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Ontario's Overnight Cultural Tourist Market, 2004 and Its Economic Impact in Ontario

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Highlights

This report focuses on overnight cultural visitors to Ontario in 2004 — visitors from Canada or abroad who: participated in cultural activities; visited a zoo, museum, art gallery, historic site or natural history display; attended festivals, fairs, cultural events, or aboriginal/native cultural activities.

- Ontario's overnight cultural visitors increased by 12% in 2004 to 10.6 million. Overnight cultural visits accounted for 23% of Ontario's total overnight visits in 2004.
- Spending by overnight cultural visitors increased to \$4.5 billion (from \$3.9 billion in 2003), and accounted for 36% of total overnight visitor spending in 2004.
- Overnight visitor spending generated \$4.6 billion in Gross Domestic Product (GDP) and supported 75,000 jobs in Ontario.
- Overnight cultural visitors spent \$423 per person visit; this is 57% higher than spending by total overnight visitors.
- Canadians made up 62% of overnight cultural visitors; 29% were Americans and 9% from overseas. 53% of overnight cultural visitors were Ontario residents.
- The summer months are peak for overnight cultural visitors: 50% came to Ontario during July, August and September.
- Overnight cultural visitors stayed 31% longer than other total overnight visitors, an average of 4.2 nights.
- Accommodation in private homes or cottages accounted for 49% of person nights for overnight cultural visitors.
- 82% of overnight cultural visitors were in adults-only parties, compared to 86% of total overnight visitors. Average party sizes ranged from 1.4 to 2.5.
- The top leisure activities for overnight cultural visitors included shopping, sightseeing, visiting friends and/or relatives, and visiting historic sites, museums or art galleries.
- Toronto and Region was Ontario's top destination for overnight cultural visitors in 2004.

Introduction

Definition: In this report an overnight cultural tourist is defined as:

1. an international visitor to Ontario who stayed in the province for at least one night and:
 - a. attended festivals or fairs, or
 - b. attended cultural events, or
 - c. visited a zoo, museum or natural display
2. a domestic visitor who stayed in the province for at least one night and:
 - a. attended festivals or fairs, or
 - b. attended cultural performances, or
 - c. attended an aboriginal/native cultural activity, or
 - d. visited a museum or art gallery, or
 - e. visited a historic site

The foundation for this report on cultural visitors to Ontario in 2004 is data created by the Canadian Travel Survey (CTS) and the International Travel Survey (ITS).

The Canadian Travel Survey (CTS) is conducted by Statistics Canada annually as a supplement to the Labour Force Survey. Co-sponsored by the provincial and the federal governments, the CTS telephone interview captures the incidence and detail of travel by Canadians. A total of 201,560 Canadian households — including 57,570 Ontario households — were surveyed during 2004. The response rates for Canadian and Ontario respondents were 83.1% and 80.4% respectively.

There have been a number of significant changes in the CTS in the past decade. Up to 1994 the CTS provided only the name of a trip's destination and the name of the province where an overnight stop might have occurred en route to the trip's destination. Starting in 1996, the CTS collected the complete trip itinerary. As such, at the sub-provincial level, only visits with a destination in a specific region are comparable pre and post 1996 and not total domestic visits. In addition to the change in the location question, starting in 1996, the CTS captured the interview data on a Computer Assisted Interview (CAI) system, rather than on paper.

Research Resolutions & Consulting Ltd., a private consulting firm, used the data in the CTS and ITS to develop the information contained in this report for the Ontario Ministry of Tourism.

The domestic data contained in this report differ from data reported in print or supplied in electronic format by Statistics Canada in the following ways:

1. Statistics Canada reports only trips of 80 kms and over, but this report includes all overnight trips, regardless of the distance travelled, as well as same-day trips with a minimum one-way distance from a respondent's home of at least 40 kms.
2. Overnight trips with an Ontario destination, but no nights spent in the province, are treated in this report as same-day trips to Ontario.

- Domestic data contained in this report include visits in Ontario by Canadians while on trips to any destination, not just Canadian destinations.

This report excludes the following: travel as a member of an operating crew of a bus, plane, truck, etc.; commuting to and from work or school; one-way travel involving a change of residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada; and trips longer than one year.

Domestic trips must also meet the following distance requirements:

Length of Stay	Place of Residence	
	Ontario	Other Canada
Same Day	40 Kms one-way from home	80 Kms one-way from home
Overnight	No minimum distance	No minimum distance

The International Travel Survey (ITS) is also conducted by Statistics Canada with the help of Canada Customs and Immigration authorities who distribute questionnaires to a sample of travellers at border crossings. Travellers self-complete the questionnaires and mail them back to Statistics Canada. Questionnaires completed by same-day visitors from the United States who enter Canada by car do not contain any questions regarding the activities that these visitors engage in during their trip. For that reason, this report deals with overnight visitors only and does not capture outdoor activity by same-day car visitors from the United States.

Most of the remaining trip characteristics were obtained from 23,833 completed questionnaires by US visitors (out of 41,032 usable questionnaires of US visitors to Canada) and 5,447 completed questionnaires by overseas visitors (out of 10,740 usable questionnaires of overseas visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

- Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit.
- The Ontario Ministry of Tourism made imputations for some fields for which the respondents did not provide any information.
- Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. Accommodation expenditures are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

For more details on how Ontario manipulates the database, please contact us and request the technical appendix.

A glossary of key terms used throughout this report is included.

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ONTARIO'S OVERNIGHT CULTURAL TOURIST MARKET, 2004

How many cultural tourists visited Ontario and where did they come from?

