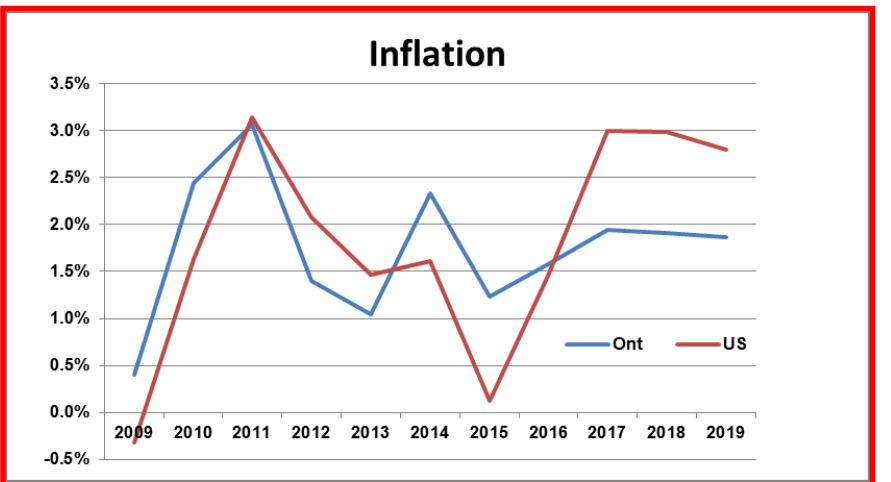
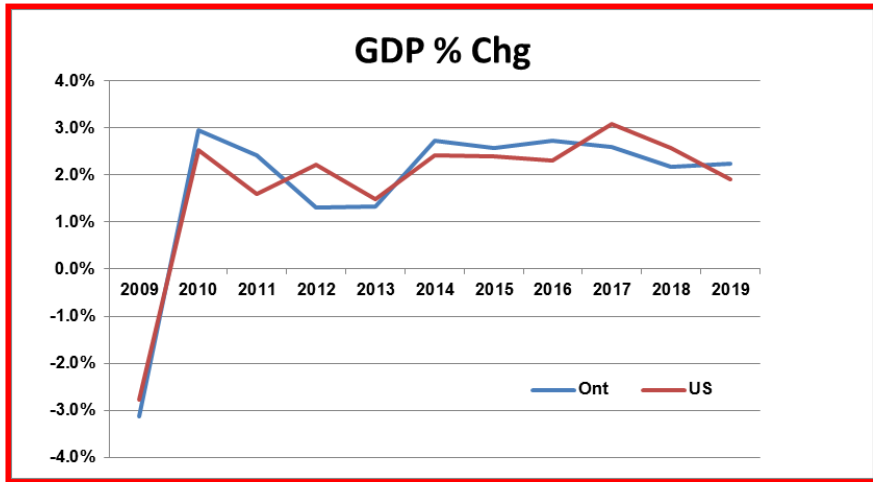
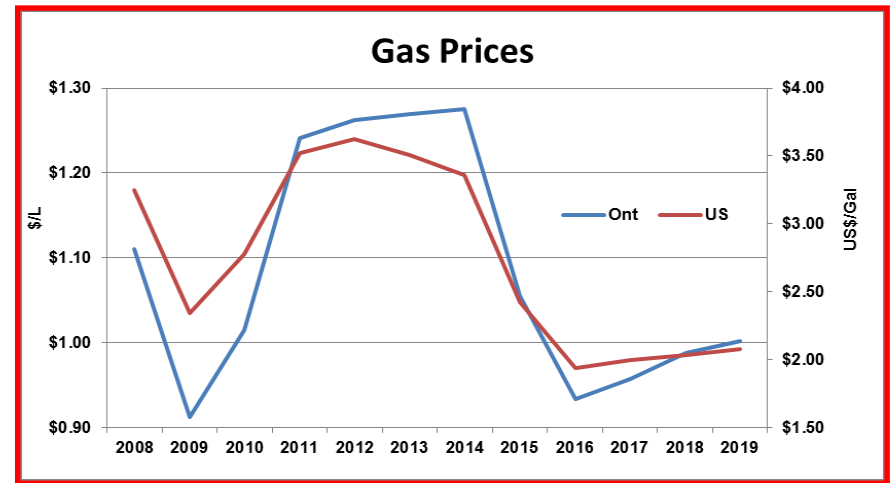
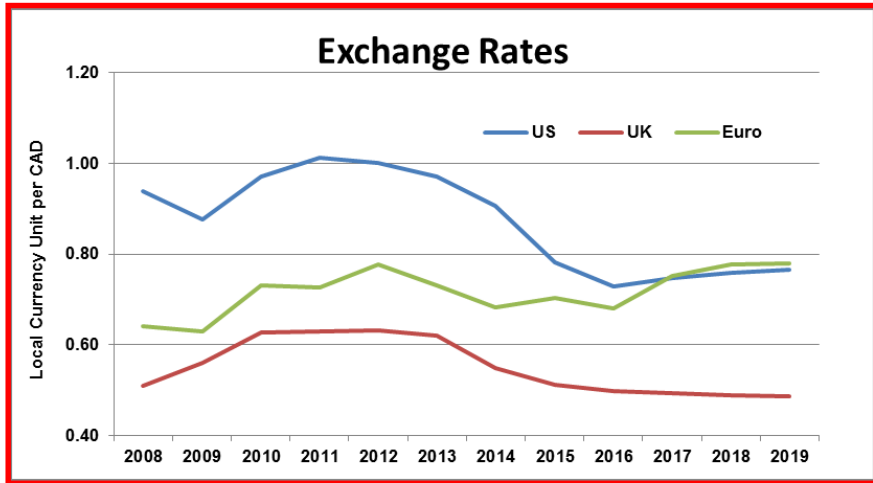


