

Tourism Statistics

RTO 1

Tourism Research Unit
Spring 2012

Ontario Tourism

Ontario Tourism Indicators 2011*

- Visits increased by 1.3% to 104.4 million. Visits from Ontario and overseas countries increased, while visits from the U.S. and other areas of Canada declined
- Visitor spending increased by 3.6% to \$18.3 billion; spending from Ontarians and overseas countries grew but spending from the U.S. and other provinces declined
- Tourism receipts increased by 4.3% to \$23.6 billion
- Total employment generated by tourism receipts in Ontario increased by 1.0% to 334,069 jobs, while employment in the tourism-related industries also increased by 1.1% to 211,277
- Provincial taxes generated by tourism receipts increased by 2.5% to \$4.0 billion
- GDP generated by tourism receipts throughout the Ontario economy increased by 3.9% to \$21.1 billion

*Tourism indicators are based on preliminary Statistics Canada data

Ontario Tourism Outlook

Origin	2009 ^A (millions)	2010 ^F	2011 ^F	2012 ^F	2013 ^F	2014 ^F	2015 ^F	% Chg 2015 vs 2011	Average Annual Growth
Total Visits	101.5	1.8%	1.2%	2.1%	3.5%	2.6%	1.9%	11.8%	2.3%
Domestic Visits	88.0	2.3%	1.6%	2.5%	3.6%	2.6%	1.8%	12.7%	2.4%
Ontario	83.7	1.6%	2.3%	2.5%	3.7%	2.6%	1.8%	13.6%	2.6%
Other Canada	4.3	17.4%	-10.6%	2.3%	2.8%	2.3%	1.9%	-2.0%	-0.3%
International Visits	13.5	-2.0%	-1.8%	-0.3%	2.7%	2.8%	2.2%	5.8%	1.1%
U.S.	11.6	-3.0%	-2.5%	-1.3%	2.0%	2.3%	1.8%	2.2%	0.5%
Overseas	1.9	4.3%	3.6%	5.1%	5.9%	4.8%	4.3%	26.0%	4.7%

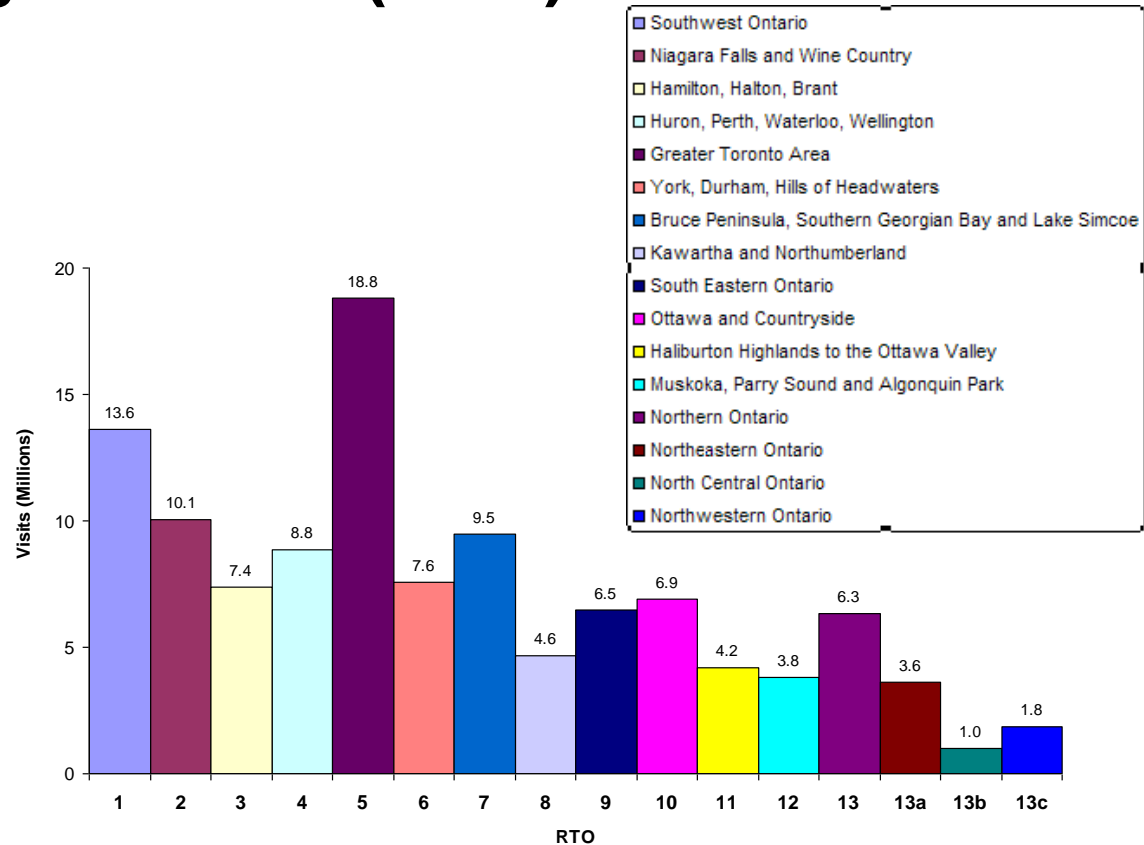
- Domestic visits, which represent 87% of visits, will experience positive growth between 2010 and 2015, with an average annual growth rate of 2.4%
- U.S. visits are expected to decline from 2010-2012 then grow in 2013-2015
- Overseas visits are expected to grow each year with an average annual growth rate of 4.7%

Source: Ontario Ministry of Tourism, Culture and Sport

Non-business & Business travel

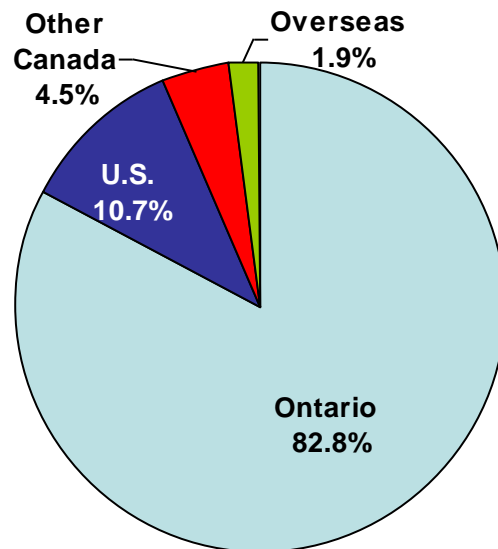
Visits and Spending by Regional Tourism Organization (RTO)

