

Region 1 Tourism Overview

Ministry of Tourism, Culture and Sport

Sept 19, 2014

Agenda

- Tourism Research Unit
- Region 1 Tourism Statistics
- Ontario Tourism Outlook

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
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- 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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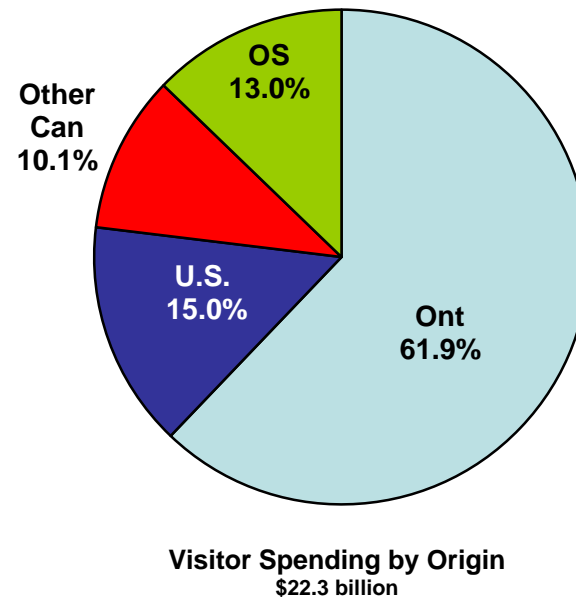
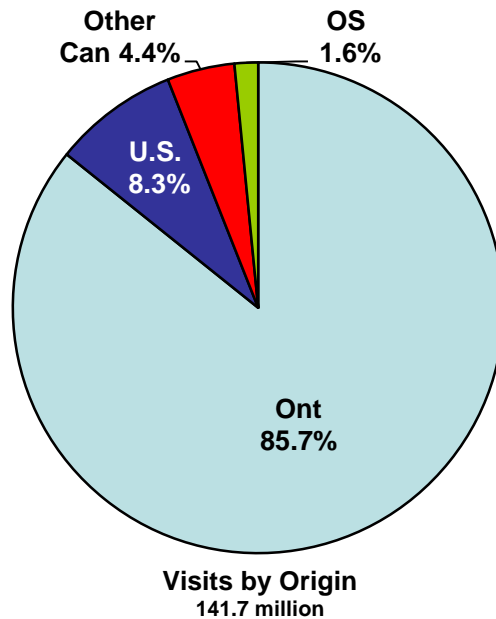
www.ontario.ca/tourismresearch

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

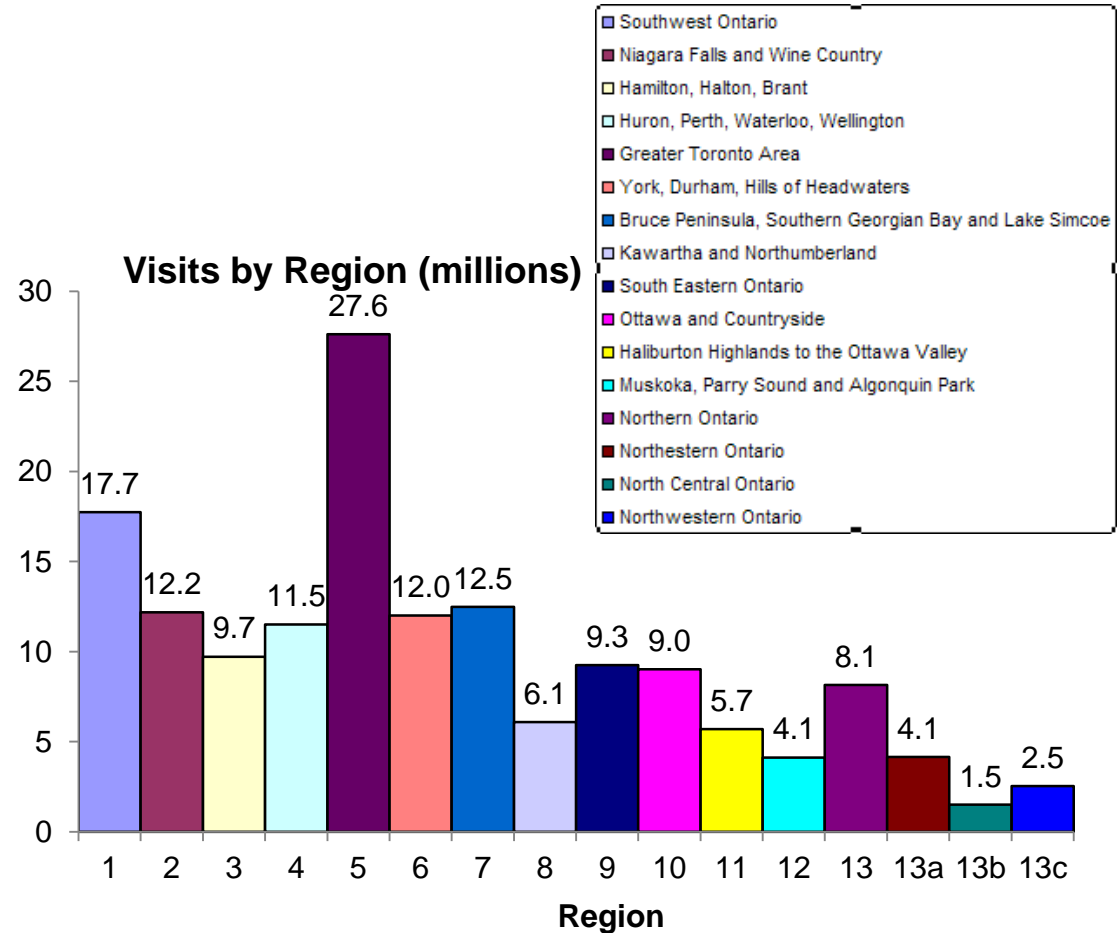


- In 2012, there were 141.7 million visits in Ontario and visitors spent \$22.3 billion
- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 8% of visits and 15% of expenditures
- Overseas visitors account for 2% of visits and 13% of spending

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 1 Tourism

Economic Impact of Tourism in Region 1

- Visitor Spending totalled **\$1.7 billion**
- Total GDP (direct, indirect and induced) generated by visitor spending amounted to **\$1.05 billion**, 1.7% of Region 1's GDP
- The total tourism employment impact (direct, indirect and induced) of visitor spending was **18,000 jobs**, accounting for 2.6% of Region 1's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$570 million**. \$283 million were federal tax revenues, \$239 million were provincial and \$47 million were municipal

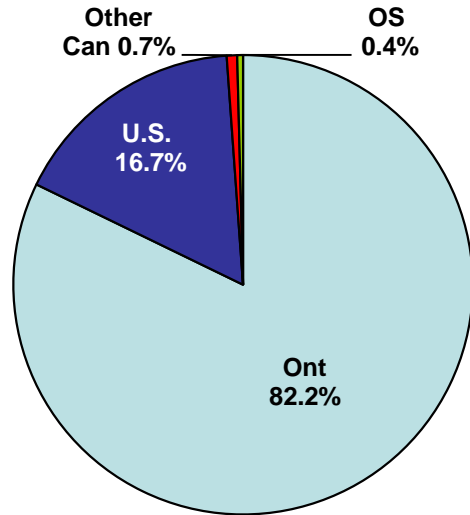
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario	141.7	22.3
Region 1	17.7	1.7
Region 1 proportion of Total Ontario	12.5%	7.7%

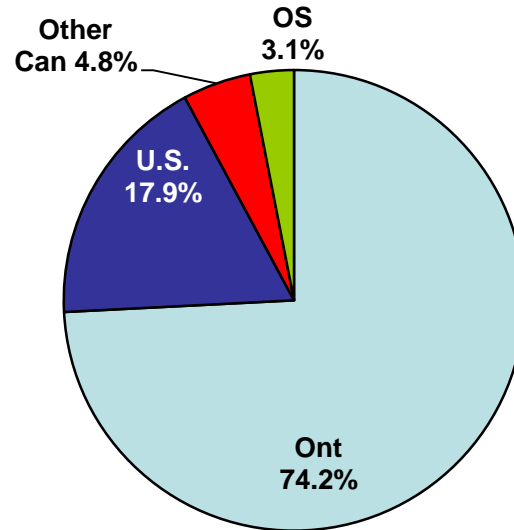
- In 2012, there were 17.7 million visits in Region 1, representing 12.5% of total visits in Ontario
- Visitors in Region 1 spent \$1.7 billion, accounting for 7.7% of total visitor spending in Ontario
- Region 1 is the 2nd largest region in terms of visits and 4th largest in terms of visitor spending

