

Regional Tourism Organizations / Ministry Meeting:

The Economic Impact of Tourism in Ontario and its Tourism Regions

Ministry of Tourism, Culture and Sport

November 12, 2013

Purpose

- To provide an overview of tourism's economic impact in Ontario and its tourism regions.
- Identify research resources available to Ministry partners.

Tourism Research/Data

How can the tourism industry use this kind of information?

- To measure the relative economic importance of an industry or the returns to an investment in terms of jobs, taxes and GDP
- To inform business planning
- To study the industrial connections of tourism and determine potential partnerships
- To study ways of retaining more of the benefits of tourism spending

Data sources and Ministry Tools

- Multiple data sources:
 - Input-Output tables for Ontario
 - The Tourism Regional Economic Impact model (TREIM)
 - The Travel Survey of Residents of Canada**
 - The International Travel survey
 - Labour Force Survey for characteristics of labour force
 - The Travel Arrangements Survey
 - The Business Registry
- Data as well as an economic impact model (TREIM) are available on the Ministry web site: <http://www.mtc.gov.on.ca/en/tourism/research.shtml>

**Data sources, all from Statistics Canada with the exception of TREIM.*

***TSRC was redesigned in 2011*

How Important is Tourism to the Ontario Economy?

In 2010, Ontario's tourism receipts reached \$22 billion*, or 3.6% of Ontario's GDP

Table 3: Components of Tourism Receipts & Visitor Spending - \$Millions

	2000	share	2010	share
1. Ontarians' spending in Ontario while visiting the province	7,613	37.6%	9,808	44.5%
2. Other Canadians' spending in Ontario while visiting the province	1,346	6.7%	1,677	7.6%
3. US visitors' spending in Ontario (including fares to Canadian carriers to get to Canada)	4,981	24.6%	3,065	13.9%
4. Overseas visitors' spending in Ontario (including fares to Canadian carriers to get to Canada)	2,508	12.4%	2,546	11.5%
Total visitor spending in Ontario	\$16,449	81.3%	\$17,095	77.6%
7. Ontarians' spending in Ontario on transport-related items for trips outside the province and with no visit in Ontario	2,679	13.2%	3,754	17.0%
8. Ontarians' spending in Ontario on travel agents' fees and commissions for trips outside the province	1,068	5.3%	1,140	5.2%
9. Other Canadian's spending in Ontario, but with no visit in the province	39	0.2%	53	0.2%
Total tourism receipts in Ontario	\$20,234	100.0%	\$22,042	100%

Source: Statistics Canada: TSRC, ITS & Travel Arrangements Survey; MTC

* 2010 statistics are being used due to the change in methodology of the TSRC making 2011 data incomparable with previous years

How Important is Tourism to the Ontario Economy? - Exports

Ontario exports 43% of its travel products to non-Ontario residents.

Tourism accounted for 2.4% of Ontario's total exports and was the province's 9th largest international merchandise export industry.

1.8% of Ontario's exports were accounted for by exports to international travellers and 0.6% to inter-provincial travellers.