2010	Visits (millions)	Visitor Spending (\$ billions)
Ontario	103.7	17.1
RTO 1	13.1%	7.5%
RTO 2	9.7%	9.1%
RTO 3	7.1%	3.2%
RTO 4	8.5%	4.8%
RTO 5	18.2%	30.0%
RTO 6	7.3%	3.5%
RTO 7	9.2%	6.8%
RTO 8	4.5%	2.7%
RTO 9	6.2%	4.4%
RTO 10	6.7%	7.7%
RTO 11	4.0%	2.4%
RTO 12	3.7%	3.0%
RTO 13	6.1%	7.3%

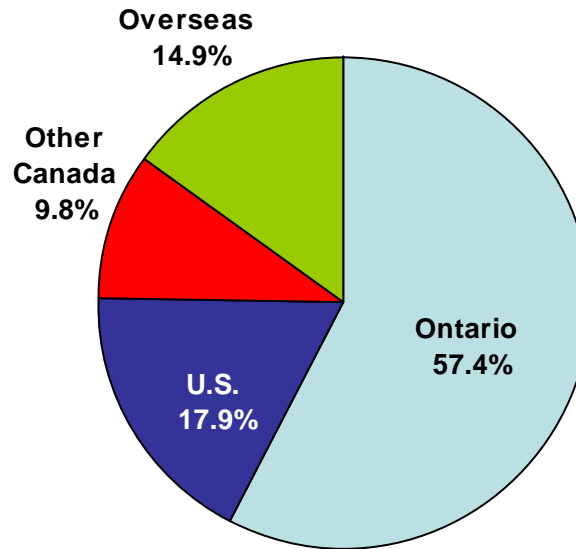


Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Visits and Spending



Visits by Origin
103.7 million



Visitor Spending by Origin
\$17.1 billion

- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 11% of visits and 18% of expenditures
- Overseas visitors account for 2% of visits and 15% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Ontario Summary

- In 2010, there were 103.7 million visits in Ontario and visitors spent \$17.1 billion
- Ontario residents accounted for the majority of visits (83%) and spending (57%)
- U.S. visitors represented 11% of visits and 18% of expenditures
- Overseas visitors accounted for 2% of visits and 15% of spending
- RTO 5 (GTA) is the largest RTO representing 18% of visits and 30% of spending
- Visitors spent an average of \$165/trip in Ontario

Ontario Summary (cont'd)

- The largest proportions of expenditures were spent on Transportation (32%) and Food & Beverage (27%)
- 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 the leading overseas source market at 16% of overseas visits
- 59% of visits were same-day visits driven by Ontario residents
- Most trips were to visit friends and relatives or for pleasure
- The majority of overnight visitors stayed in private homes (62%) except U.S. visitors who are more likely to stay at a hotel/motel (48%)

RTO 1 Tourism

Economic Impact of Tourism in RTO 1 2010

- Visitor Spending totalled **\$1.3 billion**
- Total GDP (direct, indirect and induced) generated by visitor spending amounted to **\$789 million**, 1.4% of RTO 1's GDP
- The total tourism employment impact (direct, indirect and induced) of visitor spending was **14,400 jobs**, accounting for 2.2% of RTO 1's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$424 million**. \$206 million were federal tax revenues, \$183 million were provincial and \$36 million were municipal

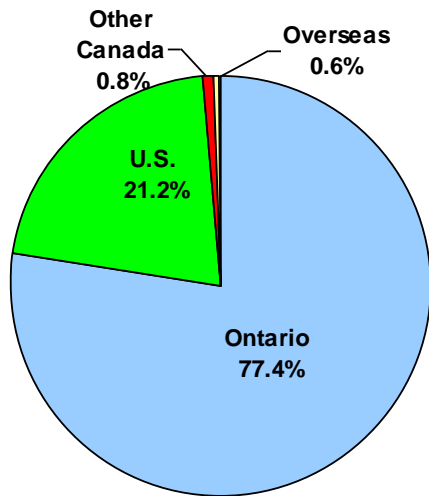
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario	103.7	17.1
RTO 1	13.6	1.3
RTO 1 proportion of Total Ontario	13.1%	7.5%

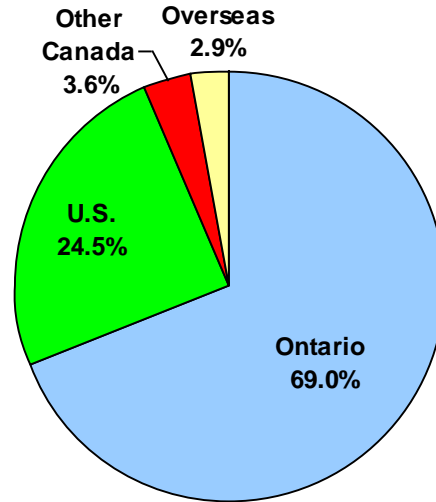
- In 2010, there were 13.6 million visits to RTO 1, representing 13.1% of total visits to Ontario
- Visitors to RTO 1 spent \$1.3 billion, accounting for 7.5% of total visitor spending in Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Visits and Spending



Visits by Origin
13.6 million



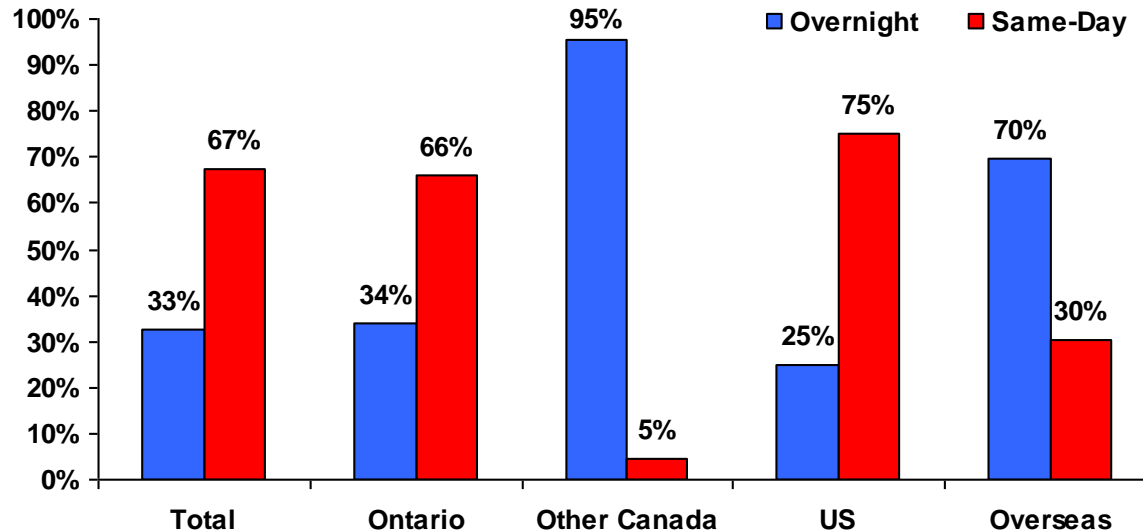
Visitor Spending by Origin
\$1.3 billion