10.6 million (23%) of Ontario's 46.7 million overnight visitors participated in cultural activities in 2004

- 10.6 million overnight visitors participated in cultural activities during their trips in or to Ontario in 2004, a 12% increase over 2003. This increase, however, did not offset the sharp drop in the visitation levels in 2003 over 2002 (Chart 1).
- Canadians accounted for 62% of overnight cultural visitors, Americans for 29%, and overseas visitors for 9% (Table 1, next page).
- Ontario residents made up 53% of total overnight cultural visitors, accounting for 87% of Canadian overnight cultural visitors.
- Overseas overnight visitors had the highest incidence (57%) of participating in cultural activities during their trips to Ontario, followed by American overnight visitors (41%) and Canadian overnight visitors (17%) (Table 1).
- Ontario residents had the lowest incidence of participating in cultural activities (17%) while travelling in their home province.
- Overnight visitors from European countries had higher incidence of participating in cultural activities than visitors from Asian countries.

Chart 1: Overnight Cultural Visits to Ontario 2001-2004

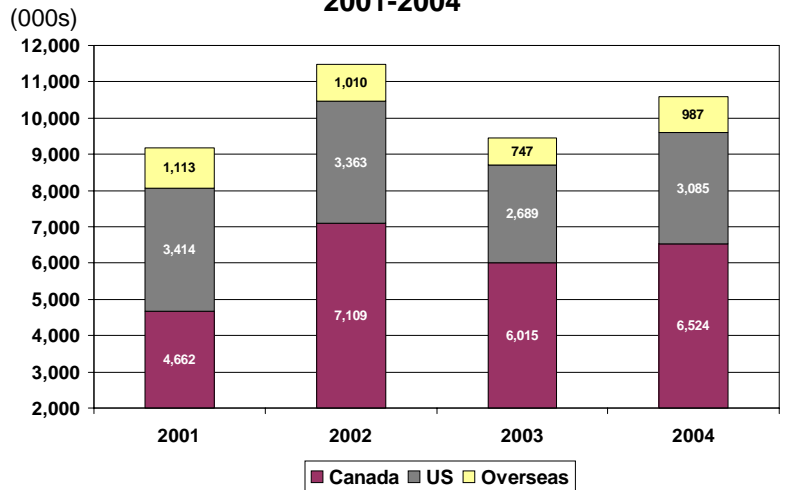
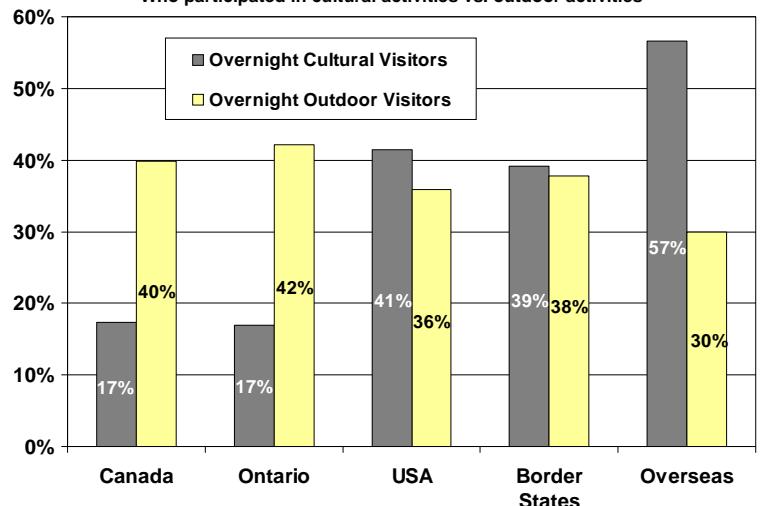


Chart 2: Percentage of Total Overnight Visitors, 2004
Who participated in cultural activities vs. outdoor activities



- Overseas visitors were about twice as likely to engage in cultural activities (57%) as outdoor activities (30%)¹ (Chart 2).
- Canadians visitors had higher participation rates in outdoor activities (40%) as compared to cultural activities (17%). Ontario residents had the highest participation rate in outdoor activities.

Origin	Overnight Cultural Visitors (000s)	% Share	Total Overnight Visitors (000s)	% Share	Incidence*
TOTAL	10,596	100%	46,672	100%	23%
Canada	6,524	62%	37,496	80%	17%
Ontario	5,648	53%	33,284	71%	17%
Quebec	467	4%	2,545	5%	18%
Manitoba	96	1%	438	1%	22%
Western Canada	162	2%	758	2%	21%
Atlantic Canada	150	1%	471	1%	32%
USA	3,085	29%	7,434	16%	41%
New York	568	5%	1,428	3%	40%
Michigan	643	6%	1,564	3%	41%
Pennsylvania	178	2%	457	1%	39%
Minnesota	58	1%	296	1%	20%
Ohio	298	3%	649	1%	46%
Illinois	147	1%	357	1%	41%
Wisconsin	72	1%	258	1%	28%
Other USA	1,122	11%	2,425	5%	46%
Overseas	987	9%	1,742	4%	57%
UK	241	2%	382	1%	63%
France	75	1%	101	**	74%
Germany	73	1%	115	**	63%
Japan	75	1%	175	**	43%
Other Europe	201	2%	331	1%	61%
Other Asia	146	1%	310	1%	47%

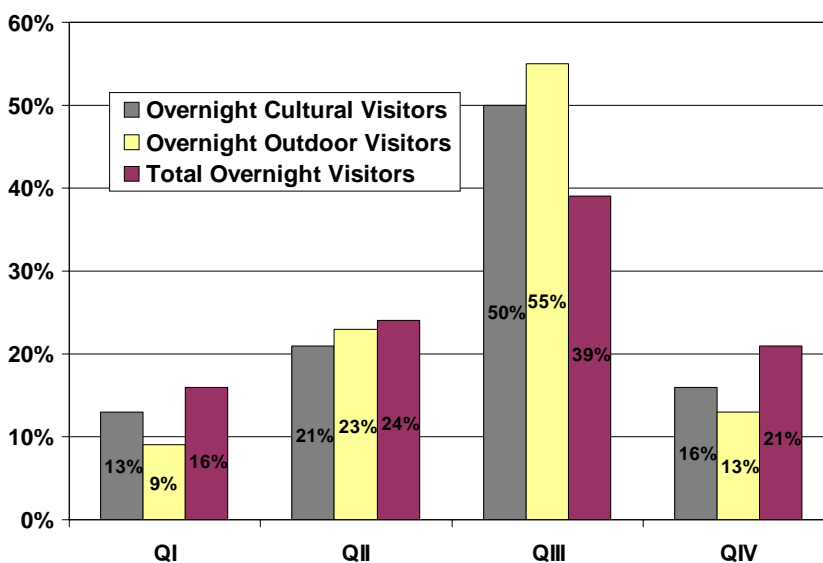
* Incidence refers to the percentage of total overnight visitors that participated in cultural activities.
 ** Less than 1%