2014 Tourism Statistics Region 12

Tourism Research Unit
Fall 2016

Economic Indicators



Source: Oxford Economics; Ontario Ministry of Tourism, Culture and Sport

2014 Notable Events

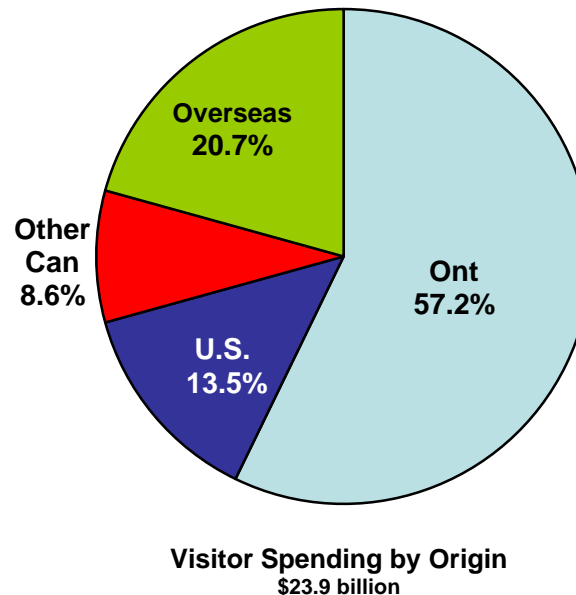
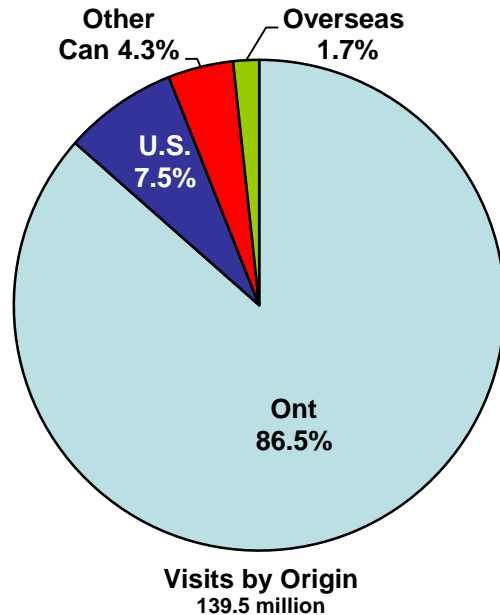
- February 7–23 – The XXII **Olympic Winter Games** are held in Sochi, Russia
- March 8 – **Malaysia Airlines Flight 370**, a Boeing 777 airliner en route to Beijing from Kuala Lumpur, disappears over the Gulf of Thailand with 239 people on board. The aircraft is presumed to have crashed into the Indian Ocean
- **Ebola Epidemic** becomes Global Health Crisis
- June 12 – July 13 – The 2014 **FIFA World Cup** are held in Brazil
- July 23 - August 3 - **XX Commonwealth Games** are held in Glasgow, Scotland
- **World oil prices** plunge to historic low
- October 22 - In the **shootings at Parliament Hill**, a gunman fatally shot a Canadian Forces soldier at the National War Memorial in Ottawa, then entered the Parliament buildings where he was killed by security forces

Ontario Tourism

Economic Impact of Tourism in Ontario 2014

- Tourism receipts totalled **\$29.8 billion**
- Total GDP (direct, indirect and induced) generated by tourism related spending amounted to **\$26.6 billion**, 3.7% of Ontario's GDP
- The total tourism employment impact (direct, indirect and induced) of tourism receipts reached **371,968 jobs**, accounting for 5.3% of Ontario's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$12.8 billion**. \$6.4 billion were federal tax revenues, \$5.1 billion were provincial and \$1.3 billion were municipal
- Tourism is an important export industry, contributing **\$8.5 billion** to Ontario's foreign earnings

Ontario Visits and Spending by Origin

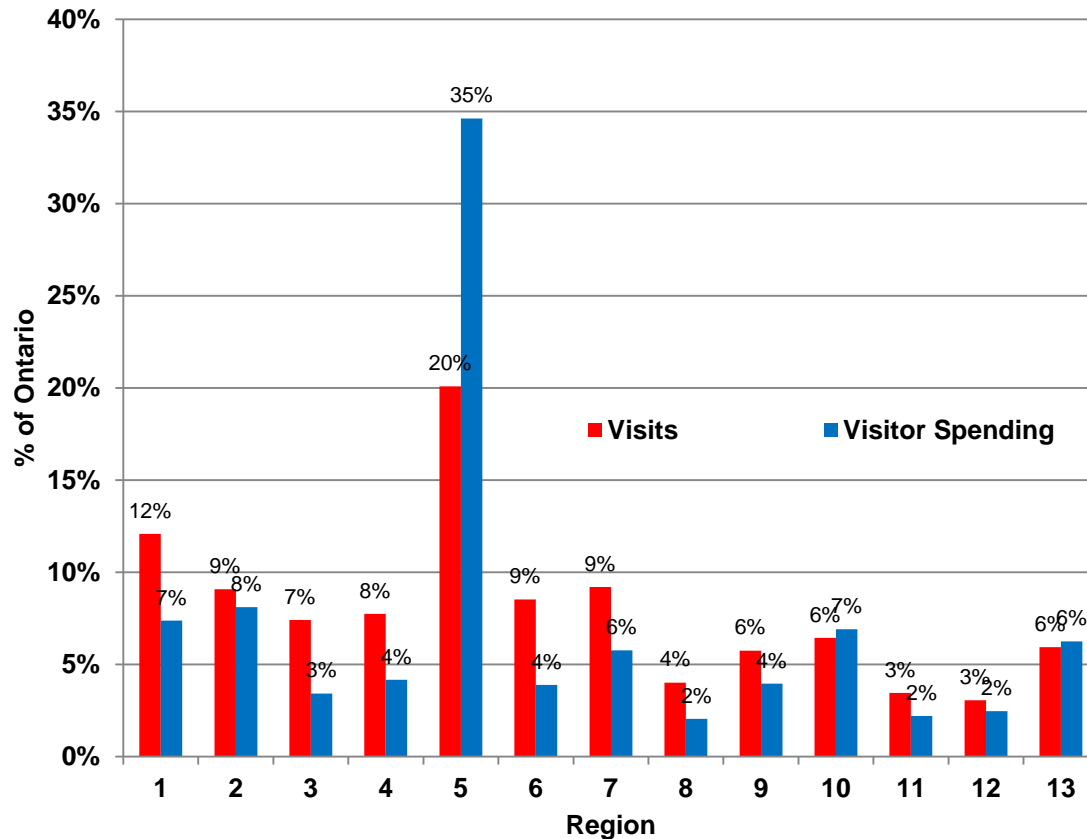


Ontario	2014	VS 2012
Visits	139.5M	-1.0%
Visitor Spending	\$23.9B	5.1%

- In 2014, there were 139.5 million visits in Ontario and visitors spent \$23.9 billion
- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 8% of visits and 14% of expenditures
- Overseas visitors account for 2% of visits and 21% of spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Destination - Visits and Spending by Region



Tourism Regions

- 1 Southwest Ontario
- 2 Niagara Falls Canada
- 3 Hamilton, Halton, Brant
- 4 Huron, Perth, Waterloo, Wellington
- 5 Greater Toronto Area
- 6 York, Durham, Hills of Headwaters
- 7 Bruce Peninsula, Southern Georgian Bay and Lake Simcoe
- 8 Kawartha and Northumberland
- 9 South Eastern Ontario
- 10 Ottawa and Countryside
- 11 Haliburton Highlands to the Ottawa Valley
- 12 Muskoka, Parry Sound and Algonquin Park
- 13 Northern Ontario

- Region 5 is the largest region representing 20% of visits and 35% of spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Ontario Summary

- In 2014, there were 139.5 million visits in Ontario and visitors spent \$23.9 billion. Visits were down 1.0%, while spending grew 5.1% compared to 2013
- Ontario residents accounted for the majority of visits (86%) and spending (57%)
- U.S. visitors represented 8% of visits and 14% of expenditures
- Overseas visitors accounted for 2% of visits and 21% of spending
- Region 5 (GTA) is the largest Region representing 20% of visits and 35% of spending
- Visitors spent an average of \$171/trip in Ontario
- The largest proportions of expenditures were spent on Transportation (37%) and Food & Beverage (27%)