RTO 1 vs. Ontario	Visit Index	Spending Index
Ontario	93	120
U.S.	197	137
Other Canada	18	37
Overseas	32	19

- Ontario residents accounted for the majority of visits and spending
- U.S. visitors accounted for 21% of visits and 25% of expenditures. This compares to 11% of visits and 18% of spending in Ontario
- Visitors from Other Canada comprised less than 1% of visits and 4% of spending
- Overseas visitors accounted for less than 1% of visits and 3% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Visits by Length of Stay



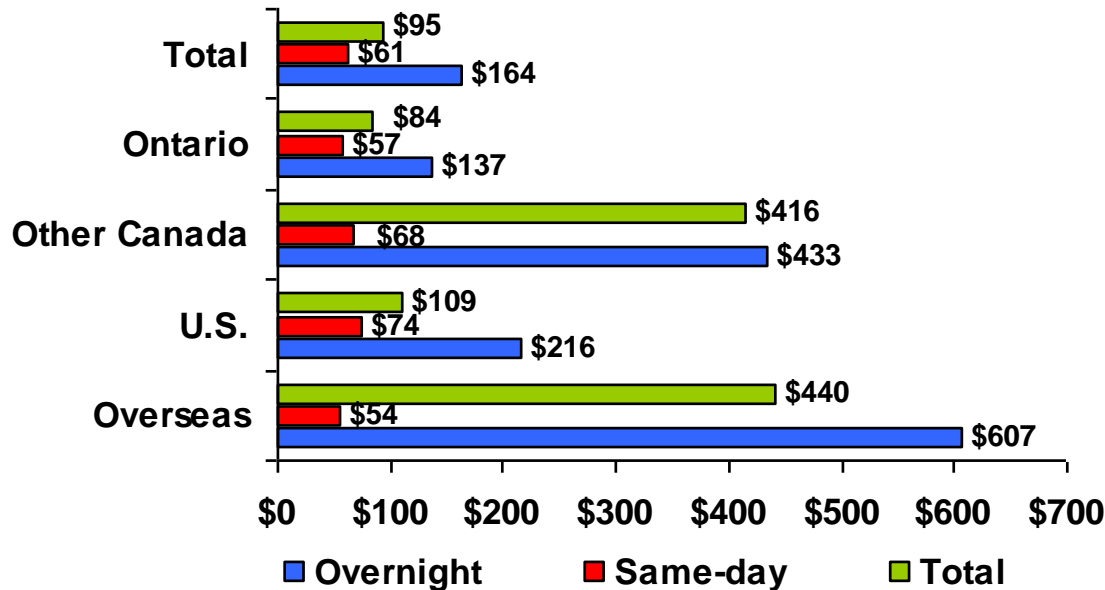
RTO 1 vs. Ontario	Length of Stay Index
Same-day	115
Overnight	79
Avg # nights	80

Average # of nights	Total	Ontario	Other Canada	US	Overseas
	2.5	2.3	5.7	2.3	13.1

- The majority (67%) of visits to RTO 1 were same-day visits. For comparison, 59% of visits in Ontario were same-day visits
- Visitors from Other Canada and Overseas were more likely to take an overnight trip
- The average number of nights spent in RTO 1 was 2.5, below Ontario's average of 3.1 nights

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

\$/Trip by Length of Stay

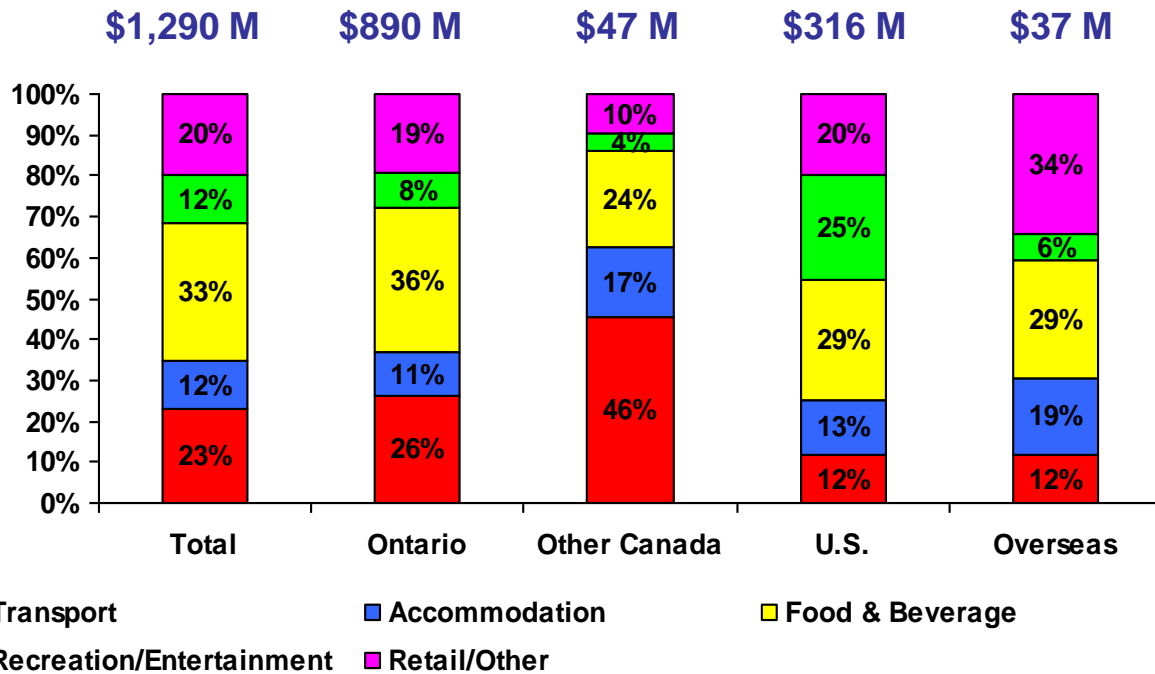


RTO 1 vs. Ontario	\$/Trip Index
Total	57
Ontario	74
Other Canada	117
U.S.	40
Overseas	34

