

2013 Tourism Statistics Region 12

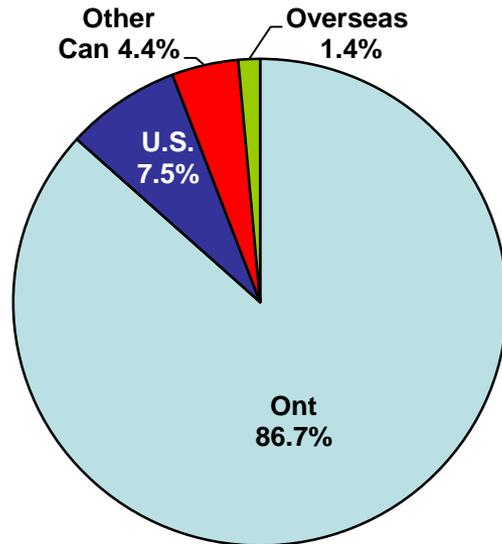
Tourism Research Unit
Summer 2016

Ontario Tourism

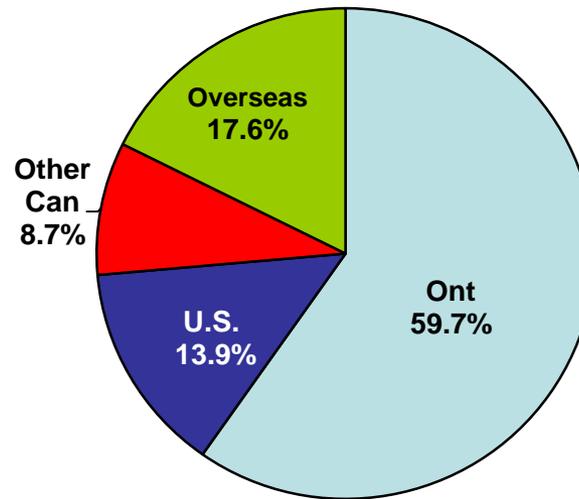
Economic Impact of Tourism in Ontario 2013

- Tourism receipts totalled **\$28.5 billion**
- Total GDP (direct, indirect and induced) generated by tourism related spending amounted to **\$25.3 billion**, 3.6% of Ontario's GDP
- The total tourism employment impact (direct, indirect and induced) of tourism receipts reached **362,365 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 **\$12.2 billion**. \$6.0 billion were federal tax revenues, \$4.9 billion were provincial and \$1.3 billion were municipal
- Tourism is an important export industry, contributing **\$7.2 billion** to Ontario's foreign earnings

Visits and Spending



Visits by Origin
140.8 million



Visitor Spending by Origin
\$22.7 billion

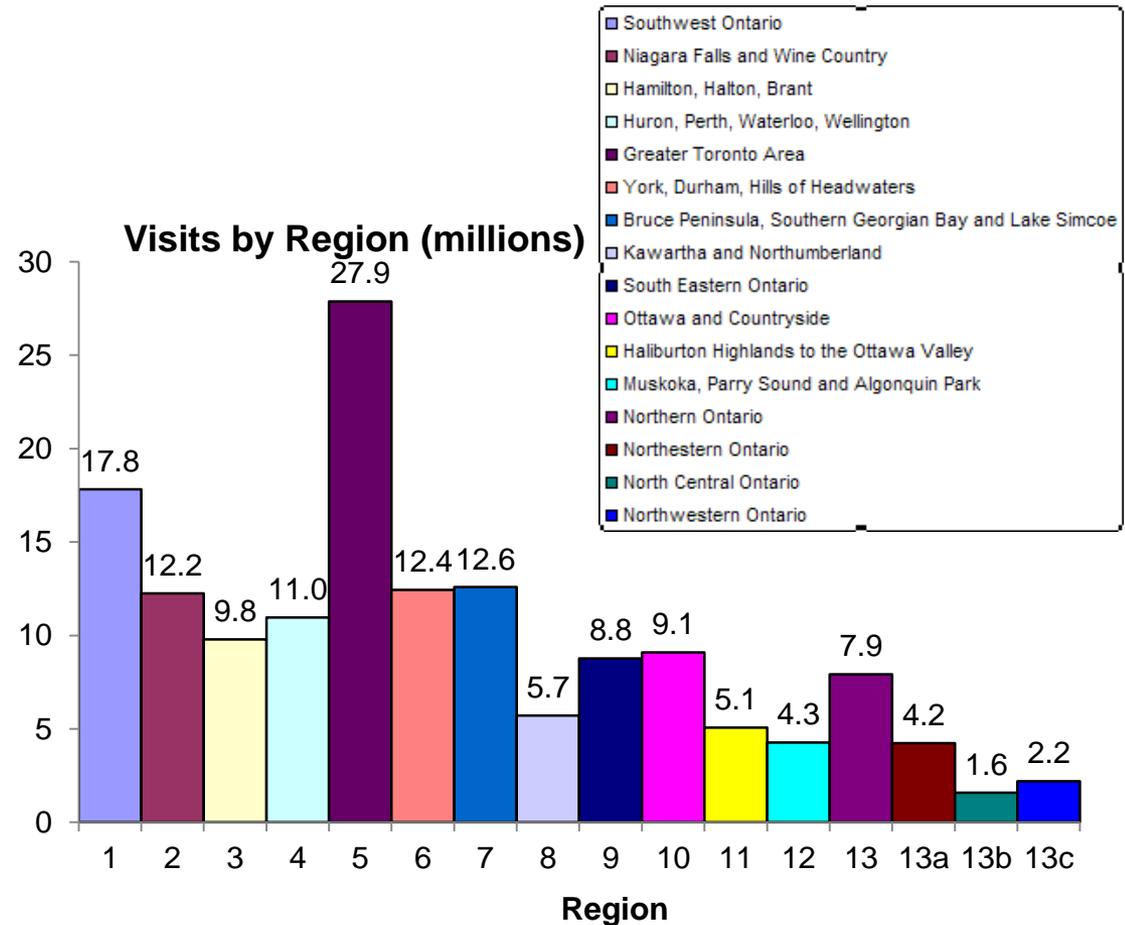
| Ontario | 2013 | VS 2012 |
|------------------|---------|---------|
| Visits | 140.8M | -0.2% |
| Visitor Spending | \$22.7B | 3.7% |