Table 4: Leading International Merchandise Exports in Ontario

Industry	2000		2010	
	\$Billions	Rank	\$Billions	Rank
Transportation Equipment Manufacturing	\$86.5	1	\$53.6	1
Chemical Manufacturing	\$10.8	4	\$14.5	2
Mining and Oil and Gas Extraction	\$2.6	14	\$14.3	3
Primary Metal Manufacturing	\$8.9	5	\$12.7	4
Machinery Manufacturing	\$15.4	2	\$11.6	5
Computer and Electronic Product Manufacturing	\$14.0	3	\$10.4	6
Food Manufacturing	\$4.3	12	\$6.3	7
Plastics and Rubber Products Manufacturing	\$7.2	7	\$5.8	8
TOURISM	\$7.5	6	\$5.6	9
Fabricated Metal Product Manufacturing	\$5.9	9	\$4.2	10
Electrical Equipment, Appliance & Component Manuf.	\$4.4	11	\$3.6	11
Miscellaneous Manufacturing	\$1.9	16	\$3.5	12
Paper Manufacturing	\$6.6	8	\$3.2	13
Furniture and Related Product Manufacturing	\$4.8	10	\$2.5	14
Petroleum and Coal Products Manufacturing	\$1.9	15	\$2.5	15
Crop Production	\$0.9	19	\$2.1	16
Non-Metallic Mineral Product Manufacturing	\$1.8	17	\$1.1	17
Wood Product Manufacturing	\$3.0	13	\$0.8	18
Animal Production	\$0.6	22	\$0.6	19
Clothing Manufacturing	\$0.9	20	\$0.6	20
Beverage and Tobacco Product Manufacturing	\$1.1	18	\$0.6	21
Printing and Related Support Activities	\$0.8	21	\$0.6	22
Textile Mills	\$0.5	22	\$0.5	23
Utilities	\$0.3	24	\$0.5	24
Textile Product Mills	\$0.5	23	\$0.4	25
Leather and Allied Product Manufacturing	\$0.1	25	\$0.3	26
Support Activities for Agriculture and Forestry	\$0.0	28	\$0.1	27
Fishing, Hunting and Trapping	\$0.1	27	\$0.1	28
Forestry and Logging	\$0.1	26	\$0.0	29

Source: Industry Canada, Trade Online, Canadian Trade by Industry

How Important is Tourism to the Ontario Economy? - Imports

Ontario's tourism imports account for 8% of the province's total imports.

Imports associated with tourism consumption grew much faster than imports associated with tourism production, while tourism-related businesses increased their imports by more than other industries.

Imports are economic "leakages" and as such decrease the impact of an activity on GDP.

Table 5: Tourism-related Imports in Ontario (\$Millions)

	2000	2010	% change
Ontario's total imports of goods & services	\$274,513	\$315,318	14.9%
From other countries	\$215,663	\$230,304	6.8%
From other provinces	\$58,850	\$85,014	44.5%
Ontario's tourism imports	\$17,445	\$25,076	43.7%
Ontario residents' travel consumption outside the province (incl. foreign fares)	\$11,889	\$18,329	54.2%
International	\$9,798	\$15,945	62.7%
Inter-provincial	\$2,091	\$2,384	14.0%
Business imports required to meet the demand of travellers in Ontario	\$5,556	\$6,747	21.4%
Direct	\$1,947	\$2,426	24.6%
Indirect	\$3,609	\$4,321	19.7%

Source: Ontario Ministry of Tourism, Culture and Sport, TREIM; Statistics Canada, ITS & TSRC; Statistics Canada Provincial Economic Accounts

How Important is Tourism to the Ontario Economy? - GDP

In 2010, tourism generated \$19.5 billion of GDP, accounting for 3.2% of Ontario's total GDP.

Of the \$19.5 billion, \$9.8 billion were produced by Ontario's tourism related industries accounting for 1.6% of the provincial GDP.

In real terms, the GDP produced by the tourism industry in 2010 at basic prices exceeded that of Agriculture, forestry, fishing & hunting, and that of Mining and oil and gas extraction.

Table 6: GDP generated in Ontario from tourism receipts
\$Millions of nominal dollars at market prices

Year	Total	Direct	Indirect	Induced	Annual Rate of Change (of Total)
2000	18,411	9,906	4,570	3,936	
2001	18,188	9,730	4,494	3,964	-1.2%
2002	19,138	10,219	4,705	4,214	5.2%
2003	17,101	8,918	4,340	3,844	-10.6%
2004	19,144	9,763	5,008	4,372	11.9%
2005	19,419	10,171	4,939	4,310	1.4%
2006	19,846	10,346	5,028	4,472	2.2%
2007	19,790	10,116	5,162	4,512	-0.3%
2008	19,943	10,062	5,243	4,638	0.8%
2009	18,718	9,398	4,916	4,404	-6.1%
2010	19,536	9,841	5,151	4,544	4.4%

Source: Ministry of Tourism, Culture and Sport, TREIM

How Important is Tourism to the Ontario Economy? - GDP

Table 7 : Ontario's GDP by Industry – in Basic Prices (chained 2002 dollars)