¹ Overnight outdoor visitors are defined as those who stayed in Ontario for at least one night and participated in any outdoor/sports activities (such as, but not limited to, fishing, boating, swimming, hunting, skiing, etc), visited any national or provincial park or historic site, or stayed at campgrounds, trailer parks, or at private or commercial cottages or cabins. An outdoor market report, "Ontario's Overnight Visitors with Outdoors Interest, 2004" is available at <http://www.tourism.gov.on.ca/english/tourdiv/research/Ontario%20Outdoor%202004.pdf>.

When did they visit Ontario?

50% of overnight cultural visitors came to Ontario during the summer months in 2004, compared to 39% of the province's total overnight visitors.

Chart 3: Overnight Visits by Calendar Quarters, 2004
Cultural Visitors vs. Outdoor Visitors and Total Overnight Visitors



- Overnight cultural visitors had a higher incidence of travelling during the summer than any other season. Cultural visitors had a slightly higher incidence of travelling during fall and winter than overnight outdoor visitors.
- Ontario received four times as many cultural visitors during the summer as it did during the winter. The province received six times as many outdoor visitors during the summer as it did in the winter. One of Ontario's tourism challenges continues to be establishing the province as a winter travel destination.

Table 2: Overnight Cultural Visits in Ontario By Calendar Quarter, 2004

	Q1	Q2	Q3	Q4
Total	1,352	2,277	5,265	1,703
CANADA (000)	1,032	1,213	3,264	1,015
Share (%)	76%	53%	62%	60%
USA (000)	260	780	1535	522
Share (%)	19%	34%	29%	31%
OVERSEAS (000)	72	284	465	166
Share (%)	5%	12%	9%	10%

How long did they stay in Ontario?

On average, overnight cultural visitors stayed in Ontario for 4.2 nights in 2004, one night longer than total overnight visitors.

- Overnight cultural visitors spent 44.8 million nights in Ontario. This is 30% of total person nights in 2004 and represents a 10% increase over 2003.
- Overseas cultural visitors stayed the longest (averaging 12.1 days), followed by American (3.5 nights) and Canadian (3.4 nights) visitors. Visitors from Michigan stayed the shortest (2.4 nights).
- Overnight cultural visitors from everywhere except France and some U.S. border states tended to stay longer than other overnight visitors (4.2 nights vs. 3.2 nights).

Table 3: Person Nights in Ontario, 2004

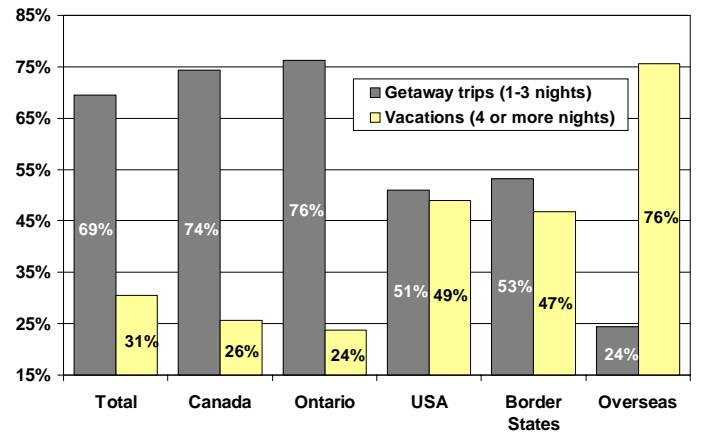
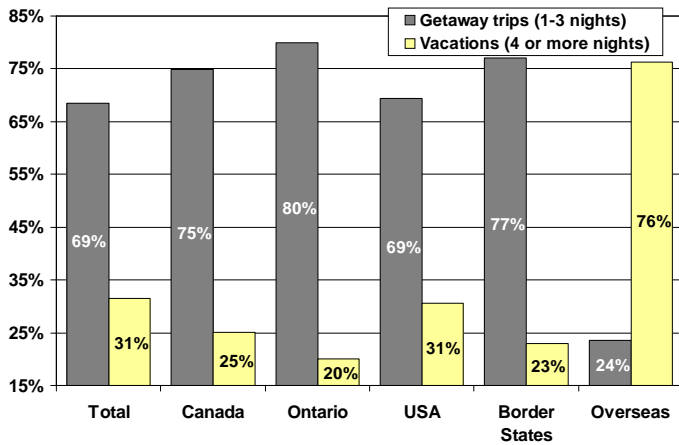
Origin	Cultural Visitors – Nights (000s)	% Share	Total Overnight Visitors – Nights (000s)	% Share	Incidence *	Average Length of Stay (nights)	
						Cultural	Total
TOTAL	44,773	100%	149,892	100%	30%	4.2	3.2
CANADA	22,114	49%	104,307	70%	21%	3.4	2.8
Ontario	16,368	37%	83,108	55%	20%	2.9	2.5
Quebec	2,078	5%	10,267	7%	20%	4.4	4
Manitoba	638	1%	2,099	1%	30%	6.6	4.8
Western Canada	1,633	4%	5,656	4%	29%	10.1	7.5
Atlantic Canada	1,396	3%	3,177	2%	44%	9.3	6.7
USA	10,764	24%	25,588	17%	42%	3.5	3.4
New York	1,827	4%	4,212	3%	43%	3.2	2.9
Michigan	1,543	3%	3,861	3%	40%	2.4	2.5
Pennsylvania	657	1%	1,768	1%	37%	3.7	3.9
Minnesota	253	1%	1,147	1%	22%	4.4	3.9
Ohio	840	2%	2,028	1%	41%	2.8	3.1
Illinois	559	1%	1,429	1%	39%	3.8	4
Wisconsin	261	1%	1,164	1%	22%	3.6	4.5
Other USA	4,823	11%	9,980	7%	48%	4.3	4.1
OVERSEAS	11,895	27%	19,997	13%	59%	12.1	11.5
UK	2,448	5%	3,628	2%	67%	10.2	9.5
France	518	1%	705	0%	73%	6.9	7.1
Germany	905	2%	1,299	1%	70%	12.4	11.3
Japan	703	2%	1,196	1%	59%	9.4	6.8