- Visitors spent an average of \$95/trip in RTO 1 (\$165/trip for Ontario)
- On average, overnight visitors spent over twice as much per person as same-day visitors
- Overseas visitors spent the most per person, on average, at \$440/trip

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Spending by Category

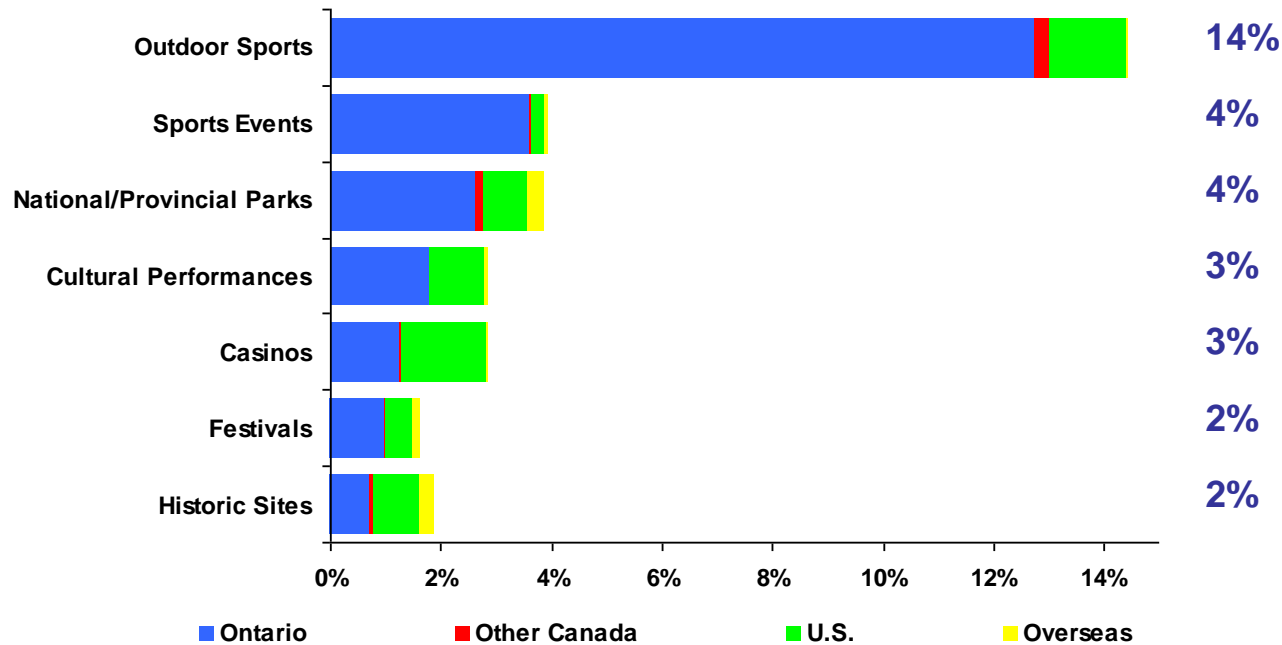


RTO 1 vs. Ontario	Spending Index
Transportation	73
Accommodation	67
Food & Beverage	124
Rec./Entertain.	131
Retail/Other	131

- The largest proportion of expenditures were spent on food & beverage
- Between markets, visitors from Other Canada spent the largest proportion on transportation, overseas visitors spent the largest share on retail, U.S. visitors spent the largest proportion on entertainment, and Ontarians spent the largest proportion on food

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Total Visits by Activity *



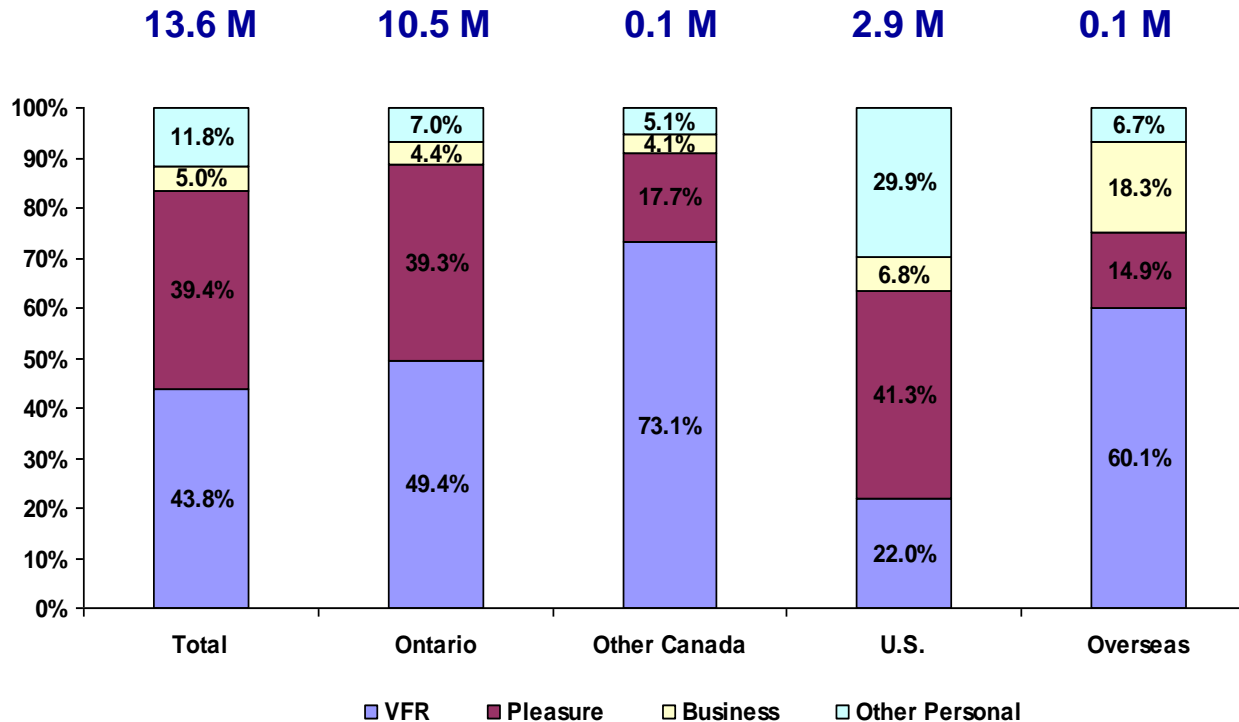
RTO 1 vs. Ontario	Activity Index
Any Outdoor Sports Activity	72
Sports Events	117
National/Provincial Parks	76
Cultural Performances	65
Casinos	93
Festivals	72
Historic Sites	45

- In general, visitors to RTO 1 demonstrated a lower rate of participation in activities compared to visitors to other regions
- Overseas visitors are more likely to visit historic sites, parks, etc.