- In 2013, there were 140.8 million visits in Ontario and visitors spent \$22.7 billion
- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 8% of visits and 14% of expenditures
- Overseas visitors account for 1% of visits and 18% of spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Visits and Spending by Region

| 2013 | Visits (millions) | Visitor Spending (\$ billions) |
|-----------|-------------------|--------------------------------|
| Ontario | 140.8 | 22.7 |
| Region 1 | 12.6% | 7.6% |
| Region 2 | 8.7% | 8.0% |
| Region 3 | 6.9% | 3.2% |
| Region 4 | 7.8% | 4.3% |
| Region 5 | 19.8% | 32.1% |
| Region 6 | 8.8% | 4.0% |
| Region 7 | 8.9% | 6.1% |
| Region 8 | 4.1% | 2.2% |
| Region 9 | 6.2% | 4.3% |
| Region 10 | 6.5% | 7.7% |
| Region 11 | 3.6% | 2.3% |
| Region 12 | 3.0% | 2.7% |
| Region 13 | 5.6% | 6.4% |



Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Ontario Summary

- In 2013, there were 140.8 million visits in Ontario and visitors spent \$22.7 billion. Visits were down slightly, -0.2%, while spending grew 3.7% compared to 2012
- Ontario residents accounted for the majority of visits (87%) and spending (60%)
- U.S. visitors represented 8% of visits and 14% of expenditures
- Overseas visitors accounted for 1% of visits and 18% of spending
- Region 5 (GTA) is the largest Region representing 20% of visits and 32% of spending
- Visitors spent an average of \$162/trip in Ontario
- The largest proportions of expenditures were spent on Transportation (36%) and Food & Beverage (27%)

Ontario Summary

- 67% of Other Canada visitors came from Quebec with 44% from Montreal
- 39% of U.S. visitors come from East North Central (Michigan, Ohio, Illinois, Indiana, and Wisconsin) and 37% from Mid Atlantic (New York, Pennsylvania, and New Jersey)
- Ontario's 9 target overseas markets (U.K., Japan, Germany, France, Mexico, India, China, South Korea and Brazil) represented 50% of overseas visitors to Ontario. The U.K. was by far the leading overseas source market at 14% of overseas visits
- 64% 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 (64%) 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 **\$614 million**
- Total GDP (direct, indirect and induced) generated by visitor spending amounted to **\$371 million**, 8.4% of Region 12's GDP
- The total tourism employment impact (direct, indirect and induced) of visitor spending was **6,200 jobs**, accounting for 13.0% of Region 12's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$195 million**. \$97 million were federal tax revenues, \$81 million were provincial and \$17 million were municipal

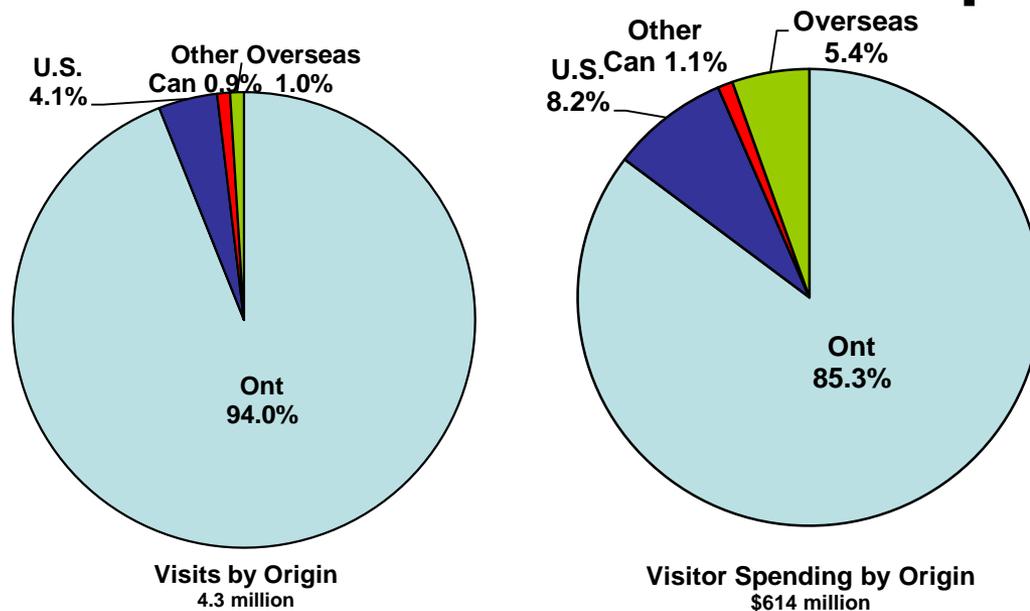
Total Visits and Spending

| Region | Visits (millions) | Visitor Spending (\$ billions) |
|---------------------------------------|----------------------|-----------------------------------|
| Ontario | 140.8 | 22.7 |
| Region 12 | 4.3 | 0.6 |
| Region 12 proportion of Total Ontario | 3.0% | 2.7% |

- In 2013, there were 4.3 million visits in Region 12, representing 3.0% of total visits in Ontario
- Visitors in Region 12 spent \$614 million, accounting for 2.7% of total visitor spending in Ontario

