
Killbear	880		286,134	17,261	30	266,121	66,530	88%
Grundy Lake	485	518	105,802	2,071	0	100,154	22,256	74%
Arrowhead	378		115,286	25,361	4	89,925	28,102	79%
Restoule	286		53,500	4,954	3	45,551	9,110	49%
Six Mile	217		55,745	7,229	13	48,516	18,660	67%
French River		15,721	15,721			15,721		
The Massasauga		19,767						
Oastler	148		33,812	2,018	0	31,794	10,963	70%
Mikisew	248		36,338	1,439	0	33,653	7,826	48%
Sturgeon Bay	80		13,980	264	0	13,716	3,517	66%
Total	4,052	276,530	1,544,690	265,133	407	1,015,815	269,926	
% of Ontario	21%	62%	23%	20%	10%	30%	23%	

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

Source: Ontario Parks 2012

Tourism Related Establishments

Type of Establishment	# 2012*	% of Ontario
Accommodations	257	6%
Arts, Entertainment, Recreation	198	2%
Food & Beverage	247	1%
Transportation	46	0%
Travel Services	10	0%
Retail	690	1%
Other Services	309	1%
Total	1,757	1%

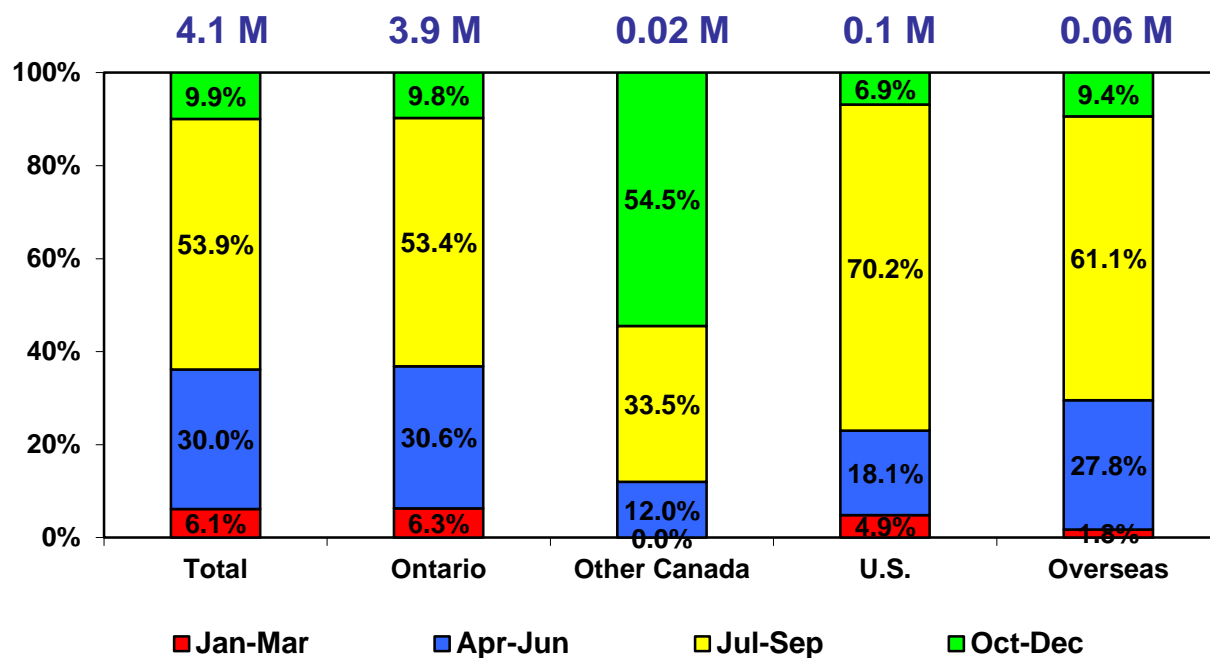
- Region 12 accounts for 1% of Ontario's tourism related establishments

Note: Region 12 represented 3% (4.1 M) of total visits and 3% (\$596 M) of visitor spending

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

Source: Statistics Canada, Business Register 2012

Visits by Time of Year



Region 12 vs. Ontario	Quarter Index
Jan-Mar	31
Apr-Jun	129
Jul-Sept	163
Oct-Dec	42

- 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 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Region 12 Summary

- In 2012, there were 4.1 million visits in Region 12, accounting for 3% of total visits to Ontario. Visitors to Region 12 spent \$596 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 3% of visits and 8% of expenditures, and Overseas visitors accounted for 1% of visits and 3% of spending
- Visitors spent an average of \$144/trip. Overnight visitors spent 2 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

- 32% of Ontario visitors to Region 12 reside in Region 5 and 23% in Region 6
- 67% of U.S. visitors came from border states including 31% from New York State
- Ontario's 9 overseas target markets accounted for 59% of overseas visitors to Region 12
- The majority of visits were overnight
- Most trips were for pleasure
- The majority of overnight visitors stayed in unpaid accommodations

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