

2012 Tourism Statistics Region 2

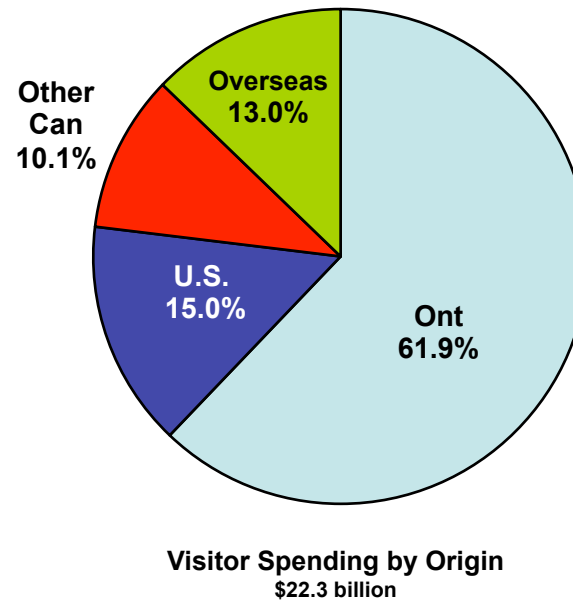
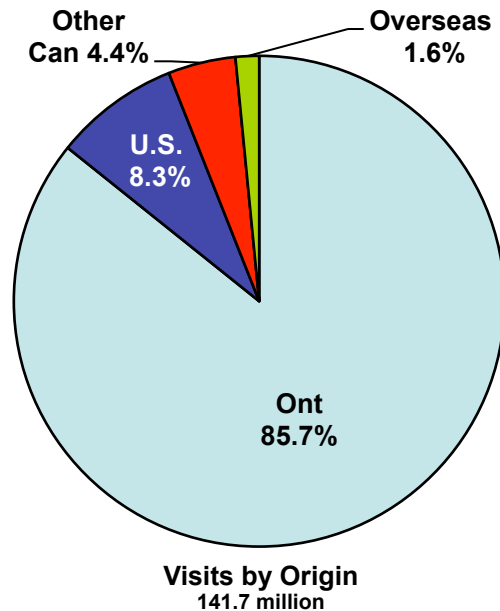
Tourism Research Unit
Summer 2014

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**, 3.7% of Ontario's GDP
- The total tourism employment impact (direct, indirect and induced) of tourism receipts reached **359,000 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



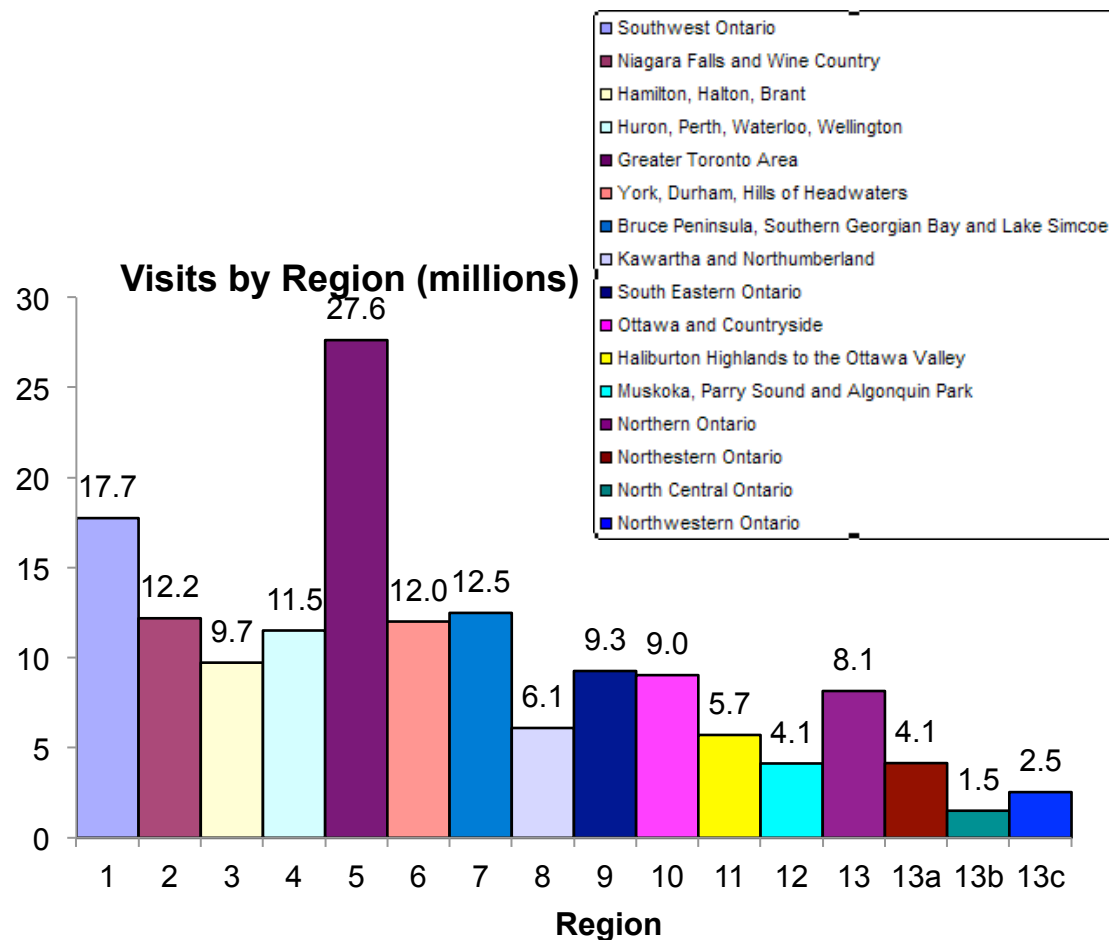
Ontario	2012	vs 2011
Visits	141.7 M	2.0%
Visitor Spending	\$22.3B	6.2%

- 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. Visits were up 2.0% and spending was up 6.2% compared to 2011
- 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 2 Tourism