Industry	% of total GDP 2000	Rank in 2000	% of total GDP 2010	Rank in 2010
Manufacturing	23.4%	1	15.1%	2
Finance, insurance, real estate and renting & leasing & management*	20.6%	2	23.5%	1
Health care and social assistance	5.9%	3	6.6%	3
Wholesale trade	5.6%	4	6.2%	4
Professional, scientific and technical services	5.6%	5	5.7%	7
Public administration	5.0%	6	5.9%	5
Retail trade*	4.8%	7	5.7%	6
Construction	4.6%	8	5.2%	8
Education services	4.6%	9	5.2%	9
Information and cultural industries*	3.6%	10	4.1%	10
Transportation and warehousing*	3.3%	11	3.6%	11
Other services (except public administration)*	2.3%	12	2.5%	13
Administrative and support, waste management & remediation services*	2.3%	13	2.7%	12
Utilities	2.2%	14	2.1%	14
TOURISM INDUSTRY	1.9%	15	1.7%	15
Accommodation and food services*	1.6%	16	1.2%	16
Agriculture, forestry, fishing & hunting	1.2%	17	1.1%	17
Arts, entertainment and recreation*	0.8%	18	0.9%	18
Mining and oil and gas extraction	0.7%	19	0.4%	19

Source: Statistics Canada, Provincial Economic Accounts; Ontario Ministry of Tourism, Culture and Sport

* The portion of GDP consumed by tourists has been subtracted from these industries

What are Tourism's Industrial links? - GDP

Table 8: Total GDP generated in Ontario by tourism receipts – By industry, 2010

Industry	Total (\$millions)	Share %	Direct (\$millions)	Share %
Crop and Animal Production	87.8	0.4%	0.0	0.0%
Forestry, Fishing and Hunting	15.2	0.1%	0.0	0.0%
Mining and Oil and Gas Extraction	36.5	0.2%	0.0	0.0%
Utilities	246.8	1.3%	0.0	0.0%
Construction	559.8	2.9%	0.0	0.0%
Manufacturing	1,183.7	6.1%	0.0	0.0%
Wholesale Trade	828.7	4.2%	0.0	0.0%
Retail Trade	1,421.2	7.3%	757.7	7.7%
Other Transportation and Warehousing	3,157.0	16.2%	2,483.6	25.2%
Ground Passenger Transportation (excl. Rail)	344.6	1.8%	293.6	3.0%
Information and Cultural Industries	555.9	2.8%	46.3	0.5%
Other Finance, Insurance, Real Estate and Renting & Leasing	1,682.7	8.6%	0.0	0.0%
Car Rental and Leasing	243.2	1.2%	188.8	1.9%
Owner Occupied Housing	698.7	3.6%	0.0	0.0%
Professional, Scientific and Technical Services	693.0	3.5%	0.0	0.0%
Other Administrative and Other Support Services	351.5	1.8%	0.0	0.0%
Travel Agencies	747.7	3.8%	747.7	7.6%
Education Services	22.7	0.1%	0.0	0.0%
Health Care and Social Assistance	152.1	0.8%	0.0	0.0%
Arts, Entertainment and Recreation	742.5	3.8%	629.8	6.4%
Accommodation Services	2,087.2	10.7%	2,048.7	20.8%
Food & Beverage Services	1,206.0	6.2%	1,041.9	10.6%
Other Services (Except Public Administration)	246.3	1.3%	8.8	0.1%
Non-Profit Institutions Serving Households	202.4	1.0%	44.7	0.5%
Government Sector	286.5	1.5%	53.0	0.5%
Exogenous Net Indirect Taxes on Production	26.0	0.1%	0.0	0.0%
GDP at Basic Prices	17,825.5	91.2%	8,344.7	84.8%
Net Indirect Taxes on Products	1,710.3	8.8%	1,496.3	15.2%
GDP at Market Prices	19,535.8	100.0%	9,841.0	100.0%

Source: Ontario Ministry of Tourism, Culture and Sport, TREIM

How Important is Tourism to the Ontario Economy? - Employment

In 2010, tourism receipts generated 305,423 jobs in Ontario, accounting for 4.5% of provincial employment, and making the tourism industry the 14th largest employer.

