

Tourism Statistics Region 1

Tourism Research Unit
Winter 2011



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Ontario Summary

- In 2008, there were 101.0 million visits in Ontario and visitors spent \$17.6 billion
- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 13% of visits and 19% of expenditures
- Overseas visitors account for 2% of visits and 15% of spending
- Visitors spend an average of \$175/trip in Ontario
- The largest proportion of expenditures was spent on Transportation

Ontario Summary (cont'd)

- ❑ The majority of U.S. visitors come from border states with 32% from New York and 31% from Michigan
- ❑ The top 10 overseas markets represent 57% of overseas visitors to Ontario. The U.K. by far is the leading overseas source market at 17% of overseas visits
- ❑ The majority of visits are same-day visits driven by Ontario and U.S. residents
- ❑ Most trips are for pleasure or to visit friends and relatives
- ❑ The majority of overnight visitors stay in private homes except U.S. visitors who are more likely to stay at a hotel/motel

Tourism Outlook Summary

Origin	Share of Visits	2010 over 2009	2011 over 2010	2014 over 2010
Total Visits	100%	-0.8%	0.5%	4.2%
Domestic Visits	87%	-0.2%	0.5%	3.7%
Ontario	83%	-0.1%	0.4%	3.5%
Canada	4%	-1.2%	2.3%	8.6%
International Visits	13%	-5.1%	0.4%	7.5%
U.S.	11%	-6.2%	-0.3%	6.0%
Overseas	2%	1.5%	4.4%	14.0%

- Domestic visits which represent 87% of visits will experience positive growth between 2011 and 2014
- U.S. visits are forecast to decline in 2010 then return to growth in 2012
- Overseas visits are expected grow for the entire period of 2010-2014

Source: Ontario Ministry of Tourism and Culture

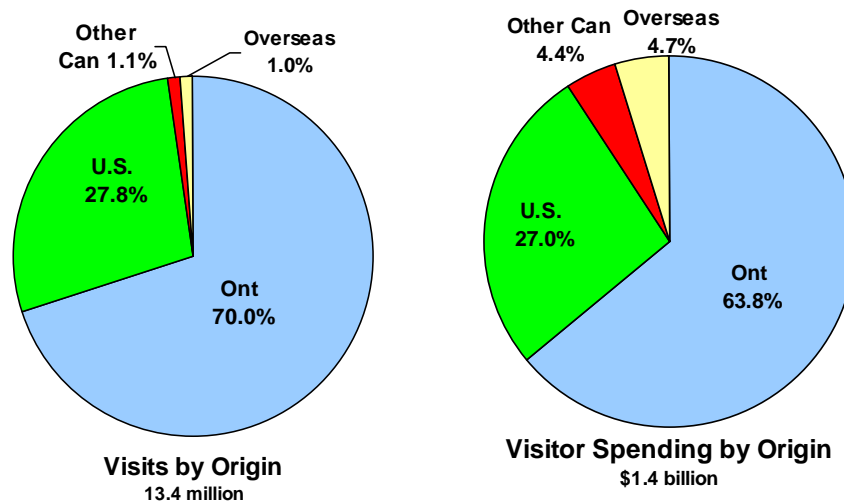
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario	101.0	17.6
Region 1	13.4	1.4
Region 1 proportion of Total Ontario	13.2%	7.8%

- In 2008, there were 13.4 million visits to Region 1, 13.2% of total visits to Ontario
- Visitors to Region 1 spend \$1.4 billion or 7.8% of total visitor spending in Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