Economic Impact of Tourism in Region 2

- Visitor Spending totalled **\$1.8 billion**
- Total GDP (direct, indirect and induced) generated by visitor spending amounted to **\$1.2 billion**, 6.8% of Region 2's GDP
- The total tourism employment impact (direct, indirect and induced) of visitor spending was **21,600 jobs**, accounting for 9.9% of Region 2's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$657 million**. \$326 million were federal tax revenues, \$272 million were provincial and \$59 million were municipal

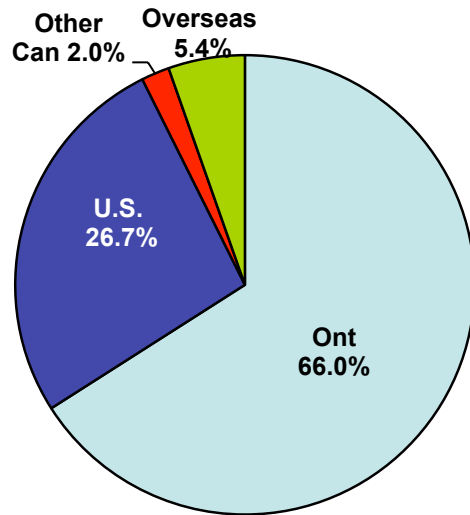
Total Visits and Spending

Region	Visits (millions) (vs 2011)	Visitor Spending (\$ billions) (vs 2011)
Ontario	141.7 (2.0%)	22.3 (6.2%)
Region 2	12.2 (8.5%)	1.8 (7.8%)
Region 2 proportion of Total Ontario	8.6%	8.0%

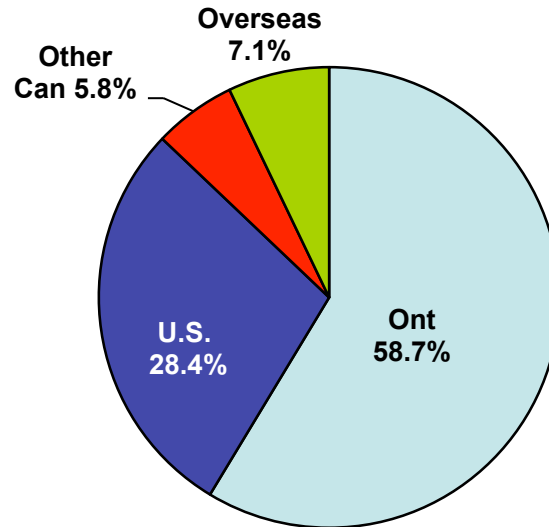
- In 2012, there were 12.2 million visits in Region 2, representing 8.6% of total visits in Ontario
- Visitors in Region 2 spent \$1.8 billion, accounting for 8.0% of total visitor spending in Ontario

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
12.2 million



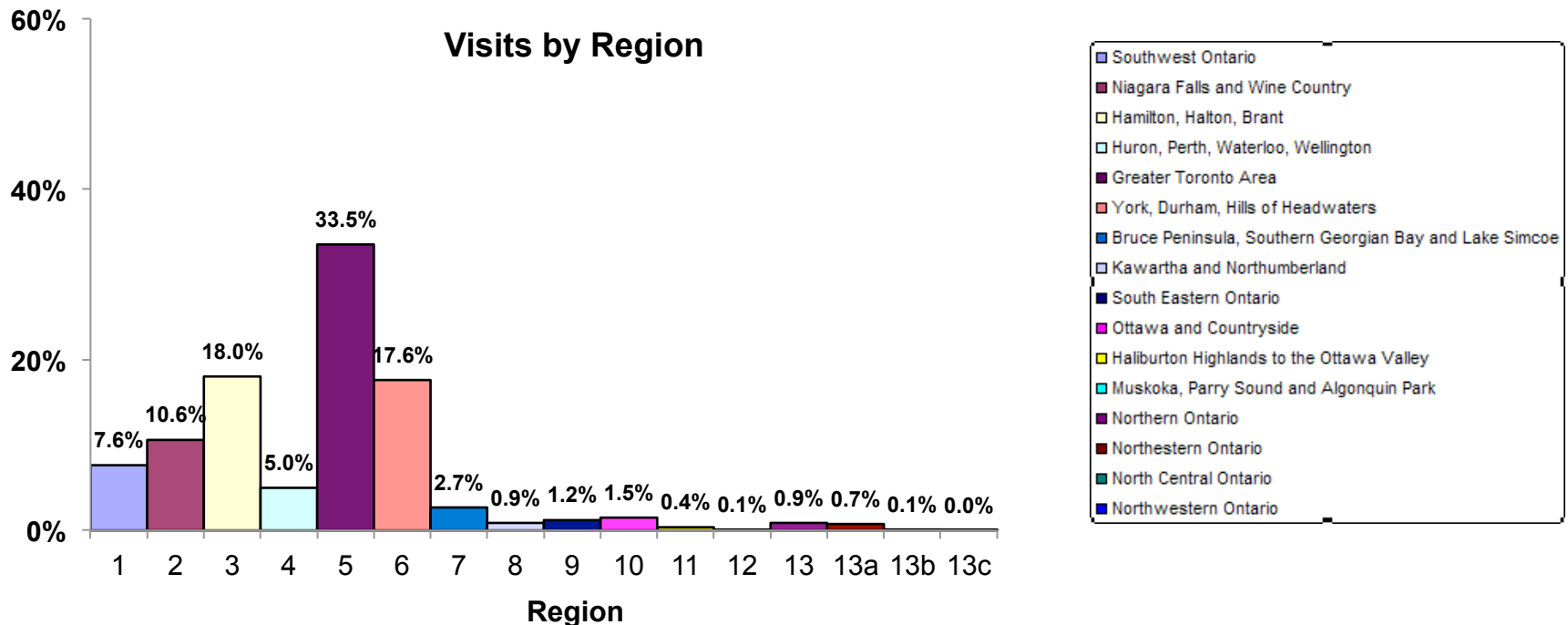
Visitor Spending by Origin
\$1.6 billion