Ontario Summary

- 67% of Other Canada visitors came from Quebec with 44% from Montreal
- 38% of U.S. visitors come from East North Central (Michigan, Ohio, Illinois, Indiana, and Wisconsin) and 36% from Mid Atlantic (New York, Pennsylvania, and New Jersey)
- Ontario's 9 target overseas markets (U.K., Japan, Germany, France, Mexico, India, China, South Korea and Brazil) represented 54% of overseas visitors to Ontario. The U.K. was the leading overseas source market at 12% of overseas visits
- 64% 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 (63%) except U.S. visitors who are more likely to stay at a hotel/motel (46%)

Region 12 Tourism

Economic Impact of Tourism in Region 12

- Visitor Spending totalled **\$589 million**
- Total GDP (direct, indirect and induced) generated by visitor spending amounted to **\$353 million**, 8.0% of Region 12's GDP
- The total tourism employment impact (direct, indirect and induced) of visitor spending was **5,700 jobs**, accounting for 12.0% of Region 12's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$186 million**. \$93 million were federal tax revenues, \$77 million were provincial and \$16 million were municipal

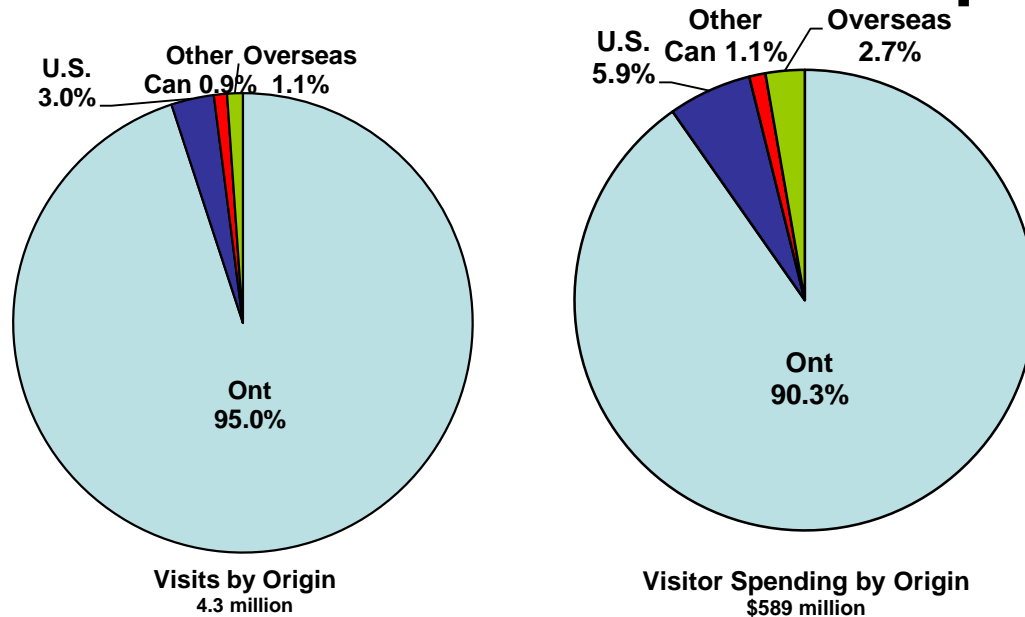
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario	139.5	23.9
Region 12	4.3	0.6
Region 12 proportion of Total Ontario	3.1%	2.5%

- In 2014, there were 4.3 million visits in Region 12, representing 3.1% of total visits in Ontario
- Visitors in Region 12 spent \$589 million, accounting for 2.5% of total visitor spending in Ontario

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Visits and Spending

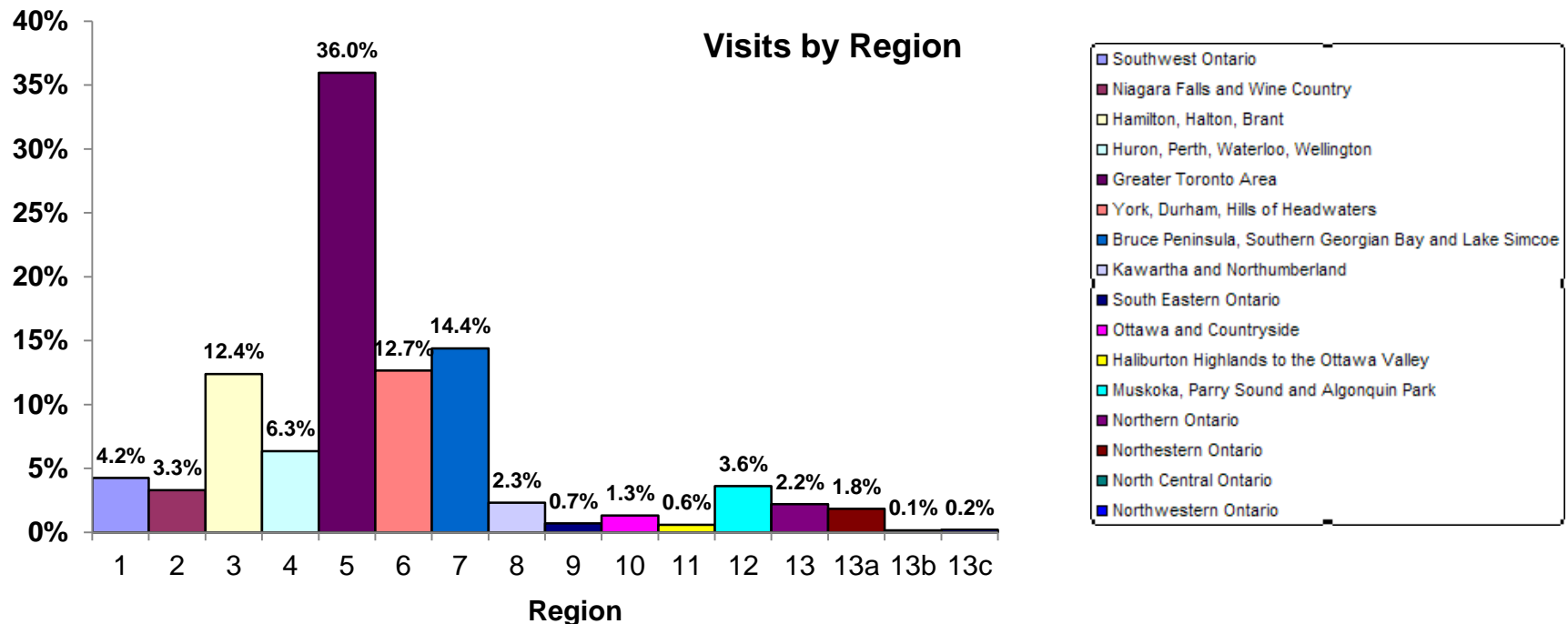


Region 12 vs. Ontario	Visit Index	Spending Index
Ontario	110	158
U.S.	40	43
Other Canada	21	13
Overseas	65	13

- Ontario residents accounted for the vast majority of visits (95%) and spending (90%)
- U.S. visitors accounted for 3% of visits and 6% of expenditures
- Visitors from Other Canada made up 1% of visits and spending
- Overseas visitors accounted for 1% of visits and 3% of spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Ontario Visitors to Region 12 by Region of Residence

