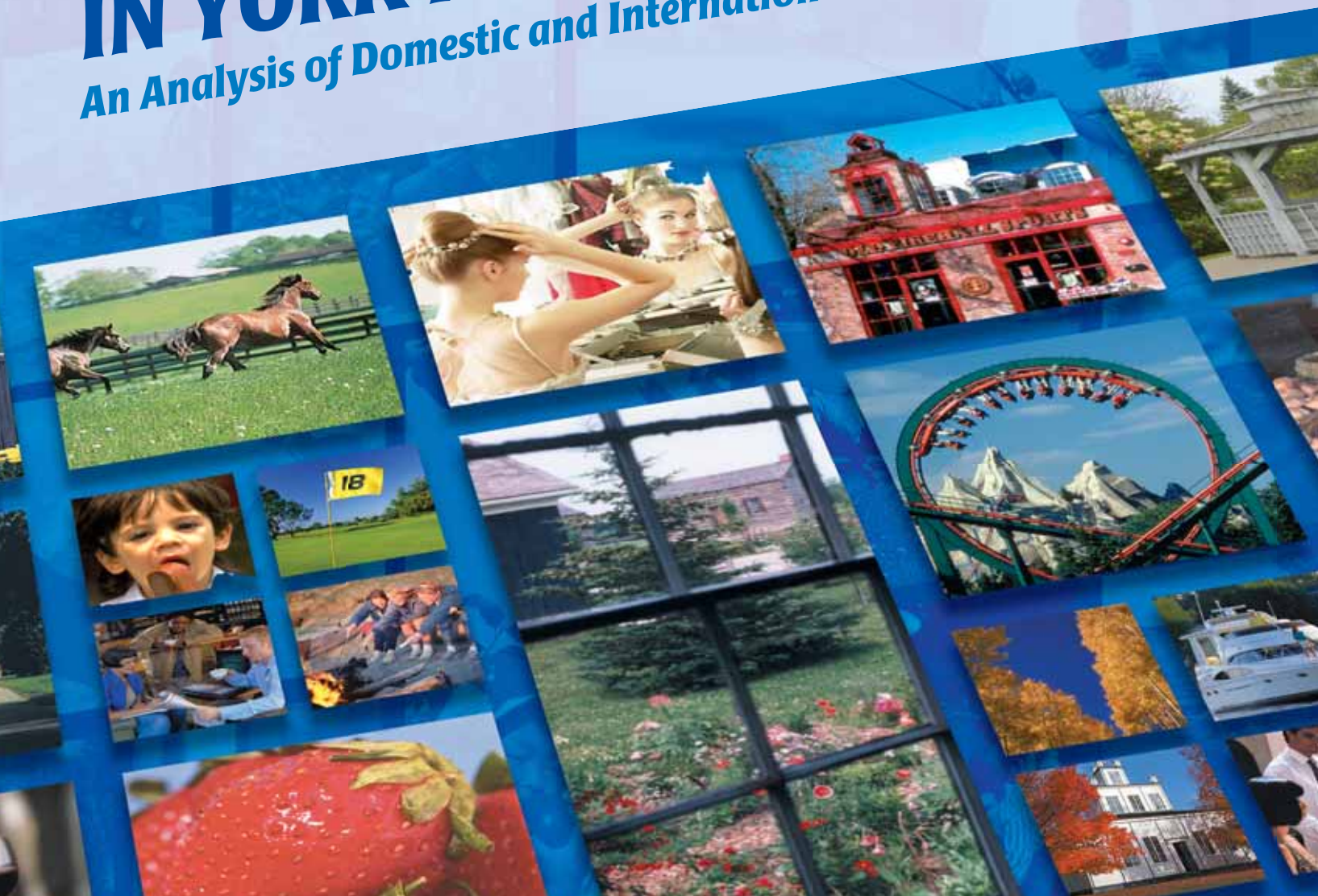




AN OVERVIEW OF TOURISM IN YORK REGION

 Ontario's Rising Star
York Region
Markham · Vaughan · Richmond Hill · Newmarket · Aurora
Georgina · Whitchurch-Stouffville · East Gwillimbury · King