Region 2 vs. Ontario	Visit Index	Spending Index
Ontario	77	95
U.S.	323	190
Other Canada	44	57
Overseas	348	55

- Ontario residents accounted for the majority of visits and spending
- U.S. visitors accounted for 27% of visits and 28% of expenditures
- Visitors from Other Canada made up 2% of visits and 6% of spending
- Overseas visitors accounted for 5% of visits and 7% 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 2 by Region of Residence

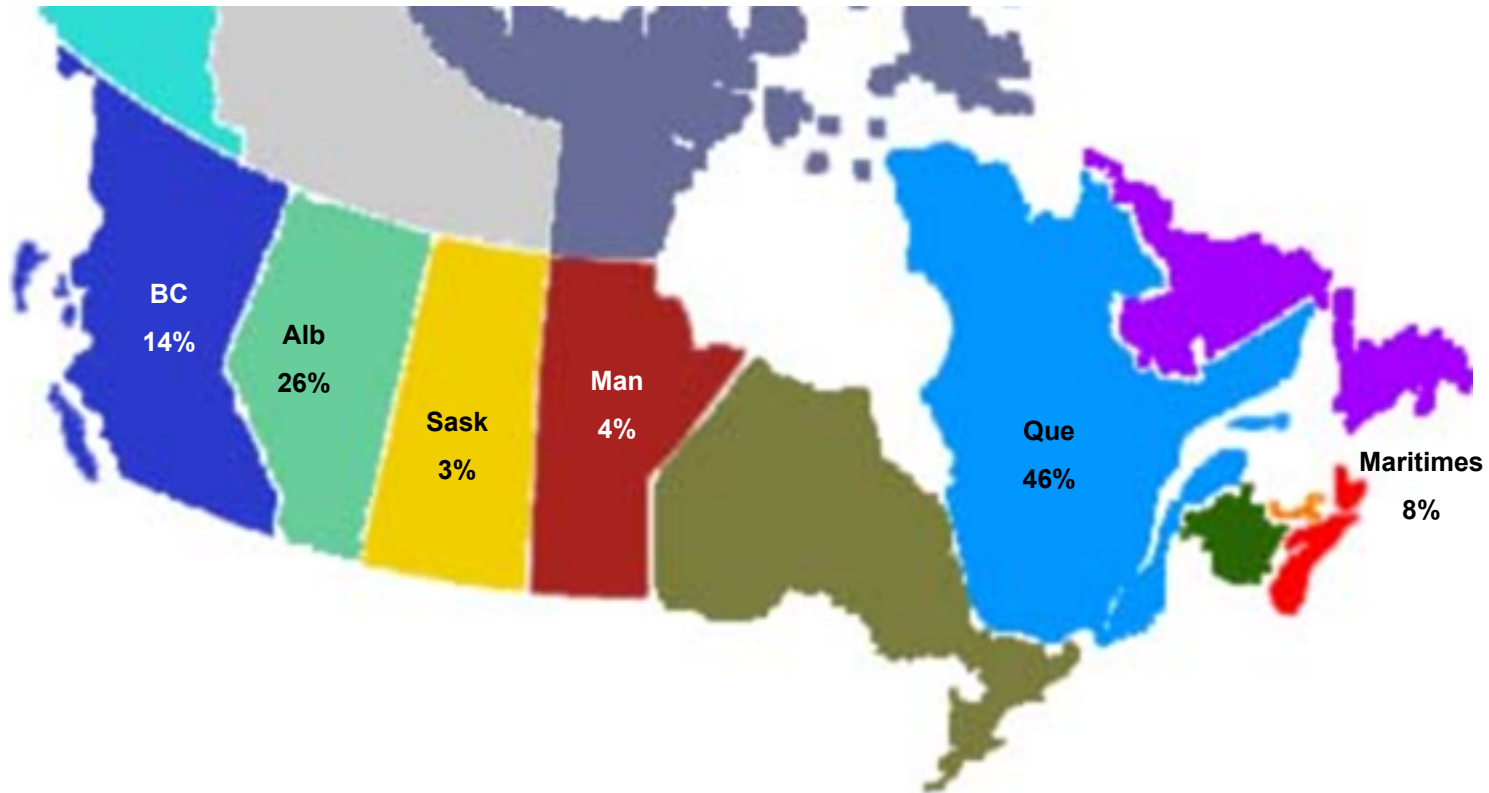


- 34% of Ontario visitors to Region 2 reside in Region 5, 18% in Region 3 and 18% in Region 6

Note: Ontario visitors to Region 2 represented 66% (8.0 M) of total visits and 59% (\$1.0 B) 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

