



**Tourism Investment Attraction**  
Ministry of Tourism, Culture and Sport

Presentation to Regional Tourism Organization 12  
*Explorers' Edge*  
*Community Relations Committee*  
September 25, 2012

## Agenda

- Background, resources and tourism investment strategy
- Research – by the numbers
- Blue sky discussion about possible investment opportunities
- Next steps

## Tourism Matters

- **Tourism is an essential part of Ontario's economy and its regional economies**
- **In 2011, tourism generated receipts of \$23.1 billion and supported 308,000 jobs**
- **Tourism is Ontario's 14th largest employer and provides jobs for youth, women, and immigrants in higher proportion than Ontario's economy as a whole**
- **Ontario's 148,200 tourism-related businesses represent 17% of all businesses in Ontario**
- **Global tourism is poised to grow rapidly as the worldwide travelling population is projected to double to 1.6 billion by 2020**
- **Ontario 2010:**
  - **Visits increased by 1.4% to 105.2 million**
  - **Visitor spending increased by 3.7% to 17.7 billion**

## MTCS Investment Role

- **MTCS's Investment & Development Office mandate is to support destination development and investment in Ontario's tourism industry**
- **MTCS partners with Ministry of Economic Development and Innovation in the delivery of investment attraction services**
- **Investment roles include identifying regional tourism investment opportunities, supporting priority tourism development projects, maintaining a global investor database, the tourism investment website portal and communications/lure documents**

## Current Projects

- **Not since Canada's Wonderland opened in 1981 (Canada's largest tourism employer with over 4,000 staff), has Ontario seen a boom in new tourism-related investments.**
- **The Ministry continues to support private sector investment projects in the pipeline totalling over \$3B and 5,000 jobs including:**
  - **Ripley's Aquarium of Canada, Toronto, \$130M investment, 360 jobs, Spring 2013**
  - **Merlin Entertainment, Legoland Discovery Centre, Vaughan, \$12M, 50 jobs, Spring 2013**
  - **Toronto Premium Outlets (100 designer stores), Halton, 500 jobs, Summer 2013**
  - **Skyline International, Georgian Valley, \$1.6B investment, 2000 jobs, TBD**
  - **Fort Erie Motor Speedway, \$170M investment, 350 jobs, 2014**
  - **Bingeman's Entertainment Complex, Kitchener, \$120M, 300 jobs, TBD**
  - **Woodbine Live, Etobicoke, \$1B, 2000 jobs, TBD**
- **Some of these investments are funded and developed by foreign investors from USA, Israel, Kuwait and Eastern Europe.**
- **MTCS support for these projects include financial incentives, site location, government contacts, senior level meetings, economic impact analysis, market research, tracking, etc.**

# MTCS resources and recent tourism investment success



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# Regional Investment Opportunities

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## Regional Investment Opportunities

To assist you in finding the right tourism investment opportunity, you can select a particular industry sector and discover where in Ontario, your investment opportunity awaits.

- Advanced Manufacturing
- Aerospace
- Automotive
- Business Services
- Clean Energy
- Clean Technology
- Digital Gaming
- Food Processing

### Select by Sector:

Select All

- Aboriginal
- Amusement Parks
- Attractions
- Bed and Breakfasts
- Cottages
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**(3) Addington Highlands Four Season Resort** [Map of Project Site](#)

Project Date Begin: **Immediately**

Region: **Eastern Ontario** [Township of Addington Highlands](#)

Type: **Resorts**

Description: Addington Highlands, at the gateway to Eastern Ontario’s renowned natural paradise, offers “a ground floor opportunity” to supply the growing demand for upscale resort lifestyle development within easy reach of the Greater Toronto Area and Ottawa. As a result, the corporations of the Township of Addington Highlands and the County of Lennox and Addington are seeking private investment to develop and operate one or more four-season destination resorts.

Based on research and analysis completed for the Resort Development Feasibility Study (the Tourism Company, September 2003), the two types of resort development considered to be a good “fit” with the market demand, resources, and attributes in the Township of Addington Highlands are a Golf, Conference, and Spa Resort and an Ecodge.

An investor information brochure is available for more details (<http://www.lennox-addington.on.ca/business/addingtonInvestment.pdf>). It provides an introduction to the key features, characteristics, and benefits of the resort development potential in the Addington Highlands. Substantial research and analysis has been undertaken to validate the attractiveness of available development opportunities and to compile information and data for interested parties.



# ONTARIO EAST



## TOURISM OPPORTUNITIES 2012



Where tourism investment opportunities come *naturally*



# OPPORTUNITIES

## Brockville Crossroads Properties Inc. Hotel Lands

Sale of Lands for development of hotel.

Location: Located near the major intersection of Highway 401 and Stewart Boulevard.

Total land area of 1.587 acres planned to accommodate at 5 storey, 92 suite Hampton Inn & Suites hotel.

Key Contact: Toby Singlehurst, President, Jennum Properties Inc., 460 Brant Street, Suite 315, Burlington, Ontario L7R 4B6, (289) 430-5027 x 315

Asking Price: \$1.5 million Cdn.



## Waterfront Hotel and/or Condo Development Complex

Seeking investment partner as major stakeholder for a unique waterfront hotel and/or residential complex encompassing commercial roof accommodation and condo units.

A major \$ 20 million tourism attraction known as the Maritime Discovery Centre in close proximity and opening in June 2013.

Contact: Dave Paul, Director of Economic Development City of Brockville 613-342-8772 [dpaul@brockville.com](mailto:dpaul@brockville.com)

Estimate investment in the \$30 to \$40 million range



## Welcome to Brockville

Brockville is famous for location, picturesque beauty and base of many multinational firms. The community is a World Health Organization Designated Safe Community and is within an enviable United Nations Biosphere Reserve. Brockville is also a transportation hub on super Highway 401, being centrally located in the Montreal Toronto economic corridor, an hour from the Nation's Capital region. The community is also accessible and connected by two

international bridges minutes away and with both CNR and CPR Rail services including VIA passenger service. Brockville is also a heritage community being Ontario's oldest incorporated municipality offering the charm and ambiance of resort living and a quality lifestyle. The loyalty and availability of the skilled workforce and the creative talent of its people, offer a significant competitive advantage for \$ business investment.



# Tourism Investment Strategy



## Context – Tourism Investment Approach

- The Ministry of Tourism, Culture and Sport has identified tourism investment attraction as a key priority to drive jobs, investment and increased visitation in the tourism industry.
- Since 2001, a number of studies have identified the need to implement a targeted, strategic approach to selling Ontario as a tourism investment destination.
- In July 2010, Minister's approval was received to proceed with the development of a 10 -Year Tourism Investment Strategy and Implementation Plan.
- In November 2011, a report entitled Ontario's Tourism investment Strategy and Implementation Plan laid out a 10 year investment attraction approach for the Ministry.

## Investment Strategy Interview Findings

Key research findings identified by stakeholders during the study:

- Tourism was not perceived to be one of Ontario's priority investment sectors.
- Tourism was not clearly defined or understood as an economic driver for Ontario.
- Ontario's investment-ready tourism assets and opportunities are not well defined or qualified.
- Ontario does not have specific financial incentives to attract tourism investment.
- At that time, the then Ministry of Tourism and Culture was not perceived as an economic ministry well positioned to lead the attraction of global investment.
- An all of government approach is required to support landed investment opportunities.
- An aggressive, proactive approach with targeted financial incentives will be required by MTCS to have any influence on future investment.