Table 9: Total number of jobs generated in Ontario by tourism receipts

	Total impact	Rate of change	Direct impact	Rate of change
2000	339,719		213,527	
2001	332,978	-2.0%	209,132	-2.1%
2002	337,072	1.2%	210,954	0.9%
2003	307,869	-8.7%	193,065	-8.5%
2004	331,560	7.7%	205,102	6.2%
2005	329,396	-0.7%	208,188	1.5%
2006	329,442	0.0%	208,271	0.0%
2007	323,722	-1.7%	203,689	-2.2%
2008	324,510	0.2%	202,180	-0.7%
2009	303,521	-6.5%	188,100	-7.0%
2010	305,423	0.6%	190,509	1.3%

Source: Ontario Ministry of Tourism, Culture and Sport, TREIM

How Important is Tourism to the Ontario Economy? - Employment

Table 10: Ontario's Employment by industry

Industry	2000		2010	
	Number	Rank	Number	Rank
TOTAL All industries	5,932,480		6,745,250	
Retail trade *	624,808	2	750,701	1
Manufacturing	937,395	1	706,470	2
Health care and social assistance	469,665	3	623,920	3
Finance, insurance, real estate and renting and leasing*	449,742	4	521,890	4
Professional, scientific and technical services	398,435	5	488,850	5
Construction	349,475	7	483,835	6
Education services	347,255	8	440,240	7
Other services (except public administration)*	313,130	9	380,493	8
Wholesale trade	354,775	6	361,570	9
Administrative & support, waste management and remediation services*	251,229	12	352,492	10
Public administration*	266,939	11	351,521	11
Accommodation and food services*	292,987	10	327,870	12
Transportation and warehousing*	219,533	13	270,764	13
TOURISM INDUSTRY	213,527	14	190,509	14
Information and cultural industries *	169,556	15	187,910	15
Arts, entertainment and recreation *	92,282	17	129,454	16
Agriculture, forestry, fishing and hunting	111,915	16	96,430	17
Utilities	43,375	18	52,100	18
Mining and oil and gas extraction	17,855	19	22,400	19

Source: Statistics Canada, System of National Accounts, Labour Productivity Measures, Table 383-0009

*Note: The jobs required by the tourism-related industries to meet the travellers' demand have been subtracted from each industry's total

How Important is Tourism to the Ontario Economy? - Employment

Table 11: Percent of employment in selected industries attributable to tourism - 2010

Tourism-related Industry	Total Employment in Ontario	Employment attributable to tourism	Tourism's share
Retail Trade	767,720	34,503	4.5%
Transportation & Warehousing	305,965	49,519	16.2%
Air, Rail, Water & Scenic Transport*	120,226	49,519	41.2%
Information & Cultural Industries	188,285	4,497	2.4%
Finance, Insurance, Real Estate and Renting & Leasing	522,870	13,065	2.5%
Car Rental and Leasing	8,940	1,262	14.1%
Administrative & Support, Waste Man. & Rem. Services	370,500	25,832	7.0%
Travel Arrangements	18,190	18,008	99.0%
Arts, Entertainment & Recreation	147,650	19,712	13.4%
Accommodation Services	63,303	46,748	73.8%
Food & Beverage Services	365,185	54,061	14.8%
Other Services (Except Public Admin.)	380,755	10,957	2.9%
Public Administration	352,975	3,483	1.0%

Source: Statistics Canada, System of National Accounts, Labour Productivity Measures, Table 383-0009 and special runs; MTCS's TREIM model

*It excludes Truck Transport, Pipeline Transport, Postal & Courier Services and Warehousing

How Important is Tourism to the Ontario Economy? - Employment

The tourism industry employs a higher than average proportion of females and young people and a lower proportion of immigrants.

It employs almost 40% of Ontario's summer students and a quarter of the province's working youth.

Contrary to popular opinion, the industry has a smaller proportion of self-employed individuals.