*activity may or may not have taken place in region

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Main Purpose of Visit

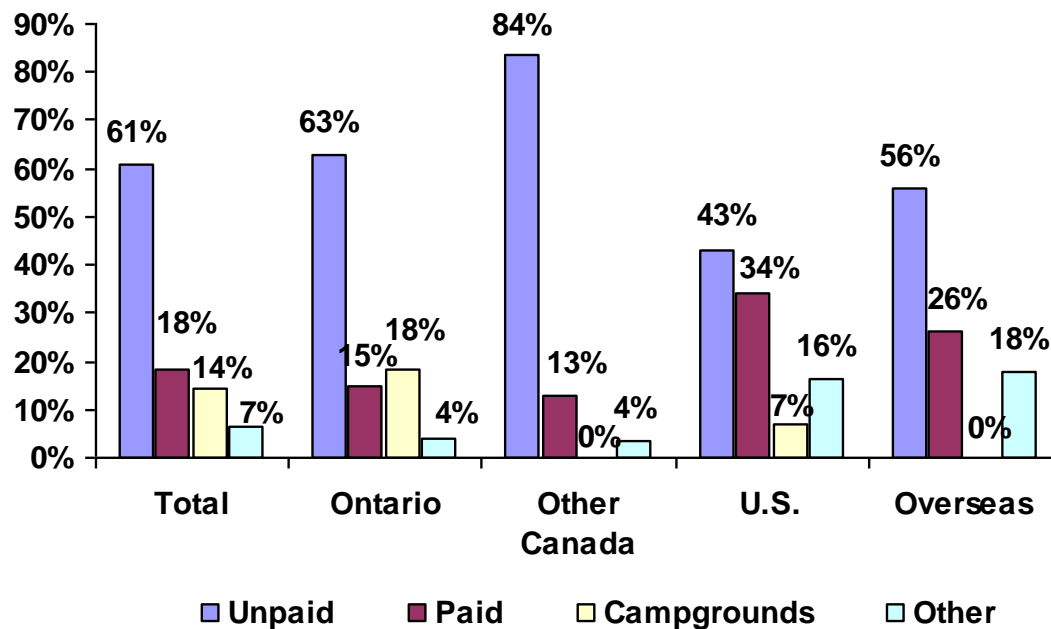


RTO 1 vs. Ontario	Purpose Index
VFR	98
Pleasure	95
Business	84
Other	156
VFR: Visiting Friends and / or Relatives	

- Most trips are to visit friends and relatives or for pleasure, similar to Ontario
- U.S. visitors are more likely to take a pleasure trip while visitors from Other Canada and Overseas are more likely to come to RTO 1 to visit family or friends

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Visits by Accommodation

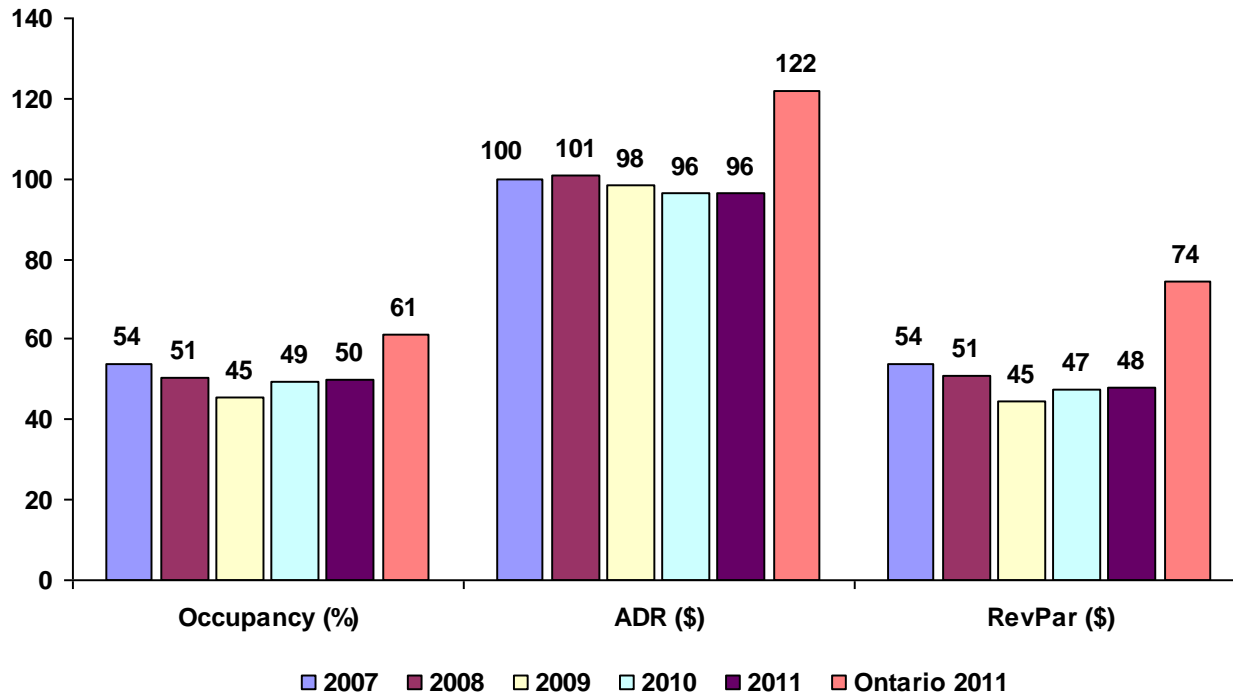


RTO 1 vs. Ontario	Type Index
Unpaid	98
Paid Roofed	71
Campground	226
Other	113

- The majority of overnight visits to RTO 1 were spent at unpaid accommodations such as private homes and cottages
- U.S. visitors stayed at hotels in higher proportion than visitors from other markets

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Hotel Statistics



RTO 1 vs. Ontario	Hotel Stats Index 2011
Occupancy	82
ADR	79
RevPar	65
ADR = Average Daily Rate RevPar = Revenue per Available Room	

- In general, occupancy, ADR and RevPar are recovering from a previous downturn
- RTO 1 had lower occupancy, ADR and RevPar than total Ontario