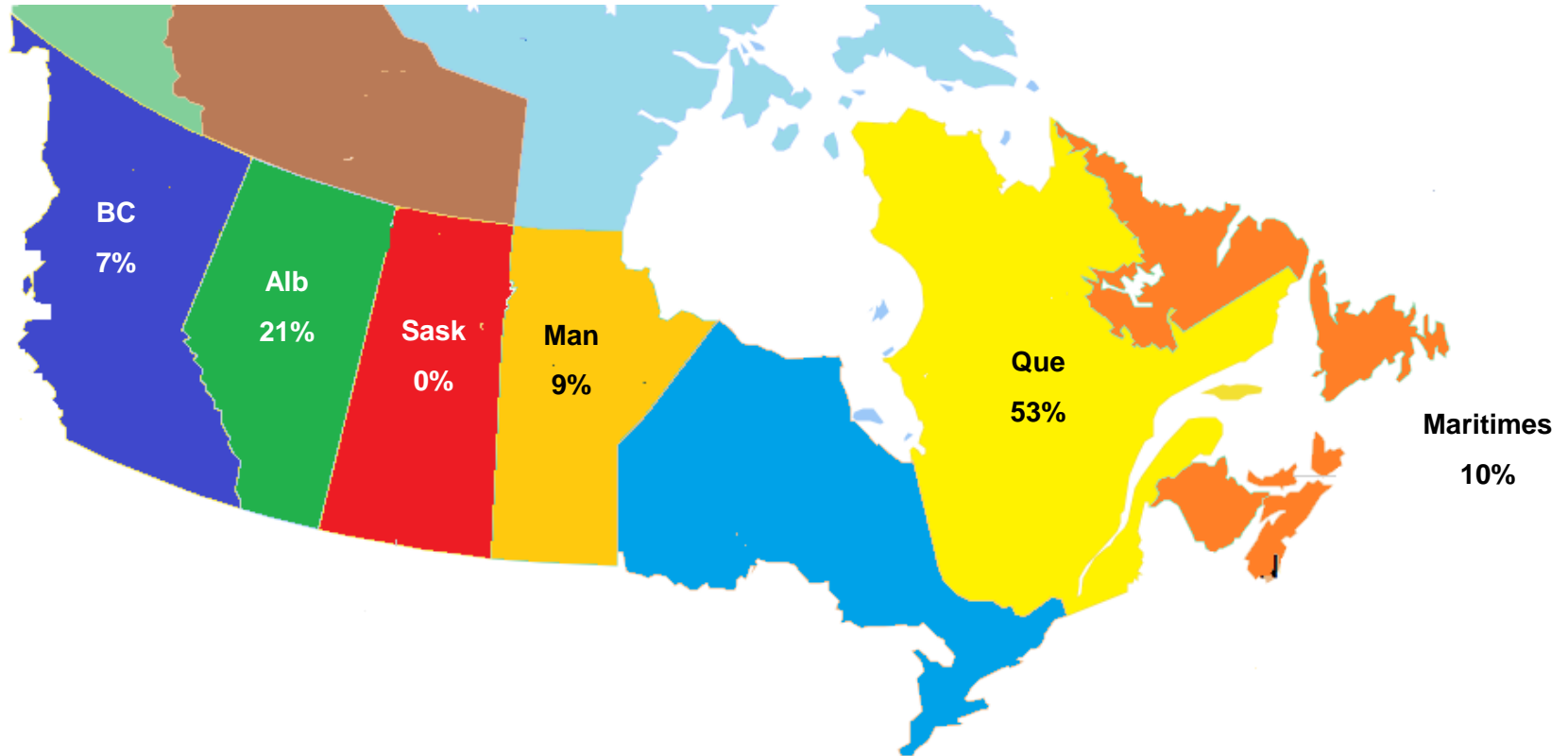


- 36% of Ontario visitors to Region 12 reside in Region 5, 14% in Region 7, and 13% in Region 6

Note: Ontario visitors to Region 12 represented 95% (4.1 M) of total visits and 90% (\$532 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Other Canada Visitors by Province of Residence

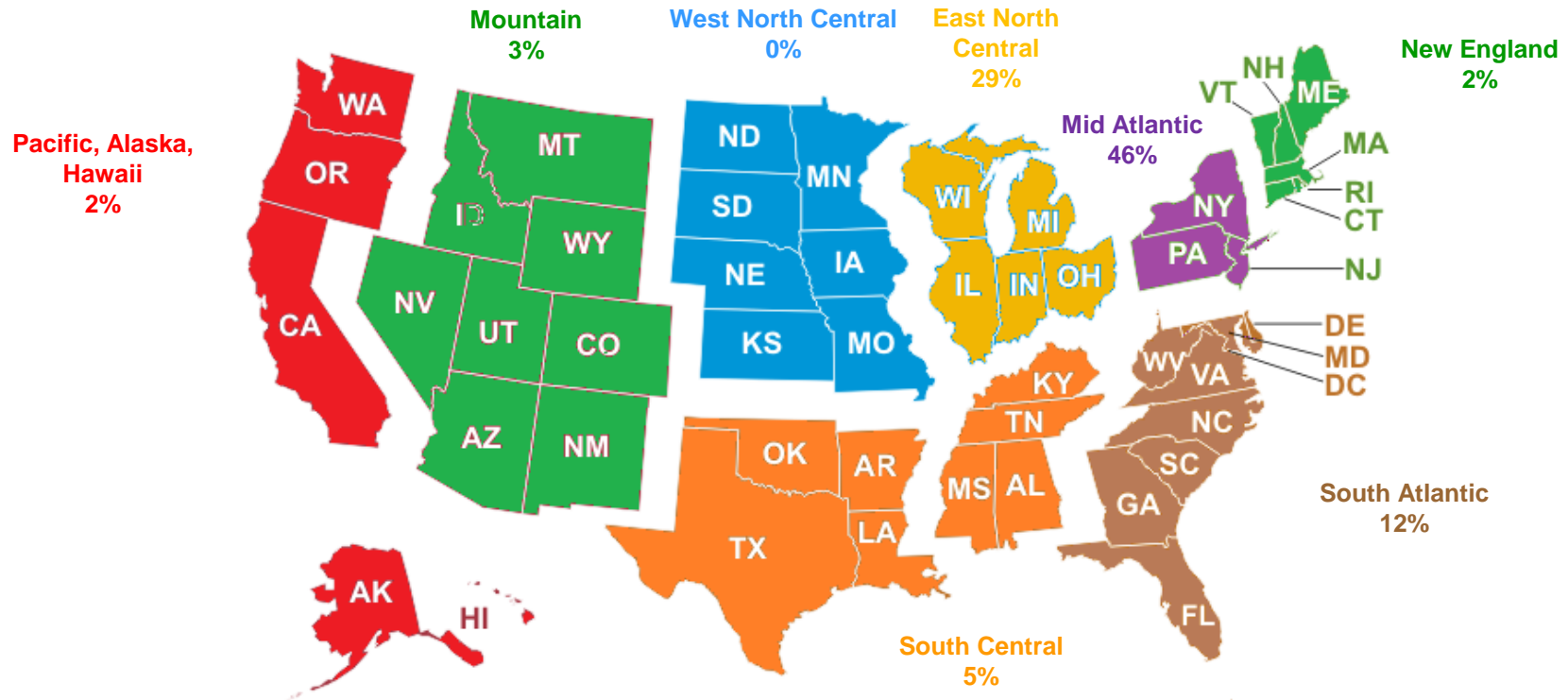


- 53% of Other Canada visitors came from Quebec with 41% from Montreal

Note: Other Canada visitors to Region 12 represented 1% (40,000) of total visits and 1% (\$7 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