Other Canada Visitors by Province of Residence

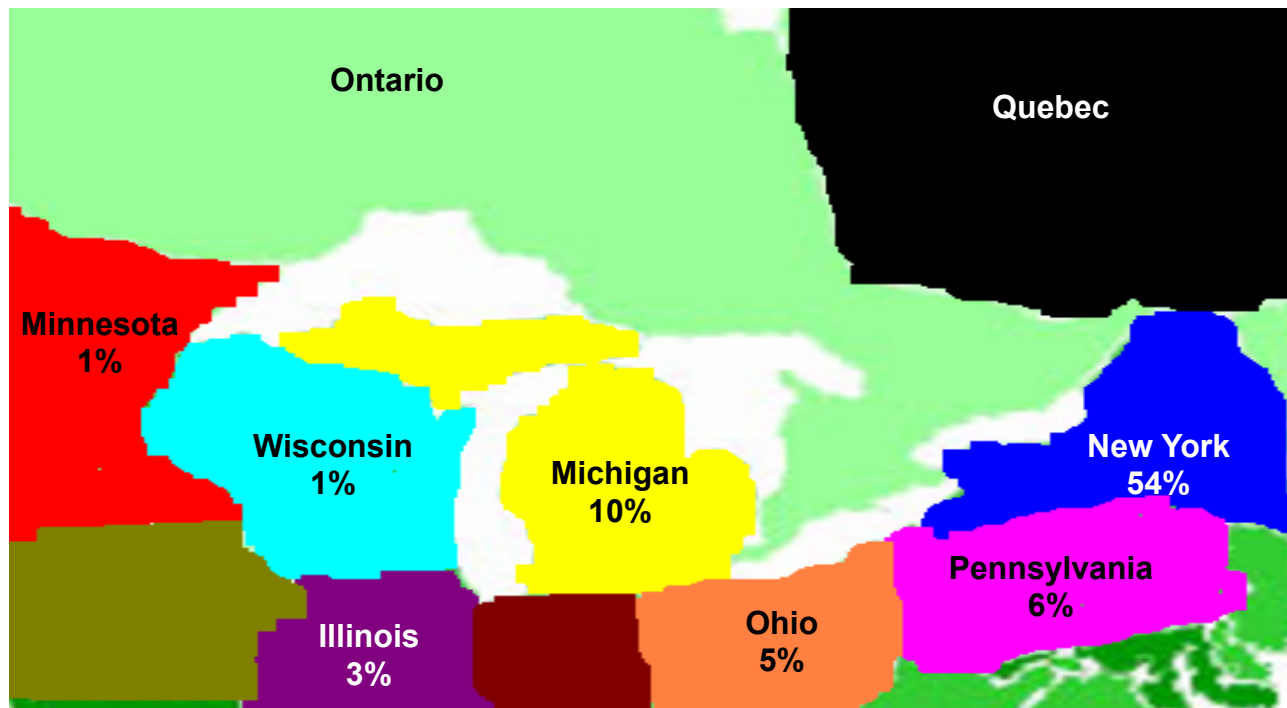


- 46% of Other Canada visitors came from Quebec with 34% from Montreal

Note: Other Canada visitors to Ontario represented 2% (241,000) of total visits and 6% (\$103 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

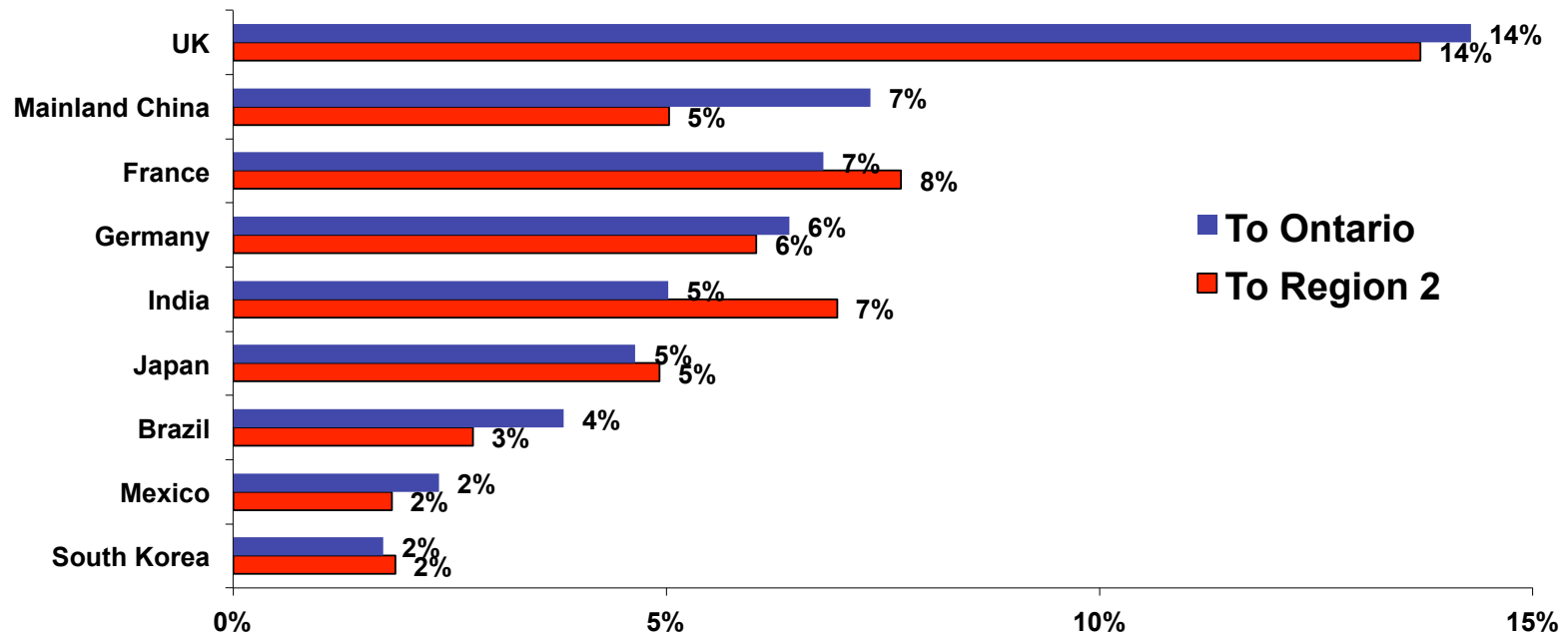


- 79% of U.S. visitors came from border states with 54% from New York

Note: U.S. visitors to Region 2 represented 27% (3.2 M) of total visits and 28% (\$507 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