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

Visits and Spending



Visits by Origin
17.7 million



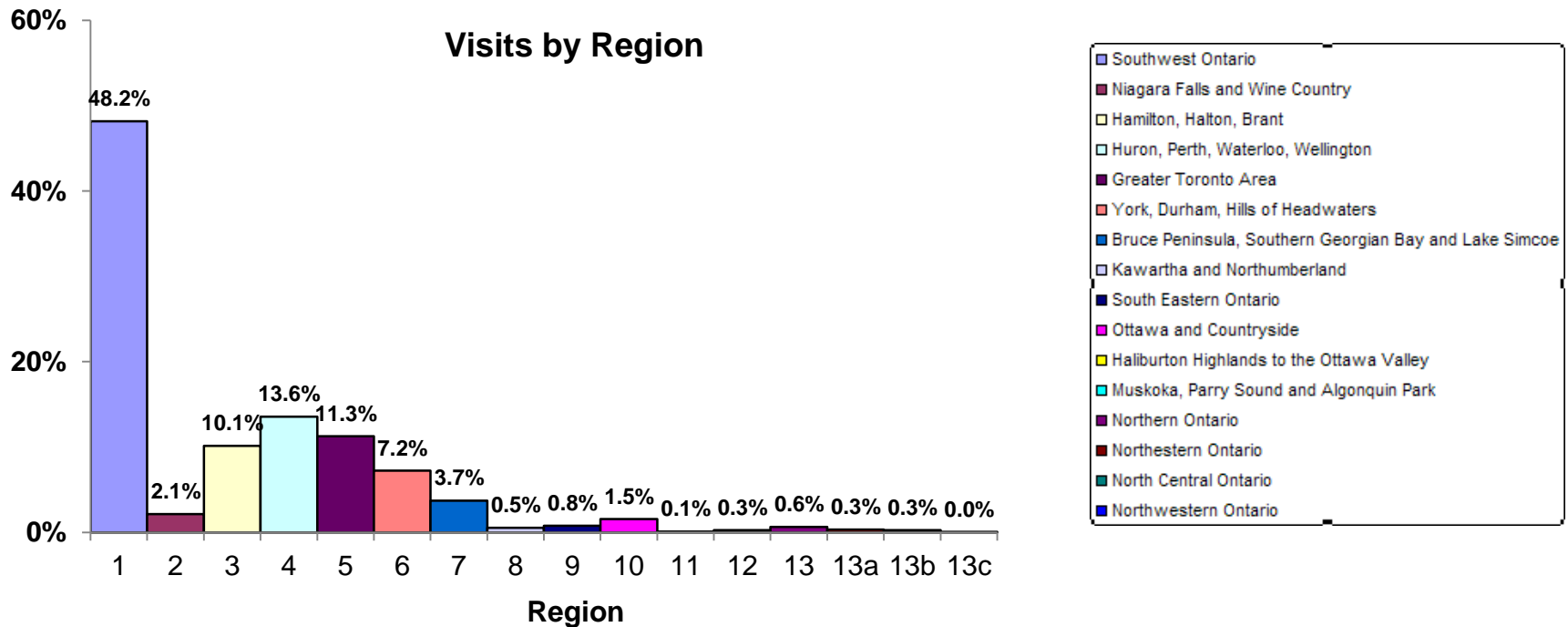
Visitor Spending by Origin
\$1.7 billion

Region 1 vs. Ontario	Visit Index	Spending Index
Ontario	96	120
U.S.	202	120
Other Canada	16	47
Overseas	26	24

- Ontario residents accounted for the majority of visits and spending
- U.S. visitors accounted for 17% of visits and 18% of expenditures. This compares to 8% of visits and 15% of spending in Ontario
- Visitors from Other Canada comprised 1% of visits and 5% 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 2012, International Travel Survey 2012, Ontario Ministry of Tourism, Culture and Sport

Ontario Visitors to Region 1 by Region of Residence

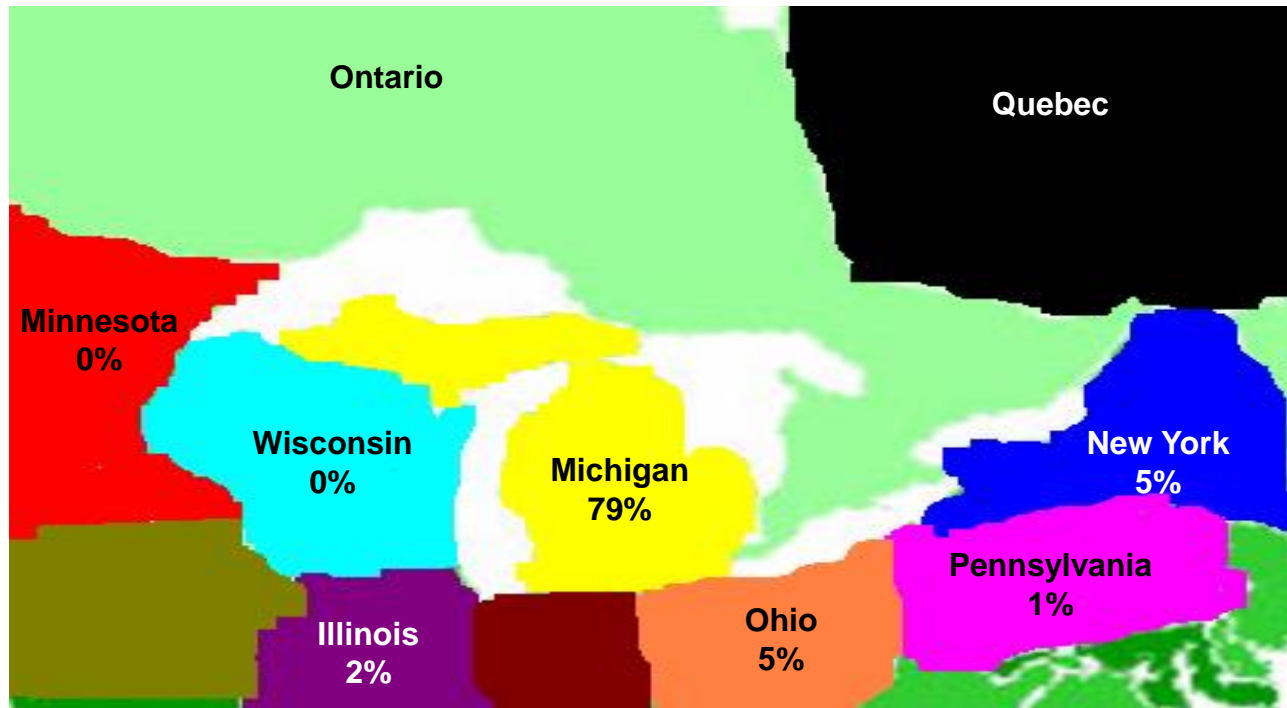


- Visits in Region 1 are primarily among Region 1 residents
- 14% of Ontario visitors to Region 1 reside in Region 4, 11% in Region 5 and 10% in Region 3

Note: Ontario visitors to Region 1 represented 82% (14.6 M) of total visits and 74% (\$1.3 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