Source: PKF Consulting, Ministry of Tourism and Culture

Park Statistics

Park	# Developed Campsites	Visitors	Day Use	Bus Permits	Camper Nights	Campers	July-Aug %Occ
Pinery	1,000	614,479	119,912	56	484,845	115,439	93%
Long Point	253	131,152	52,480	3	78,672	24,585	88%
Turkey Point	235	123,794	65,071	0	54,930	14,085	66%
Port Burwell	232	116,470	41,954	0	71,161	16,173	82%
Rondeau	261	168,758	96,687	20	71,943	19,444	66%
Wheatley	220	81,456	11,397	0	68,833	19,667	48%
Selkirk	151	36,989	2,577	0	33,365	10,427	54%
Rock Point	178	66,238	11,561	3	52,186	17,395	73%
Port Bruce		9,833	9,833				
Total	2,530	1,349,169	411,472	82	915,935	237,215	
% of Ontario	14%	15%	10%	6%	20%	19%	

- The Pinery is the most popular camping destination in RTO 1, with the largest number of visitors and overall nights spent
- During July and August, the Pinery is almost at full capacity

Source: Ontario Parks 2010

Tourism Related Establishments

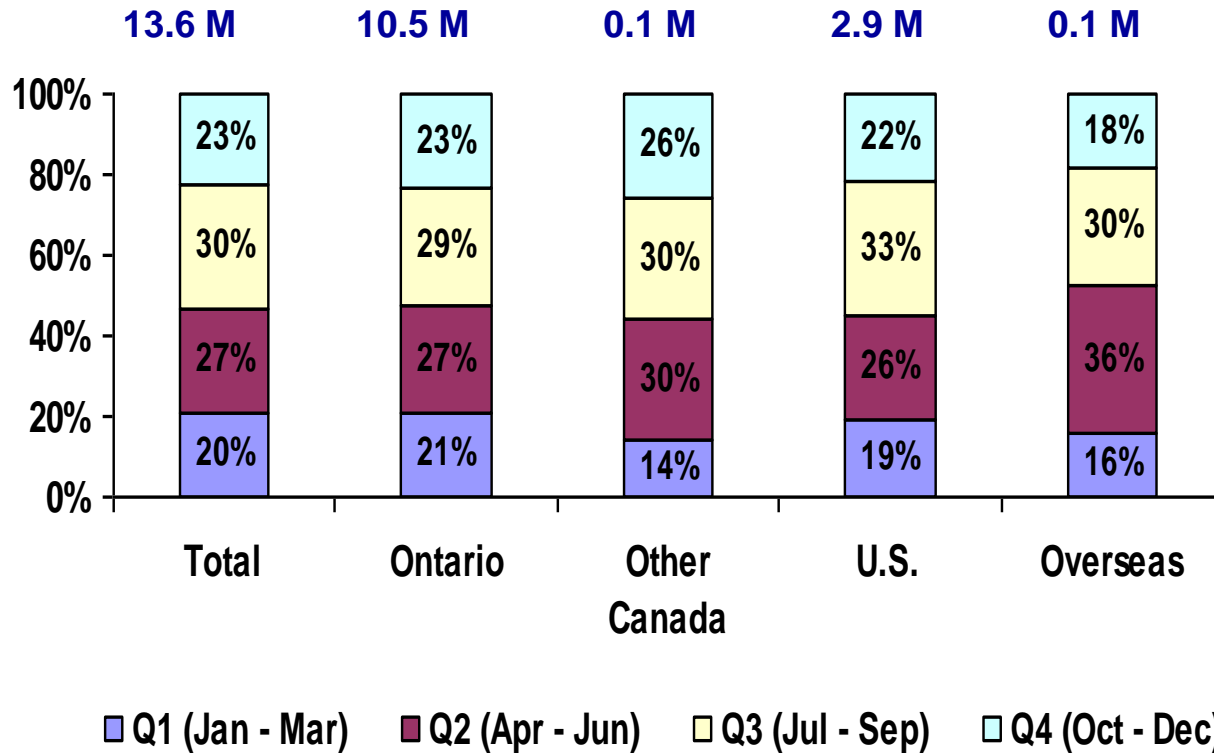
Type of Establishment	# 2010*	% of Ontario
Accommodations	317	7%
Arts, Entertainment, Recreation	903	10%
Food & Beverage	2,749	9%
Transportation	748	8%
Travel Services	167	6%
Retail	6,095	10%
Other Services	3,305	10%
Total	14,284	10%

- RTO 1 accounts for 10% of Ontario's tourism related establishments
- Note: RTO 1 represented 13% (13.6 M) of total visits and 8% (\$1.3 B) of visitor spending