## Recommended Investment Approach for MTCS

- MTCS is implementing the following investment attraction recommendations:
  1. Establish Tourism as a priority sector in Ontario's investment attraction approach.
  2. Create a powerful value proposition to promote Ontario as a destination of choice for tourism investment.
  3. Develop an investor outreach approach to promote Ontario's value proposition and generate investment leads.
  4. Support investment leads with an all-of-government approach.
  5. Continue to identify provincially owned assets as opportunities for investment attraction.

# Investment Strategy Implementation

## 1. **Establish Tourism as a priority sector in Ontario's investment attraction mandate.**

### Ministry Role:

- Partnership established with the Ministry of Economic Development and Innovation (MEDI) to support lead generation and investment marketing for tourism.
- 8 International Marketing Centres and 30 International Business Development Representatives will be used to generate tourism leads.
- Three Senior Investment Consultants at the Investment and Development Office (IDO) are focused on identifying investment opportunities, generating leads and supporting developments.
- Ongoing networking with federal departments, provincial ministries, Economic Development Officers (EDO's) and other Investment Promotion Agencies (IPA's) to raise the profile of tourism.

### Regionally:

- Establish relationships with the RTO's, EDO's, IPA's and municipal leaders to raise the profile of tourism as an economic driver and investment priority.
- Identify major tourism generators, establish relationships with existing businesses and consult on future investment plans.

## Investment Strategy Implementation

### 2. **Create a powerful value proposition to position Ontario as a destination of choice for tourism investment.**

#### Ministry Role:

- Document key reasons to invest in Ontario's tourism industry.
- Develop customized value propositions for investment leads.
- Examine policies and programs across government to support tourism investors.
- Utilize the Tourism Development Fund to encourage projects which support private sector investment attraction.
- Partner with MEDI on international marketing campaigns and social media, update the tourism portal on [www.investinontario.com](http://www.investinontario.com) website.
- Partner with regions to identify and develop market ready investment opportunities.

#### Regionally:

- Develop regional asset maps to identify tourism product strengths, clusters, gaps and investment opportunities.



# Ontario's Value Proposition

- **A large and growing tourism market** - 35% of all tourism spending in Canada takes place in Ontario.
- **Investor's choice** - Ontario is Canada's leading destination for foreign direct investment and second only to California in all of North America.
- **Access to capital** - Toronto is home to Canada's secure and enviable financial sector.
- **Lowest taxes** - Ontario has one of the lowest corporate tax rates in all of North America.
- **Human capital** - Ontario has a diverse, multilingual, highly educated and available workforce.
- **Best brand – anywhere** - International business consulting group, Future Brand, has dubbed Canada the best country “brand” in the world.
- **Competitive cost** – Among the 30 largest North American cities (metro populations of 2 million plus), KPMG ranks Toronto second for low business costs.
- **Well connected** - Toronto's Pearson Airport is the 4th largest entry point into North America and highly connected to US and International destinations.
- **A growing economy** - The International Monetary Fund has forecast Canada to have the highest economic growth among G7 countries for 2012.
- **Demand** - There are 139 million consumers within an 8 hour drive of Toronto.
- **Support for Business** - the Government of Ontario has dedicated programs and services to support international investment, major events, site visits and business feasibility studies.
- **Tourism investor confidence** - International brands including Ripley, Legoland, Trump, Four Seasons, Shangri-la, and Ritz Carleton have invested in Ontario within the last two years.
- **Iconic assets** - Ontario has prime destinations looking to grow including: Toronto's waterfront – largest urban waterfront redevelopment in North America; Georgian Bay – home to Wasaga Beach, the world's largest freshwater beach; Niagara's award winning wine and culinary region; the world-renowned Rideau Canal, a UNESCO World Heritage Site, and Central Ontario with it's hundreds of lakes and recreational activities.

## Investment Strategy Implementation

### 3. **Develop an investor outreach approach to promote Ontario's value proposition and generate investment leads.**

#### Ministry Role:

- Regular communication with IMC's, IBDR's, IPA's to encourage investment leads and provide information on Ontario tourism opportunities.
- A list of domestic and foreign investors is being developed for lead generation purposes.
- Participation at key investment shows/conferences is planned.
- Customer relationship management system is being used to track leads, key contacts and investment projects.
- Support incoming investment missions.

#### Regionally:

- Participate at investment shows to promote regional investment opportunities as appropriate, support incoming missions.

## Investment Strategy Implementation

### 4. Support investment leads with an all-of-government approach.

#### Ministry Role:

- Follow-up on leads generated to provide client service required to secure the investment.
- Support familiarization trips and senior level government meetings for investment decision makers.
- Maintain a comprehensive list of government programs/incentives/contacts available to investors.
- Establish cross-government working teams to support major investment projects.

#### Regionally:

- Inform MTCS of any new tourism developments.
- Work with MTCS to provide local information and contacts available to support new developments.
- Work with municipal partners to facilitate new tourism developments.

## Investment Strategy Implementation

### 5. **Identify provincially owned assets as opportunities for private sector investors.**

#### Ministry Role:

- Explore alignment on the Ontario Place file and provide support as required.
- Identify key public properties through the Ministry of Infrastructure with potential for private sector tourism investment.
- Work with Tourism Agencies Branch to identify opportunities for public private partnerships (e.g., Niagara Parks Commission power plants).

## Investment Strategy – MTCS Next Steps

- Invitations sent out to all individual RTO's requesting a meeting to discuss partnership opportunities
- Organizing an investment session for the Ontario Tourism Summit (October 21-24, London Convention Centre) focused on community revitalization and how to attract investors to a region
- Continue to develop the investment value proposition and local opportunities to market to investors
- Continue to build relationships with IMC's, IBDR's and IPA's
- Attend investment shows/generate leads
- Ongoing support for existing investment projects

# Research

Ontario and RTO 12 data

# 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 <sup>A</sup> (millions)	2010 <sup>F</sup>	2011 <sup>F</sup>	2012 <sup>F</sup>	2013 <sup>F</sup>	2014 <sup>F</sup>	2015 <sup>F</sup>	% Chg 2015 vs 2011	Average Annual Growth
<b>Total Visits</b>	<b>101.5</b>	<b>1.8%</b>	<b>1.2%</b>	<b>2.1%</b>	<b>3.5%</b>	<b>2.6%</b>	<b>1.9%</b>	<b>11.8%</b>	<b>2.3%</b>
<b>Domestic Visits</b>	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%
<b>International Visits</b>	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%