U.S. Visitors by State of Residence

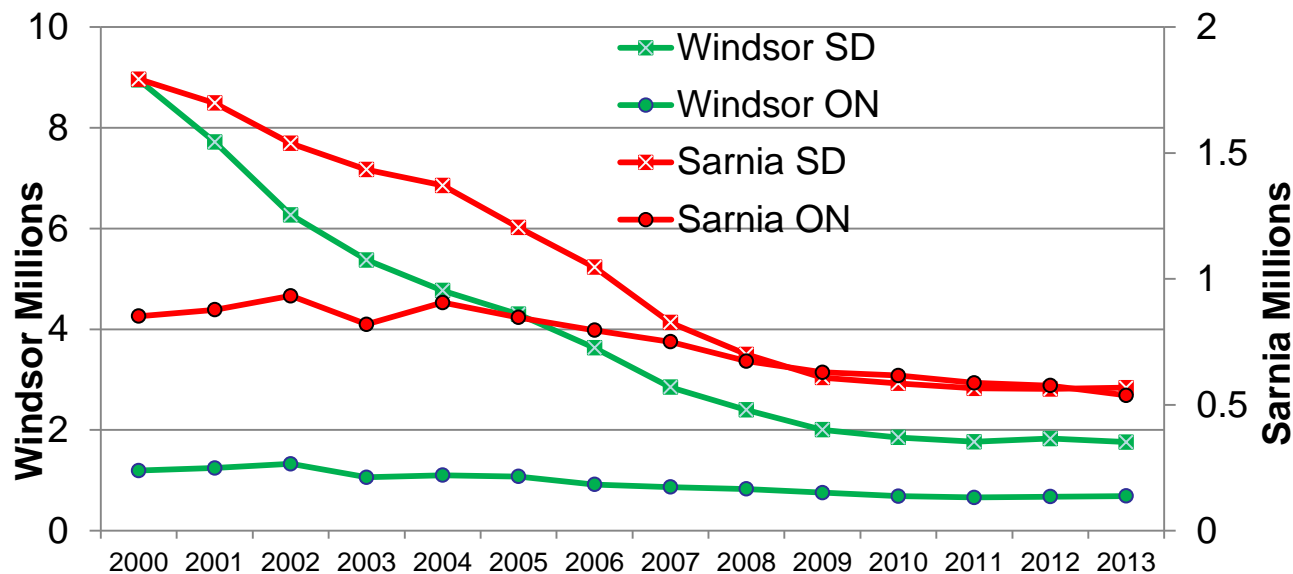


- 92% of U.S. visitors came from border states; primarily from Michigan at 79%

Note: U.S. visitors to Region 1 represented 17% (3.0 M) of total visits and 18% (\$310 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. Border Crossings



13 vs 00	SD	ON
Wind	-80%	-42%
Sar	-68%	-37%
ON	-76%	-28%

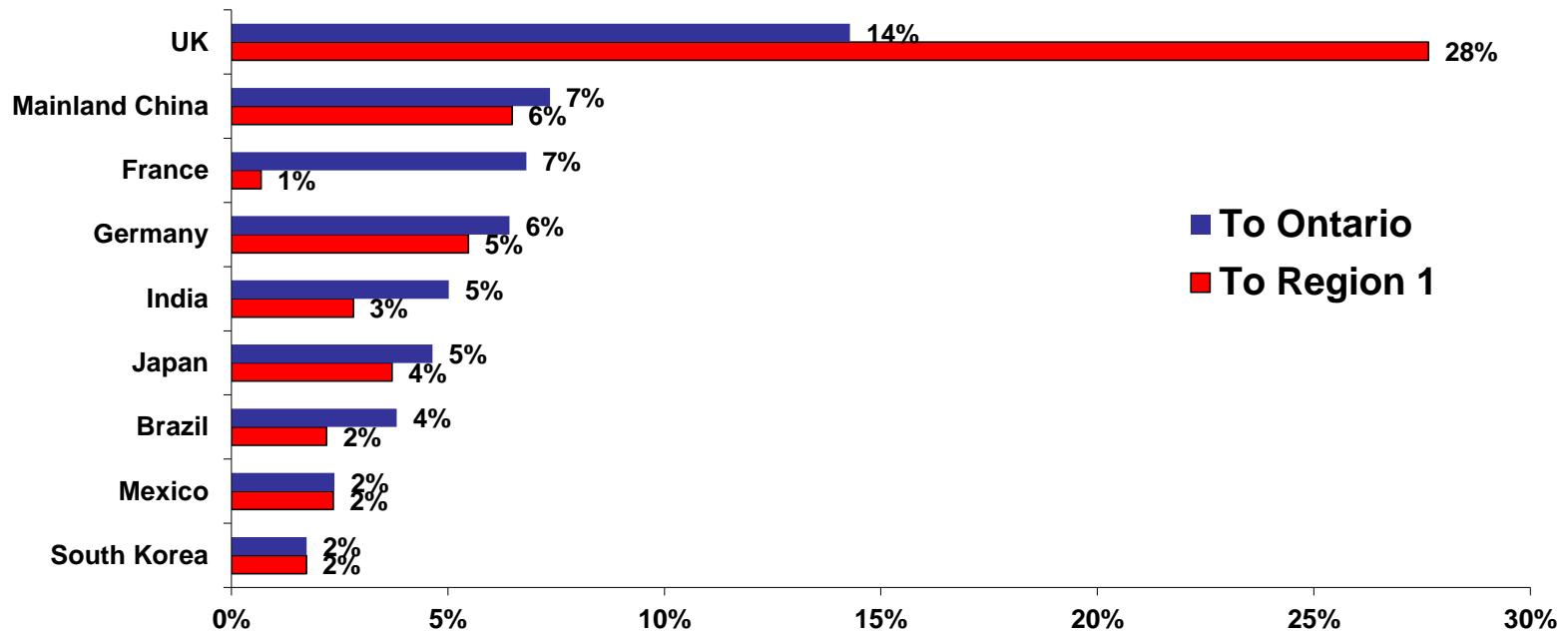
SD = same day

ON = overnight

- U.S. border crossings via Windsor accounted for 22% of U.S. entries into Ontario and Sarnia represented 10% in 2013
- U.S. crossings via Windsor declined 76% from 2000 to 2013, Sarnia -58% and Ontario -62%
- In the first 6 months of 2014, U.S. entries via Windsor are down 8%, Sarnia -2% and Ontario -3%

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

Overseas Visitors by Country of Residence



- Ontario's 9 overseas target markets represent 53% of overseas visitors to Region 1

Note: Overseas visitors to Region 1 represented less than 1% (72,000) of total visits and 3% (\$53 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

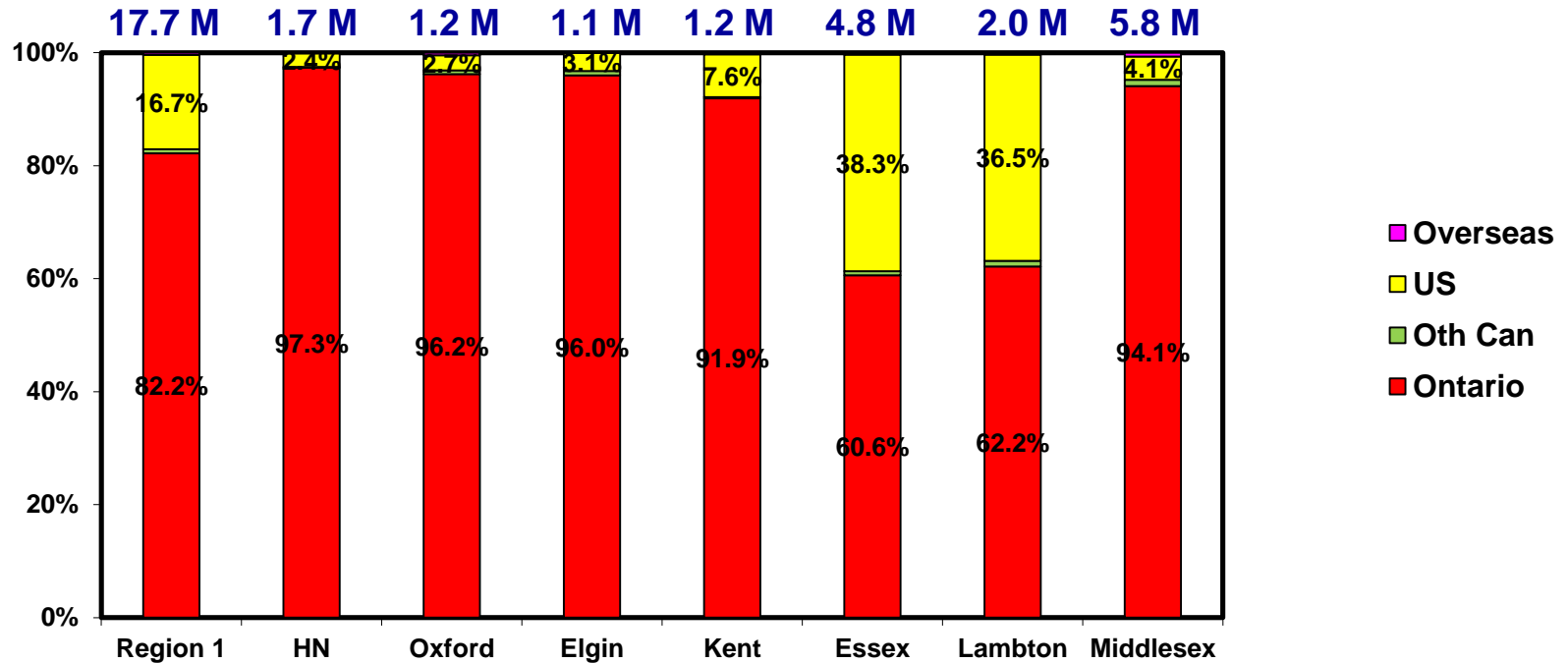
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ millions)
Region 1	17.7	1,729
Haldimand-Norfolk	1.7 (10%)	108.8 (6%)
Oxford	1.2 (7%)	45.6 (3%)
Elgin	1.1 (6%)	57.3 (3%)
Kent	1.2 (7%)	67.8 (4%)
Essex	4.8 (27%)	562.3 (33%)
Lambton	2.0 (11%)	163.8 (9%)
Middlesex	5.8 (33%)	637.6 (37%)