* Percentage of total person nights spent by overnight cultural visitors

- 69% of total overnight cultural visitors took short getaway trips (1 to 3 nights). 80% of Ontario resident cultural visitors took short getaways while 76% of overseas cultural visitors stayed four or more nights. (Chart 4A).
- The length of stay of U.S. overnight visitors was correlated to the types of activities that they participated in. For example, U.S. overnight cultural visitors had a higher incidence of taking short getaway trips than overnight outdoor visitors — 69% of US cultural visitors versus 51% of US outdoor visitors stayed 1 to 3 nights in Ontario. (Chart 4A & 4B).
- On the other hand, the length of stay for overseas overnight visitors was not correlated to the types of activities they participated in.

Chart 4A: Length of Stay for Overnight Cultural Visitors, 2004

Chart 4B: Length of Stay for Overnight Outdoor Visitors, 2004



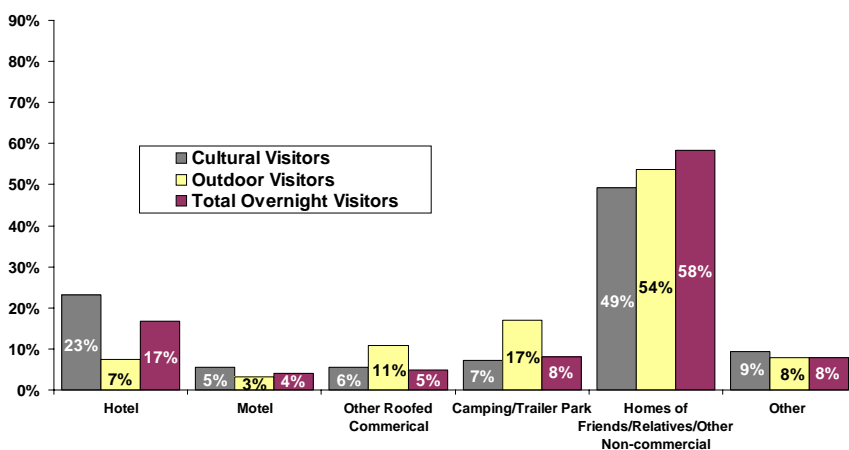
- While the length of stay of Canadian cultural visitors decreased between 2004 and 2001, it increased for American and overseas cultural visitors (Table 4).

	2001	2002	2003	2004
TOTAL	4.6	4.3	4.3	4.2
CANADA	3.8	3.8	3.7	3.4
Ontario	3.3	3.2	3.1	2.9
Quebec	3.3	3.8	5.6	4.4
US	3.4	3.4	3.5	3.5
Border States	3.0	3.0	3.1	3.0
Other States	4.2	4.2	4.4	4.3
OVERSEAS	11.2	11.1	12.1	12.1
UK	9.2	10.3	10.6	10.2
France	6.4	4.9	6.9	6.9
Germany	9.4	9.8	9.8	12.4
Japan	5.5	6.8	7.2	9.4

Where did they stay in Ontario?

Non-commercial accommodation was the top choice for cultural visitors in 2004, accounting for 49% of total person nights spent in Ontario.

**Chart 5: Percentage of Person Nights Spent in Ontario, 2004
By Accommodation Type**
Overnight Cultural Visitors vs. Outdoor and Total Overnight Visitors



- Ontario overnight cultural visitors spent 49% of their person nights at private homes of friends or relatives or at private cottages — 22.1 million out of a total of 44.8 million nights. However, cultural visitors were less inclined to stay at private homes/cottages than other overnight visitors.
- Cultural visitors had the highest incidence of staying at hotels of all overnight visitors. Hotels accounted for 23% of the total person nights of cultural visitors compared to 17% of other overnight visitors and 7% of outdoor overnight visitors.
- Cultural visitors from overseas had the highest incidence of staying at private homes or non-commercial accommodation. Cultural visitors from the U.S. had the highest incidence of spending nights in hotels.

Table 5: Cultural Visitors' Accommodation Use by Person Nights and Origin, 2004

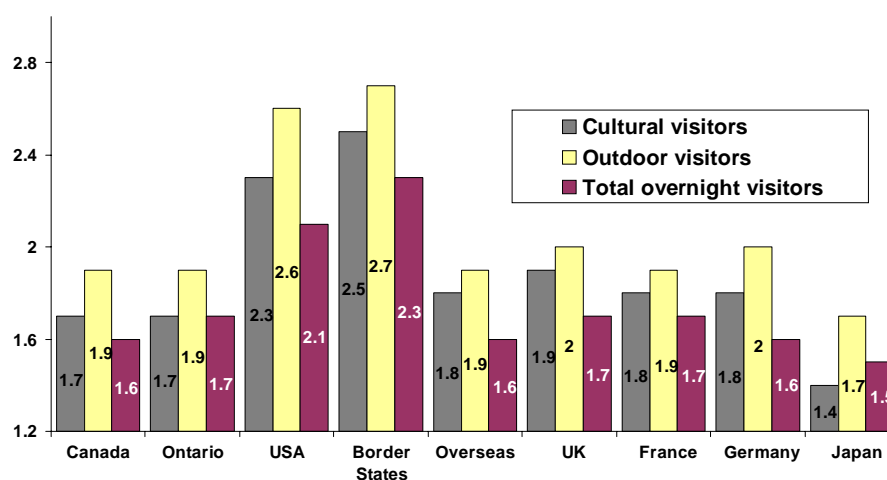
Type of Accommodation	Canada (000s)	% Share	USA (000s)	% Share	Overseas (000s)	% Share
Total Person Nights	22,114	100%	10,764	100%	11,895	100%
Hotel	3,893	18%	4,120	38%	2,317	19%
Motel	1,043	5%	1,127	10%	273	2%
Other Roofed Commercial	1,551	7%	703	7%	251	2%
Camping/Trailer Park	2,524	11%	560	5%	119	1%
Homes of Friends/Relatives/other non-commercial	12,165	55%	2,754	26%	7,156	60%
Other	938	4%	1,500	14%	1,778	15%

How big were their travel parties? Who were in their travel parties²?