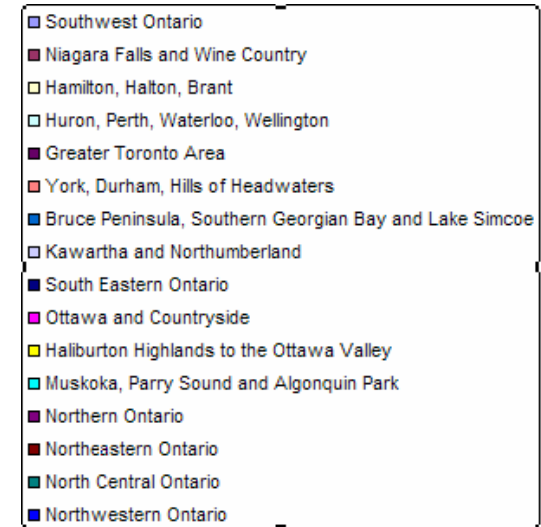
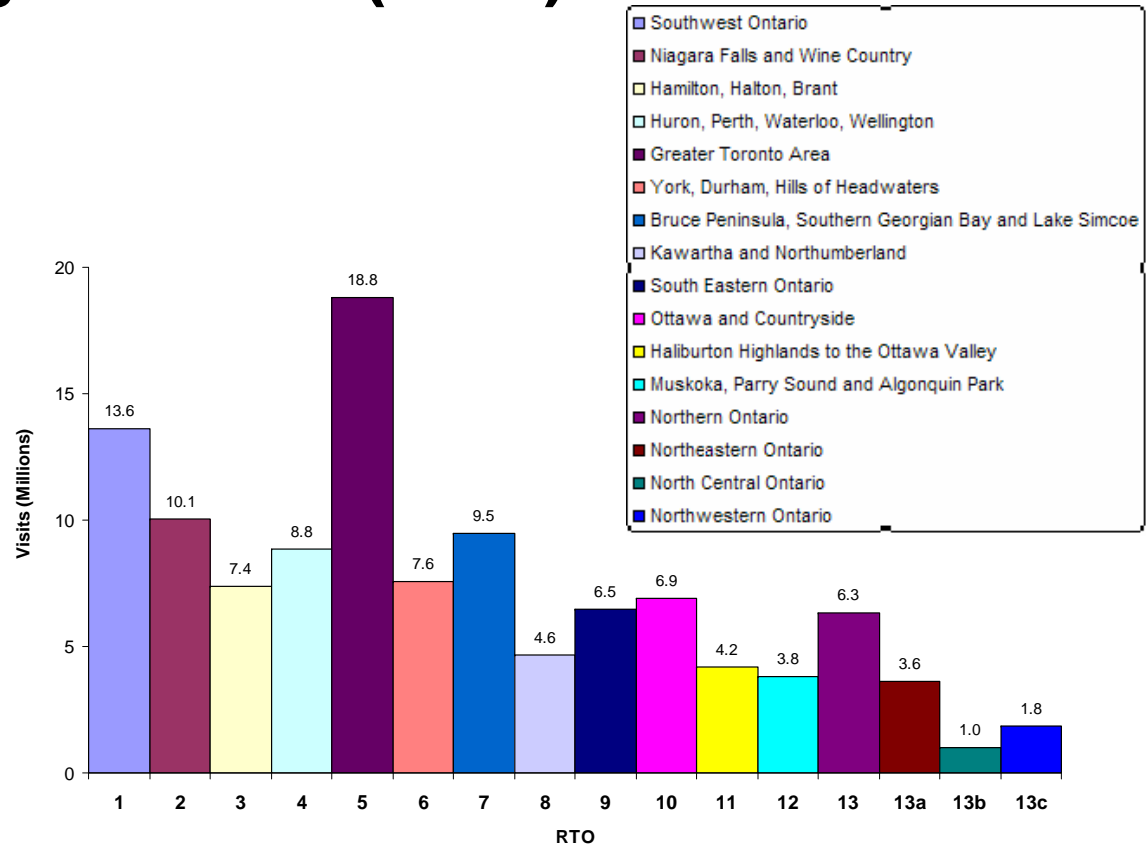
Source: Ontario Ministry of Tourism, Culture and Sport

*Non-business & Business travel*



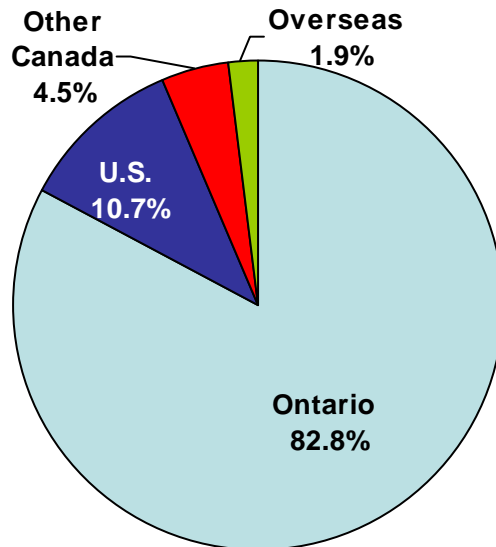
# Visits and Spending by Regional Tourism Organization (RTO)

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%

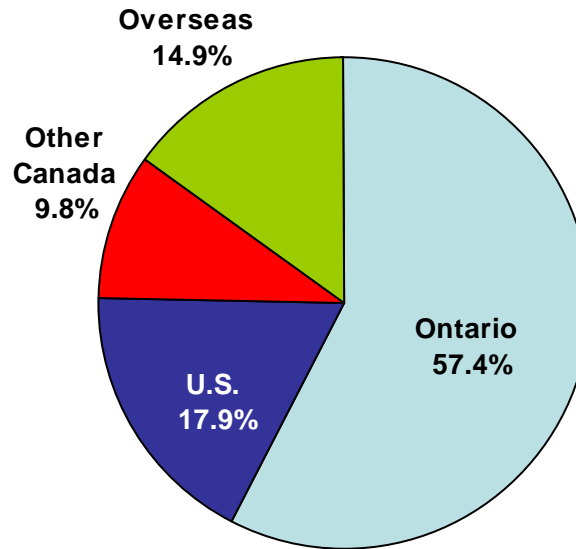


Source: Statistics Canada, Travel Survey of the Residents of Canada 2010, International Travel Survey 2010, Ontario Ministry of Tourism, Culture and Sport

# Ontario 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 12 Tourism

## Economic Impact of Tourism in RTO 12, (2010)

- Visitor Spending totalled **\$513 million**
- Total GDP (direct, indirect and induced) generated by visitor spending amounted to **\$250 million**, 6.7% of RTO 12's GDP
- The total tourism employment impact (direct, indirect and induced) of visitor spending was **4,452 jobs**, accounting for 9.7% of RTO 12's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$146.2 million**. \$63.8 million were federal tax revenues, \$57 million were provincial and \$25 million were municipal

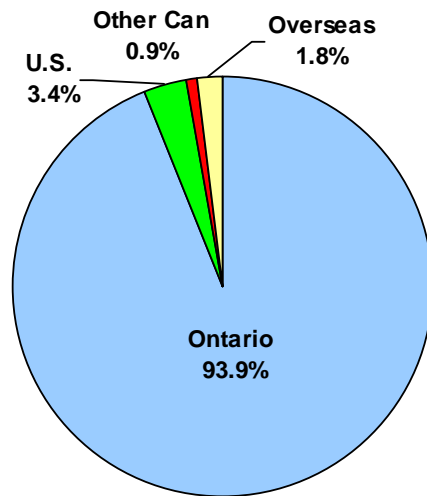
# Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario	103.7	17.1
RTO 12	3.8	0.5
RTO 12 proportion of Total Ontario	3.7%	3.0%

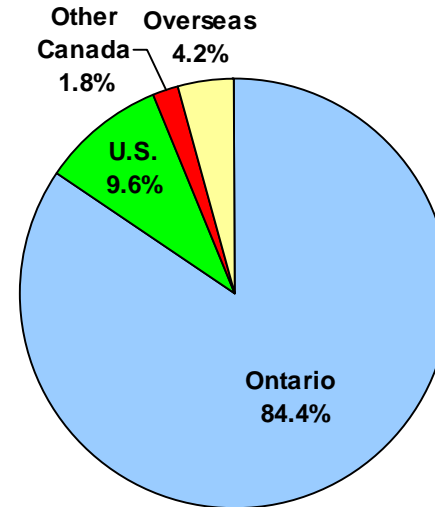
- In 2010, there were 3.8 million visits to RTO 12, representing 4% of total visits to Ontario
- Visitors to RTO 12 spent \$513 million, accounting for 3% of total visitor spending in Ontario