An Analysis of Domestic and International Travel Surveys 2004



An Overview of Tourism in York Region

*Domestic & International
Travel Surveys (2004)*

Presented To:

The Regional Municipality of York

Presented By:



**Research Resolutions
& Consulting Ltd.**

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I. Introduction

Tourism in York Region is vital to many businesses and to the many people who come to the region annually to enjoy its natural beauty; its attractions and events including the McMichael Canadian Art Collection, the Frederick Horsman Varley Art Gallery, one of Canada's major amusement parks (*Paramount Canada's Wonderland*), historic main street in Unionville; numerous shopping venues; its business opportunities and to spend time with friends and relatives. By attracting visitors to the region, York obtains revenue across a variety of economic sectors including accommodation, restaurants and grocery stores, transportation services, attractions and events, and retail.

At the request of the Regional Municipality of York, Research Resolutions & Consulting Ltd. undertook an examination of special tabulations of Statistics Canada's Canadian and International Travel Surveys (CTS, ITS) made available by the Ontario Ministry of Tourism (OMT). Tourism highlights described in the following pages reflect travel over the 2004 calendar year. Some points to keep in mind:

- Unless specifically noted, the primary unit of analysis is a person *visit* -- a same-day or overnight stay in York Region.
- Visits by Canadians are those that take them at least 40 kilometres from home (one-way) for *same-day* trips. No distance minimum is imposed on domestic travel for *overnight* trips. Visits by Americans and overseas visitors have no distance minimums.
- "York Region" is defined as Census Division 35 19 (York Regional Municipality), as declared by the survey respondent. The region includes the following:

Vaughan	Whitchurch-Stouffville	East Gwillimbury
Markham	Aurora	Georgina
Richmond Hill	Newmarket	Georgina Island 33
	King	

- Consumer spending can be divided into (a) dollars spent by visitors *who spent time in York Region* and (b) touristic spending by residents of the region to *leave* the region (e.g., fares for residents' trips to other destinations) and travel costs by non-domestic visitors to reach Canada (inbound fares).¹ Within the text and tables provided herein, **estimates of spending and economic impact are associated with visits to York Region**. Carrier fares and some other transportation spending by area residents *to leave* the region and carrier fares to come and go from Canada by U.S. and overseas visitors have been excluded.²

This summary provides an overview of current markets, value and characteristics of visits to the region. There is considerably more information in the tabulations provided by Research Resolutions & Consulting Ltd. (under separate cover). Tourism planners and marketers in the York area are encouraged to explore this information in detail.

II. Executive Summary

➤ **In 2004, almost 3.0 million visitors went to York Region.**

Two thousand and four was a recovery and growth year for tourism in York Region. Not only did the number of same-day and overnight tourists and their spending in the region increase following the catastrophic 2003 *SARS¹ year*, but 2004 levels far exceeded those achieved in the previous “banner year” – 2002, particularly for overnight tourists and total visitor spending.

In 2004, the 3.0 million visitors came to York Region from Ontario and other parts of Canada (2.8 million), the United States (153,000) and overseas (59,000).

➤ **York Region remains a same-day destination.**

Because of its proximity to Toronto and the relatively short distance required to qualify as a same-day *tourism* trip in Ontario (40 kilometres, one way), tourism in York Region is dominated by same-day trips from the Toronto area. In total, three-quarters of all person visits to the region were same-day excursions in 2004 (2.2 million). This volume of same-day visitors represents a 16% growth rate over the *SARS year*.

➤ **Overnight tourism in York Region increased substantively between 2003 and 2004.**

Growth in overnight visits was robust in 2004, climbing to 798,000 from 661,000 in 2003, for an increase of 21%.