Visits and Spending

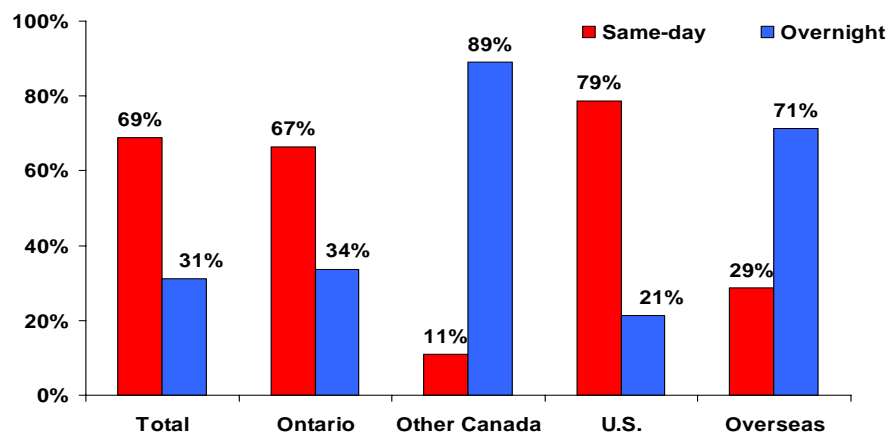


Region 1 vs. Ontario	Visit Index	Spending index
Ont	87	112
U.S.	213	146
Other Canada	27	49
Overseas	47	31

- ❑ Ontario residents account for the majority of visits and spending
- ❑ U.S. visitors represent 28% of visits and 27% of expenditures. This compares to 13% of visits and 19% of spending in Ontario
- ❑ Visitors from Other Canada make up 1% of visits and 4% of spending
- ❑ Overseas visitors account for 1% of visits and 5% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

Visits by Length of Stay



Region 1 vs. Ontario	Length of Stay Index
Same-day	119
Overnight	74
Avg # nights	83

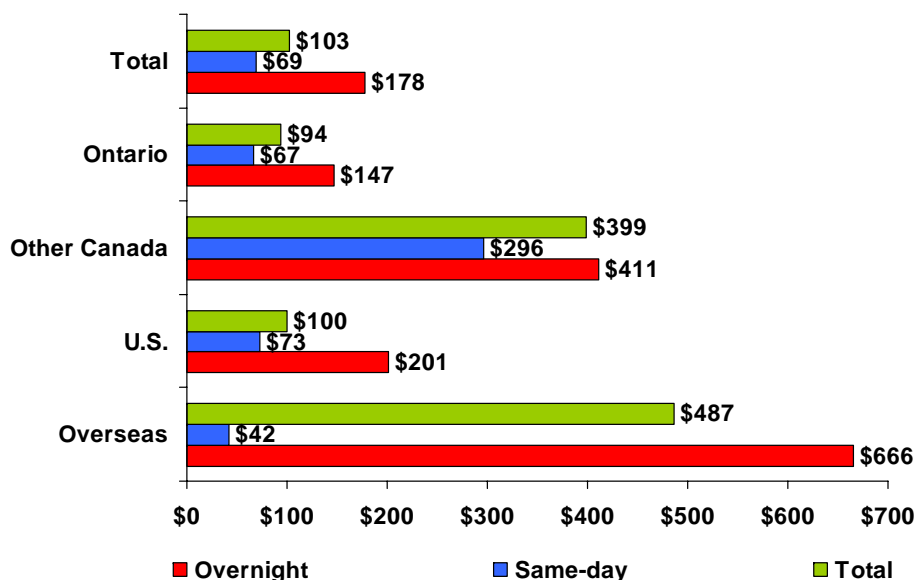
Average # of nights	Total	Ontario	Other Canada	U.S.	Overseas
	2.7	2.4	2.5	2.2	11.9

- The majority of visits to Region 1 were same-day visits. For comparison, in Ontario 58% of visits were same-day visits
- Other Canada and Overseas visitors were more likely to take an overnight trip
- The average number of nights spent in Region 1 was 2.7, below Ontario's average of 3.2 nights