U.S. Visitors by Region of Residence

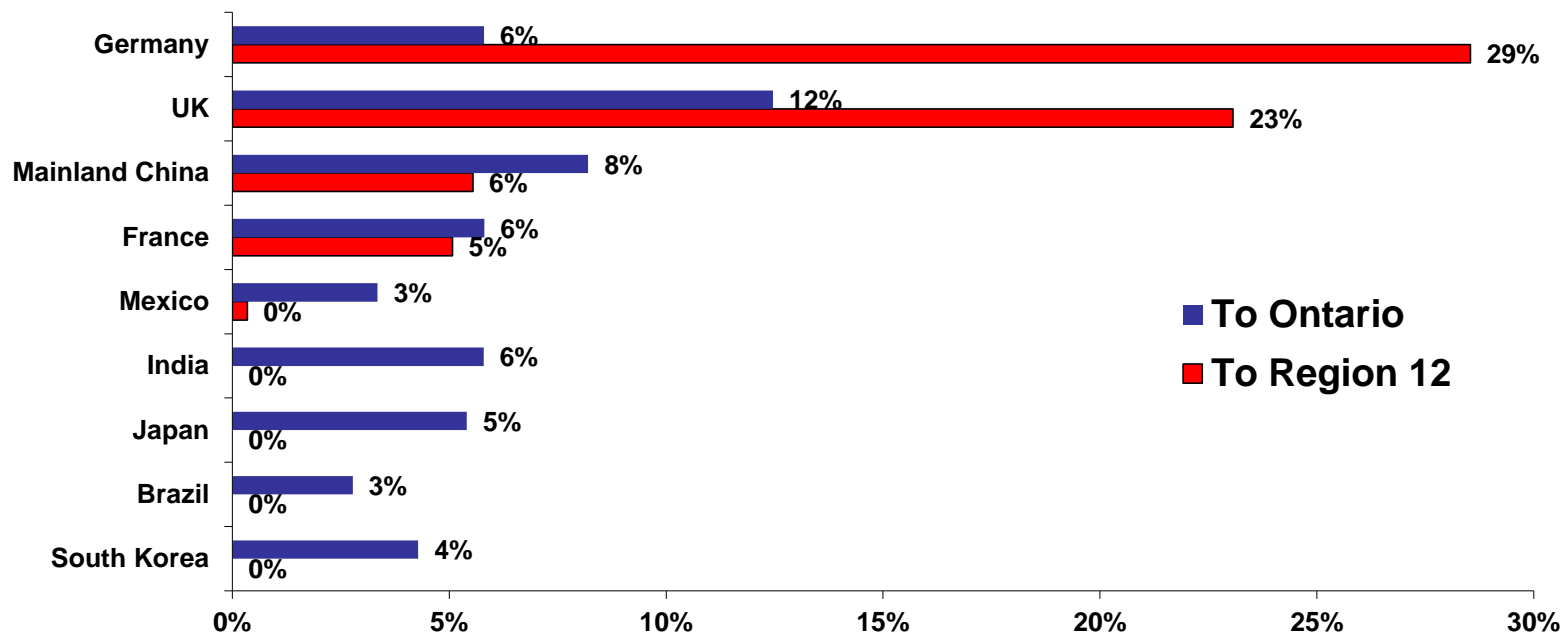


- 46% of U.S. visitors come from Mid Atlantic and 29% from East North Central

Note: U.S. visitors to Region 12 represented 3% (129,000) of total visits and 6% (\$34 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Overseas Visitors by Country of Residence

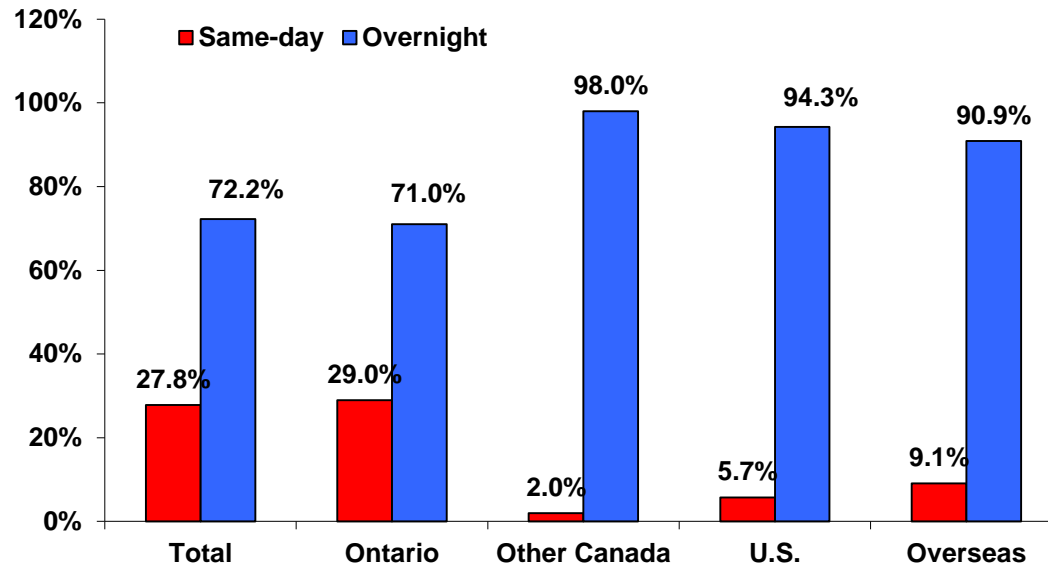


- Ontario's 9 overseas target markets represent 63% of overseas visitors to Region 12

Note: Overseas visitors to Region 12 represented 1% (47,000) of total visits and 3% (\$16 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Visits by Length of Stay