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Visits and Spending

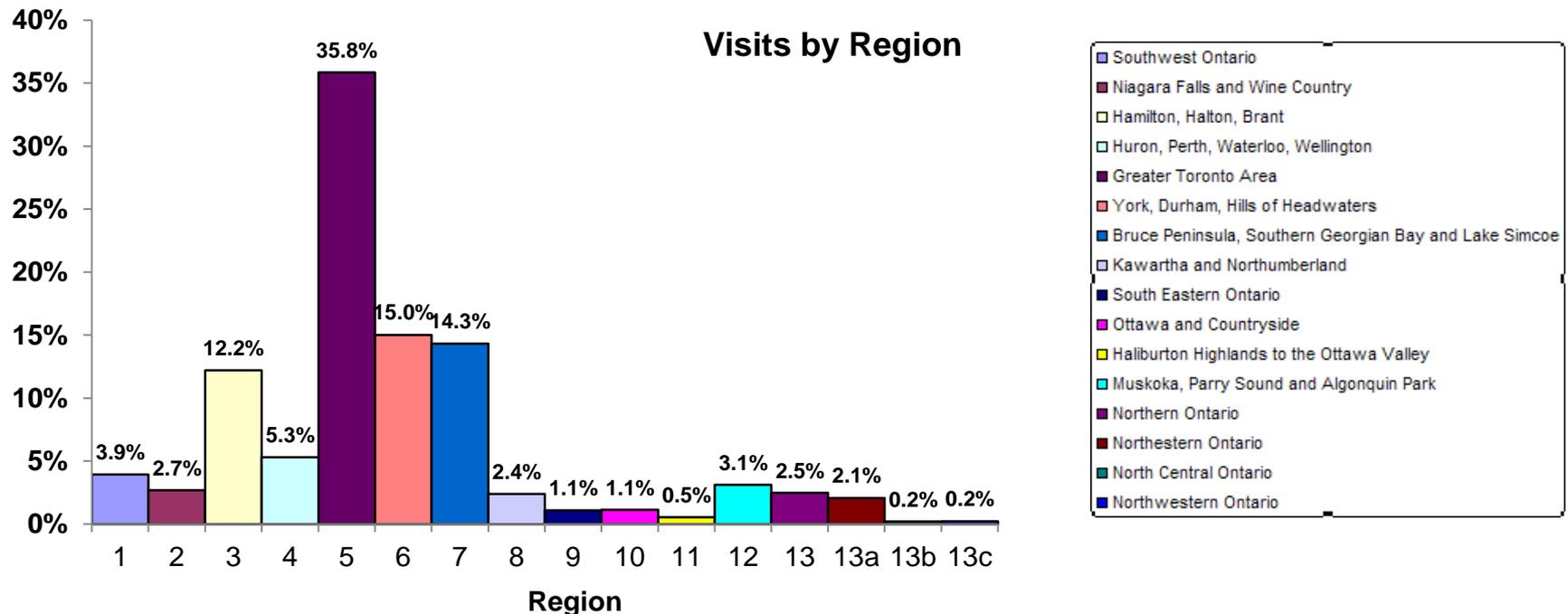


| Region 12 vs. Ontario | Visit Index | Spending Index |
|-----------------------|-------------|----------------|
| Ontario | 108 | 143 |
| U.S. | 55 | 59 |
| Other Canada | 21 | 12 |
| Overseas | 68 | 31 |

- Ontario residents accounted for the vast majority of visits (94%) and spending (85%)
- U.S. visitors accounted for 4% 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 5% of spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Ontario Visitors to Region 12 by Region of Residence