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

Source: Statistics Canada, Business Register 2010

Visits by Time of Year

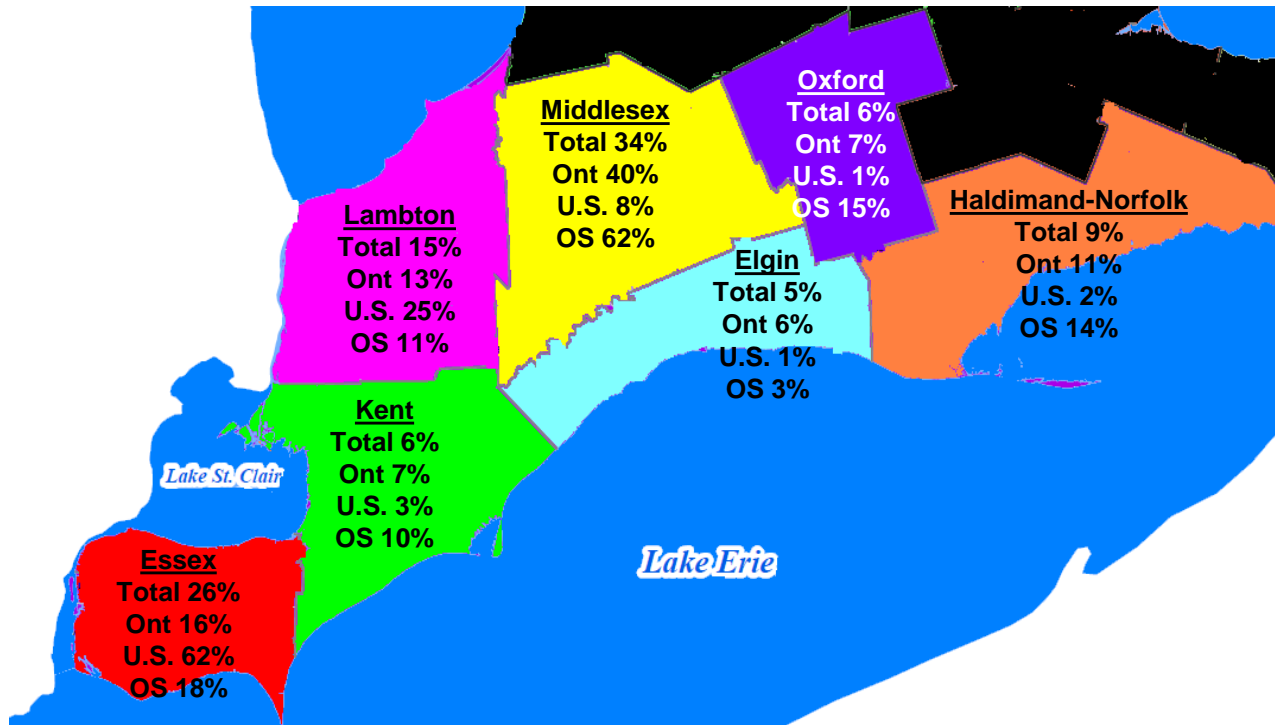


RTO 1 vs. Ontario	Quarter Index
Jan-Mar	107
Apr-Jun	103
Jul-Sept	94
Oct-Dec	99

- The largest proportion of trips occur in the summer months
- This region's seasonal pattern is similar to that of Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

Visitors by Origin by Census Division

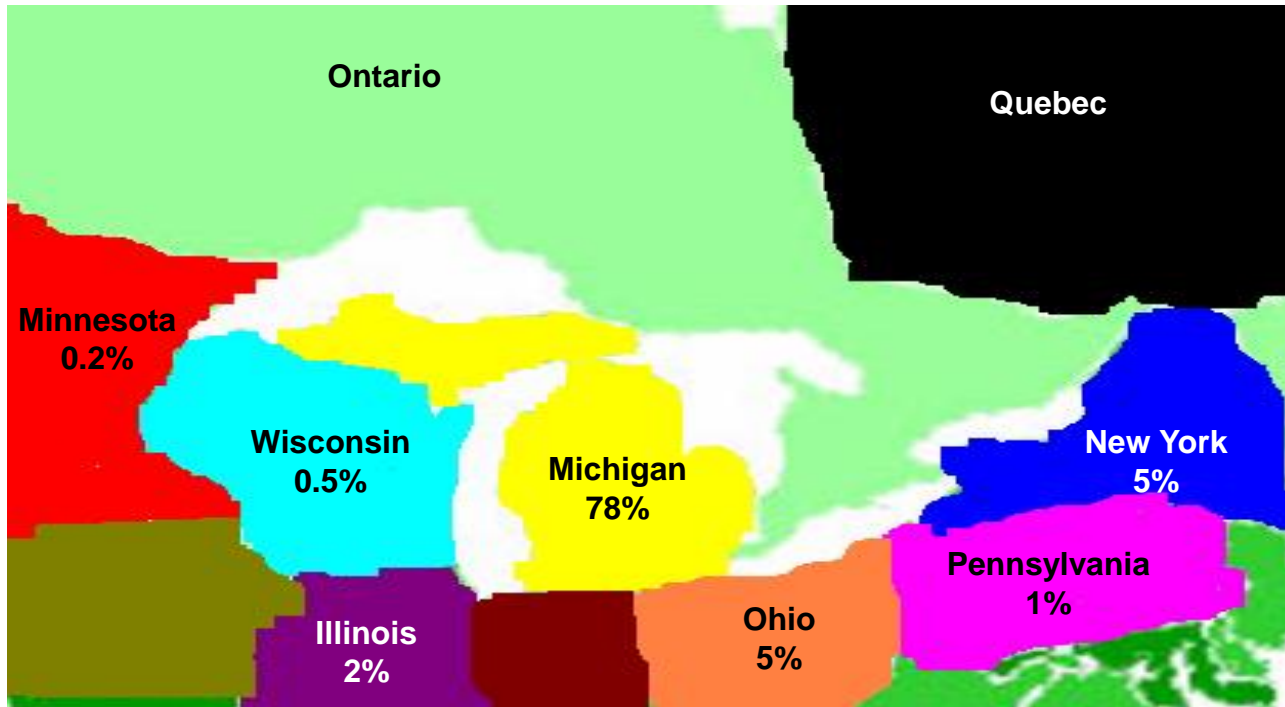


Origin	% of Visits	% of \$
Ontario	77%	69%
Other Canada	1%	4%
U.S.	21%	24%
Overseas	1%	3%
OS = Overseas		

- Visits to RTO 1 are mainly to Middlesex and Essex
- 62% of U.S. visitors went to Essex, 62% of Overseas visitors went to Middlesex
- Most visitors only go to one census division per visit while visiting RTO 1