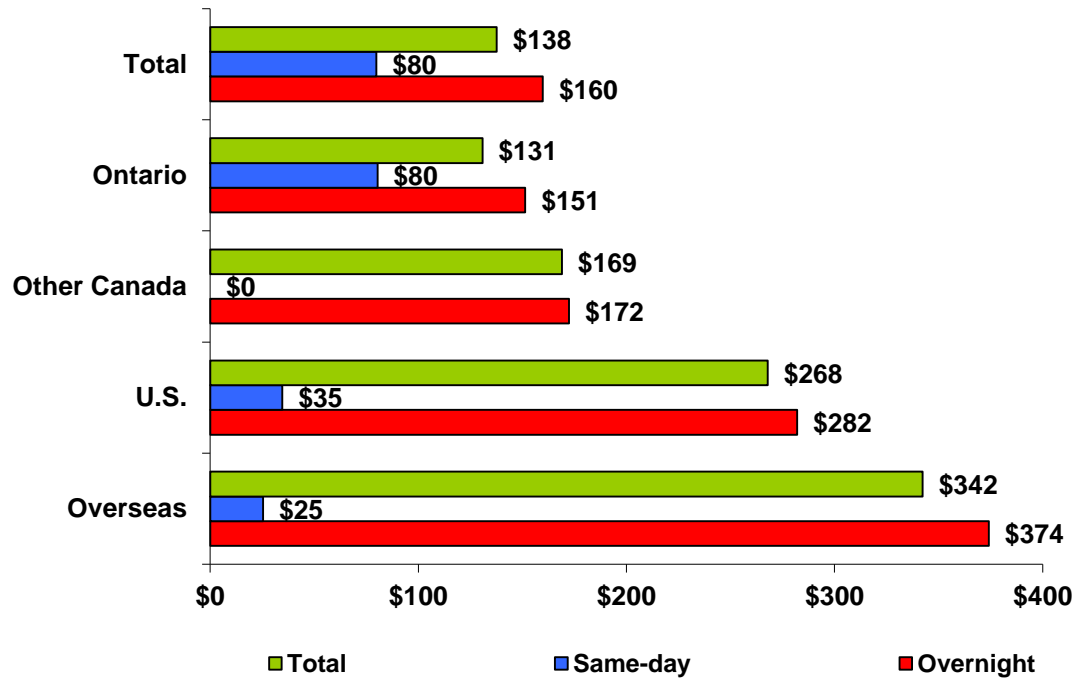
Region 12 vs. Ontario	Length of Stay Index
Same-day	44
Overnight	199
Avg # nights	100

Average # of nights	Total	Ontario	Other Canada	U.S.	Overseas
	3.1	2.9	2.5	7.5	4.3

- The majority (72%) of visits to Region 12 were overnight visits. For comparison, 36% of visits in Ontario were overnight visits
- The average number of nights spent in Region 12 was 3.1, on par with Ontario's average of 3.1 nights

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

\$/Trip by Length of Stay

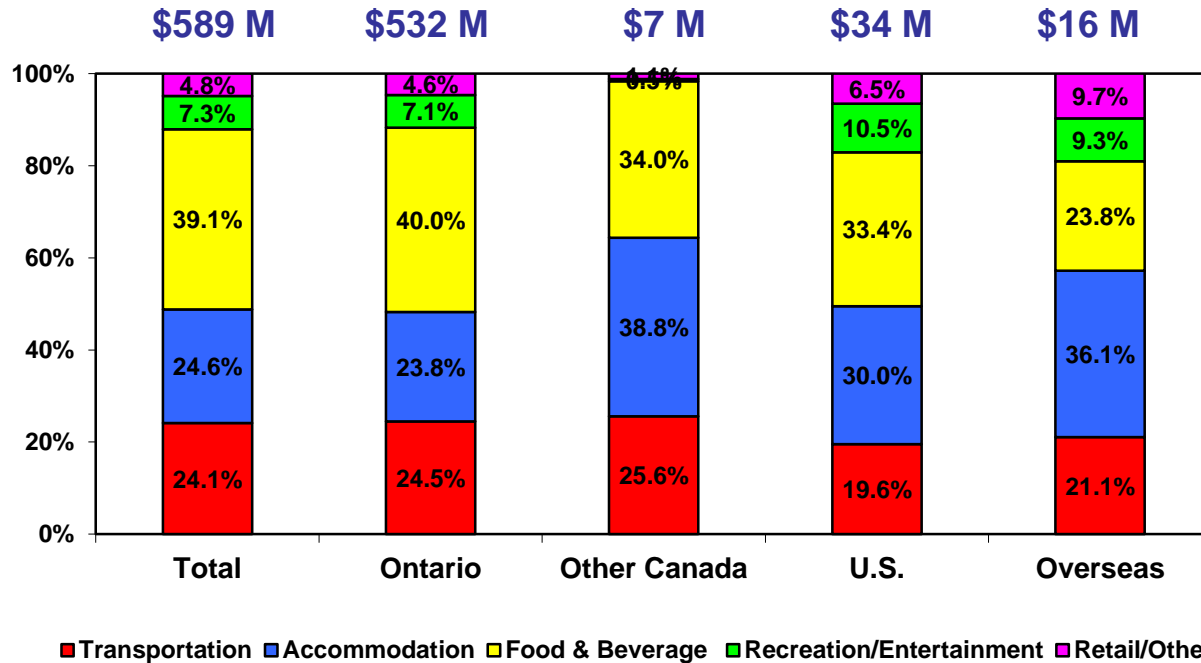


Region 12 vs. Ontario	\$/Trip Index
Total	80
Ontario	115
Other Canada	50
U.S.	86
Overseas	16

- Visitors spent an average of \$138/trip in Region 12 (\$171/trip for Ontario)
- On average, overnight visitors spent 2 times as much as same-day visitors

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Spending by Category

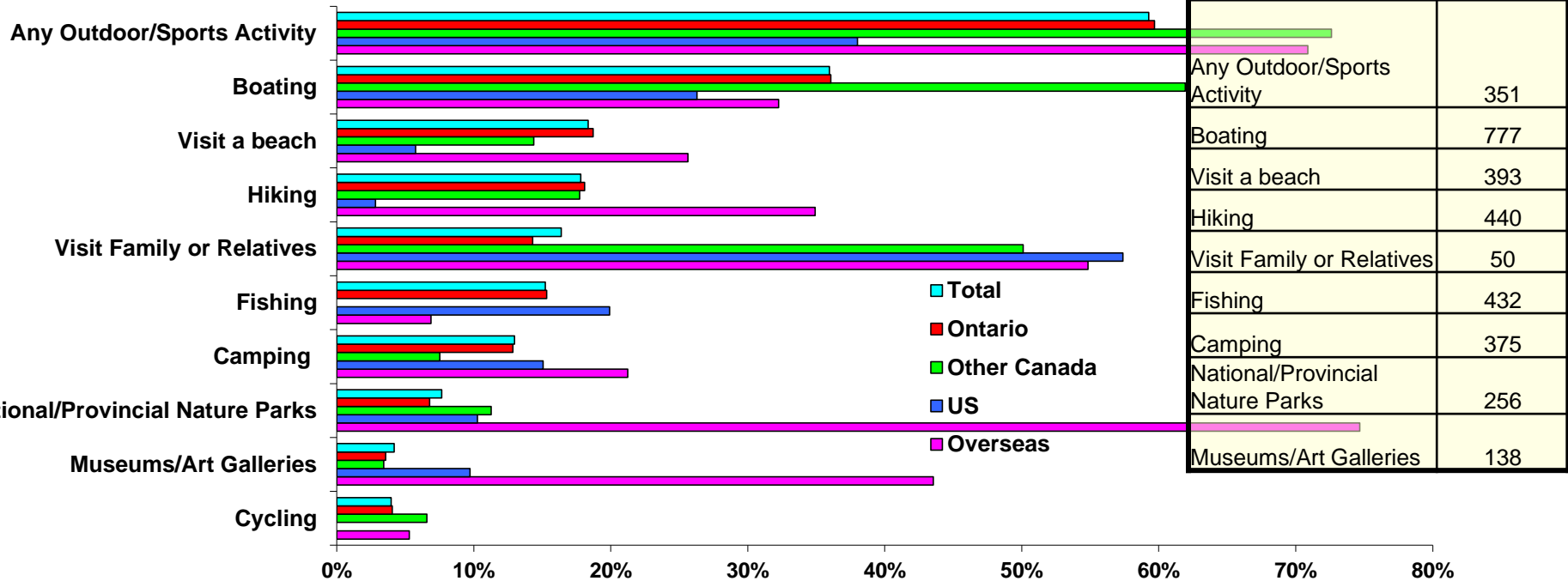


Region 12 vs. Ontario	Spending Index
Transportation	65
Accommodation	150
Food & Beverage	145
Rec./Entertain.	98
Retail/Other	39