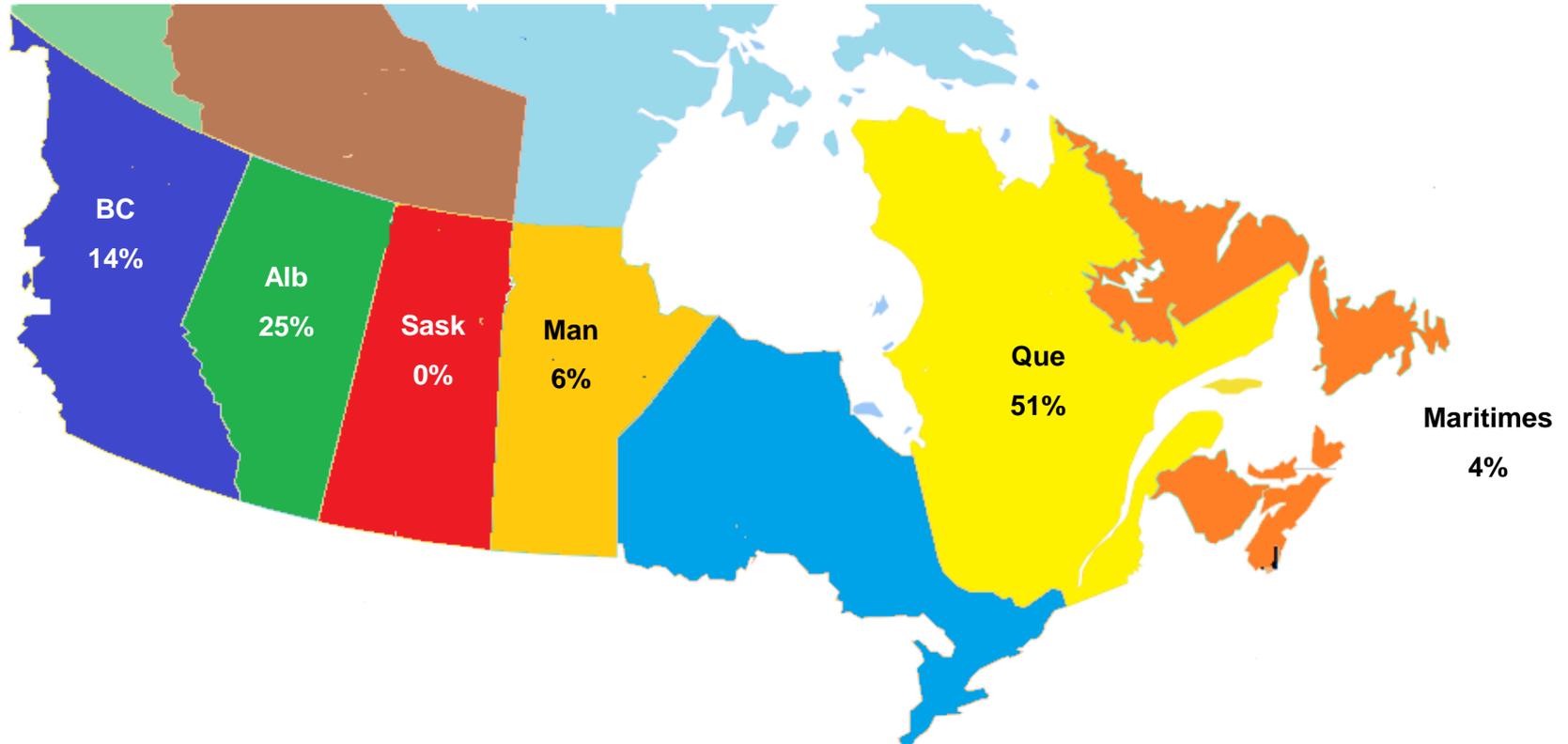


- 36% of Ontario visitors to Region 12 reside in Region 5 and 15% in Region 6

Note: Ontario visitors to Region 12 represented 94% (4.0 M) of total visits and 85% (\$524 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Other Canada Visitors by Province of Residence



- 51% of Other Canada visitors came from Quebec with 42% from Montreal

Note: Other Canada visitors to Region 12 represented 1% (39,000) of total visits and 1% (\$6 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

U.S. Visitors by Region of Residence

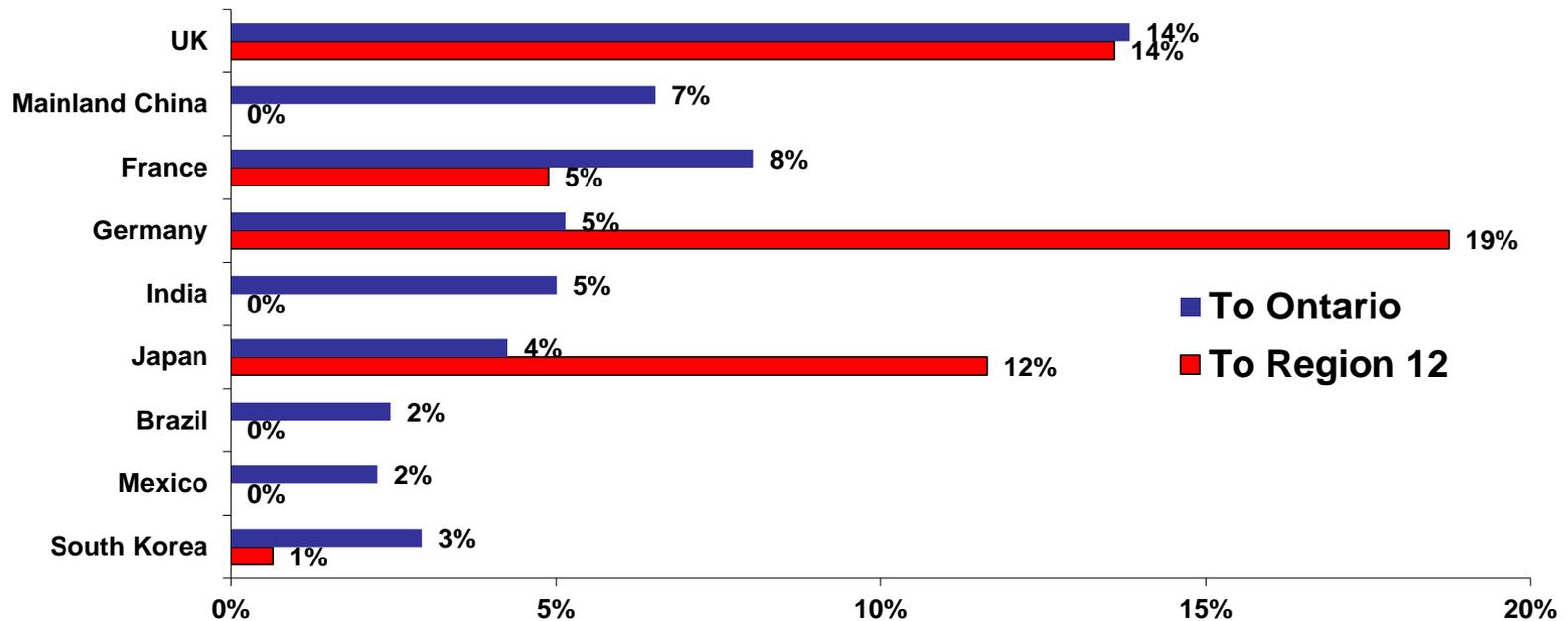


- 45% of U.S. visitors come from Mid Atlantic and 20% from East North Central

Note: U.S. visitors to Region 12 represented 4% (176,000) of total visits and 8% (\$50 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Overseas Visitors by Country of Residence