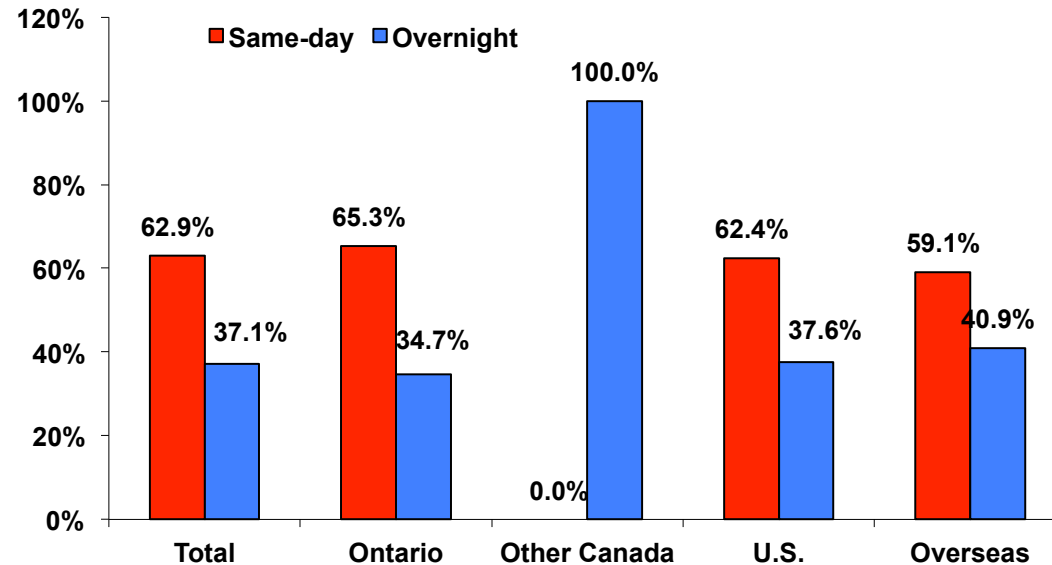


- Ontario's 9 overseas target markets represent 51% of overseas visitors to Region 2

Note: Overseas visitors to Region 2 represented 5% (657,000) of total visits and 7% (\$127 million) 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

Visits by Length of Stay



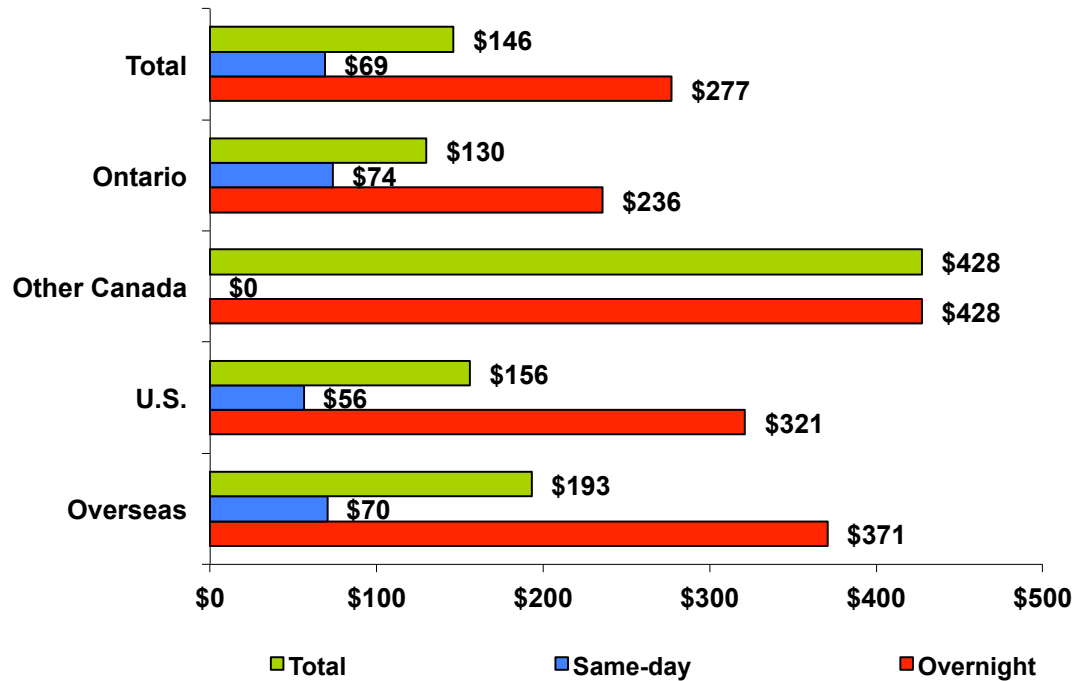
Region 2 vs. Ontario	Length of Stay Index
Same-day	97
Overnight	106
Avg # nights	65

Average # of nights	Total	Ontario	Other Canada	U.S.	Overseas
	1.9	1.6	3.0	2.1	3.2

- The majority (63%) of visits to Region 2 were same-day visits. For comparison, 65% of visits in Ontario were same-day visits
- Visitors from Other Canada were more likely to make an overnight trip
- The average number of nights spent in Region 2 was 1.9, below 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