- The largest proportions of expenditures were spent on Food & Beverage, Transportation and Accommodations
- Ontario visitors in Region 12 spent 53% of their Food & Beverage dollars at stores and 47% at restaurants. This compares to 29% at stores and 71% at restaurants for Ontario visitors travelling anywhere in Ontario

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Total Visits by Activity *

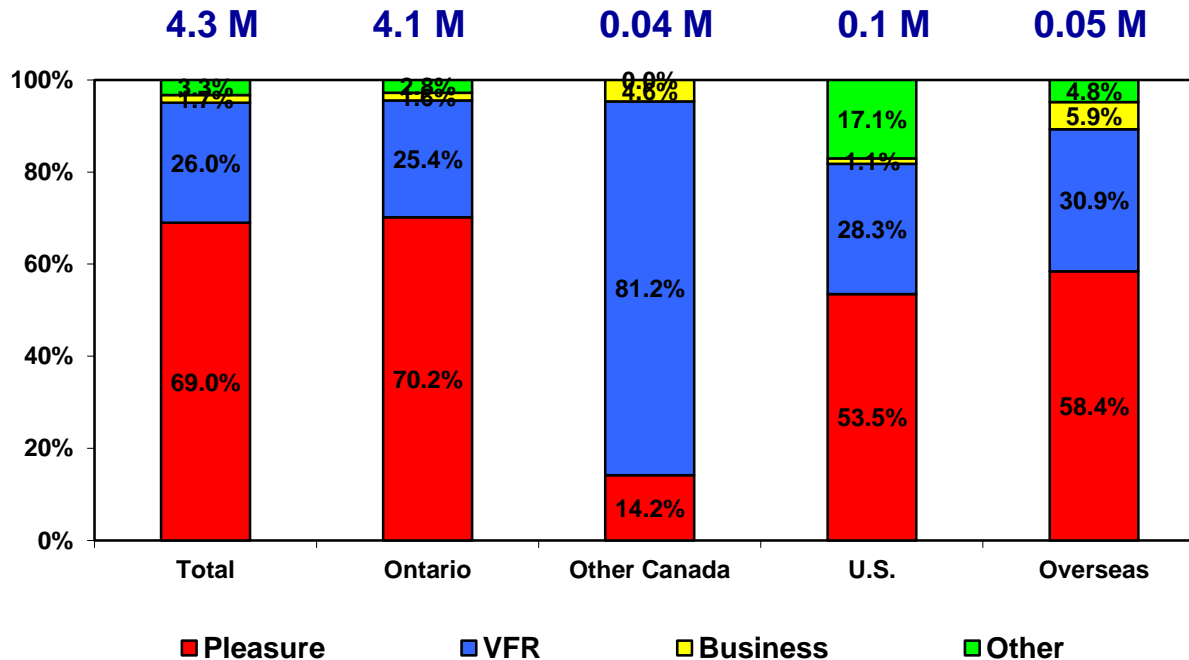


- In general, visitors to Region 12 demonstrated a higher rate of participation in activities compared to visitors to other regions
- Outdoor activities are most popular among visitors to Region 12

*activity may or may not have taken place in region

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Main Purpose of Visit

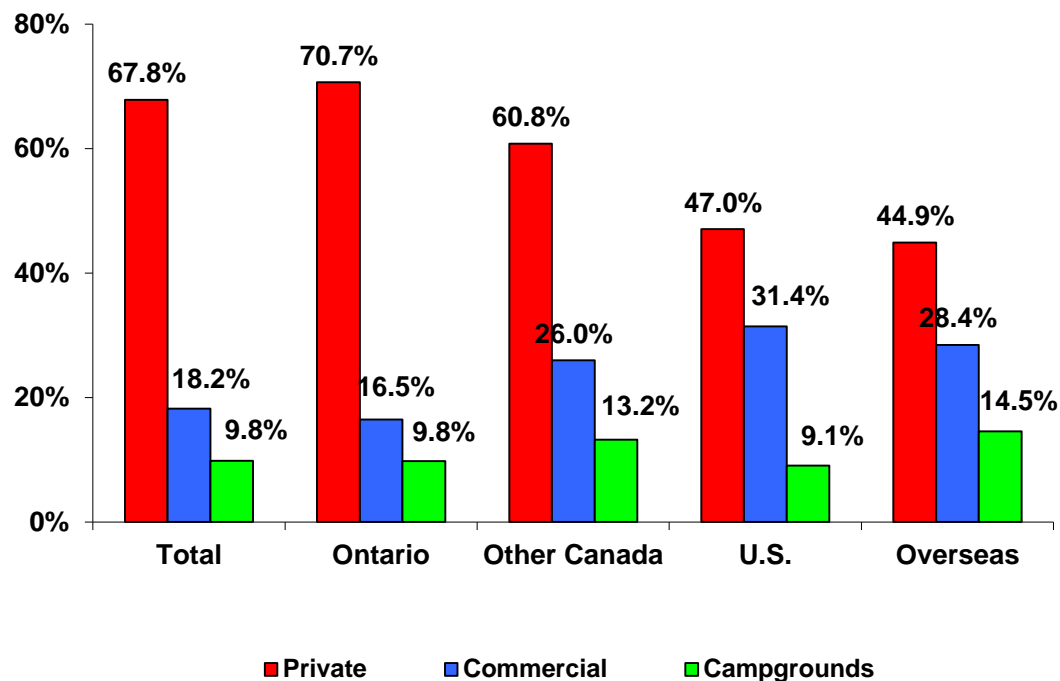


Region 12 vs. Ontario	Purpose Index
Pleasure	200
VFR	58
Business	19
Other	29
VFR: Visiting Friends and / or Relatives	

- Trips to Region 12 are mainly for pleasure
- Other includes shopping, medical, religious, hobby/trade show, etc.