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

# RTO 12 Visits and Spending



**Visits by Origin**  
3.8 million



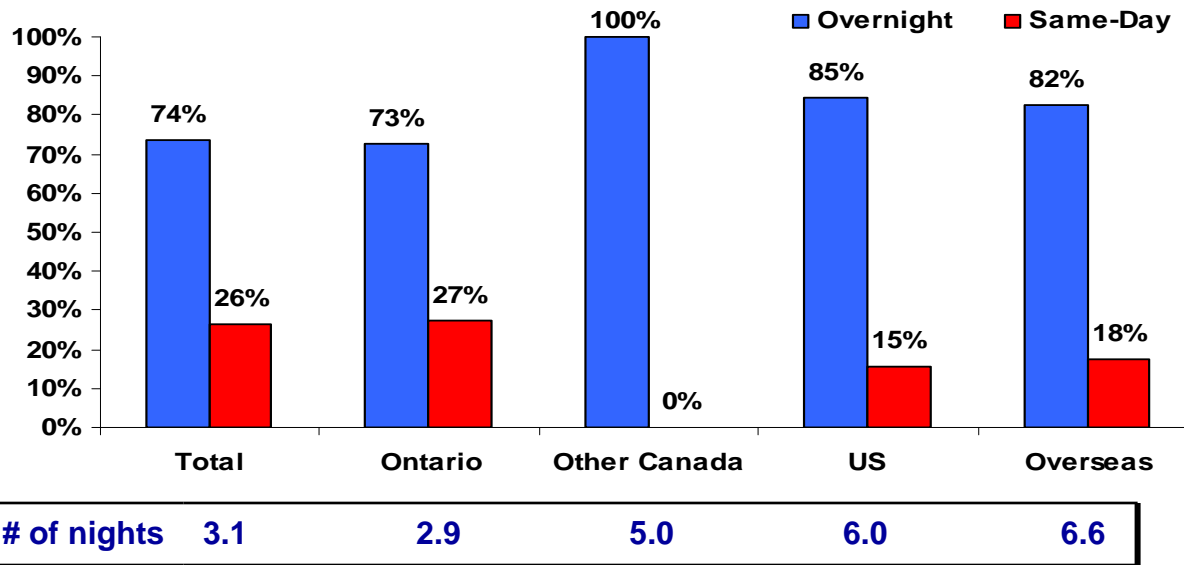
**Visitor Spending by Origin**  
\$513 million

- Ontario residents accounted for the majority of visits and spending
- U.S. visitors accounted for 3% of visits and 10% of expenditures. Visitors from Other Canada comprised less than 1% of visits and 2% of spending
- Overseas visitors accounted for 2% of visits and 4% of spending

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



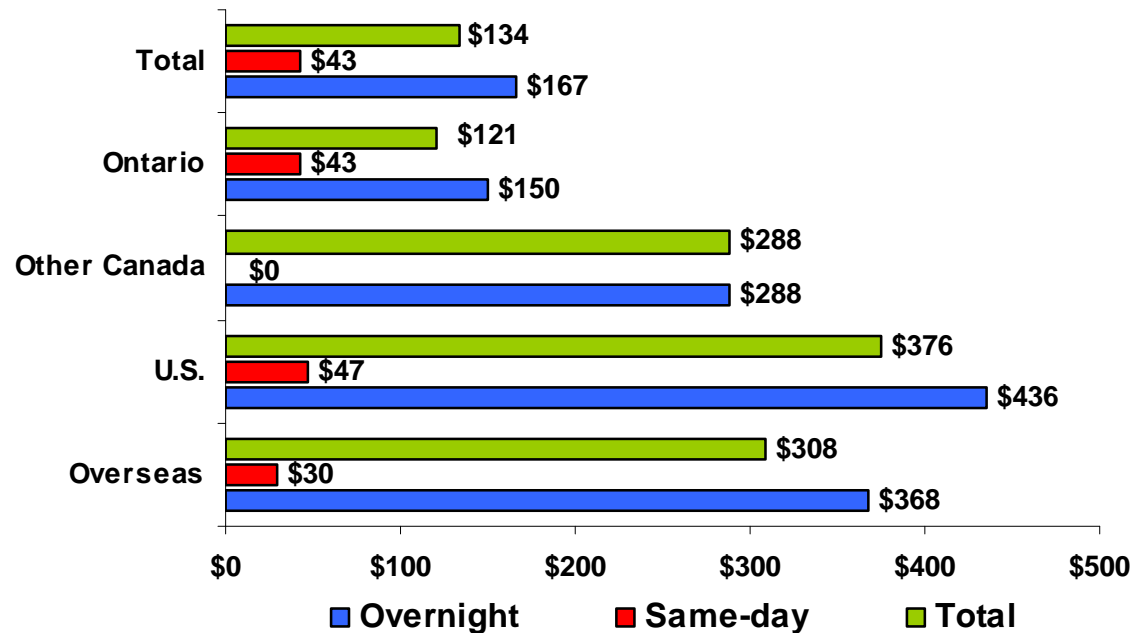
# Visits by Length of Stay



- The majority (74%) of visits to RTO 12 were overnight visits. For comparison, 59% of visits in Ontario were same-day visits
- The average number of nights spent in RTO 12 was equal 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

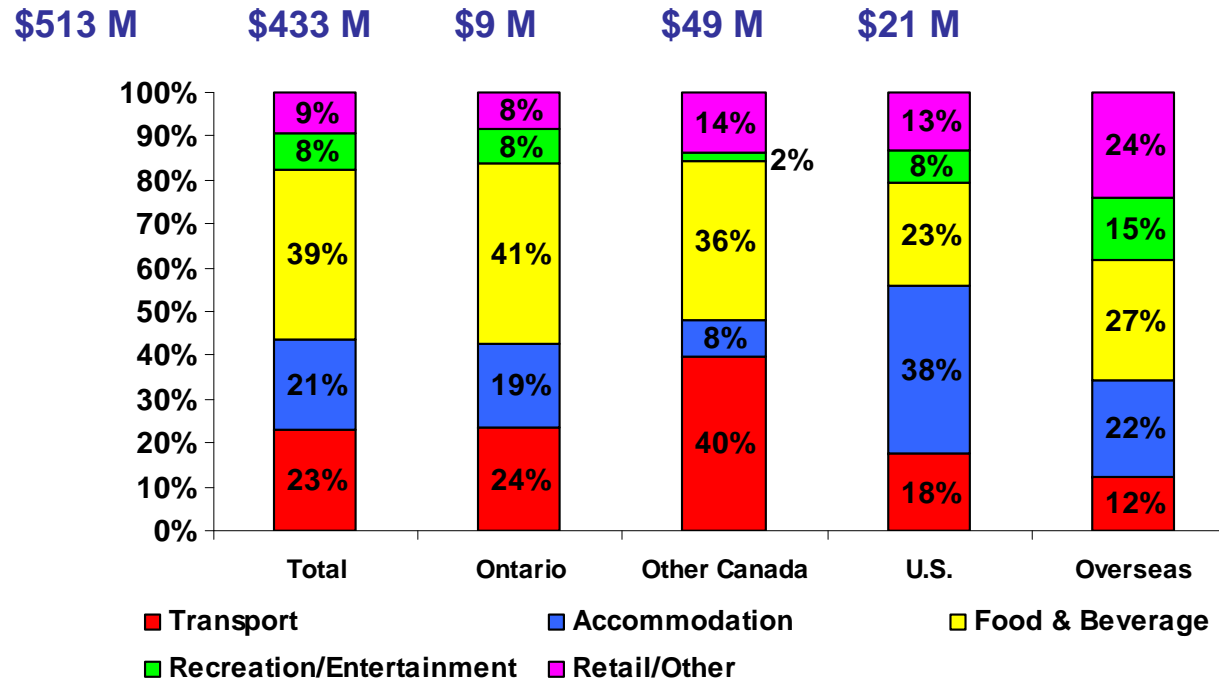
## \$/Trip by Length of Stay



- Visitors spent an average of \$134/trip in RTO 12 (\$165/trip for Ontario)
- On average, overnight visitors spent just under four times as much per person as same-day visitors
- U.S. visitors spent the most per person, on average, at \$376/trip