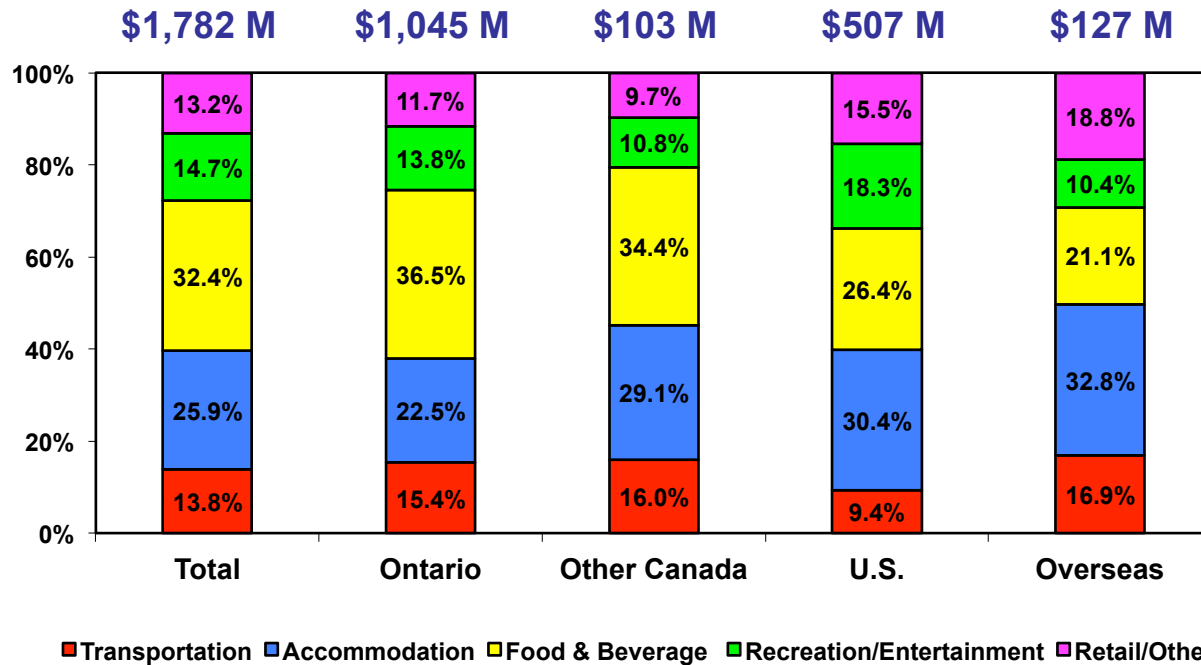


Region 2 vs. Ontario	\$/Trip Index
Total	93
Ontario	114
Other Canada	119
U.S.	55
Overseas	15

- Visitors spent an average of \$146/trip in Region 2 (\$150/trip for Ontario)
- On average, overnight visitors spent 4 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

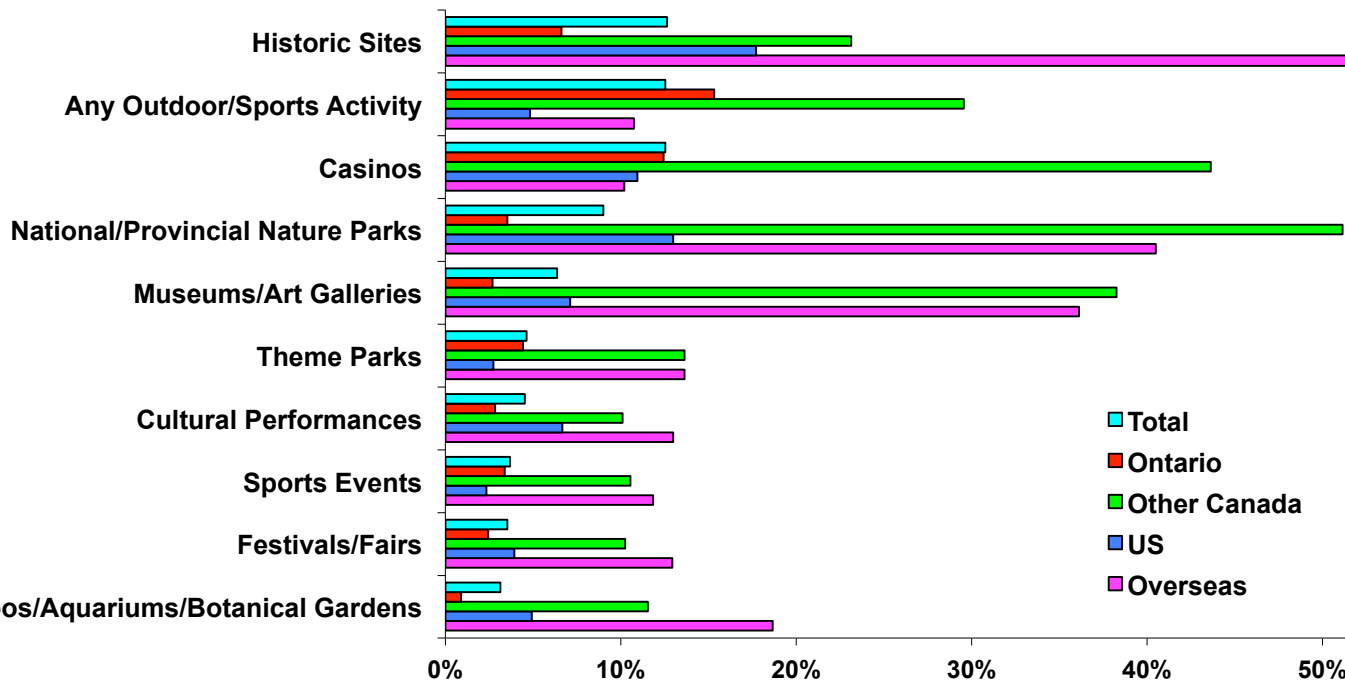


Region 2 vs. Ontario	Spending Index
Transportation	40
Accommodation	161
Food & Beverage	115
Rec./Entertain.	180
Retail/Other	102

- The largest proportions of expenditures were spent on Food & Beverage and Accommodations
- Between markets, Ontario visitors spent the largest share on Food, overseas visitors paid the biggest percentage on Accommodations, visitors from the U.S. spent the largest proportion on Recreation/Entertainment, overseas visitors spent the largest share on retail