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture



\$/Trip by Length of Stay

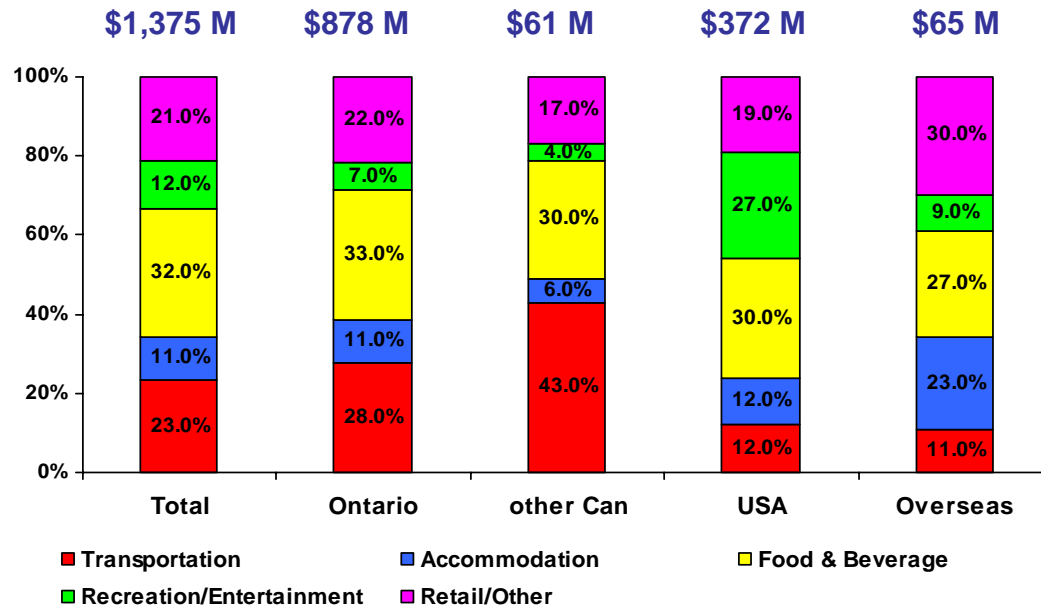


Region 1 vs. Ontario	\$/Trip Index
Total	59
Ontario	76
Other Canada	72
U.S.	40
Overseas	40

- ❑ Visitors spend an average of \$103/trip in Region 1 (\$175/trip for Ontario)
- ❑ Overnight visitors spend over twice as much as same-day visitors
- ❑ Overseas visitors spent the most at \$487/trip

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

Spending by Category



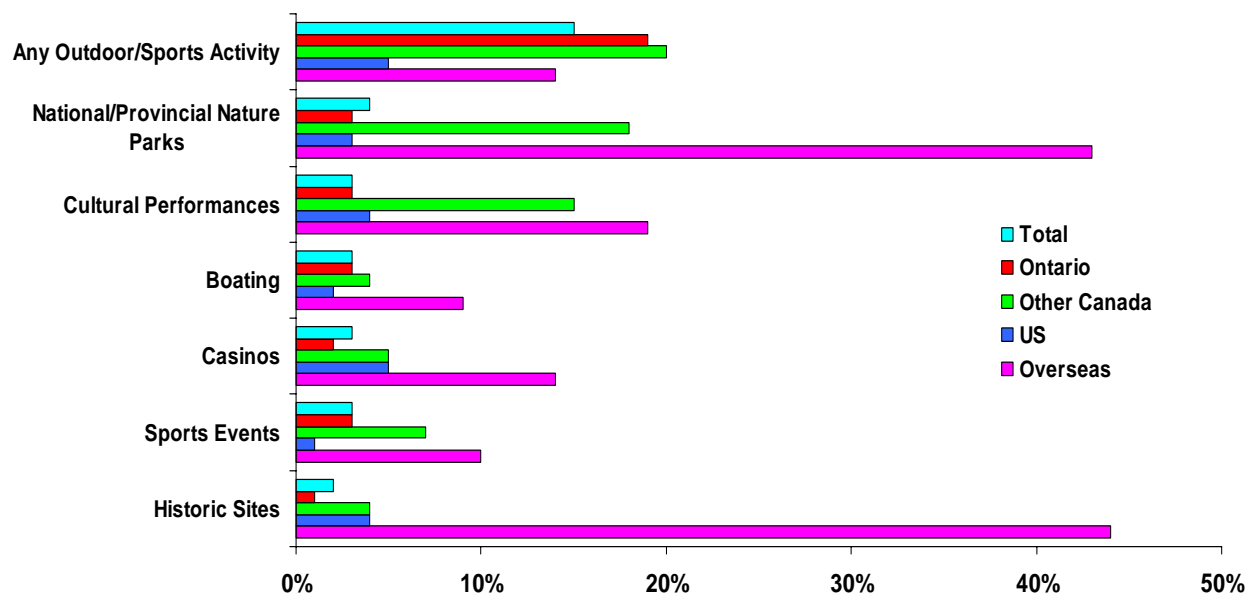
Region 1 vs. Ontario	Spending Index
Transportation	73
Accommodation	63
Food & Beverage	122
Rec./Entertain.	139
Retail/Other	140

- The largest proportions of expenditures were spent on food & beverage, transportation, and retail
- Other Canada visitors spent more on transportation while overseas visitors spent more on accommodations and retail