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

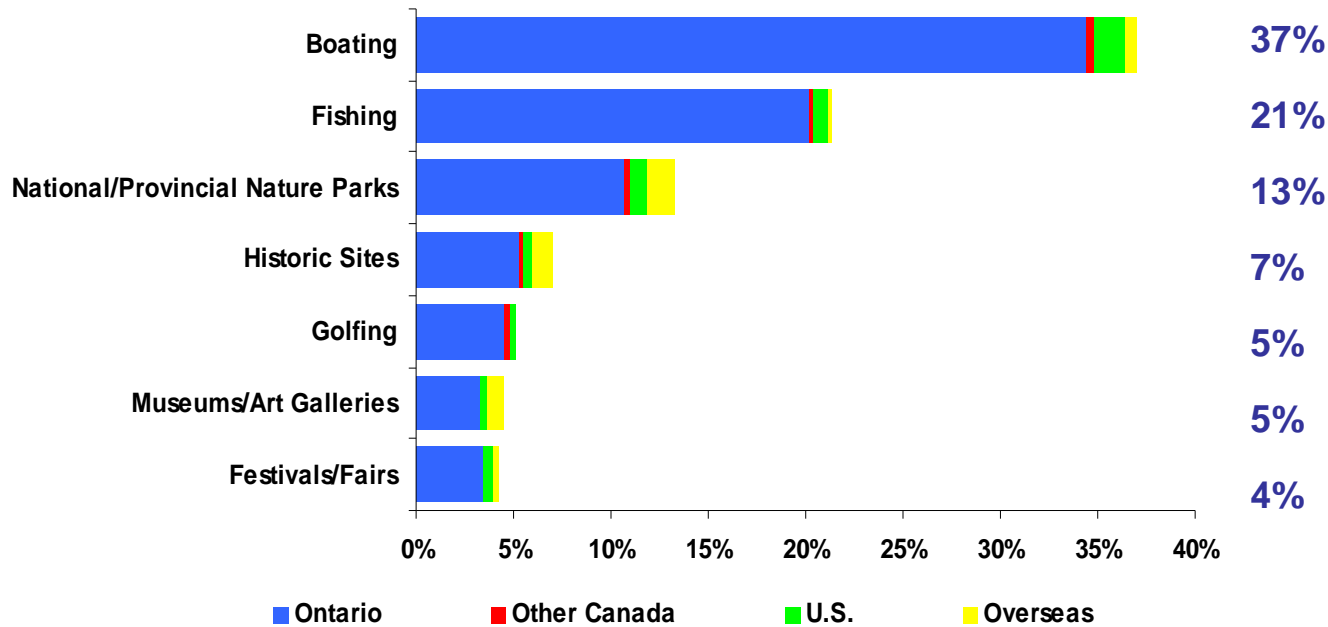
# Spending by Category



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

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 \*



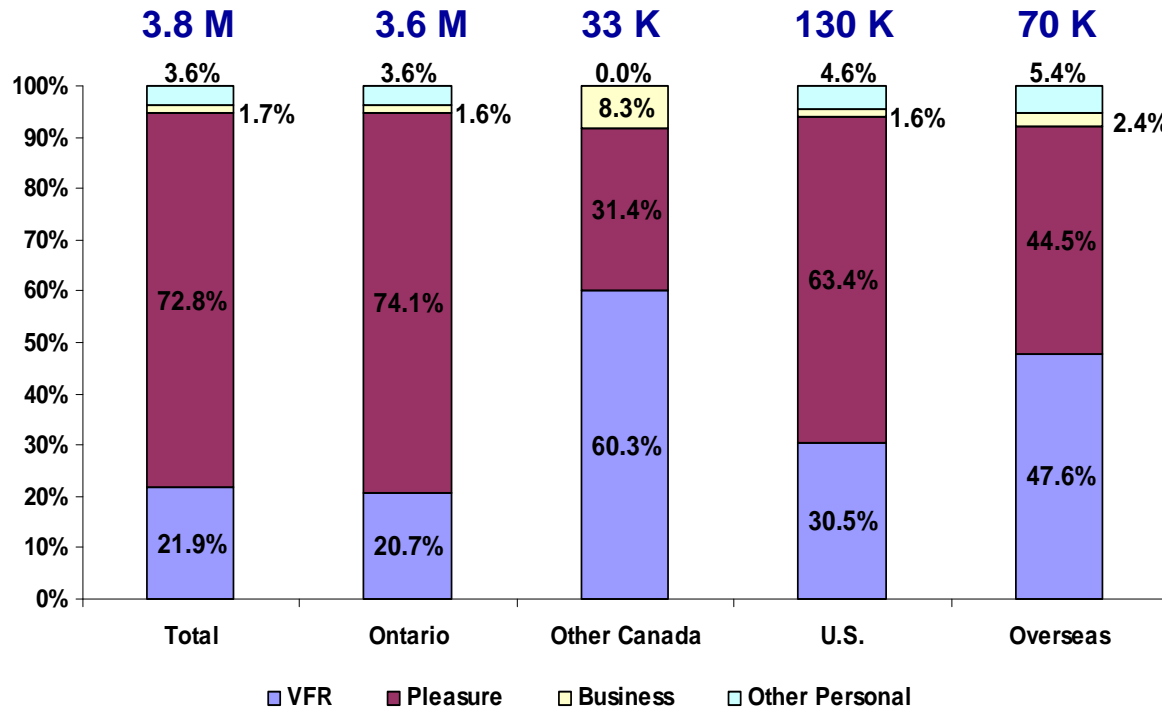
RTO 12 vs. Ontario	Activity Index
Boating	614
Fishing	524
National/Provincial Parks	261
Historic Sites	165
Golfing	266
Museum/Art Galleries	121
Festival/Fairs	186

- In general, visitors to RTO 12 demonstrated a higher rate of participation in activities compared to visitors to other regions
- Overseas visitors are more likely to visit historic sites and parks