- Middlesex represented 33% of Region 1 visits and 37% of Region 1 spending while Essex accounted for 27% of visits and 33% of spending

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

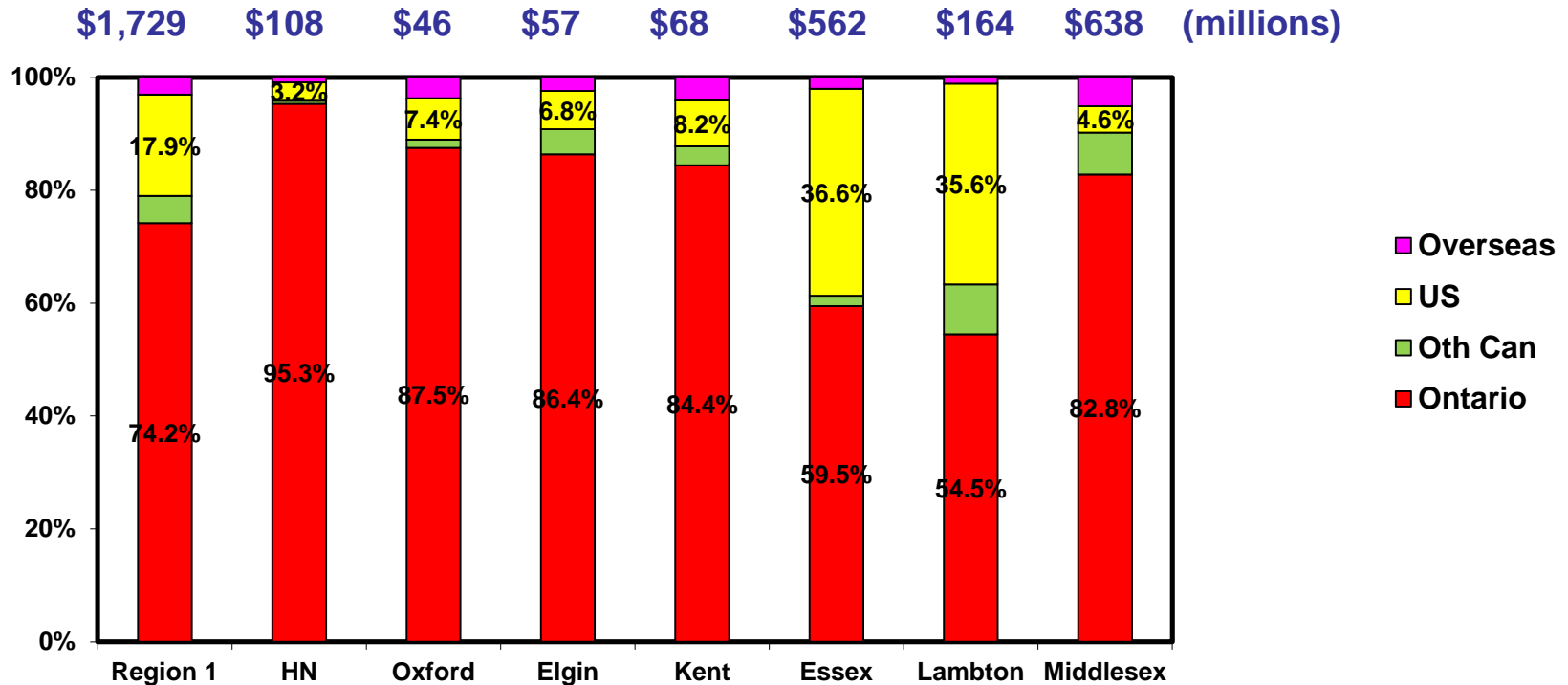
Visits by Origin



- The vast majority of visitors to all sub-regions are Ontario residents except Essex and Lambton where almost 40% of visits are among US residents

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

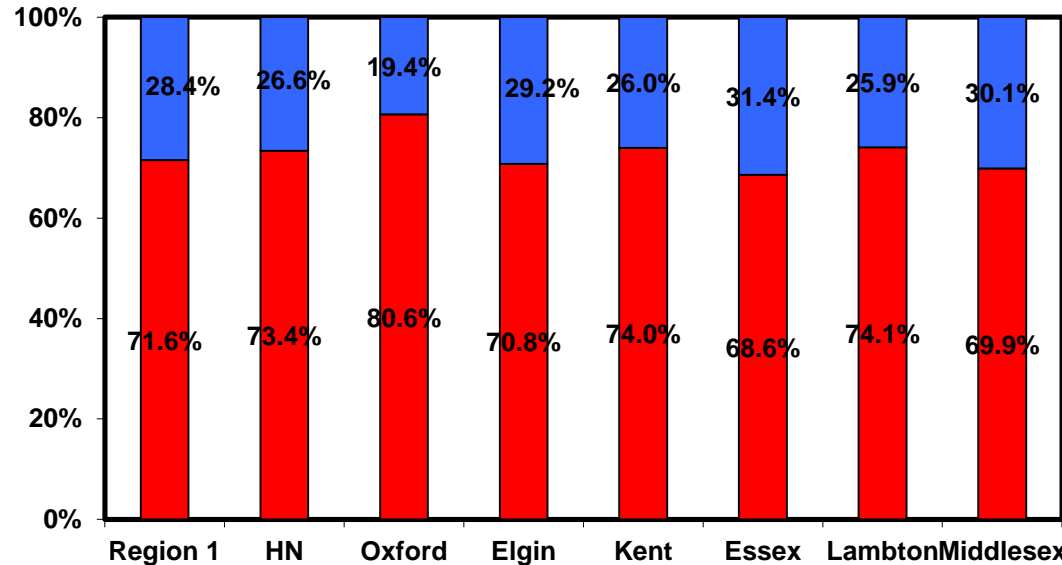
Visitor Spending by Origin



- The majority of visitor spending to all sub-regions came from Ontario residents except Essex and Lambton where just over 35% of spending came from US residents