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture



Visits by Activity*



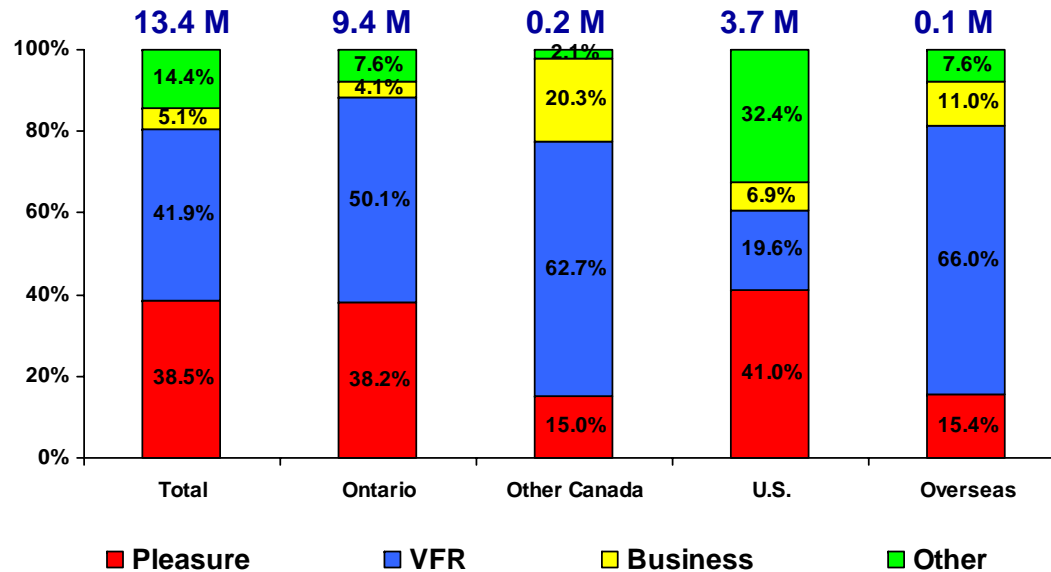
Region 1 vs. Ontario	Activity Index
Casino	99
Sports	82
Culture	76
Nat/Pro Park	76
Outdoor	71
Festival	58
Zoo/Aq	53
Historic	50
Museum	45
Theme Park	35
Casino	99
Sports	82

- Visitors to Region 1 participate in less activities than visitors to other regions
- International visitors are more likely to visit museums, historic sites, parks, etc.

*activity may or may not have taken place in region

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

Visits by Purpose

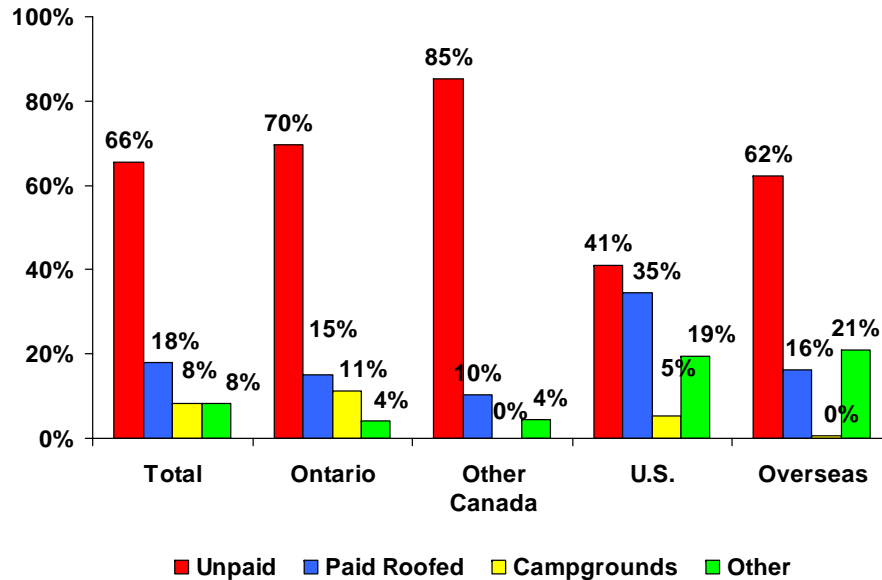


Region 1 vs. Ontario	Purpose Index
Pleasure	90
VFR	99
Business	81
Other	174
VFR: Visiting Friends and / or Relatives	