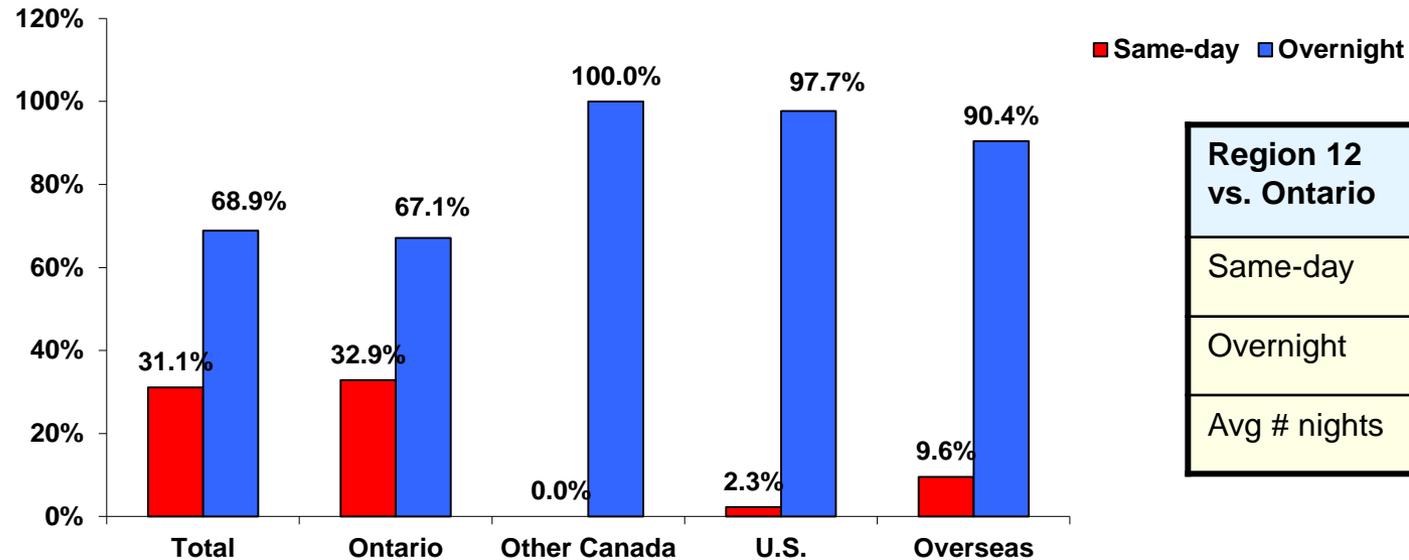


- Ontario's 9 overseas target markets represent 50% of overseas visitors to Region 12

Note: Overseas visitors to Region 12 represented 1% (41,000) of total visits and 5% (\$33 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Visits by Length of Stay



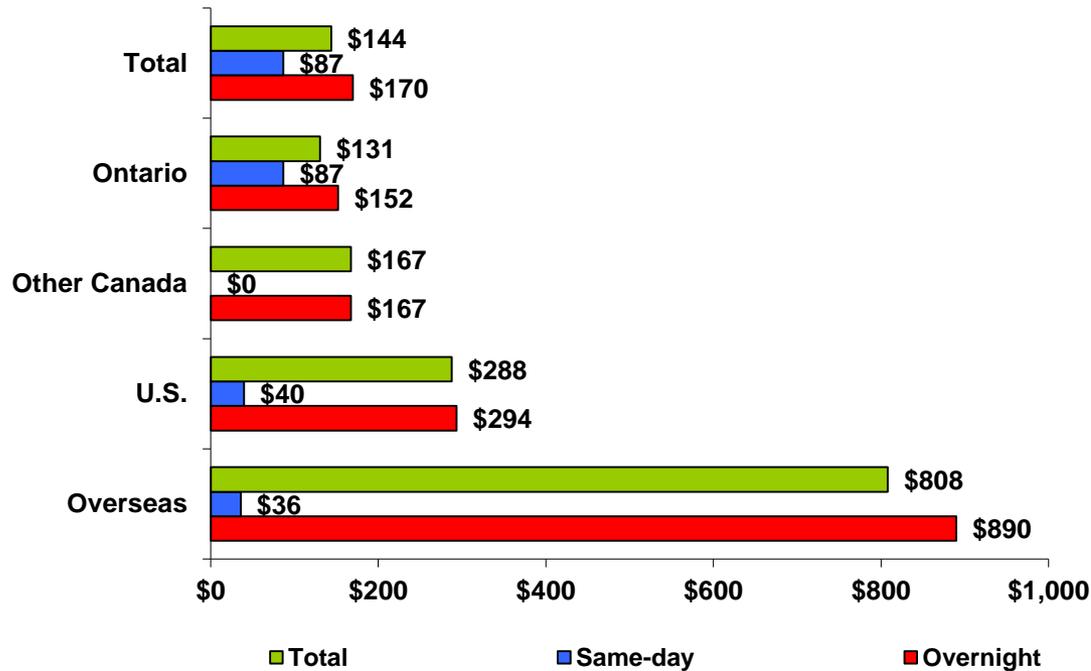
| Region 12 vs. Ontario | Length of Stay Index |
|-----------------------|----------------------|
| Same-day | 48 |
| Overnight | 194 |
| Avg # nights | 102 |

| Average # of nights | Total | Ontario | Other Canada | U.S. | Overseas |
|---------------------|-------|---------|--------------|------|----------|
| | 3.1 | 2.8 | 3.0 | 7.2 | 7.0 |

- The majority (69%) 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 3.1, on par with Ontario's average of 3.1 nights