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



■ Overnight
■ Same-day

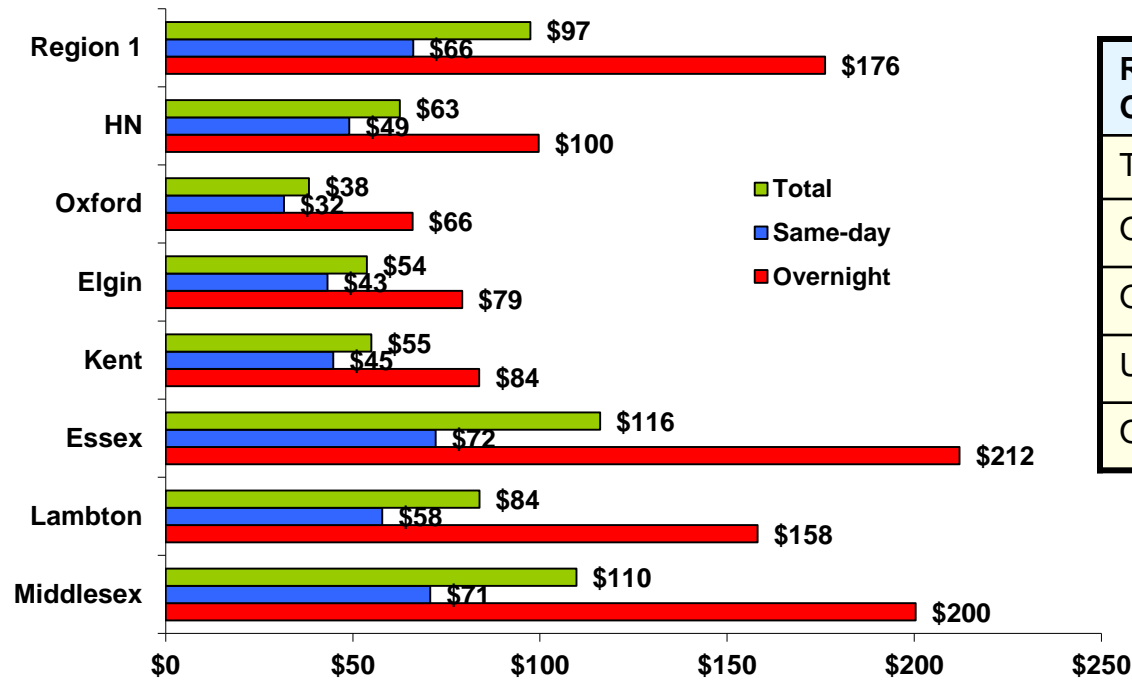
Region 1 vs. Ontario	Length of Stay Index
Same-day	110
Overnight	81
Avg # nights	81

Avg # of nights	Region 1	HN	Oxford	Elgin	Kent	Essex	Lambton	Middlesex
	2.4	2.0	2.3	1.9	2.3	2.4	2.3	2.6

- The majority (72%) of visits to Region 1 were same-day visits. For comparison, 65% of visits in Ontario were same-day visits
- The average number of nights spent in Region 1 was 2.4, 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

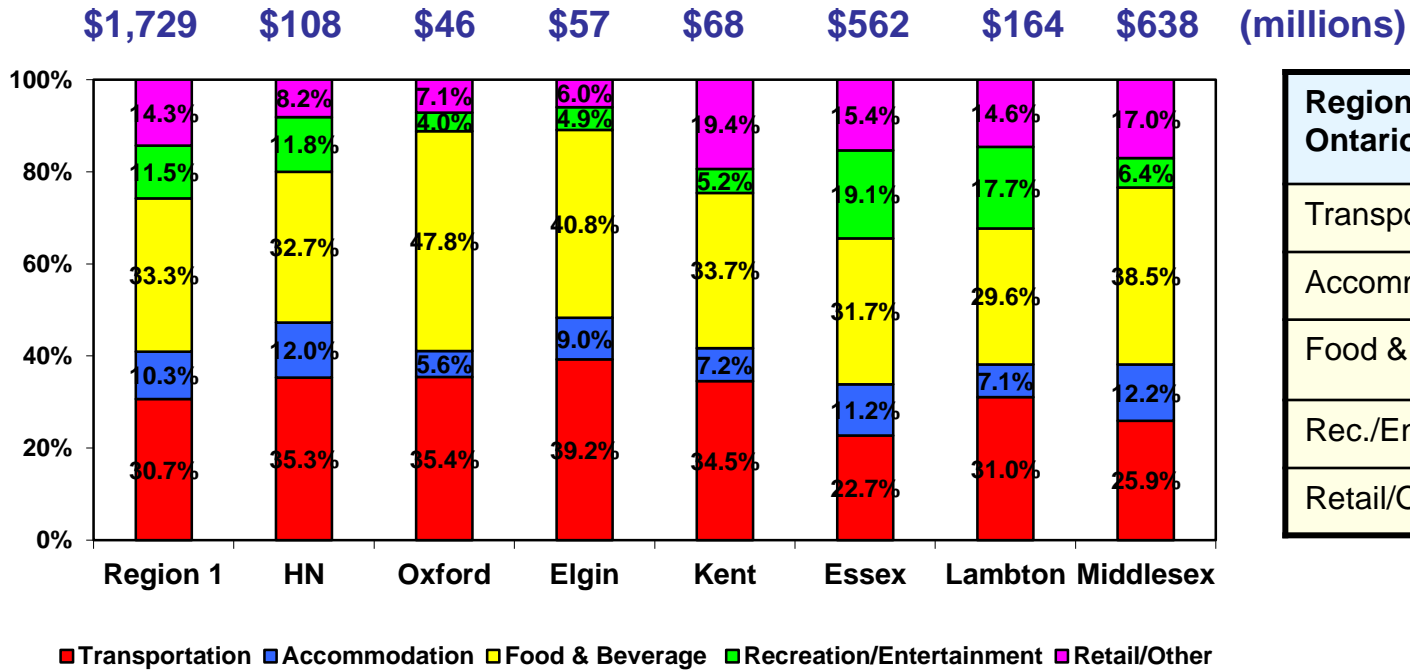


Region 1 vs. Ontario	\$/Trip Index
Total	62
Ontario	77
Other Canada	178
U.S.	37
Overseas	55

- Visitors spent an average of \$97/trip in Region 1 (\$158/trip for Ontario)
- On average, overnight visitors spent almost three times as much per trip 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

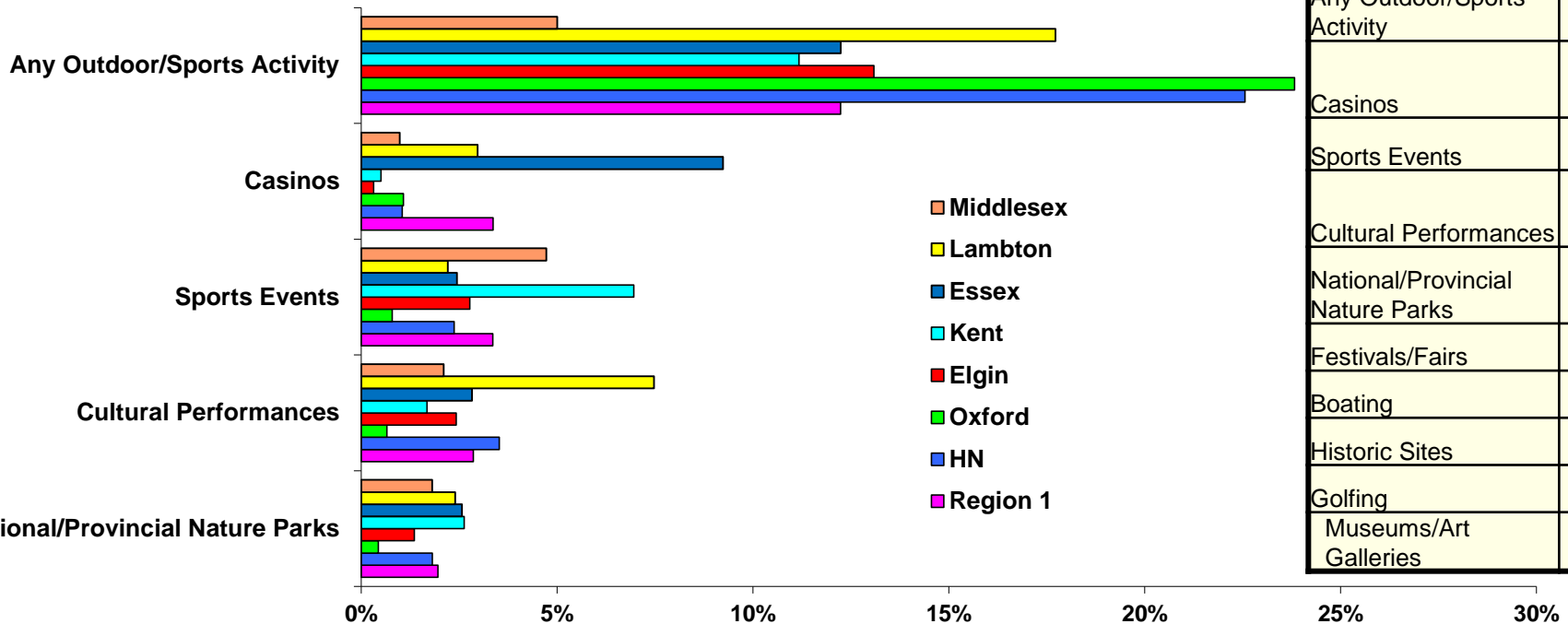


Region 1 vs. Ontario	Spending Index
Transportation	88
Accommodation	64
Food & Beverage	118
Rec./Entertain.	140
Retail/Other	111