➤ **York Region was more successful than was Ontario as a whole in recovering tourism volume and value after the challenges of 2003.**

The province attracted no more same-day visitors in 2004 than it did in 2003, compared to a 16% increase for York Region. Similarly, York Region was much more successful in attracting *overnight* visitors in 2004, up by 21% over 2003, than was Ontario as a whole. The province experienced only an eight percent increase in overnight visitation between 2003 and 2004.

➤ **All markets for York Region grew between 2003 and 2004.**

The most significant increases were evident for the USA (+30%) and overseas tourists (+34%). Because they are much smaller markets for York Region than is the *domestic* market, the 16% growth in *Canadians* travelling to York Region has more of an impact on the total year-to-year growth rate of +17% than do the increases in foreign visitors.

¹ Severe Acute Respiratory Syndrome.

➤ **Ontario continues to be York Region's primary feeder market for overnight tourism.**

Ontario residents took over half a million overnight trips to York Region (588,000) making them the largest source of tourists for the region. About half of these trips were made for the purpose of visiting their friends and relatives. Americans, primarily from New York and Michigan, represent the second largest market for overnight tourism in York Region (133,000).

Overseas visitors, primarily from Europe and Asia, represent the smallest overnight tourism flow to York Region (52,000) but because they tend to stay in the region longer than other tourists – the average stay is almost 14 nights – they spend more money in the region than their volume would suggest.

➤ **The increase in overnight tourism between 2003 and 2004 seems to have been driven by a renewed confidence among travellers to visit friends and relatives in York Region (VFR).**

In 2004, two-thirds of the 798,000 overnight visits in York Region were made for this primary purpose. The 516,000 VFR visitors represent a 49% increase over 347,000 overnight VFR trips to the region in 2003.

➤ **While the VFR segment grew substantively between the two years, the *pleasure* market experienced a noticeable decline.**

This market segment fell from almost 186,000 person visits in 2003 to about 130,000 in 2004 (-30%). Overnight business travel in the region remained relatively stable between 2003 and 2004, at about 58,000 person trips.

➤ **Visitors spent \$209.3 million in York Region during 2004.**

In spite of the brevity of their stays in the region, same-day visitors contributed almost one-third of all tourism spending in the region in 2004 or about \$63.0 million. The balance of the \$209.3 million spent on tourism in York Region, or \$146.2 million was spent by overnight visitors.³

➤ **The shift in purpose of travel to York Region between 2003 and 2004 alters the contribution each travel segment makes to spending within the region.**

In 2003, overnight pleasure travel generated almost one-third of all overnight visitor spending in the region. This proportion fell to 15% in 2004, representing a substantial year-over-year decline in overnight pleasure visitor spending, from \$40.4 million to \$22.0 million (-46%).

The decline in spending by *pleasure* visitors was more than compensated for by the increase in volume and spending by *VFR* visitors to York Region. Now representing almost half of all

overnight spending in the region, the VFR market brought about \$70 million to tourism businesses in the region, up from about \$44.7 million in 2003 (+57%).

➤ **Same-day visitors seem to be spending money differently in 2004.**

In 2003, over half of all visitor spending on *entertainment* was done by same-day visitors (\$13.6 million of the total entertainment spending estimate of \$24.9 million). By 2004, the same-day market contributes only about one-third of this spending but is making a much more substantial contribution to *retail* spending in York Region. It now contributes about half of all *retail* spending in the region, compared to about one-third in 2003. Whether they are spending their money on *recreation* or *retail*, “day visitors” add substantively to the financial health of businesses in York Region.

The shift from *entertainment* to *retail* spending among same-day visitors may be a function of new shopping facilities in the region (e.g., new “box stores”) and/or retailers’ increasing focus on “shopping-as-recreation”. The shift away from cultural pursuits and towards shopping activities evident among same-day visitors to York Region in 2004 warrants on-going attention to determine whether this is a *once-off* occurrence or is indicative of a trend.