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

\$/Trip by Length of Stay

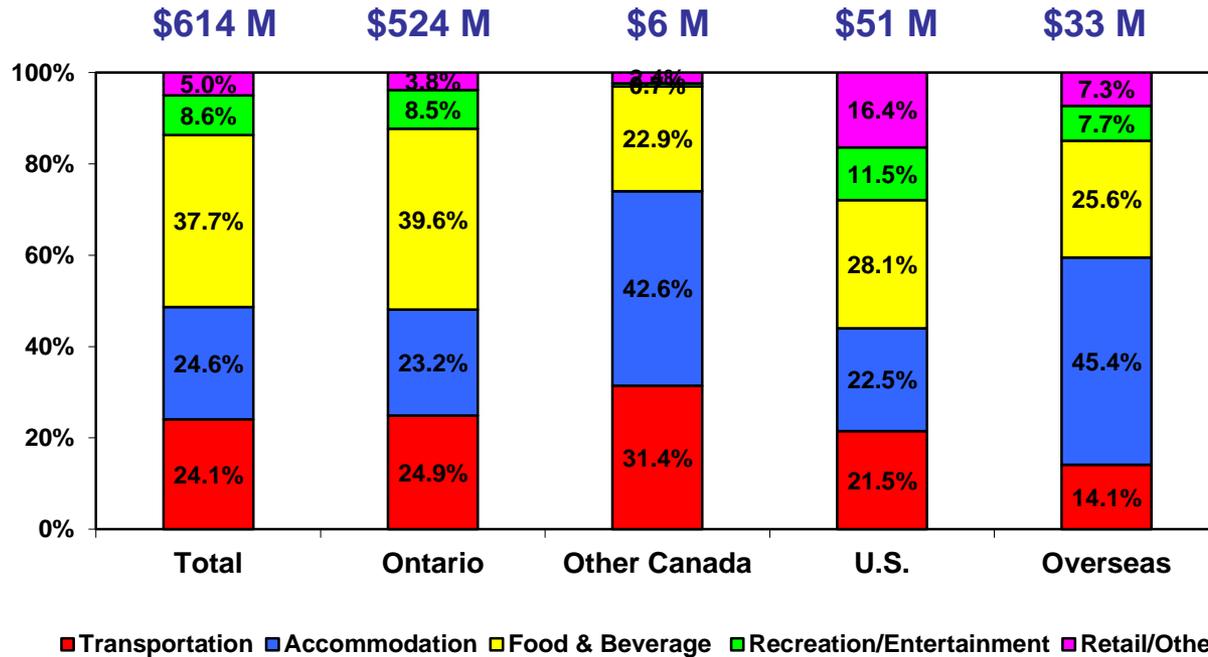


| Region 12 vs. Ontario | \$/Trip Index |
|-----------------------|---------------|
| Total | 89 |
| Ontario | 117 |
| Other Canada | 49 |
| U.S. | 97 |
| Overseas | 40 |

- Visitors spent an average of \$144/trip in Region 12 (\$162/trip for Ontario)
- On average, overnight visitors spent 2 times as much as same-day visitors

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Spending by Category

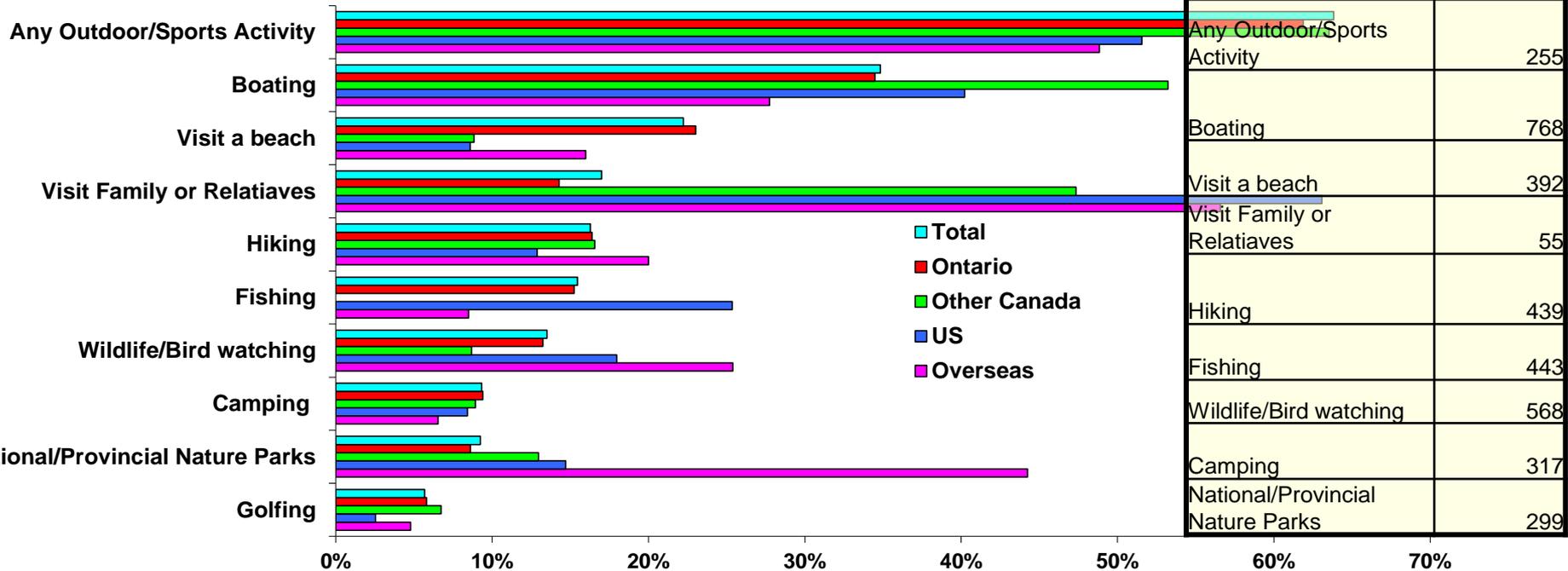


| Region 12 vs. Ontario | Spending Index |
|-----------------------|----------------|
| Transportation | 66 |
| Accommodation | 151 |
| Food & Beverage | 137 |
| Rec./Entertain. | 110 |
| Retail/Other | 41 |

- The largest proportions of expenditures were spent on Food & Beverage, Transportation and Accommodations
- Ontario visitors in Region 12 spent 47% of their Food & Beverage dollars at stores and 53% at restaurants. This compares to 30% at stores and 70% at restaurants for Ontario visitors travelling anywhere in Ontario