- The largest proportions of expenditures were spent on Food & Beverage and Transportation

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 *



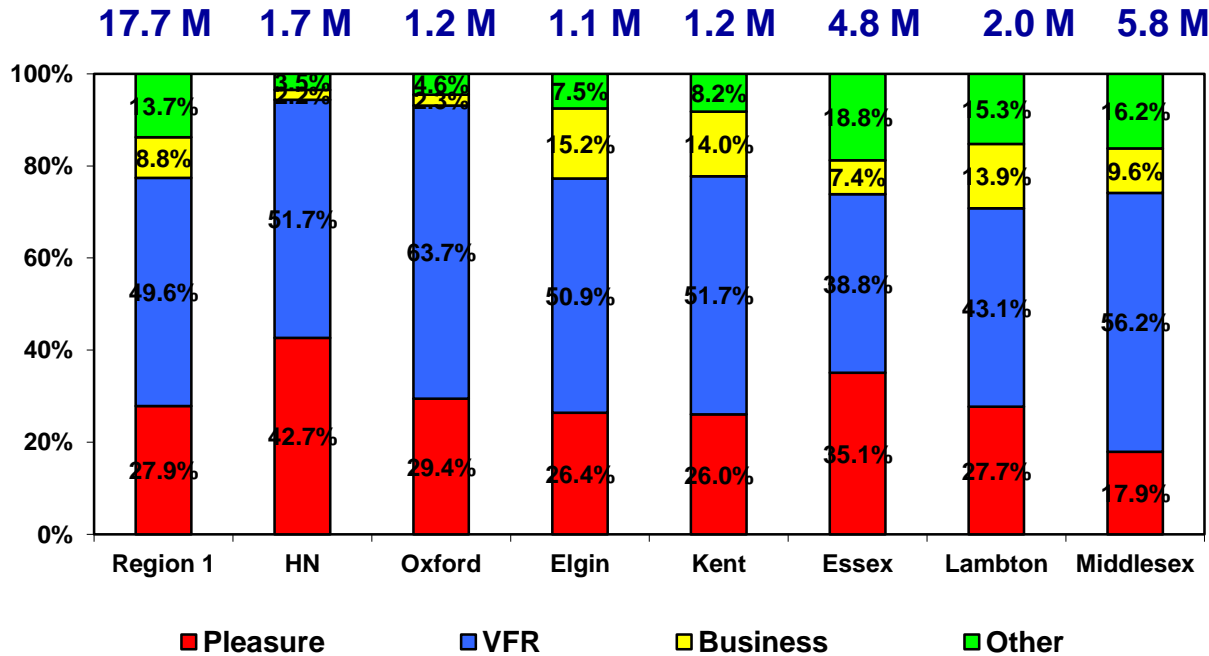
Region 1 vs. Ontario	Activity Index
Any Outdoor/Sports Activity	71
Casinos	130
Sports Events	81
Cultural Performances	73
National/Provincial Nature Parks	51
Festivals/Fairs	92
Boating	25
Historic Sites	30
Golfing	51
Museums/Art Galleries	35

- In general, visitors to Region 1 demonstrated a lower rate of participation in activities compared to visitors to other regions

*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

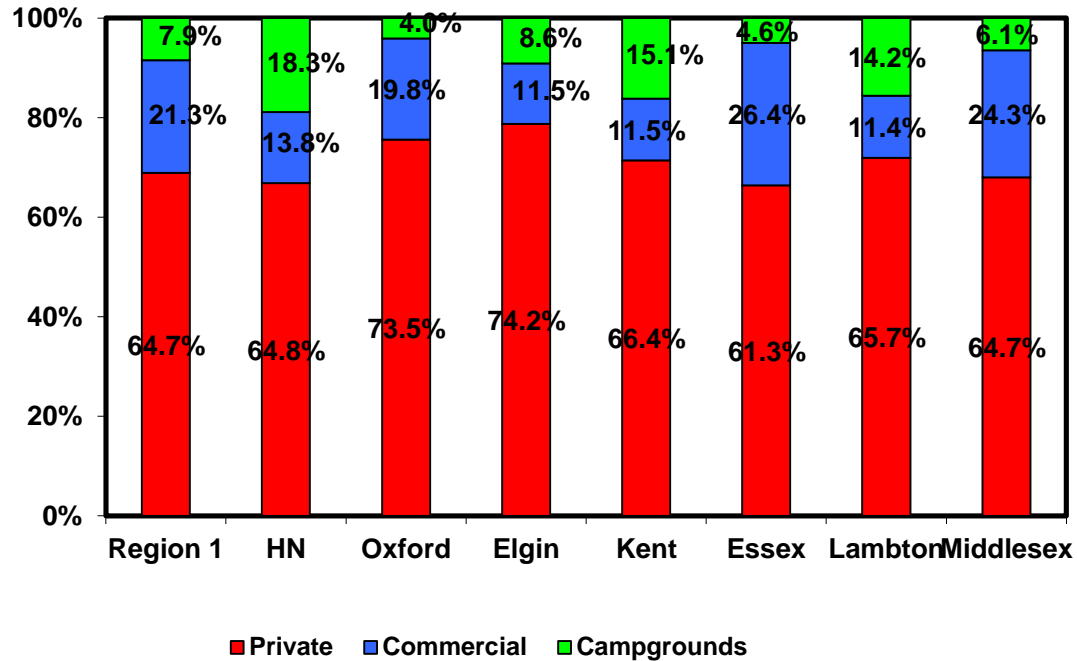


Region 1 vs. Ontario	Purpose Index
Pleasure	82
VFR	111
Business	60
Other	108
VFR: Visiting Friends and / or Relatives	

- About half of trips were to visit friends and/or relatives
- 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 1 vs. Ontario	Type Index
Private	104
Commercial	83
Campground	122

- The majority of overnight visits to Region 1 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