- 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 Region 1 to visit family or friends

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

Visits by Accommodation Type

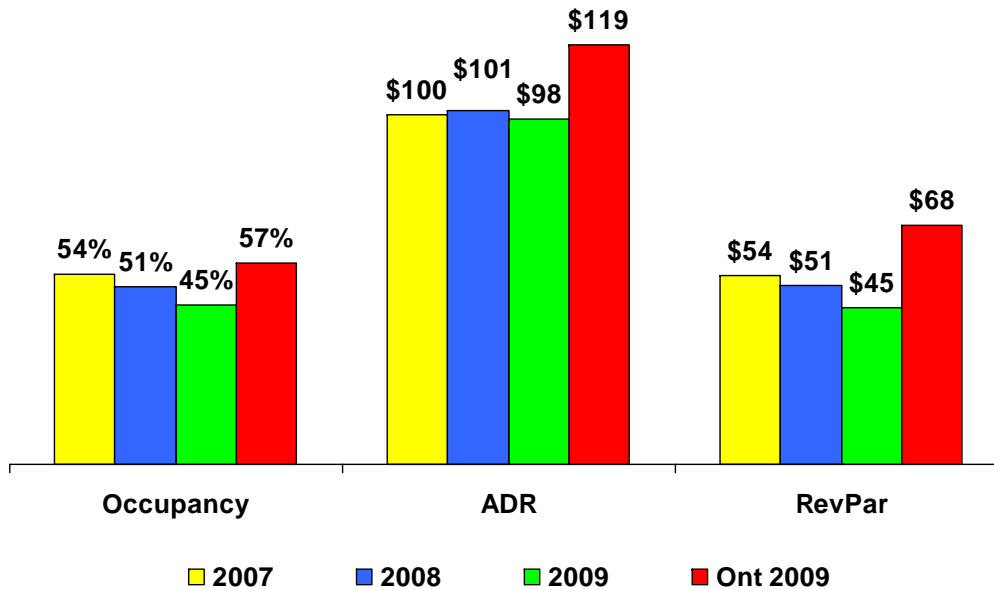


Region 1 vs. Ontario	Accom Type Index
Unpaid	106
Paid Roofed	70
Campground	145
Other	125

- The majority of overnight visit to Region 1 were spent at unpaid accommodations such as private homes and cottages
- U.S. visitors are more likely to stay at a hotel

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

Hotel Statistics



Region 1 vs. Ontario	Hotel Stats Index 2009
Occupancy	79
ADR	82
RevPar	65
ADR = Average Daily Rate RevPar = Revenue per Available Room	

- Occupancy, ADR and RevPar have all declined over the past few years
- Region 1 had lower occupancy, ADR and RevPar than total Ontario

Source: PKF Consulting, Ministry of Tourism and Culture

Tourism Related Establishments

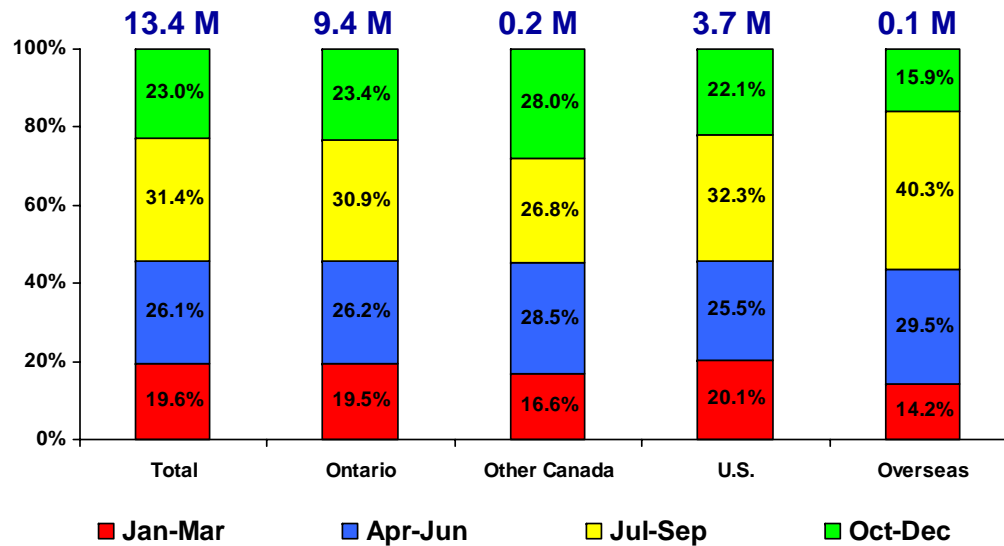
Type of Establishment	# 2008*	% of Ontario
Accommodations	321	7%
Arts, Entertainment, Recreation	925	10%
Food & Beverage	2,807	9%
Transportation	651	8%
Travel Services	190	7%
Retail	6,206	10%
Other Services	2,945	10%
Total	14,045	10%