82% of overnight cultural visitors travelled in parties of adults only. Average party sizes ranged from 1.4 to 2.5 .

- Overnight cultural visitors from Ontario's border states had the largest average party size (2.5), while Japanese visitors had the smallest (1.4).
- All cultural visitors, regardless of their origin, travelled in smaller groups than overnight outdoor visitors of the same origins (Chart 6).

Chart 6: Average Party Size, 2004
Overnight Cultural Visitors vs. Outdoor and Total Overnight Visitors



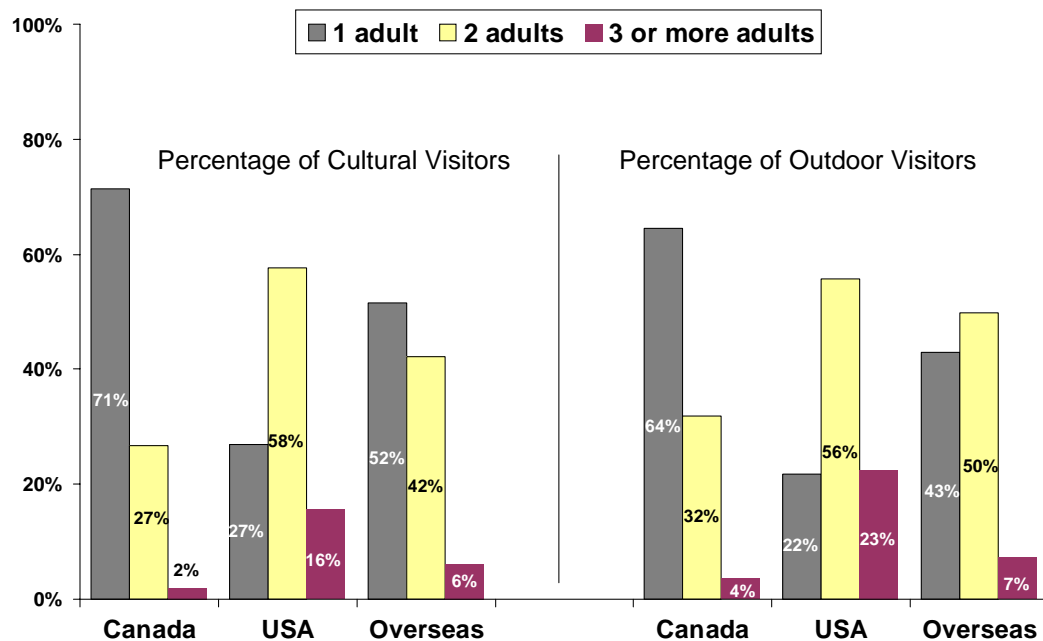
- Overnight cultural visitors travelled primarily in adults-only groups (Table 6).
- U.S. overnight cultural visitors had the lowest incidence of travelling in adults-only groups (76%), while visitors from overseas countries had the highest (86%).
- Overnight cultural visitors from the U.S. and overseas had a higher incidence of travelling with children than overnight outdoor visitors from the same origin.

² The International Travel Survey (ITS) defines "travel party" as everyone who travels together, regardless of whether they are members of the same household. In the Canadian Travel Survey (CTS) the "travel party" contains only household members. As such, a person who is travelling with the respondent, but is not a member of that household, will not be included in the CTS party-size measurement.

Origin	Cultural Visitors		Outdoor Visitors		Total Overnight Visitors	
	Adults Only	Adults w/ Kids	Adults Only	Adults w/ Kids	Adults Only	Adults w/ Kids
Total	82%	18%	81%	19%	86%	14%
Canada	84%	16%	81%	19%	86%	14%
USA	76%	24%	82%	18%	88%	12%
Overseas	86%	14%	90%	10%	93%	7%

- U.S. overnight cultural and outdoor visitors had a higher frequency of travelling in groups of two people (58%) or three-or-more people (16%) than overnight visitors from other origins.
- Cultural visitors, regardless of their origin, had a higher incidence of travelling alone than outdoor visitors (Chart 7).