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Total Visits by Activity *

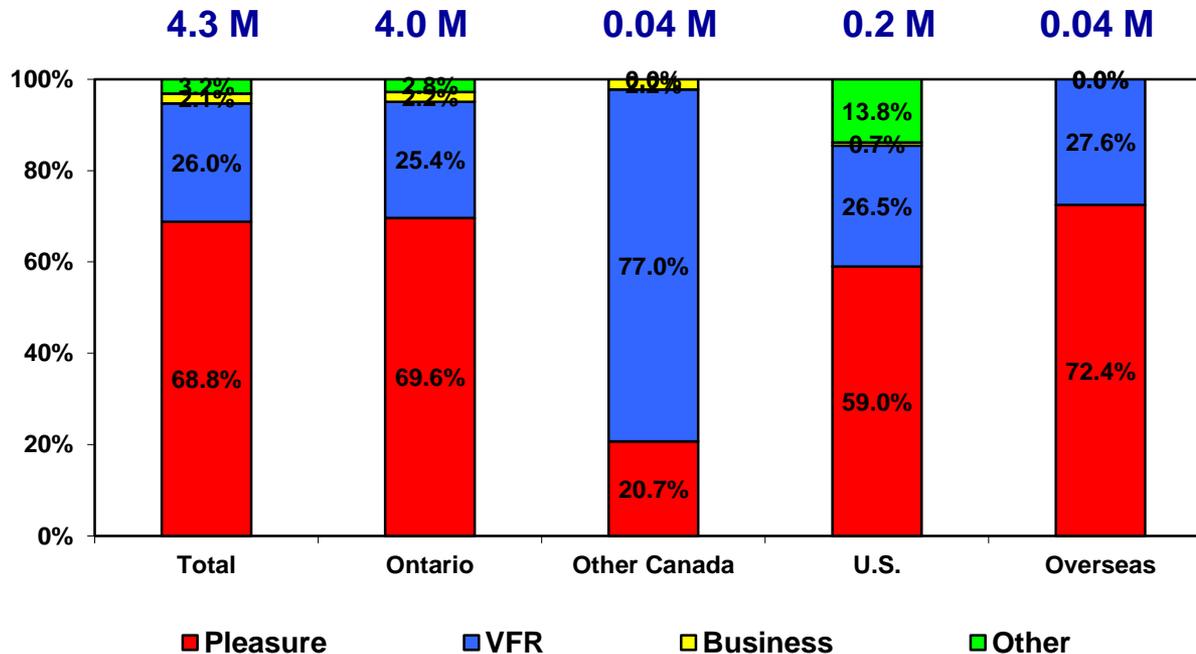


- In general, visitors to Region 12 demonstrated a higher rate of participation in activities compared to visitors to other regions
- Outdoor activities are most popular among visitors to Region 12

*activity may or may not have taken place in region

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Main Purpose of Visit

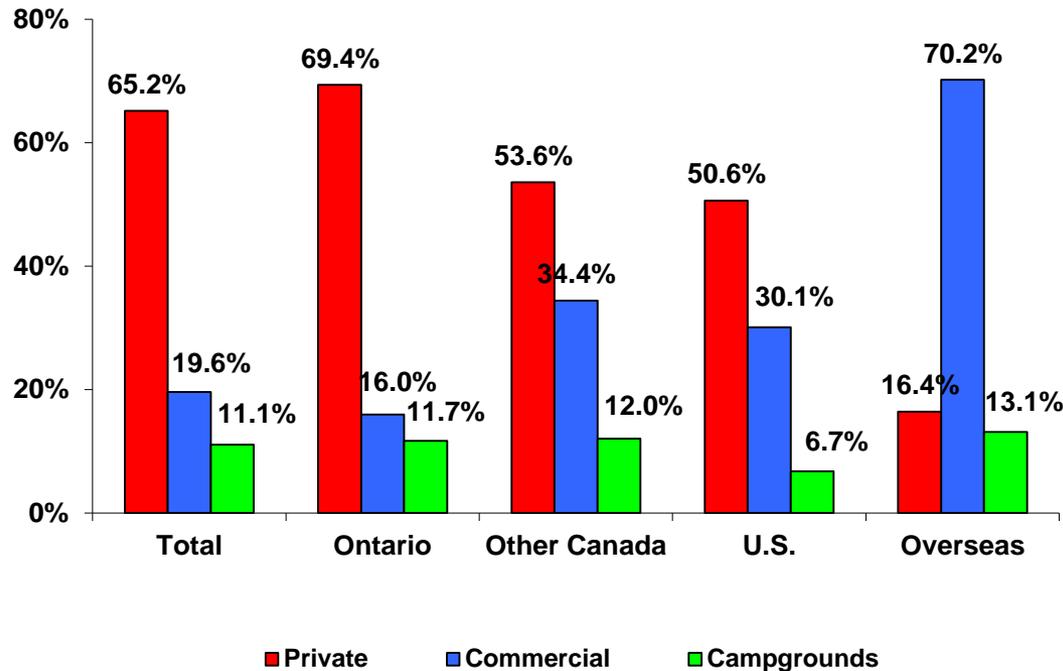


| Region 12 vs. Ontario | Purpose Index |
|--|---------------|
| Pleasure | 203 |
| VFR | 58 |
| Business | 22 |
| Other | 28 |
| VFR: Visiting Friends and / or Relatives | |

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

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Visits by Accommodation Type