- Region 1 represents 10% of Ontario's tourism related establishments
- Note: Region 1 represented 13% (13.4 M) of total visits and 8% (\$1.4 B) of visitor spending

*Represents the actual number of establishments in that category

Source: Statistics Canada, Business Register 2008

Visits by Time of Year

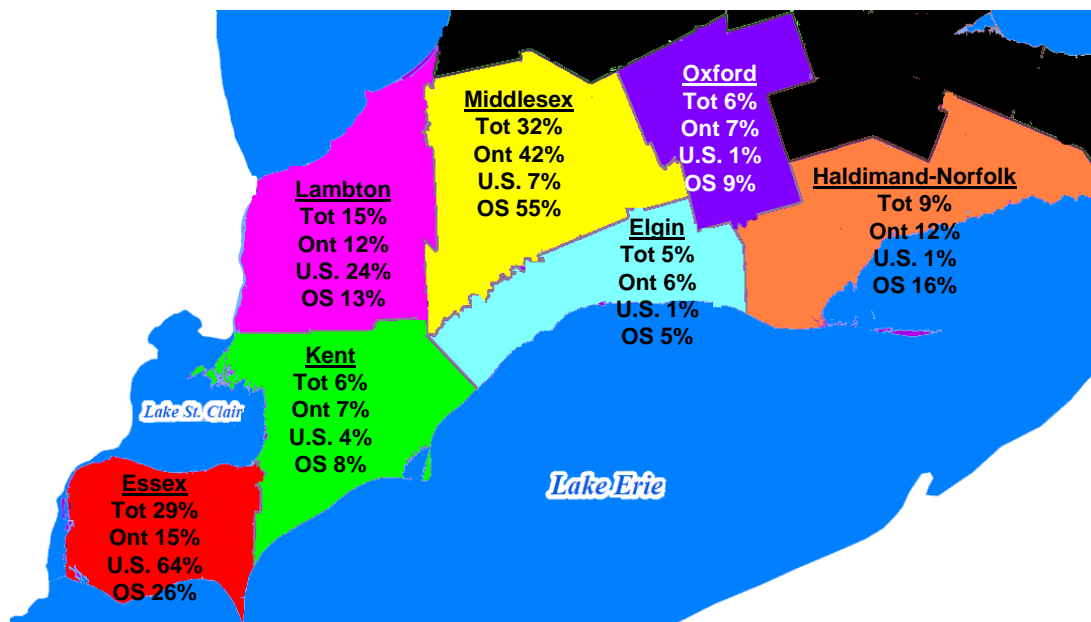


Region 1 vs. Ontario	Quarter Index
Jan-Mar	102
Apr-Jun	104
Jul-Sept	95
Oct-Dec	102

- 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 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