**Chart 7: Party Size (Adults Only), 2004
Overnight Cultural Visitors vs. Outdoor Visitors**

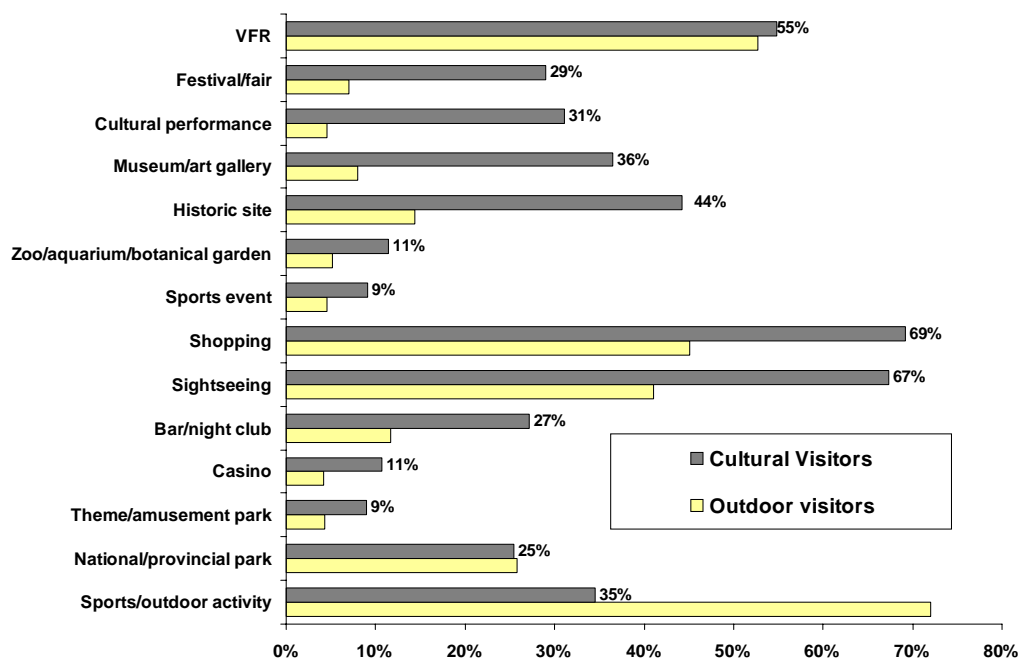


What activities did they participate in?

The top activities for overnight cultural visitors in 2004 were shopping, sightseeing, visiting friends/relatives, and touring historic sites, museums or art galleries..

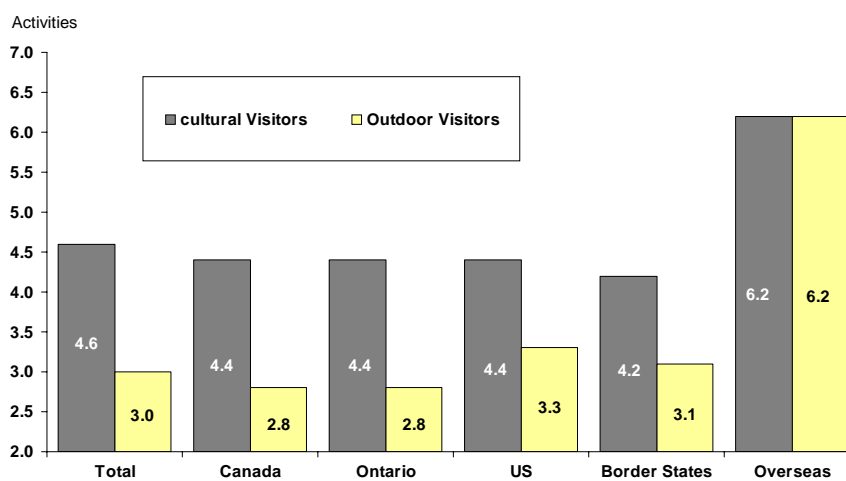
- All overnight cultural visitors participated in cultural activities, including visiting historic sites, museums and art galleries, attending festivals, fairs, and cultural performances. 69% went shopping, 65% went sightseeing. 55% visited friends/relatives. 35% took part in outdoor/sports activities (Chart 8).
- Overnight cultural visitors were more active than overnight outdoor visitors and more likely to participate in all activity categories, except sports/outdoor activity and visiting national/provincial parks.

Chart 8: Activities Participated in During Trip in Ontario, 2004
Overnight Cultural Visitors vs. Overnight Outdoor Visitors



- Overnight cultural visitors participated, on average, in 4.6 activities, compared with 53% more than overnight outdoor visitors, who participated in 3.0 activities (Chart 9, next page).
- Overseas cultural visitors participated in more activities (6.2 activities per person visit), than Americans (4.4 activities) or Canadians (4.4 activities), partly because visitors from overseas stay longer and have greater opportunity to participate in activities.

Chart 9: Average Number of Activities per Visit, 2004
Overnight Cultural Visitors vs. Overnight Outdoor Visitors



- Cultural visitors, regardless of their origins, had the highest incidence of shopping and sightseeing in Ontario (Table 7).
- Cultural visitors from Canada and overseas had higher incidence of visiting friends/relatives than cultural visitors from U.S..

Table 7: Overnight Cultural Visitors in Ontario
Percent of Visitors who Participated in Selected Activities, 2004

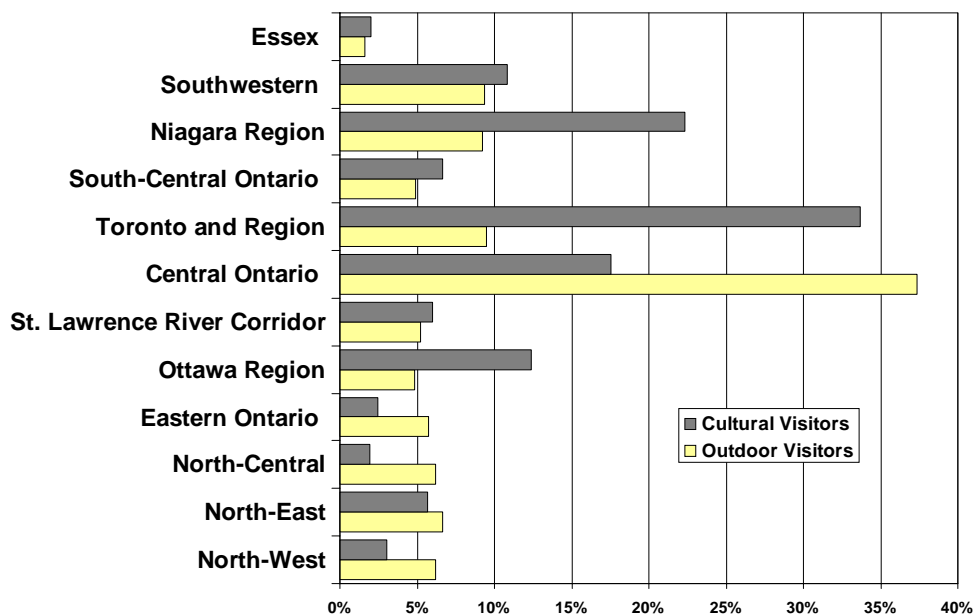
Activity	Canada	Ontario	USA	Border States	Overseas
VFR	65%	65%	29%	24%	66%
Festival/fair	35%	36%	19%	19%	24%
Cultural performance	32%	33%	31%	37%	26%
Museum/art gallery	31%	27%	41%	36%	62%
Historic site	35%	34%	56%	51%	68%
Zoo/aquarium/botanical garden	9%	8%	10%	8%	34%
Sports event	10%	9%	7%	6%	13%
Shopping	62%	61%	77%	75%	93%
Sightseeing	61%	59%	73%	69%	88%
Bar/night club	26%	25%	28%	28%	35%
Casino	11%	12%	8%	8%	14%
Theme/amusement park	9%	8%	7%	6%	20%
National/provincial park	19%	19%	29%	26%	56%
Sports/outdoor activity	40%	41%	25%	25%	26%

Which Ontario regions³ did they visit?