➤ **Tourism generated 2,121 direct jobs and an additional 525 indirect and induced jobs in York Region and about \$148.6 million in Gross Domestic Product for the municipality during 2004.**

Based on the \$209.3 million in spending in 2004, tourism activity generated approximately 3,184 direct, indirect and induced jobs throughout Ontario, with 83% of them or about 2,646 jobs in York Region *per se*. Of the jobs retained in the region, 2,121 were direct jobs – those directly required to deliver goods and services to tourists. In turn, all jobs generated by visitors to York Region yielded \$100.2 million in wages and salaries province-wide, with three-quarters of these wages and salaries retained by York Region (\$76.5 million in direct, indirect and induced wages).

All levels of government benefited from tourism spending in York Region. Tourism generated \$88.6 million in taxes (direct, indirect, and induced) province-wide. These taxes included \$6.4 million at the municipal level of which \$4.9 million were retained by the region.

III. An Overview Of Tourism Activity In York Region

A. Tourism in 2004

York Region attracted almost three million person visits in 2004 or between two and three percent of the 118.3 million person visits that took place in Ontario during the year. Canadians, Americans and visitors from other countries spent approximately \$209.3 million on touristic activities in the region. These estimates include trips made for a wide variety of purposes, including visiting friends and relatives, business, and pleasure; and trips that involve same-day and overnight stays in York Region.

Table 1: An Overview of Tourism in 2004

	Person Visits In York Region		Tourism Spending In York Region	
Total	2,976,000		\$209,300,000	
Canada	2,763,000	93%	\$122,100,000	58%
USA	153,000	5%	\$48,000,000	23%
Overseas	59,000	2%	\$39,100,000	19%
Same-Day Visit	2,178,000	73%	\$63,000,000	30%
Overnight Visit	798,000	27%	\$146,200,000	70%

Spending estimates rounded to nearest 100,000. Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, 1, 2. Percentages may add to more than 100% because of rounding. Figures may not add to total due to rounding.

Three-quarters of all visits to York Region were same-day excursions (2.2 million) including trips of 40 kilometres one way from home made by residents of Ontario. The remainder were overnight visits (798,000). Even though same-day trips represent most of the *volume* of tourism in the region, overnight trips represent most

of the *value*. Seventy percent of all spending in the region, or \$146.2 million, takes place on overnight trips.

Consistent with other counties in Ontario, the **domestic** market is the main source of tourism volume and value for York Region. Canadians account for 2.8 million visits to the region and \$122.1 million in travel spending. Americans account for about 153,000 visits (5%) but a considerably higher

proportion of tourism spending -- \$48.0 million or 23%. While only 1-in-50 visits were made to the region by overseas travellers in 2004 (59,000), these tourists represent close to one-fifth of tourism spending in York Region (\$39.1 million or 19%).

Table 2: Tourism Pattern in Ontario and York Region, 2004

	York Region 2,976,000		Ontario 118,283,000	
Total Person Visits				
Same-day	2,178,000	73%	71,611,000	61%
Overnight (Total)	798,000	27%	46,672,000	39%
Visit Friends/Relatives	516,000	65%	17,669,000	38%
Pleasure	130,000	16%	21,098,000	45%
Business	57,000	7%	4,351,000	9%
Other	95,000	12%	3,518,000	8%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, pages 10, 12. Percentages may add to more than 100% because of rounding.

Compared to the province as a whole, York Region attracts a higher proportion of visitors who are on same day trips (73% for York; 61% for Ontario) and a higher proportion of *overnight* visitors who are travelling to see friends and relatives (VFR). Almost two-thirds of York Region's **overnight** visitors were on VFR trips (65%) while only about one-third (38%) of all overnight trips in the province were made for this purpose in 2004.