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 *



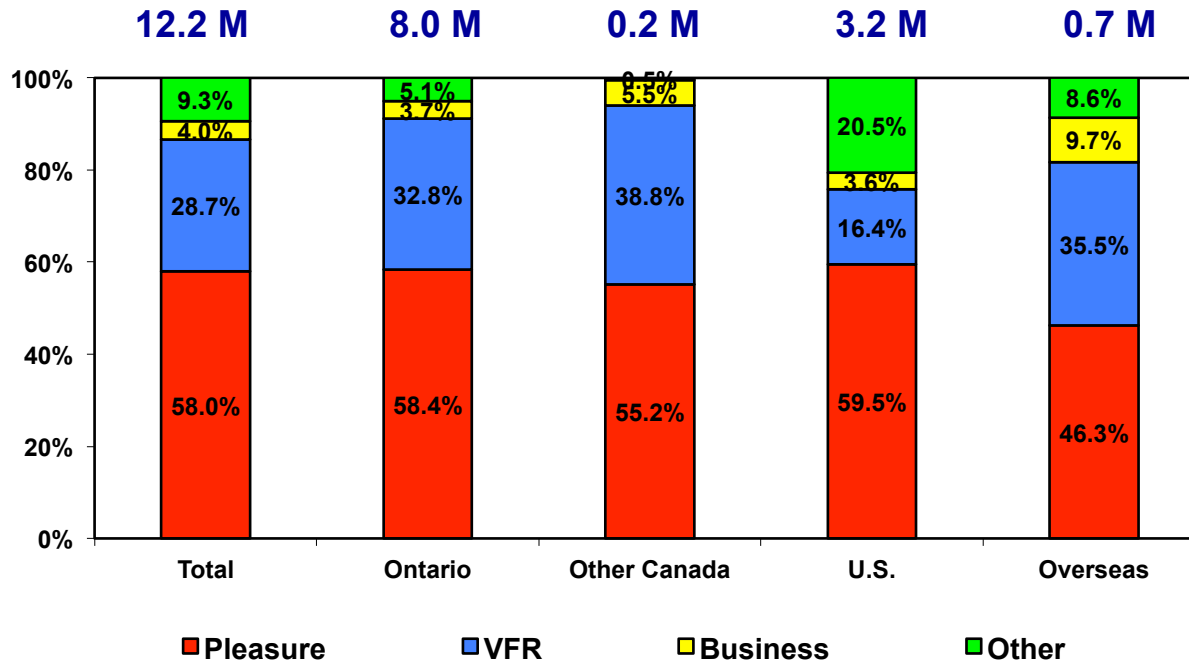
Region 2 vs. Ontario	Activity Index
Historic Sites	391
Any Outdoor/Sports Activity	73
Casinos	486
National/Provincial Nature Parks	236
Museums/Art Galleries	247
Theme Parks	343
Cultural Performances	116
Sports Events	90
Festivals/Fairs	196
Zoos/Aquariums/Botanical Gardens	327

- Visitors to Region 2 are more likely to visit a casino, theme park, zoo/aquarium, historic site, park, and museum/art gallery compared to visitors to Ontario

*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

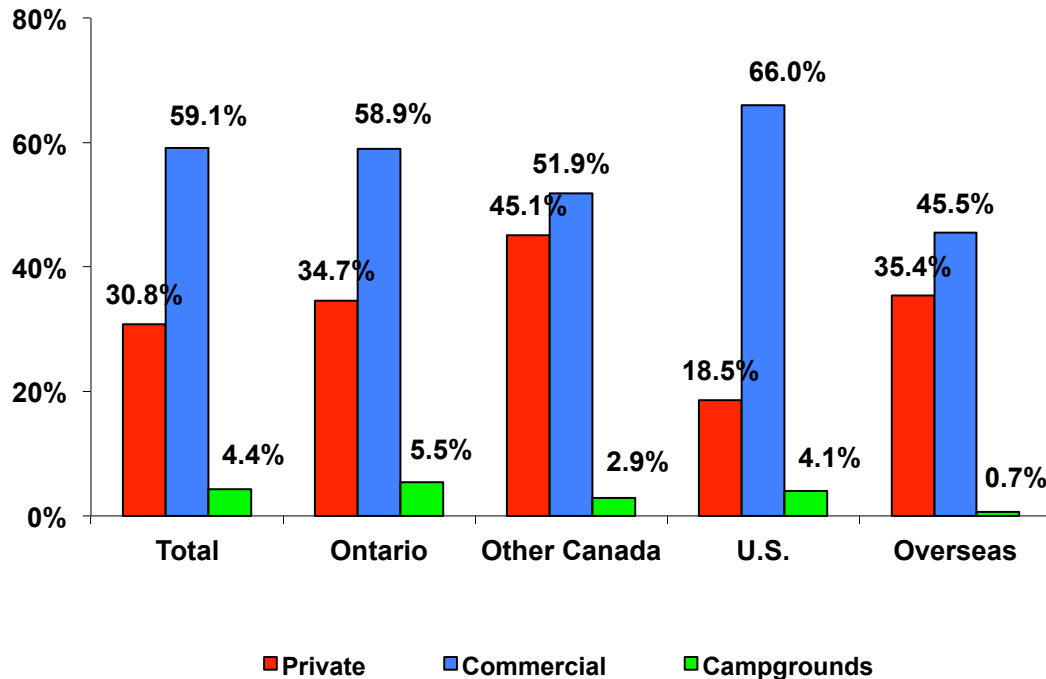


Region 2 vs. Ontario	Purpose Index
Pleasure	170
VFR	64
Business	300
Other	63
VFR: Visiting Friends and / or Relatives	

- Most trips to Region 2 are 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