34% of Ontario's overnight cultural visitors chose Toronto and Region in 2004.

- 34% of overnight cultural visitors went to Toronto and Region, which is ranked as Ontario's top cultural tourism destination (Chart 10).
- Niagara Region (22%) and Central Ontario (18%) were in second and third place.
- Overnight cultural visitors tended to travel in Ontario's urban areas for cultural experience and had a higher incidence of visiting Southern Ontario than overnight outdoor visitors, who had a higher incidence of visiting Central Ontario and Northern Ontario.

Chart 10: Distribution of Ontario Travel Regions Visited by Overnight Cultural Visitors vs. Overnight Outdoor Visitors, 2004



³ Please see page 18 for a map of Ontario's Travel Regions.

- Overseas cultural visitors had the highest incidence of visiting Toronto and Region (81%), Niagara Region (52%) and Ottawa Region (30%).
- Cultural visitors from Ontario's border states had the highest incidence of visiting the Niagara Region (35%).
- Ontario cultural visitors had the highest incidence of visiting Central Ontario (47%). This is cottage country for many Ontario residents.

Region Visited	Percent of Overnight cultural Visitors, by Origin, Visiting each Ontario Travel Region*				
	Canada	Ontario	USA	Border States	Overseas
Total overnight cultural visits (000s)	6,524	3,085	3,085	1,964	987
Essex	1%	3%	3%	4%	2%
Southwestern	10%	20%	14%	17%	6%
Niagara Region	11%	21%	36%	35%	52%
South-Central Ontario	6%	12%	6%	5%	13%
Toronto and Region	25%	39%	38%	34%	81%
Central Ontario	23%	47%	7%	6%	13%
St. Lawrence River Corridor	5%	9%	7%	6%	10%
Ottawa Region	12%	17%	8%	6%	30%
Eastern Ontario	2%	3%	3%	3%	3%
North-Central	2%	5%	1%	1%	1%
North-East	7%	13%	5%	5%	3%
North-West	3%	4%	4%	3%	1%

*The percentages are based on the total number of visitors with a known regional destination in Ontario.
Note: The sum of each column is greater than 100% because multiple locations may be visited in a given trip.

How much money did they spend in Ontario?

Visitor spending by overnight cultural visitors in Ontario reached \$4.5 billion, representing 36% of the total spending by overnight visitors in 2004.

- Total visitor spending in Ontario by overnight cultural visitors increased by 16% in 2004, from \$3.9 billion to \$4.5 billion. This is a partial recovery from a 20% decrease in spending from 2002 to 2003.
- Canadian overnight cultural visitors accounted for 40% of total spending; Americans for 32% and overseas cultural visitors for 28% (Table 9).
- The average amount spent per person visit in 2004 was \$423. Overnight Ontario resident cultural visitors had the lowest average spending per person visit (\$241); visitors from Japan had the highest (\$1,421) (Table 10).
- Overseas visitors spent more because, on average, they travelled longer distances, stayed longer and engaged in more activities than visitors from Canada and the U.S.

Origin	Total Spending (000)	Share (%)
TOTAL	\$4,479,561	100%
CANADA	\$1,781,608	40%
Ontario	\$1,362,381	30%
USA	\$1,449,901	32%
Border States	\$778,174	17%
Other U.S.	\$671,727	15%
OVERSEAS	\$1,248,052	28%
UK	\$330,780	7%
France	\$65,328	1%
Germany	\$98,467	2%
Japan	\$106,558	2%

	Average Per Person Visit	Average Per Person Night	Average Per Party
TOTAL	\$423	\$100	\$778
CANADA	\$273	\$81	\$461
Ontario	\$241	\$83	\$412
USA	\$470	\$135	\$1,089
Border States	\$396	\$131	\$975
Other US	\$599	\$139	\$1,258
OVERSEAS	\$1,264	\$105	\$2,217
UK	\$1,373	\$135	\$2,564
France	\$871	\$126	\$1,593
Germany	\$1,349	\$109	\$2,462
Japan	\$1,421	\$152	\$2,011

- Accommodation, transportation, and food/beverage at restaurants led the spending list for overnight cultural visitors (Table 11, next page).
- Overnight cultural visitors from the U.S. tended to spend more on accommodation than visitors of other origins; overseas cultural visitors spent more on transportation and retail/other; Canadian cultural visitors spent more eating at restaurants.
- Cultural visitors had a slightly different spending pattern from their outdoor visitors of the same origins. For example, overseas cultural visitors tended to spend more on transportation and less on accommodation than overseas outdoor visitors. Meanwhile,