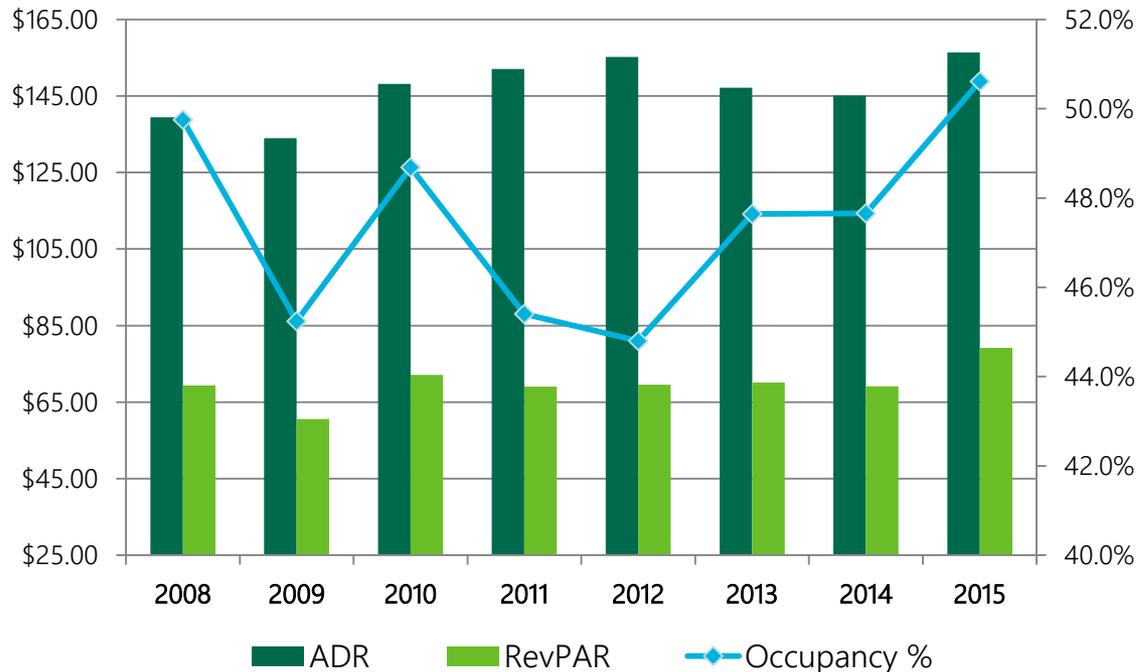


| Region 12 vs. Ontario | Type Index |
|-----------------------|------------|
| Private | 103 |
| Commercial | 81 |
| Campground | 192 |

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

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Hotel Statistics



| Region 12 vs. Ontario | Hotel Stats Index 2015 |
|---|------------------------|
| Occupancy | 78 |
| ADR | 113 |
| RevPar | 88 |
| ADR = Average Daily Rate RevPar = Revenue per Available Room | |

- Over the last few years, occupancy, ADR and RevPar have been an upward trend
- Region 12 had lower occupancy and RevPar than total Ontario, but a higher ADR

Source: [CBRE Hotels Trends in the Hotel Industry National Market Report](#)

Tourism Related Establishments

| Type of Establishment | # 2013* | % of Ontario |
|---------------------------------|--------------|--------------|
| Accommodations | 267 | 5% |
| Arts, Entertainment, Recreation | 206 | 2% |
| Food & Beverage | 257 | 1% |
| Transportation | 38 | 0% |
| Travel Services | 13 | 0% |
| Retail | 707 | 1% |
| Other Services | 307 | 1% |
| Total | 1,795 | 1% |

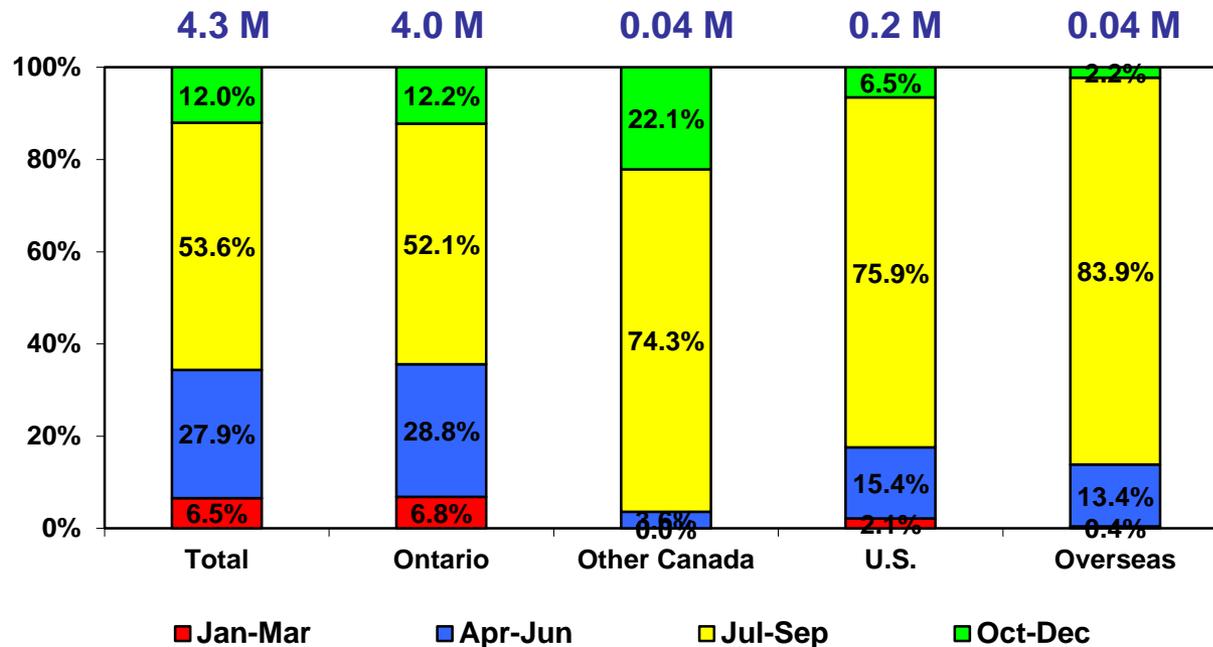
- Region 12 accounts for 1% of Ontario's tourism related establishments

Note: Region 12 represented 3% (4.3 M) of total visits and 3% (\$614 M) of visitor spending

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

Source: Statistics Canada, Business Register 2013

Visits by Time of Year



| Region 12 vs. Ontario | Quarter Index |
|-----------------------|---------------|
| Jan-Mar | 32 |
| Apr-Jun | 113 |
| Jul-Sept | 168 |
| Oct-Dec | 51 |

- 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's Travel Survey of the Residents of Canada and International Travel Survey 2013; Ontario Ministry of Tourism, Culture and Sport

Region 12 Summary

- In 2013, there were 4.3 million visits in Region 12, accounting for 3% of total visits to Ontario. Visitors to Region 12 spent \$614 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 4% of visits and 8% of expenditures, and Overseas visitors accounted for 1% of visits and 5% 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

- 36% of Ontario visitors to Region 12 reside in Region 5 and 15% in Region 6
- 45% of U.S. visitors come from Mid Atlantic and 20% from East North Central
- Ontario's 9 overseas target markets accounted for 50% 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

We Know. Just Ask.

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