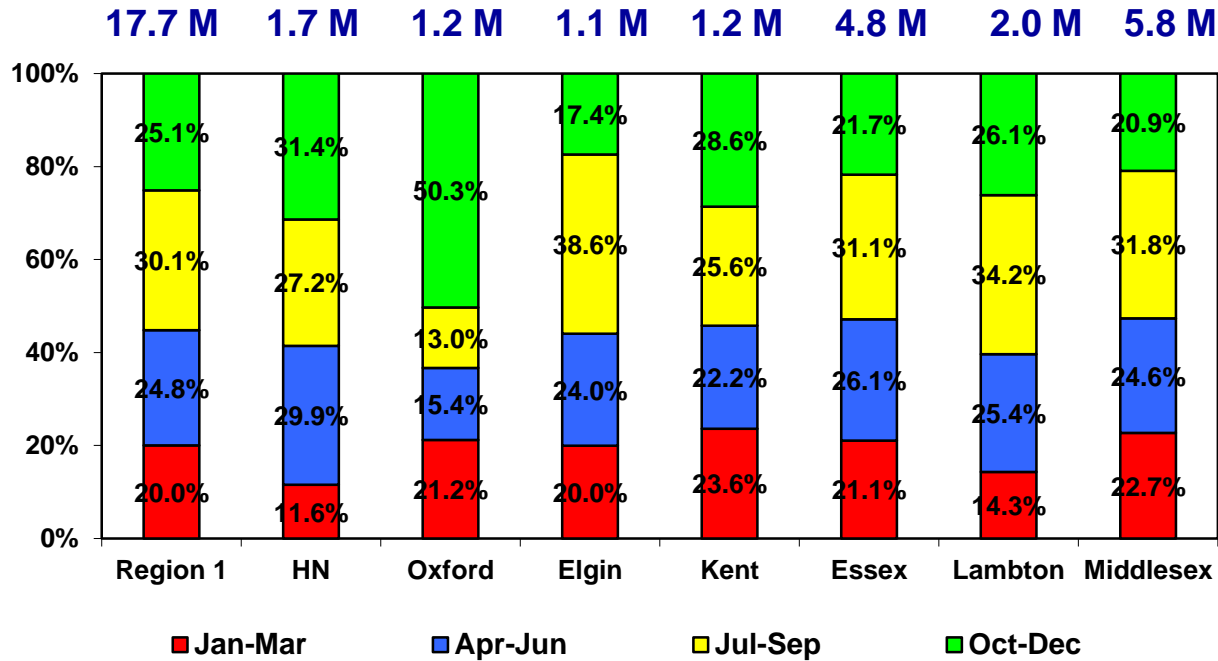
Park Statistics

Park	# Developed Campsites	Visitors	Day Use	Bus Permits	Camper Nights	Campers	July-Aug %Occ
Pinery	1,000	549,130	117,608	32	422,823	128,128	94%
Long Point	253	138,049	60,548	8	77,501	25,000	89%
Turkey Point	235	122,598	69,052	0	51,279	19,029	61%
Port Burwell	232	108,949	36,631	0	69,532	21,729	83%
Rondeau	262	153,454	90,652	16	62,752	20,917	65%
Wheatley	220	63,714	12,251	0	50,581	18,065	49%
Selkirk	151	25,441	2,288	0	22,312	4,057	49%
Rock Point	178	68,336	12,854	2	53,272	18,370	77%
Port Bruce		7,480	7,480				
Total	2,531	1,237,151	409,364	58	810,052	255,295	
% of Ontario	13%	16%	15%	4%	19%	19%	

- The Pinery is the most popular camping destination in Region 1, with the largest number of visitors and camper nights
- During July and August, the Pinery is at 94% capacity

Source: Ontario Parks 2012

Visits by Time of Year



Region 1 vs. Ontario	Quarter Index
Jan-Mar	100
Apr-Jun	106
Jul-Sept	91
Oct-Dec	106

- The largest proportion of trips occur in the summer months

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

Region 1 Summary

- In 2012, there were 17.7 million visits in Region 1, accounting for 12% of total visits to Ontario. Visitors to Region 1 spent \$1.7 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 5% of spending, U.S. visitors represented 17% of visits and 18% of expenditures, and overseas visitors accounted for less than 1% of visits and 3% of spending
- Visitors spent an average of \$97/trip. Overnight visitors almost 3 times as much as same-day visitors. Overseas and Other Canada visitors spent over \$500/trip
- The largest proportions of expenditures were spent on food & beverage and transportation

Region 1 Summary

- Visits in Region 1 are primarily among Region 1 residents (48%). 14% of Ontario visitors to Region 1 reside in Region 4, and 11% in Region 5
- 92% of U.S. visitors came from border states including 79% from Michigan
- Ontario's 9 overseas target markets accounted for 53% of overseas visitors to Region 1. The U.K. was by far the leading overseas source market at 28% of overseas visits
- The majority of visits were same-day
- Half of trips were to visit friends and relatives
- The majority of overnight visitors stayed in unpaid accommodations

Ontario Tourism Outlook

Methodology

The Ontario tourism outlook is based on an econometric model which includes the following variables:

- GDP
- CPI
- Exchange Rates
- Gas Prices

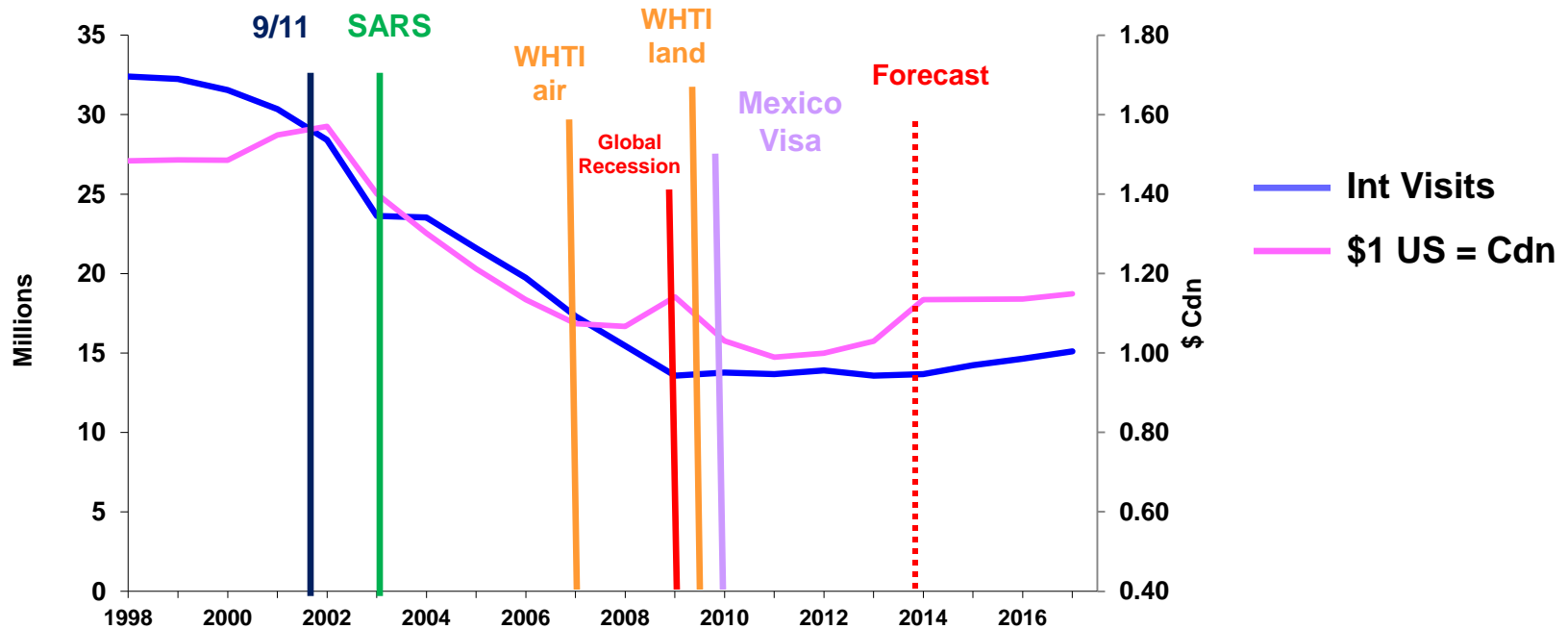
This model does not take into account unpredictable events that could influence consumer travel behaviour such as weather, medical outbreaks, terrorism attacks, etc., nor does it take into account marketing efforts.

It was assumed that the Pan / Para Pan Am Games would attract 250,000 visits from all origins (200,000 same day and 50,000 overnight visits)

Caution

- Visits from some origins are small so data should be used with caution
- Visits from some origins show large fluctuations in annual growth so it may be better to look at trends and average growth
- These are topline results and the user should do further analysis on trip characteristics e.g. length of stay, purpose of visit, time of visit, etc.