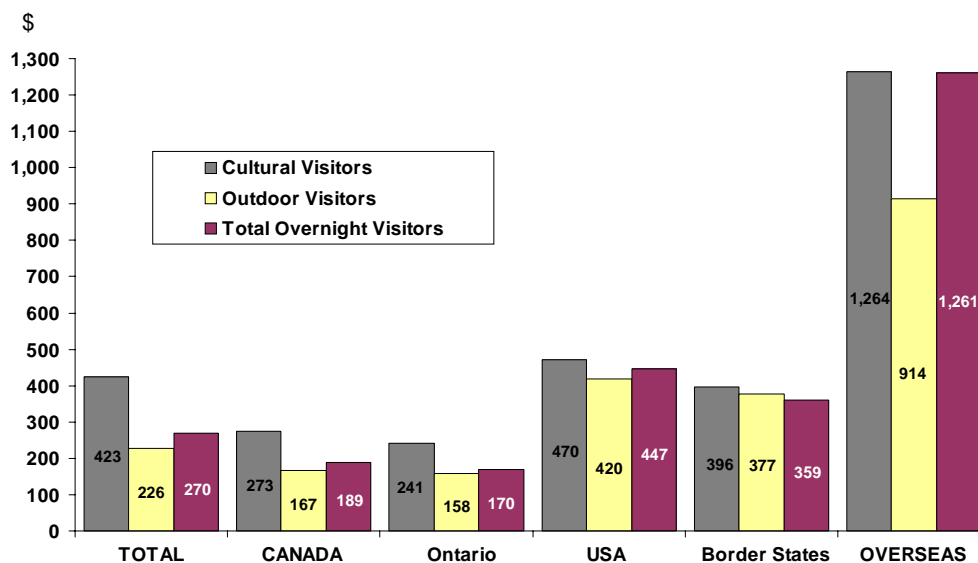
Canadian cultural visitors tended to spend more on eating at restaurants and less on buying food at stores than their outdoor visitors.

	Overnight Cultural Visitors				Overnight Outdoor Visitors			
	Total	Canada	U.S.	Over-seas	Total	Canada	U.S.	Over-seas
Total Spending (000,000s)	\$4,480	\$1,782	\$1,450	\$1,248	\$4,101	\$2,503	\$1,122	\$476
Transportation related*	23%	21%	13%	39%	20%	25%	11%	15%
Accommodation	27%	25%	36%	20%	28%	23%	39%	29%
Food/Beverage at Stores	5%	7%	4%	3%	9%	11%	5%	5%
Food/Beverage at Restaurants	18%	22%	18%	12%	17%	18%	16%	17%
Recreation/Entertainment	11%	11%	15%	7%	11%	10%	16%	10%
Retail/Other (Total)	15%	14%	14%	26%	14%	13%	13%	24%

* includes public/local transport and private/auto (including vehicle rental)

- Overnight cultural visitors, regardless of their origins, had higher average spending per person visit than overnight outdoor or other overnight visitors (Chart 11). In 2004, the average spending per cultural visitor was 87% more than overnight outdoor visitors, and 57% more than other overnight visitors. Their higher activity participation rates contribute to this higher average spending.

Chart 11: Average Spending per Visit, 2004
Overnight Cultural Visitors vs. Outdoor and Other Visitors



What was the economic impact⁴ of overnight cultural visitors in Ontario?

In 2004, the \$4.5 billion spent by overnight cultural tourists generated \$4.6 billion in Gross Domestic Product (GDP) for Ontario and supported 75,000 jobs.

- Overnight cultural tourists spent \$4.5 billion in Ontario during 2004.
- This expenditure generated \$2.5 billion in direct tourism Gross Domestic Product⁵ (GDP) for the province from tourism front-line businesses⁶. This represented a 19% increase over 2003.
- The visitor spending generated an additional \$2.1 billion in GDP through indirect⁷ and induced⁸ impact.
- Overnight cultural visitor spending supported about 50,000 (direct) jobs in tourism-related businesses and 25,000 (indirect and induced) jobs in other businesses in Ontario.
- Overnight cultural visitors generated \$2.1 billion in total taxes, of which \$1.1 billion were federal tax revenues⁹, \$844 million were provincial¹⁰ and \$171 million were municipal tax revenues¹¹.

Visitor Expenditures (million \$):	\$4,480
Gross Domestic Product (million \$):	
Total	\$4,591
Tourism Front-line Businesses	\$2,521
Labour Income (million \$):	
Total	\$2,534
Tourism Front-line Businesses	\$1,342
Employment – Number of Jobs	
Total	74,925
Tourism Front-line Businesses	49,871
Taxes (Total) (million \$):	
Federal	\$1,078
Provincial	\$844
Municipal	\$171
Taxes (Tourism Front-line Businesses) (million \$) :	
Federal	\$655
Provincial	\$578
Municipal	\$48
* Preliminary and subject to change.	

⁴ These estimates of economic impact are based on MTR's Tourism Regional Economic Impact Model.

⁵ Gross Domestic Product (GDP): Value of goods and services produced by labour and capital within a country (or region), regardless of nationality of labour or ownership. This GDP is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travelers.

⁶ Tourism front-line businesses: refer to the businesses or sectors that sell products and services directly to travellers, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc. Although these sectors or businesses supply the goods and services consumed by travellers, they also supply goods and services consumed by non-travellers. As such, not all of these businesses' or sectors' revenues and jobs are attributable to tourism expenditures.

⁷ Indirect impact: refers to the impact resulting from the expansion of demand from tourism front-line businesses or tourism-related sectors, to other businesses or sectors.

⁸ Induced impact: refers to the impact associated with the re-spending of labour income and /or profits earned in the industries that serve travellers directly and indirectly.

⁹ Federal tax revenues: refers to personal income tax, corporate income tax, commodity tax (GST) and payroll deduction that collected by the federal government.

¹⁰ Provincial tax revenues: refers to personal income tax, corporate income tax, commodity tax (PST, gasoline tax, fuel tax and tobacco tax), and employer health tax that collected by Ontario provincial government.

¹¹ Municipal tax revenues: refers to business and personal property taxes that collected by the municipalities.

Glossary

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

Other accommodation is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. It excludes spending by Ontarians on (Canadian) public fares for trips outside the province that did not involve a visit in Ontario.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, works of art, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents' expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to MTR rules.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the transportation in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention*. In this report, *business convention* has been combined with *business* and *pleasure* has been combined with *non-business convention*.

QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. A one month reporting period has been used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in the preceding June. In the ITS, a respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same day trips, the location of the trip's destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that they had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same day trips to region x.

Map of Ontario Travel Regions