Table 12: Employment by demographic and job status characteristics* – 2010

	% of Tourism industry employment	% of employment in Ontario's economy	Tourism as % of total employment in Ontario
IMMIGRANT STATUS			
Immigrants	25.5%	30.0%	7.7%
EMPLOYMENT STATUS			
Full-time	59.7%	80.7%	7.1%
Part-time	40.3%	19.3%	19.3%
Employees	89.9%	84.6%	13.0%
Self-employed	10.1%	15.4%	8.0%
GENDER			
Male	45.7%	51.7%	7.5%
Female	54.3%	48.3%	9.6%
AGE			
15-24	39.9%	13.7%	24.8%
25-34	18.5%	21.1%	7.4%
35-44	14.4%	22.8%	5.4%
45+	27.1%	42.3%	5.5%
SUMMER STUDENTS (enrolled full time & part time)			
4-month moving average	9.1%	3.1%	36.9%

Source: Statistics Canada, LFS special run and Human Resource Module of the Tourism Satellite Account

* It excludes Retail

How Important is Tourism to the Government?

In 2010, tourism generated \$9.5 billion of taxes for all levels of government, of which \$4.0 billion were provincial tax revenues.

Tourism accounted for 3.8% of total provincial revenues, 1.8% of the total municipal revenues and 5.2% of total federal revenues collected in Ontario.

Table 13: Government revenues generated by tourism receipts in Ontario - Millions

Government Revenue	2000	share	2010*	share	%change
Direct	\$5,825	57.7%	\$5,121	54.0%	-12.1%
Federal	\$2,859	28.3%	\$2,277	24.0%	-20.4%
Provincial	\$2,493	24.7%	\$2,324	24.5%	-6.8%
Municipal	\$473	4.7%	\$520	5.5%	9.9%
Total	\$10,092	100.0%	\$9,484	100.0%	-6.0%
Federal	\$5,107	50.6%	\$4,548	48.0%	-10.9%
Provincial	\$4,138	41.0%	\$3,970	41.9%	-4.1%
Municipal	\$847	8.4%	\$966	10.2%	14.0%
Total tourism-generated taxes as a percent of:					
Total federal revenues collected in Ontario	6.0%	N/A	5.2%	N/A	-13.6%
Total provincial revenues	6.2%	N/A	3.8%	N/A	-38.7%
Total municipal revenues	2.8%	N/A	1.8%	N/A	-33.0%

Source: Ontario Ministry of Tourism, Culture and Sport, TREIM; Statistics Canada, PEA
 *At the time of this report only 2009 government revenues were available from Statistics Canada. To obtain the 2010 figures we applied the growth rates from the Provincial government's auditor's report and from Statistics Canada Table 385-0032 to the 2009 figures.

What is the economic impact of different travel markets?

Ontario residents account for the majority of tourism's impacts in the province, followed by Americans.

Table 14: The economic impact of visitor spending in Ontario, by origin - 2010

	Visitors' Origin				Total
	Ontario	U.S.	Overseas	Other Canada	
Visitor Spending (Mil.)	\$9,808	\$3,065	\$2,546	\$1,677	\$17,096
GDP (Mil.)	\$7,906	\$2,863	\$2,302	\$1,514	\$14,585
Direct (Mil.)	\$3,874	\$1,535	\$1,179	\$782	\$7,370
Labour Income (Mil.)	\$4,918	\$1,807	\$1,508	\$969	\$9,202
Direct (\$Mil.)	\$2,391	\$979	\$805	\$511	\$4,686
Employment (# of Jobs)	130,063	47,607	34,929	24,578	237,177
Direct (# of Jobs)	82,631	31,688	21,575	15,877	151,771
Government Revenue (Mil.)	\$4,004	\$1,403	\$1,098	\$741	\$7,246
Federal (Mil.)	\$1,905	\$666	\$527	\$355	\$3,453
Provincial (Mil.)	\$1,687	\$591	\$460	\$310	\$3,048
Municipal (Mil.)	\$412	\$145	\$111	\$77	\$745
Direct (Mil.)	\$2,176	\$791	\$593	\$407	\$3,967
Federal (Mil.)	\$941	\$341	\$265	\$179	\$1,726
Provincial (Mil.)	\$1,007	\$366	\$269	\$185	\$1,827
Municipal (Mil.)	\$227	\$84	\$59	\$43	\$413
	Shares				
Total Visitor Spending	57.4%	17.9%	14.9%	9.8%	100.0%
Total GDP	54.2%	19.6%	15.8%	10.4%	100.0%
Direct	52.6%	20.8%	16.0%	10.6%	100.0%
Total Labour Income	53.4%	19.6%	16.4%	10.5%	100.0%
Direct	51.0%	20.9%	17.2%	10.9%	100.0%
Total Employment	54.8%	20.1%	14.7%	10.4%	100.0%
Direct (Jobs)	54.4%	20.9%	14.2%	10.5%	100.0%
Total Government Revenue	55.3%	19.4%	15.2%	10.2%	100.0%
Federal	55.2%	19.3%	15.3%	10.3%	100.0%
Provincial	55.3%	19.4%	15.1%	10.2%	100.0%
Municipal	55.3%	19.5%	14.9%	10.3%	100.0%