B. Changes Over Time

Two thousand and four was a recovery and growth year for tourism in York Region. Not only did the number of same-day and overnight tourists and their spending in the region increase following the catastrophic 2003 SARS² year, but 2004 levels far exceeded those achieved in 2001 or the previous "banner year" – 2002, particularly for overnight tourists and total visitor spending.

Both same-day and overnight visits to York Region increased noticeably between 2003 and 2004. Total spending by tourists in the region also increased substantively, from \$184.0 million in 2003 to \$209.3 million in 2004.

Table 3: Change over Time – Person Visits from 2001 to 2004

	2001	2002	2003	2004
Same-day Visits	2,148,000	2,040,000	1,881,000	2,178,000
Overnight Visits	565,000	714,000	661,000	798,000
Visitor Spending	\$152,000,000	\$172,000,000	\$184,000,000	\$209,300,000

Source: Ontario Ministry of Tourism & Research Resolutions, 2001 - 2004, Harmonized CTS/ITS Detailed Tables, Table 1

Growth From 2002 to 2004: As displayed in the accompanying chart, same-day visitors to York Region grew by about seven percent between 2002 and 2004.

During this three-year span, the number of overnight visitors grew at almost twice the *same-day* rate (12%) and total tourism spending in the region increased at a rate of 22%, from \$172.0 million in 2002 to \$209.3 million in 2004.

Growth From 2003 to 2004: Tourism spending was *higher* in 2003 than it was in 2002 but 2004 represents a double-digit increase in spending over 2003, from \$184.0 million to \$209.3 million (+14%). Same-day visits increased from about 1.9 million in 2003 to almost 2.2 million in 2004, or a 16% growth rate over the SARS year. Growth in overnight visits was even more robust in 2004, climbing to 798,000 from 661,000 in 2003, for an increase of 21%.

Table 4: Rate of Change 2001 to 2004

	2001 to 2004	2002 to 2004	2003 to 2004
Same-day Visits	+1%	+7%	+16%
Overnight Visits	+41%	+12%	+21%
Visitor Spending	+38%	+22%	+14%

Source: Ontario Ministry of Tourism & Research Resolutions, 2001 - 2004, Harmonized

² Severe Acute Respiratory Syndrome.

York Region was more successful than was Ontario as a whole in recovering tourism volume and value after the challenges of 2003.

Table 5: Change over Time – York Region vs. Ontario 2003 to 2004

	York Region	Ontario
Same-day Person Visits	+16%	±0%
Overnight Person Visits	+21%	+8%

Source: Ontario Ministry of Tourism & Research Resolutions, 2003/2004, Harmonized CTS/ITS Detailed Tables, Table 1

The province attracted no more same-day visitors in 2004 than it did in 2003, compared to a 16% increase for York Region. Similarly, York Region was much more successful in attracting *overnight* visitors in 2004, up by 21% over 2003, than was

Ontario as a whole. The province experienced only an eight percent increase in overnight visitation between 2003 and 2004.

All markets for York Region grew between 2003 and 2004. The most significant increases were evident for the USA (+30%) and overseas tourists (+34%). Because they are much smaller markets for York Region than is the *domestic* market, however, the 16% growth in *Canadians* travelling to York Region has more of an impact on the total year-to-year growth rate of +17% than do the increases in foreign visitors (see Table 6 for figures).

Table 6: Change over Time – All Person Visits 2001- 2004

	2001	2002	2003	2004
Total Person Visits	2,713,000	2,754,000	2,542,000	2,976,000
Canada	2,542,000	2,587,000	2,380,000	2,763,000
USA	125,000	124,000	118,000	153,000
Overseas	46,000	44,000	44,000	59,000

Source: Ontario Ministry of Tourism & Research Resolutions, 2001 - 2004, Harmonized CTS/ITS Detailed Tables, Table 1

C. Major Markets - Overnight Visits In York Region

1. The Domestic Market

Ontario is the primary source of tourism for York Region in total and within the overnight tourism sector. In 2004, Ontario residents made 588,000 overnight person visits to York Region, or 74% of all overnight visits. Relatively little overnight visitation to York Region originates in other parts of Canada (3%). The Toronto CMA, including Metro Toronto and York Region itself, is the largest single market for overnight tourism in the region (27%). Hamilton, Windsor, and the Niagara Regional Municipality also make noteworthy contributions to overnight tourism in York Region.