\*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

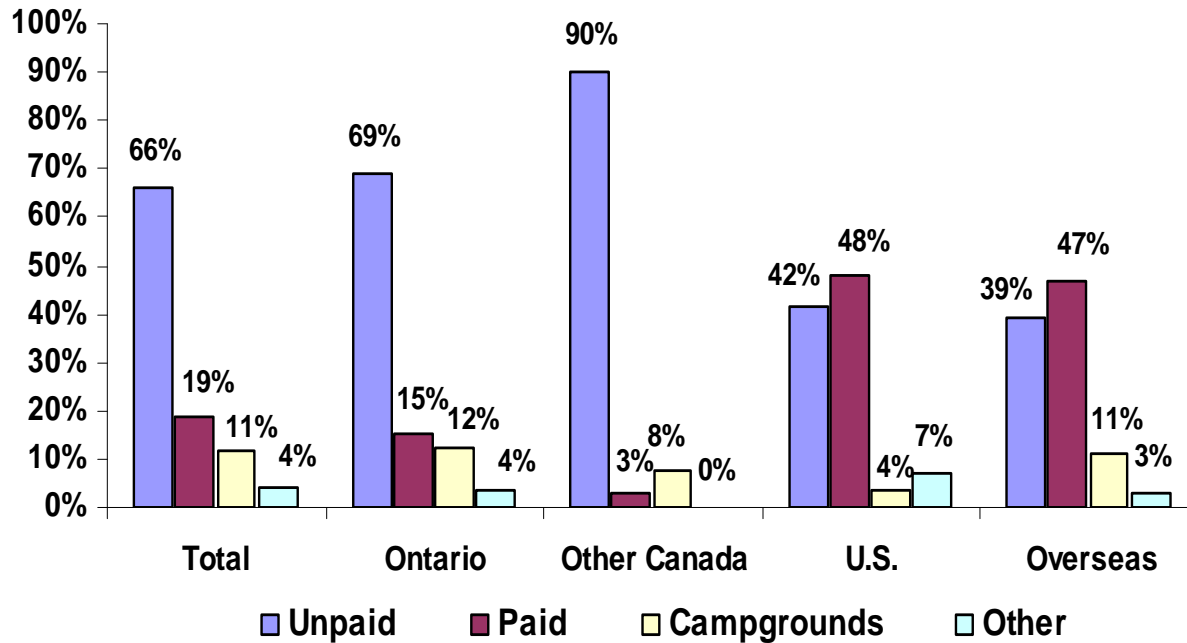


RTO 12 vs. Ontario	Purpose Index
VFR	49
Pleasure	175
Business	28
Other	48
VFR: Visiting Friends and/or Relatives	

- Most trips are for pleasure
- Visitors from other Canada and overseas are more likely 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

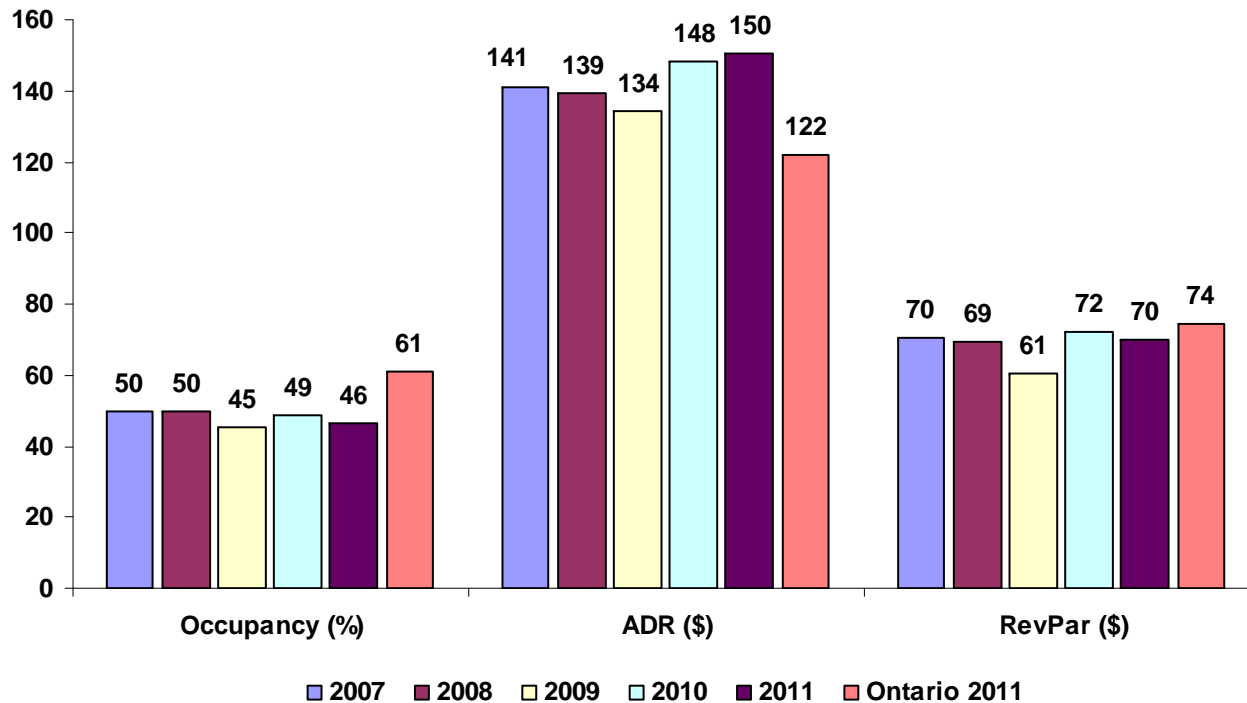


RTO 12 vs. Ontario	Type Index
Unpaid	107
Paid Roofed	72
Campground	179
Other	66

- The majority of overnight visits to RTO 12 were spent at unpaid accommodations such as private homes and cottages
- U.S. and overseas 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 12 vs. Ontario	Hotel Stats Index 2011
Occupancy	76
ADR	123
RevPar	94
<b>ADR = Average Daily Rate</b> <b>RevPar = Revenue per Available Room</b>	

- In general, occupancy and RevPar dropped from 2010 to 2011, but ADR improved during the same time period
- RTO 12 had lower occupancy and RevPar than total Ontario, but a higher ADR

Source: PKF Consulting, Ministry of Tourism and Culture

# Park Statistics

Park	# Developed Campsites	Interior Camper-Nights	Visitors	Day Use	Bus Permits	Camper-Nights	Campers	July/Aug % Occupancy
Algonquin	1,325	242,688	772,300	219,991	420	355,879	91,251	77%
Killbear	881		348,023	14,836	14	329,918	48,517	86%
Grundy Lake	485	401	104,594	1,529	0	100,646	21,880	69%
Arrowhead	378		118,320	25,296	25	93,024	28,189	82%
Restoule	275		60,355	5,076	0	52,267	9,503	48%
Six Mile	217		56,346	5,610	12	50,736	13,352	65%
French River		18,100						
The Massasauga		20,489						
Oastler	148		33,425	1,506	0	31,919	8,627	69%
Mikisew	258		35,868	1,207	0	33,238	8,310	45%
Sturgeon Bay	80		15,827	207	0	15,620	4,881	63%
Total	4,047	281,678	1,545,058	275,258	471	1,063,247	234,510	
<b>% of Ontario</b>	<b>22%</b>	<b>65%</b>	<b>17%</b>	<b>7%</b>	<b>32%</b>	<b>23%</b>	<b>19%</b>	

- Algonquin is the most popular camping destination in RTO 12, with the largest number of visitors and overall nights spent