Source: Statistics Canada, ITS & TSRC; Ontario Ministry of Tourism, Culture and Sport, TREIM

What is the economic impact of different travel markets?

For every \$1 million in visitor spending, Americans have a higher impact than other visitors.

For every 500 additional tourists to Ontario, tourists from overseas have a higher impact than other visitors.

Table 15: The economic impact of \$1 million of visitor spending, by origin - 2010

	Ontario	U.S.	Overseas	Other Canada	Total
GDP	\$806,077	\$934,095	\$904,163	\$902,803	\$853,124
Labour Income	\$501,427	\$589,560	\$592,302	\$577,818	\$538,255
Employment (jobs)	13	16	14	15	14
Government Revenue	\$408,238	\$457,749	\$431,265	\$441,860	\$423,842
Federal	\$194,229	\$217,292	\$206,991	\$211,688	\$201,977
Provincial	\$172,002	\$192,822	\$180,676	\$184,854	\$178,287
Municipal	\$42,007	\$47,308	\$43,598	\$45,915	\$43,577

Table 16: The economic impact of 500 additional visitors, by origin - 2010

	Visitors' Origin				Total
	Ontario	U.S.	Overseas	Other Canada	
Visitor spending	\$57,086	\$137,670	\$644,331	\$177,747	\$82,405
GDP	\$46,015	\$128,597	\$582,581	\$160,471	\$70,302
Labour Income	\$28,624	\$81,165	\$381,638	\$102,706	\$44,355
Employment (jobs)	0.8	2.1	8.8	2.6	1.1
Government Revenues	\$23,305	\$63,018	\$277,877	\$78,540	\$34,927
Federal	\$11,088	\$29,915	\$133,371	\$37,627	\$16,644
Provincial	\$9,819	\$26,546	\$116,415	\$32,857	\$14,692
Municipal	\$2,398	\$6,513	\$28,091	\$8,161	\$3,591

How Important is Tourism to Ontario's Tourism Regions?

Table 17: The economic impact of Ontario's tourism receipts at the RTO level - 2010

	GDP - Millions		Employment - jobs		Taxes - Millions			
	Total	Direct	Total	Direct	Total	Federal	Provincial	Municipal
RTO 1	929	585	16,275	12,226	493	240	212	41
RTO 2	1,153	758	21,729	16,962	611	295	260	56
RTO 3	389	261	6,916	5,451	212	103	91	18
RTO 4	586	376	10,380	7,934	309	153	136	21
RTO 5	7,761	4,561	117,887	80,589	3,701	1,839	1,565	296
RTO 6	478	310	8,136	6,227	255	125	110	20
RTO 7	737	480	13,089	10,106	401	191	170	40
RTO 8	318	210	5,630	4,370	170	82	72	15
RTO 9	510	331	9,310	7,200	269	133	117	20
RTO 10	1,282	799	20,993	15,503	641	316	273	52
RTO 11	276	175	4,680	3,490	147	70	63	14
RTO 12	311	202	5,566	4,240	164	79	71	14
RTO 13	876	561	15,066	11,385	475	219	194	62
RTO 13a	424	267	7,383	5,572	238	108	95	35
RTO 13b	118	76	2,018	1,530	66	29	26	11
RTO 13c	323	217	5,546	4,284	166	80	71	15

Source: MTCS, TREIM

How Important is Tourism to Ontario's Tourism Regions?