Visitors by Origin by Census Division

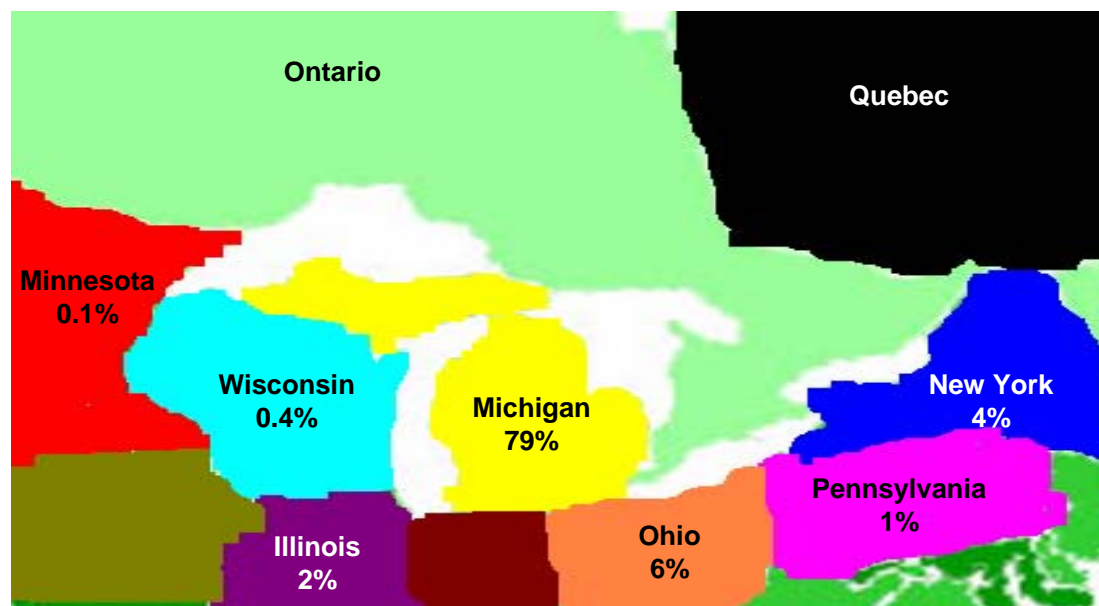


Origin	% of Visits	% of \$
Ont	70%	64%
Oth Can	1%	4%
U.S.	28%	27%
OS	1%	5%
OS: Overseas		

- ❑ Visits to Region 1 are mainly to Essex and Middlesex
- ❑ 64% of U.S. visitors went to Essex, 55% of Overseas visitors went to Middlesex
- ❑ Most visitors only go to 1 census division per visit while visiting Region 1

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

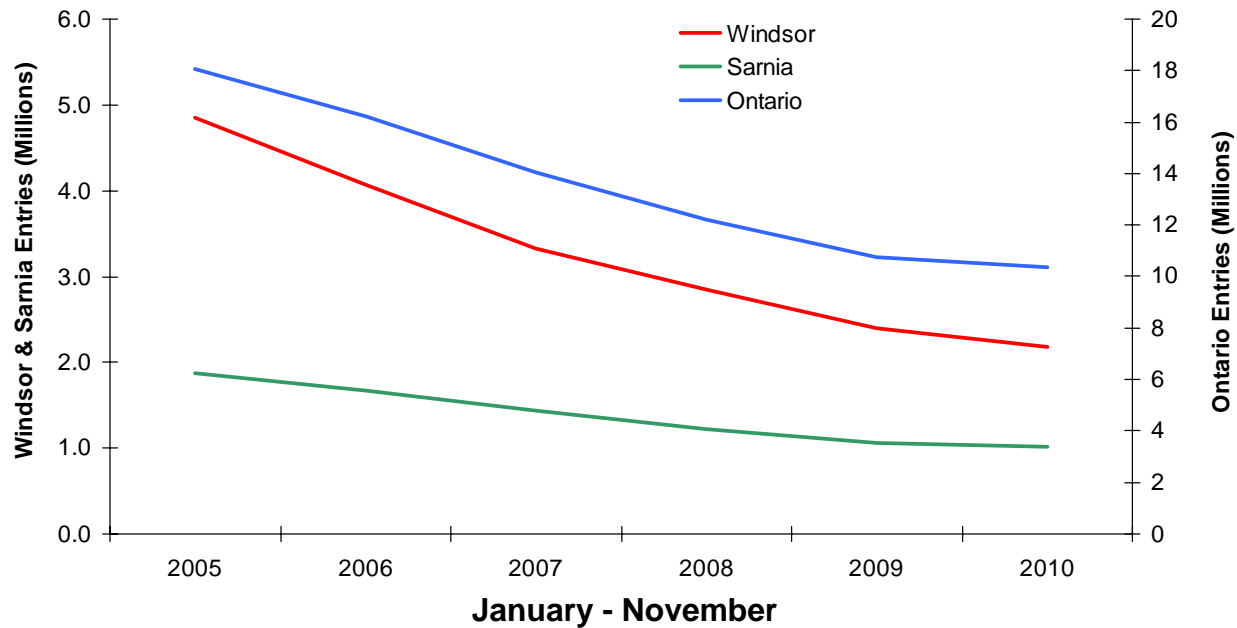
U.S. Visitors by State of Residence



- 93% of U.S. visitors come from border states; primarily from Michigan at 79%
- Note: U.S. visitors to Region 1 represented 28% (3.7 M) of total visits and 27% (\$372 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