Source: Ontario Parks 2010



# Tourism Related Establishments

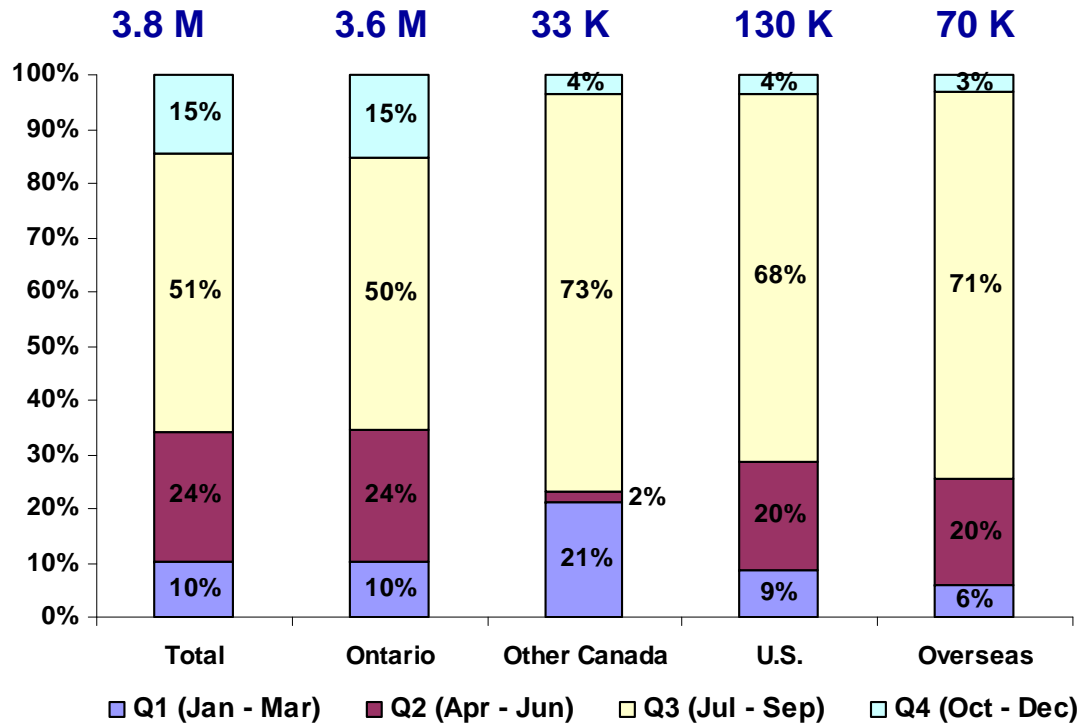
Type of Establishment	# 2010*	% of Ontario
Accommodations	254	5%
Arts, Entertainment, Recreation	180	2%
Food & Beverage	250	1%
Transportation	46	0%
Travel Services	14	1%
Retail	666	1%
Other Services	278	1%
<b>Total</b>	<b>1688</b>	<b>1%</b>

- RTO 12 accounts for 1% of Ontario's tourism related establishments
- Note: RTO 12 represented 4% (3.8 M) of total visits and 3% (\$513 M) of visitor spending

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

Source: Statistics Canada, Business Register 2010

# Visits by Time of Year

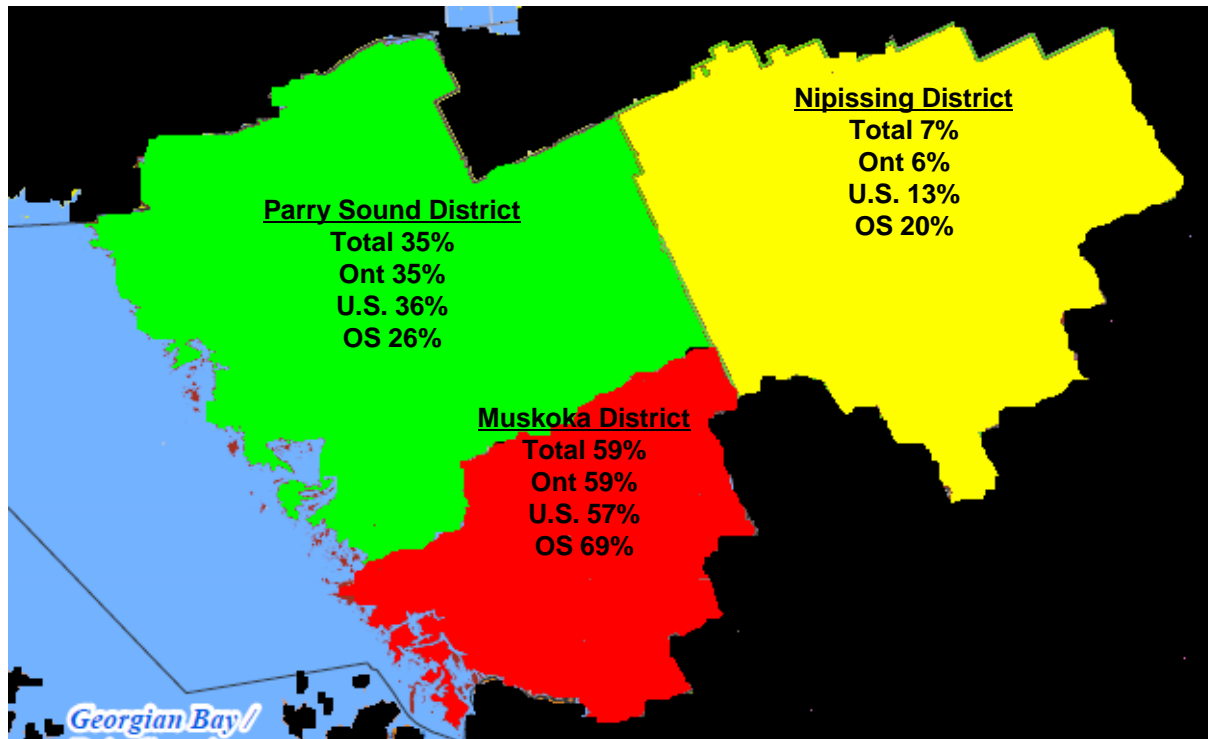


RTO 12 vs. Ontario	Quarter Index
Jan-Mar	53
Apr-Jun	92
Jul-Sept	161
Oct-Dec	63

- The largest proportion of trips occur in the summer months, especially among international visitors
- 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, 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

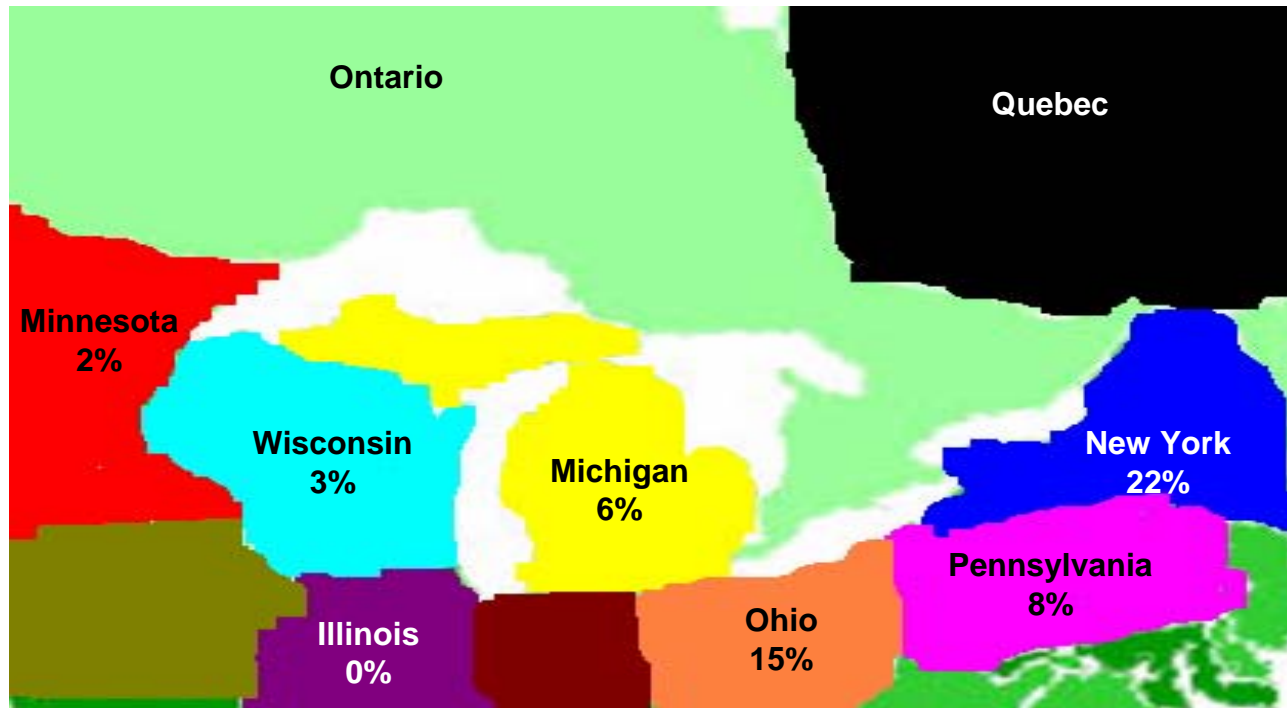


Origin	% of Visits	% of \$
Ontario	94%	84%
U.S.	3%	10%
Overseas	2%	4%
OS = Overseas		