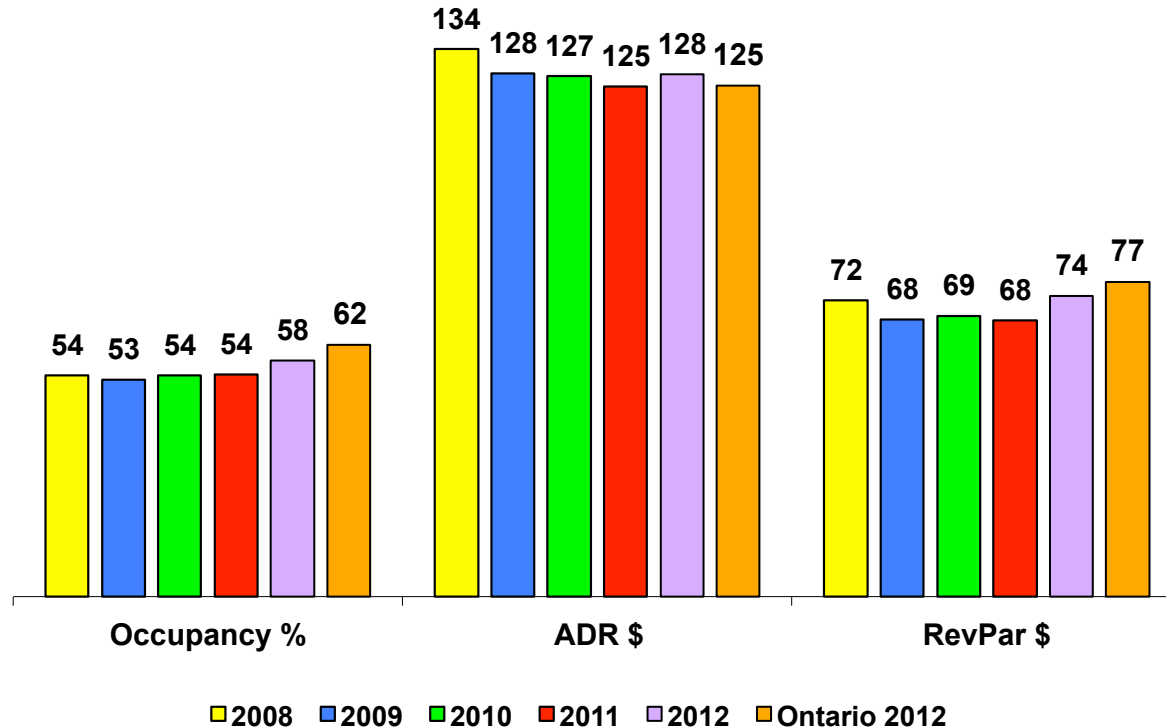


Region 2 vs. Ontario	Type Index
Private	49
Commercial	231
Campground	67

- The majority of overnight visits to Region 2 were spent at paid accommodations such as hotels and motels

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 2 vs. Ontario	Hotel Stats Index 2012
Occupancy	94
ADR	102
RevPar	96
ADR = Average Daily Rate RevPar = Revenue per Available Room	

- In 2012, occupancy, ADR and RevPar all grew compared to 2011
- Region 2 had a higher ADR than Ontario as a whole, but a lower average occupancy rate and revenue per available room

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

Tourism Related Establishments

Type of Establishment	# 2012*	% of Ontario
Accommodations	321	7%
Arts, Entertainment, Recreation	413	4%
Food & Beverage	1,121	4%
Transportation	129	1%
Travel Services	89	3%
Retail	2,013	3%
Other Services	1,128	3%
Total	5,214	3%

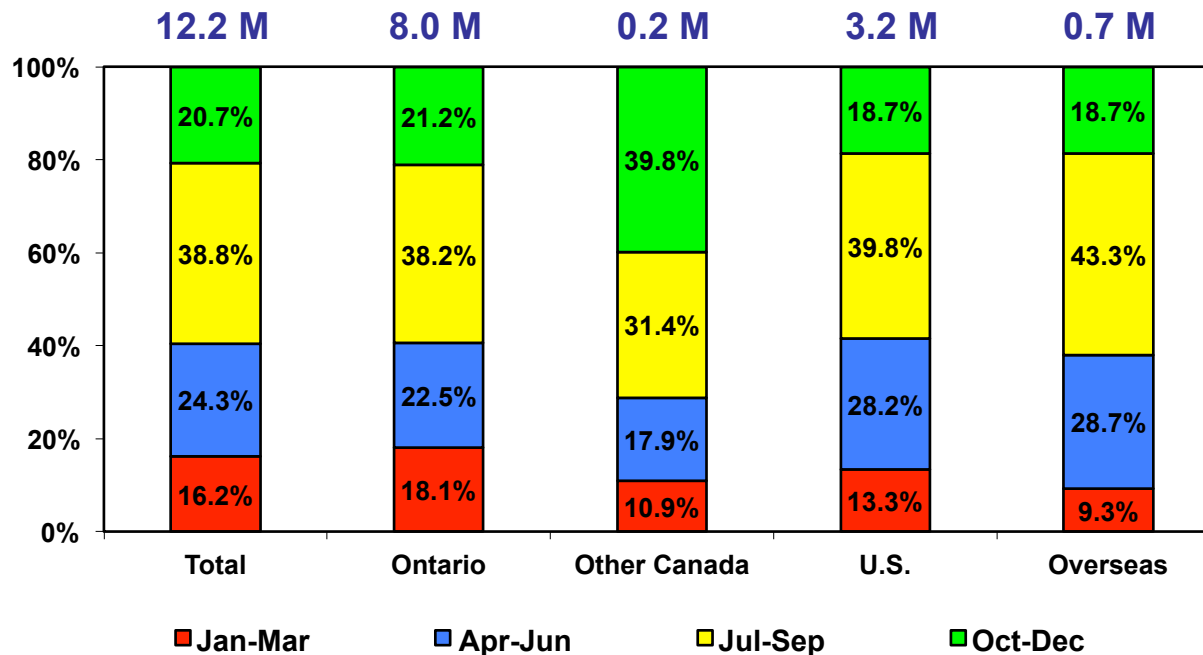
- Region 2 accounts for 3% of Ontario's tourism related establishments

Note: Region 2 represented 9% (12.2 M) of total visits and 8% (\$1.8 B) of visitor spending

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

Source: Statistics Canada, Business Register 2011

Visits by Time of Year



Region 2 vs. Ontario	Quarter Index
Jan-Mar	81
Apr-Jun	104
Jul-Sept	117
Oct-Dec	88

- The largest proportion of trips occur in the summer months
- This region's seasonal pattern is more skewed towards summer compared to Ontario

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

Region 2 Summary

- In 2012, there were 12.2 million visits in Region 2, accounting for 9% of total visits to Ontario. Visitors to Region 2 spent \$1.8 billion, or 8% of total visitor spending in Ontario. Visits were up 8.5% and spending was up 7.8% compared to 2011
- Ontario residents accounted for the majority of visits and spending, residents of Other Canada accounted for 2% of visits and 6% of spending, U.S. visitors represented 27% of visits and 28% of expenditures, and overseas visitors accounted for 5% of visits and 7% of spending
- Visitors spent an average of \$146/trip. Overnight visitors spent 4 times as much as same-day visitors
- The largest proportions of expenditures were spent on Food & Beverage and Accommodations

Region 2 Summary

- 34% of Ontario visitors to Region 2 reside in Region 5, 18% in Region 3 and 18% in Region 6
- 79% of U.S. visitors came from border states including 54% from New York
- Ontario's 9 overseas target markets accounted for 51% of overseas visitors to Region 2. The U.K. was the leading overseas source market at 14% of overseas visits
- The majority of visits were same-day
- Most trips were for pleasure
- The majority of overnight visitors stayed in paid accommodations

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