Table 18: The percent of each RTO's employment, GDP and Taxes attributable to the impacts of Ontario's tourism receipts - 2010

RTO #	% of total employment	% total GDP	% of total local taxes*
RTO 1	2.4%	1.7%	1.9%
RTO 2	10.2%	6.8%	5.7%
RTO 3	1.3%	0.8%	0.9%
RTO 4	2.3%	1.5%	1.3%
RTO 5	5.3%	4.0%	3.6%
RTO 6	1.0%	0.7%	0.5%
RTO 7	4.9%	3.2%	3.9%
RTO 8	4.8%	3.2%	3.2%
RTO 9	3.7%	2.4%	2.5%
RTO 10	3.0%	2.1%	2.9%
RTO 11	4.2%	2.9%	4.0%
RTO 12	12.1%	8.3%	5.8%
RTO 13	4.0%	2.7%	6.7%
RTO 13a	3.8%	2.5%	6.7%
RTO 13b	3.3%	2.4%	7.3%
RTO 13c	4.6%	3.2%	5.8%

Source: MTCS, TREIM and Ministry of Municipal Affairs & Housing; *2009 data

Discussion

- Are there any research projects or priorities that would be of benefit to tourism regions and/or stakeholders?
- Are there any opportunities to partner with RTOs on tourism research activities?

Appendix: Definitions

- **Domestic tourists:** In Canada, a domestic tourist is someone who took an “out-of-town” trip for one or more nights, or a same day out-of-town trip that took him/her at least 40 km one-way from his/her home. The trip may have been taken for any reason except for:
 - travelling to and from work or school (i.e. commuting);
 - moving to a new residence;
 - travelling as a member of the operating crew of buses, aeroplanes, boats, etc;
 - travelling for regular shopping;
 - travelling for a routine visit to the doctor;
 - travelling to a hospital inside an ambulance;
 - travelling for a routine sales or service call;
 - travelling on diplomatic or military orders;
 - routine travel to attend a religious ceremony;
 - travelling to go to a funeral;
 - attending a routine business meeting; and
 - picking up or dropping someone else off.

Definitions (Continued)

- The domestic definition of a tourist is totally subjective, as it is up to the respondent of the survey to define what “out-of-town” means to him/her. For example, someone who lives in Mississauga but works in Toronto may consider the Toronto-Mississauga region as “their town”, while someone else who rarely comes to Toronto may consider a trip to it as an out-of-town trip.
- **Visitor Spending:** The amount of money a visitor to a region spends in that region on things like accommodation, food and beverage, retail, local transport, operations of private vehicle, car rental and public transport.
- Surveys usually capture a traveller’s spending on the whole trip and never ask the respondent to allocate this spending on the places s/he visited. This is done at a later stage by Statistics Canada.
- If a trip started and ended in the same region, say, Ontario, then all of a visitor’s trip spending will be allocated to Ontario. But if that trip also included a visit to Quebec, then some of the visitor’s trip spending will be allocated to Quebec based on pre-determined rules.

Definitions (Continued)

- **Tourism receipts:** In addition to the visitors' spending, a destination also receives other spending from tourists who do not visit it, but this spending is associated with travel and is received by industries that form a critical component of the tourism sector.
- This is spending by the residents of a destination who take trips outside it and is associated mainly with fares to Canadian public carriers and fees to travel agents and other Internet based reservation systems. For example, someone who lives in Toronto takes a trip to France on Air Canada and pays \$X to a travel agent for commissions on a package that included accommodation, transportation and tickets to the opera. In other words:

Tourism Receipts = Visitor spending

+

Canadian fares paid by Ontarians for trips outside Ontario (and no visit in the province)

+

Canadian fares allocated to Ontario for trips by non-Ontarians going through the province (and without visiting)

+

Travel industry commissions on trips outside the province.