- Muskoka District is the most visited census division in RTO 12 receiving 59% of total visitors
- Most visitors only go to one census division per visit while visiting RTO 12

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

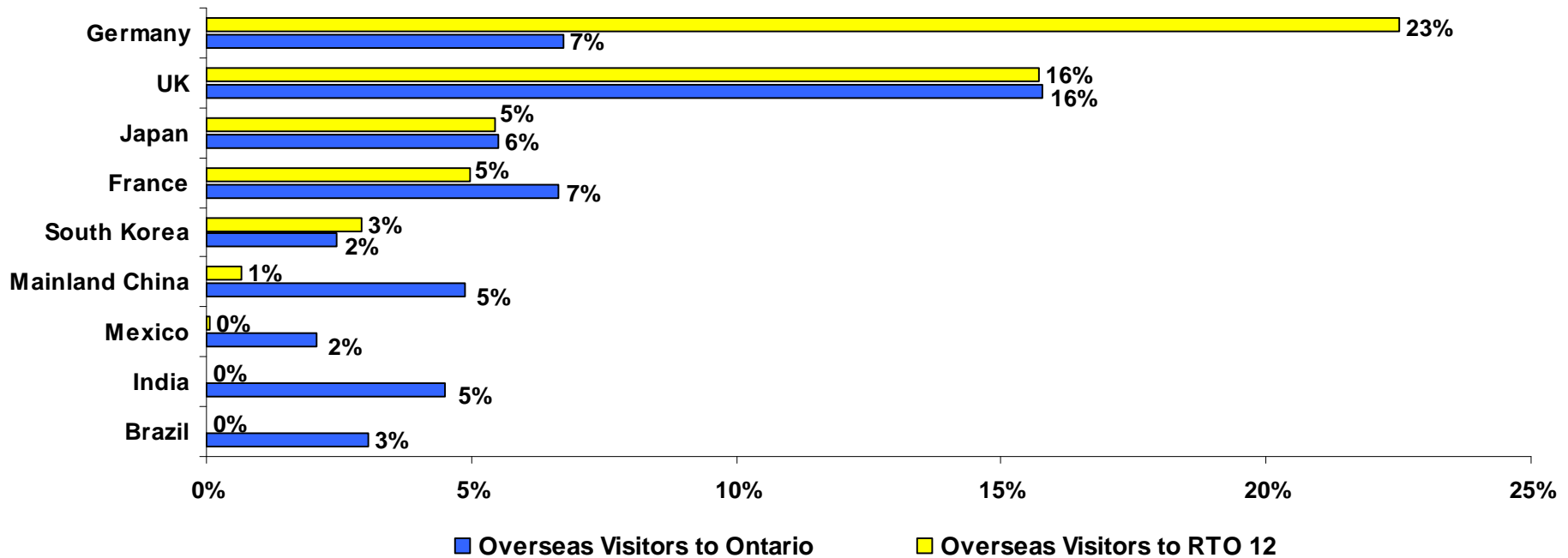
# U.S. Visitors by State of Residence



- 55% of U.S. visitors came from border states; primarily from New York State at 22%
- Note: U.S. visitors to RTO 12 represented 3% (131 K) of total visits and 10% (\$49 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

# Overseas Visitors by Country of Residence



- Ontario's 9 overseas target markets represented 52% of overseas visitors to RTO 12
- Note: Overseas visitors to RTO 12 represented 2% (69 K) of total visits to the region and 4% (\$21 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 12 Summary

- In 2010, there were 3.8 million visits in RTO 12, accounting for 4% of total visits to Ontario. Visitors to RTO 12 spent \$513 million, or 3% 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 2% of spending, U.S. visitors represented 3% of visits and 10% of expenditures, and Overseas visitors accounted for 2% of visits and 4% of spending
- Visitors spent an average of \$134/trip. On average, overnight visitors spent just under four times as much per person as same-day visitors. U.S. visitors spent the most per person, on average, at \$376/trip
- The largest proportion of expenditures were spent on Food & Beverage

## RTO 12 Summary (cont'd)

- 55% of U.S. visitors came from border states including 22% from New York State
- Ontario's 9 overseas target markets accounted for 52% of overseas visitors to RTO 12. Germany was by far the leading overseas source market at 23% of overseas visits
- The majority of visits were overnight by visitors of all origins
- Most trips were for pleasure, while visitors from other Canada and overseas are more likely to visit family or friends
- The majority of overnight visitors stayed in unpaid accommodations. U.S. and overseas visitors are more likely to stay in paid accommodations than Ontario visitors



- RTO 12 Research Take-aways
  - In 2010, visitors spent over half a billion \$\$ in RTO 12.
    - Tourism is a real economic generator for the region
  - The overwhelming source of visitors are from Ontario, specifically the GTA.
    - The GTA is your market
  - Overnight visitors spent almost four times as much per person as same-day visitors.
    - The overnight visitors will spend if there are things, places, events to do
  - The majority of overnight visitors stayed in unpaid accommodations.
    - These are likely the cottagers
  - Visitors largest expenditure is on Food and Beverage.
    - Perhaps a larger focus on the culinary aspects of the region. For example, utilize the lakes, the parks and resorts to create the fall, winter and spring Great Explorer's Edge "rib-off" or "burger-fest" in which your major hubs compete with each other to get visitors from the GTA to visit your areas for a weekend of winter BBQs and outdoor activities such as ice fishing, skiing, and sledding.

# Blue sky discussion

## Asset Mapping – Tourism Summit Exercise

1. What do you consider to be your top five tourism attractors from a visitation perspective? i.e. CN Tower, Niagara Falls, Fort William etc...
2. What do you consider to be your greatest undeveloped assets from a tourism perspective? i.e. natural waterways, proximity to the Rideau Canal, access to urban and the US markets etc...
3. If an investor were to come to your community to build a tourism development or attraction, what would be the top five new projects that you would like to see completed in the next 3 - 5 years? i.e. a four-season attraction, a new luxury waterfront resort, a retail and entertainment complex, or for fun, a Mississippi style gambling paddleboat.

## Next steps – What MTCS can do for you

- Investment ready workshops
- Create a premium “market-ready tourism related real estate inventory
- Tourism B.R. & E. What is the succession plan for your major tourism operators?
- Asset study – What’s working and what can be improved?

## Final Thoughts

The Ministry's Investment and Development Office is your resource centre for communities to assist them moving forward with identifying investment opportunities and packaging them for promotion to the investment community.

RTO 12 has the opportunity to create a comprehensive investment package which will yield the following benefits:

- Increased cooperation with neighbouring communities to identify unique qualified investment opportunities that will benefit the community and the region
- The creation of a organic investment portfolio that will reflect the state of readiness in your community for tourism investment opportunities
- Ability to define the region separately from other RTOs to target niche investors
- Opportunity to encourage innovative approaches that could be catalysts for other economic development activities
- Develop a consistent message about the growing importance of tourism as a economic generator for communities that will be shared with the regional and local tourism industry, municipal planners, potential investors, media sources and elected officials

Thank you.

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