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

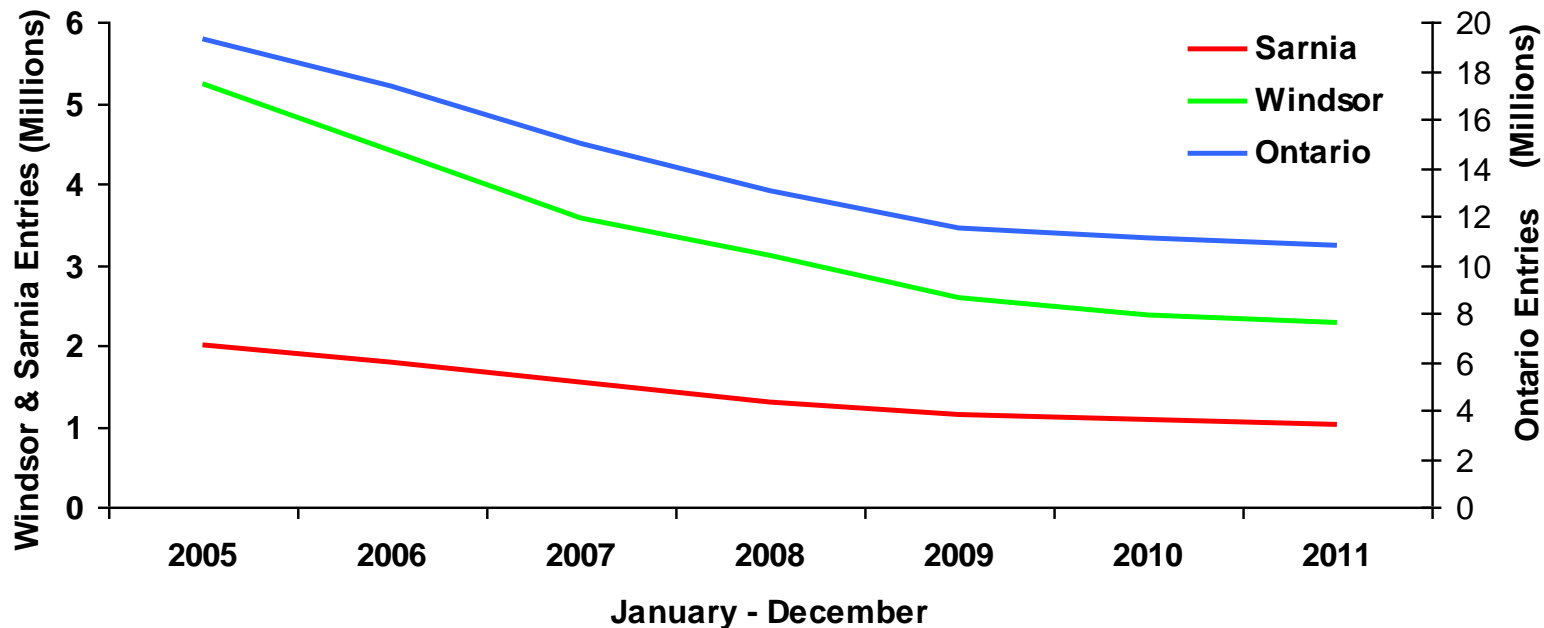
U.S. Visitors by State of Residence



- 92% of U.S. visitors came from border states; primarily from Michigan at 78%
- Note: U.S. visitors to RTO 1 represented 21% (2.9 M) of total visits and 24% (\$315 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

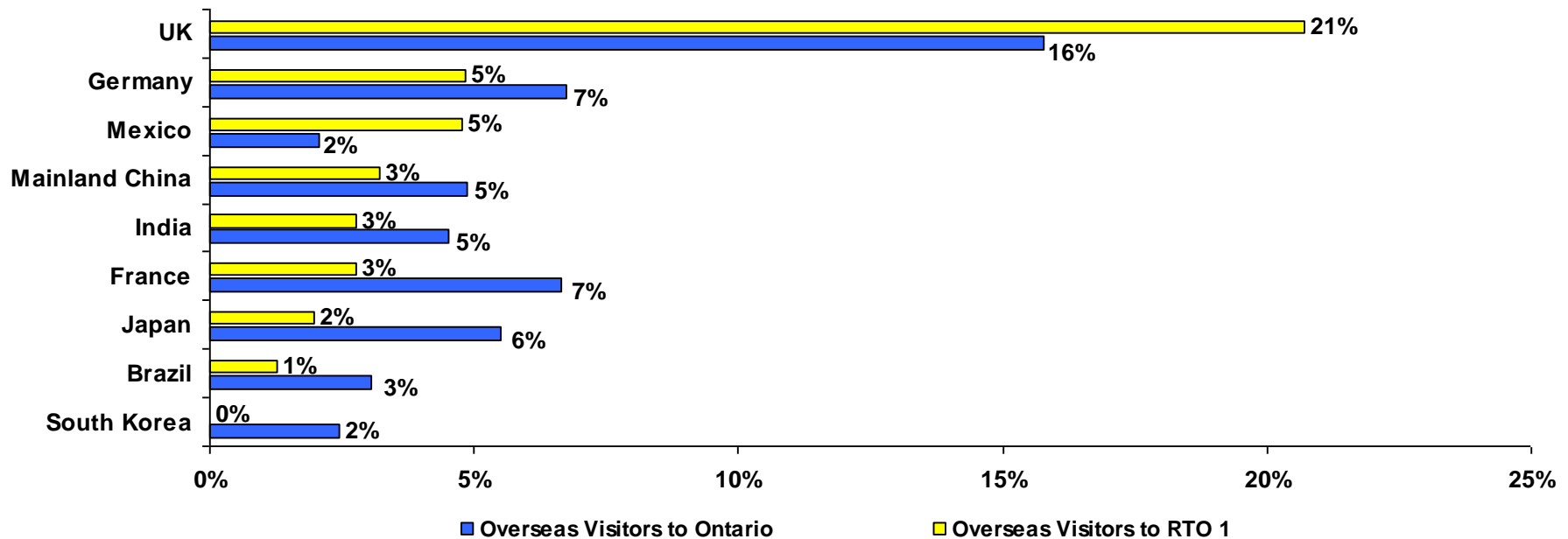
U.S. Border Crossings



- U.S. border crossings via Windsor and Sarnia accounted for 31% of U.S. entries into Ontario in 2011
- U.S. crossings via Windsor and Sarnia have declined at a greater rate than entries into Ontario
- In 2011 compared to 2010, U.S. entries via Windsor and Sarnia were down 5%, while U.S. entries to Ontario decreased by 3%

Source: Statistics Canada, Ontario Ministry of Tourism, Culture and Sport

Overseas Visitors by Country of Residence



- Ontario's 9 overseas target markets represented 42% of overseas visitors to RTO 1
- Note: Overseas visitors to RTO 1 represented 1% (84,000) of total visits to the region and 3% (\$37 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

RTO 1 Summary

- In 2010, there were 13.6 million visits in RTO 1, accounting for 13% of total visits to Ontario. Visitors to RTO 1 spent \$1.3 billion, or 8% of total visitor spending in Ontario
- Ontario residents accounted for the majority of visits and spending, residents of Other Canada accounted for 1% of visits and 4% of spending, U.S. visitors represented 21% of visits and 23% of expenditures, and overseas visitors accounted for 1% of visits and 3% of spending
- Visitors spent an average of \$95/trip. On average, overnight visitors spent over 2 times as much per person as same-day visitors. Overseas visitors spent the most per person, on average, at \$440/trip
- The largest proportions of expenditures were spent on food & beverage, transportation, and retail

RTO 1 Summary (cont'd)

- 92% of U.S. visitors came from border states including 78% from Michigan
- Ontario's 9 overseas target markets accounted for 42% of overseas visitors to RTO 1. The U.K. was by far the leading overseas source market at 21% of overseas visits
- The majority of visits were same-day
- Most trips were to visit friends and relatives or for pleasure
- The majority of overnight visitors stayed in unpaid accommodations

We Know. Just Ask.

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