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Visits by Accommodation Type

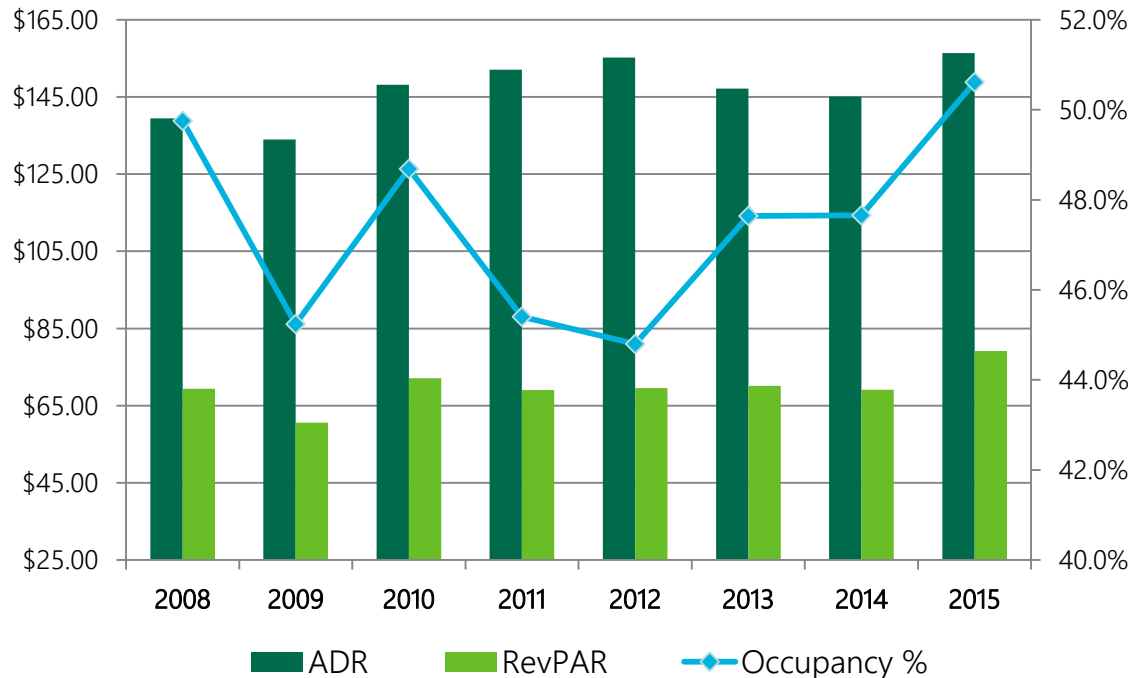


Region 12 vs. Ontario	Type Index
Private	108
Commercial	72
Campground	189

- The majority of overnight visits to Region 12 were spent at unpaid accommodations such as private homes and cottages

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Hotel Statistics



Region 12 vs. Ontario	Hotel Stats Index 2015
Occupancy	78
ADR	113
RevPar	88
ADR = Average Daily Rate RevPar = Revenue per Available Room	

- Over the last few years, occupancy, ADR and RevPar have been on an upward trend
- Region 12 had lower occupancy and RevPar than total Ontario, but a higher ADR

Source: [CBRE Hotels Trends in the Hotel Industry National Market Report](#)

Tourism Related Establishments

Type of Establishment	# 2014*	% of Ontario
Accommodations	281	5%
Arts, Entertainment, Recreation	222	2%
Food & Beverage	251	1%
Transportation	51	0%
Travel Services	13	0%
Retail	733	1%
Other Services	354	1%
Total	1,905	1%

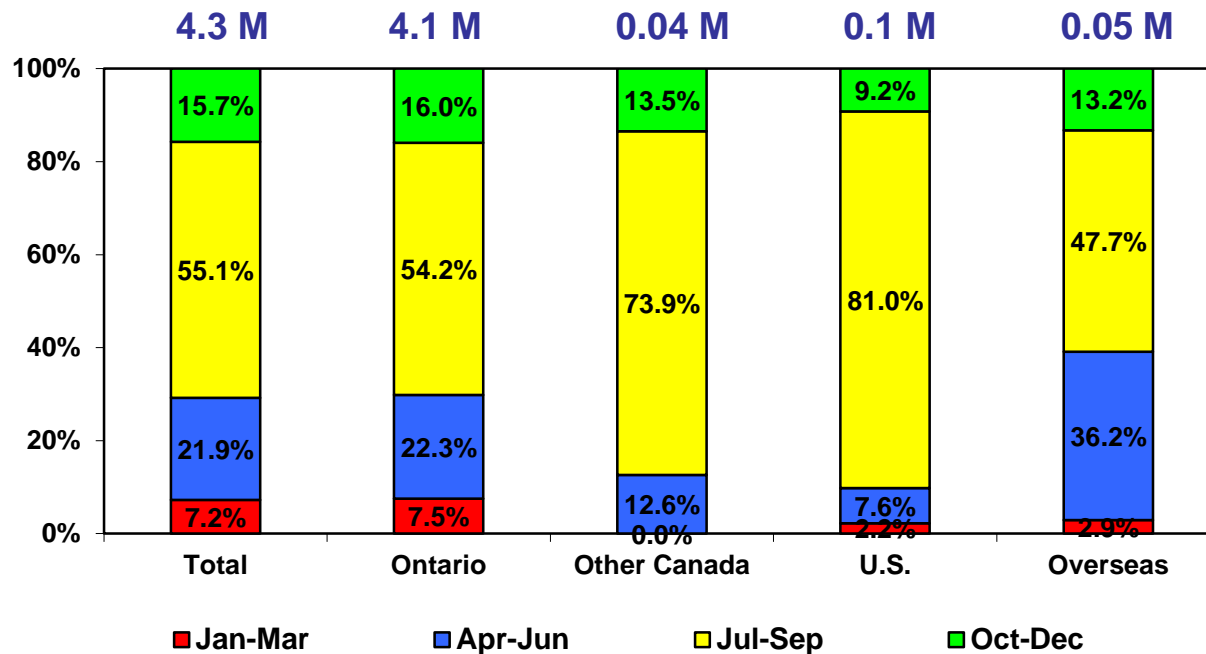
- Region 12 accounts for 1% of Ontario's tourism related establishments

Note: Region 12 represented 3% (4.3 M) of total visits and 2% (\$589 M) of visitor spending

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

Source: Statistics Canada, Business Register 2014

Visits by Time of Year



Region 12 vs. Ontario	Quarter Index
Jan-Mar	36
Apr-Jun	85
Jul-Sept	181
Oct-Dec	67

- The largest proportion of trips occur in the summer months, especially among visitors from outside Ontario
- 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's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Region 12 Summary

- In 2014, there were 4.3 million visits in Region 12, accounting for 3% of total visits to Ontario. Visitors to Region 12 spent \$589 million, or 2% of total visitor spending in Ontario.
- Ontario residents accounted for the vast majority of visits and spending, residents of Other Canada accounted for 1% of visits and spending, U.S. visitors represented 3% of visits and 6% of expenditures, and Overseas visitors accounted for 1% of visits and 3% of spending
- Visitors spent an average of \$138/trip. Overnight visitors spent 2 times as much per trip as same-day visitors.
- The largest proportions of expenditures were spent on Food & Beverage, Transportation and Accommodations

Region 12 Summary

- 36% of Ontario visitors to Region 12 reside in Region 5, 14% in Region 7, and 13% in Region 6
- 46% of U.S. visitors come from Mid Atlantic and 29% from East North Central
- Ontario's 9 overseas target markets accounted for 63% of overseas visitors to Region 12
- The majority of visits were overnight
- Most trips were for pleasure
- The majority of overnight visitors stayed in unpaid accommodations

We Know. Just Ask.

tourism.research@ontario.ca

(416) 325-8287