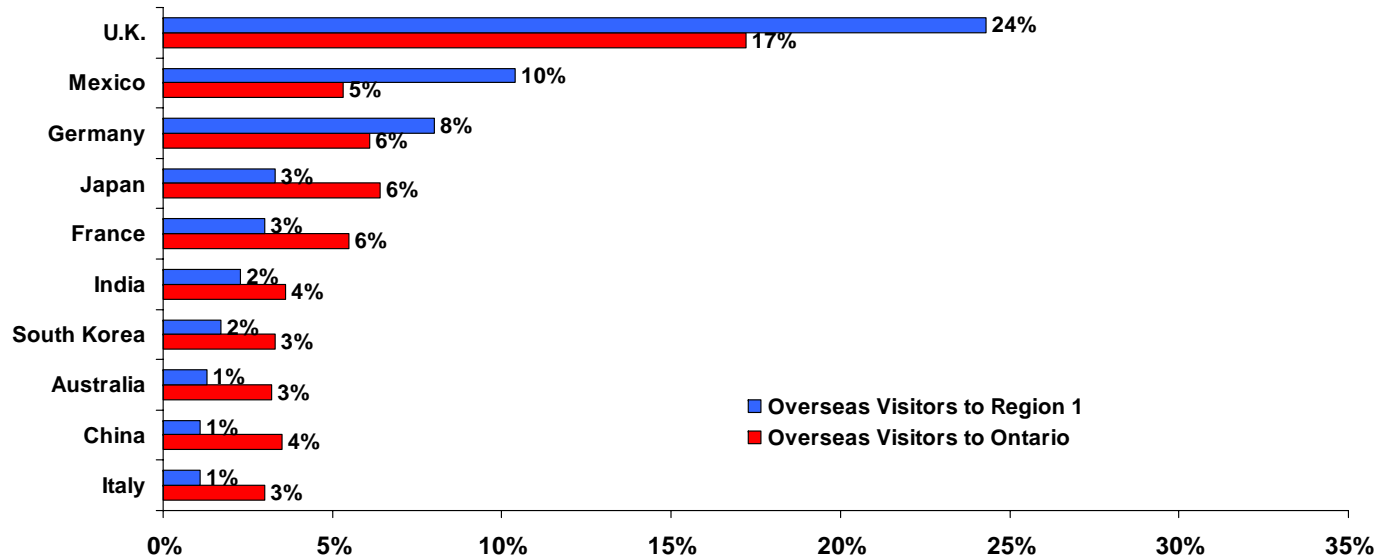
U.S. Border Crossings



- U.S. border crossings via Windsor and Sarnia accounted for over 30% of U.S. entries into Ontario
- U.S. crossings via Windsor and Sarnia have declined at a greater rate than entries into Ontario
- In Nov 2010, U.S. entries via Windsor were down 0.3% and via Sarnia up 0.7%, while U.S. entries to Ontario increased 1.4%

Source: Statistics Canada, Ontario Ministry of Tourism and Culture

Overseas Visitors by Country of Residence



- The top 10 overseas markets represent 67% of overseas visitors to Region 1
- Note: Overseas visitors to Region 1 represented 1% (134,000) of total visits and 5% (\$65 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

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- Ontario residents account for the majority of visits and spending, other Canada residents account for 1% of visits and 4% of spending, U.S. visitors represent 28% of visits and 27% of expenditures, overseas visitors account for 1% of visits and 5% of spending
- Visitors spend an average of \$103/trip. Overnight visitors spend over 2 times as much as same-day visitors. Overseas visitors spend the most at \$487/trip
- The largest proportions of expenditures were spent on food & beverage, transportation, and retail

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- 93% of U.S. visitors come from border states including 79% from Michigan
- The top 10 overseas markets represent 67% of overseas visitors. The U.K. is by far the leading overseas source market at 24% of overseas visits
- The majority of visits are same-day
- Most trips are to visit friends and relatives or for pleasure
- The majority of overnight visitors stay in unpaid accommodations

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