Notable Events

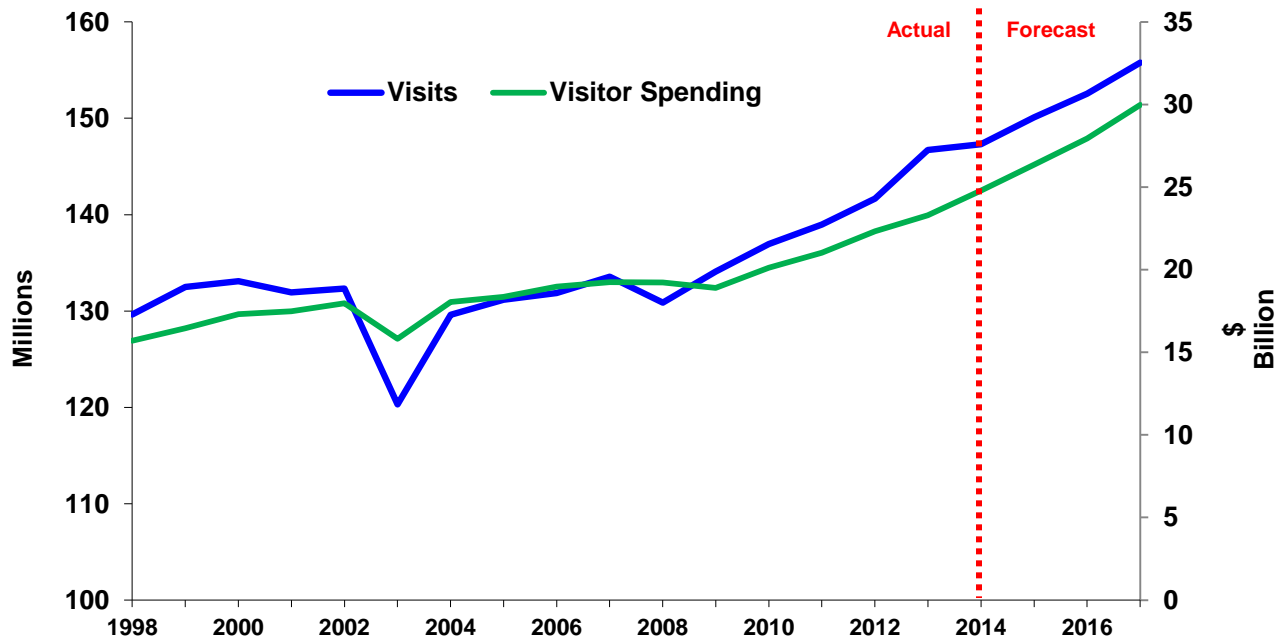


- WHTI air – Western Hemisphere Travel Initiative requires passport for entry to US via air (Jan 2007)
- WHTI land– Western Hemisphere Travel Initiative requires passport for entry to US via land or sea (June 2009)
- As of July 2009, Mexican residents require a visa to enter Canada

Source: Ontario Ministry of Tourism, Culture and Sport
 Before 2013 actual data, 2013 preliminary data, after 2013 forecast

Executive Summary

Total Visits & Visitor Spending



Year	Visit	\$
2013	3.5%	4.4%
2014	0.4%	6.4%
2015	1.9%	6.3%
2016	1.6%	6.0%
2017	2.1%	7.3%
Average	1.9%	6.1%

- In 2012 there were 141.7M visits in Ontario and visitors spent \$22.3B
- Ontario visits are forecast to grow an average of 1.9% per year from 2013 to 2017 while visitor spending is forecast to grow an average of 6.1% per year
- By 2017, total visits are forecast to reach 156M with visitor spend of \$30B

Source: Ontario Ministry of Tourism, Culture and Sport
 Before 2013 actual data, 2013 preliminary data, after 2013 forecast

Visit Growth Summary

Origin	% of Visits	Avg Annual Growth 2013-2017
Total Visits	100%	1.9%
Ontario	86%	1.9%
Same day	59%	1.7%
Overnight	27%	2.2%
Other Canada	4%	3.7%
U.S.	8%	0.6%
Border	6%	0.5%
Non-Border	2%	0.9%

Origin	% of Visits	Avg Annual Growth 2013-2017
Overseas	2%	7.0%
UK	0.2%	4.4%
Germany	0.1%	1.9%
France	0.1%	-2.2%
Japan	0.1%	1.5%
China	0.1%	15.1%
India	0.1%	1.5%
Brazil	0.1%	3.0%
Mexico	0.04%	14.0%
South Korea	0.03%	22.7%

- Visits among Ontario residents is forecast to increase between 2013 and 2017, with an average annual growth rate of 1.9%
- Other Canada visits are forecast to increase an average of 3.7% per year
- U.S. visits are forecast to decline in 2013 and 2014, then grow in 2015-2017, averaging 0.6% growth per year from 2013 to 2017
- The overseas market is forecast to grow over the next 5 years an average 7.0% per year, especially China (15% annual growth)

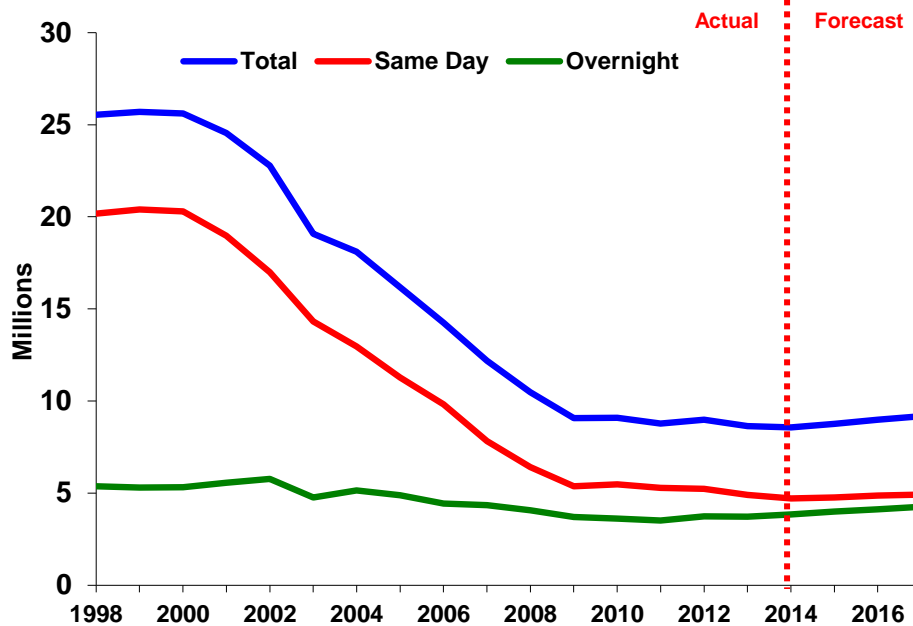
Visitor Spending Growth Summary

Origin	% of \$	Avg Annual Growth 2013-2017
Total Spending	100%	6.1%
Ontario	62%	3.9%
Same day	29%	4.3%
Overnight	32%	3.6%
Other Canada	10%	2.2%
U.S.	15%	8.3%
Border	8%	9.4%
Non-Border	7%	7.0%

Origin	% of \$	Avg Annual Growth 2013-2017
Overseas	13%	14.7%
UK	1.9%	9.5%
Germany	0.8%	10.0%
France	0.5%	9.2%
Japan	0.8%	10.7%
China	1.6%	28.9%
India	0.4%	1.9%
Brazil	0.7%	6.5%
Mexico	0.3%	19.5%
South Korea	0.2%	30.3%

- Visitor spending among Ontario residents is forecast to grow between 2013 and 2017 by 3.9% per year
- Other Canada spending is forecast to increase by 2.2% per year
- U.S. spending is forecast to grow by 8.3% per year
- Overseas spending is forecast to grow at 14.7% per year over each of the next five years

US Border States to Ontario



Year	T	SD	ON
2013	-3.9%	-6.3%	-0.5%
2014	-0.9%	-4.0%	3.3%
2015	2.3%	1.1%	3.7%
2016	2.5%	1.9%	3.1%
2017	2.2%	1.2%	3.4%
Average	0.5%	-1.2%	2.6%

US border state overnight visits represent 3% of visits and 7% of spending

- From 2013 to 2017 visits from US border states are forecast to grow an average of 0.5% per year to 9.2M with same day visits down 1.2% and overnight trips up 2.6%
- Same day spending is forecast to increase 9.7% per year and overnight by 9.3% annually

Source: Ontario Ministry of Tourism, Culture and Sport
 Before 2013 actual data, 2013 preliminary data, after 2013 forecast

We Know. Just Ask.

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