2. Key USA Feeder Markets

Americans represent about one-sixth of all overnight visitors to York Region, or 133,000 person visits (17%). The region primarily draws overnight American visitors from traditional feeder states including Michigan (26,000), New York (18,000) and less commonly, Pennsylvania (10,000). The region also drew about 15,000 overnight visitors from California and slightly fewer from New Jersey (11,000).

3. Overseas

Over one-twentieth of York Region's overnight visitors in 2004 were from overseas, representing about 52,000 visitors, primarily from Europe. The United Kingdom (10,000) was the most prominent source of European visitors. A further 19,000 visitors came to the region from Asia in 2004.⁴

Table 7: Key Overnight Markets in 2004

Overnight Person Visits	798,000	
<i>In rank order</i>		
Canada	613,000	77%
U.S.A.	133,000	17%
Other Countries	52,000	7%
Ontario (Total)	588,000	74%
Toronto CMA	218,000	27%
Metro Toronto (CD 20)	101,000	13%
York Region	68,000	9%
Hamilton	49,000	6%
Michigan	26,000	3%
Europe	26,000	3%
Windsor CMA	24,000	3%
Niagara CMA	20,000	3%
Asia	19,000	2%
New York	18,000	2%
Ottawa-Hull CMA	18,000	2%
California	15,000	2%
Kitchener CMA	15,000	2%
London CMA	13,000	2%
New Jersey	11,000	1%
Oshawa CMA	11,000	1%
Pennsylvania	10,000	1%
United Kingdom	10,000	1%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 3.

Table 8: Markets for Overnight Tourism in Ontario and York Region

	York Region		Ontario	
Total Overnight Person Visits	798,000		46,672,000	
Canada	613,000	77%	37,496,000	80%
USA	133,000	17%	7,434,000	16%
Overseas	52,000	7%	1,742,000	5%

Spending estimates rounded to nearest 100,000. Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, pages 10, 12. Percentages may not add to 100% because of rounding.

Overnight visits to York Region are very similar to the provincial pattern with respect to visitors' origins although the Region was slightly more successful than was the province as a whole in attracting overnight visitors from overseas countries in 2004:

- 8-in-10 overnight visitors to Ontario live in Canada;
- 1-in-6 overnight visitors live in the U.S.A.; and
- 1-in-20 live in other countries.

D. Major Markets – Same-Day Visits In York Region

Ontario residents made almost all of the 2,178,000 same-day person visits to York Region in 2004 (99%). Almost two-thirds of all same-day trips to the region originate in the Toronto Census Metropolitan Area (1,349,000, or 62%) and about one-quarter of all overnight trips to York Region originate here (218,000) making the Toronto CMA the largest single market for York Region.

Americans also take same-day excursions within the region – they made 21,000 same-day visits during 2004. These visits may have been stops on an overnight trip to other Canadian destinations or a same-day trip to York Region with no other stops in Canada. No single state makes a substantive contribution to same-day tourism in the region although Michigan generates more same-day visitors than does any other state. About 10,000 Michigan residents took a same-day trip to York Region in 2004 (0.5% of all same-day trips).

Table 9: Key Same-Day Markets in 2004

Same-Day Person Visits	2,178,000	
<i>Rank Order</i>		
Canada	2,150,000	99%
U.S.A.	21,000	1%
Other Countries	7,000	*
 Ontario (Total)	 2,150,000	 99%
Toronto CMA	1,349,000	62%
Metro Toronto (CD 20)	354,000	16%
York Region	293,000	14%

*Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 3. *Less than 0.5%*

E. Spending in York Region

The same-day market is quite important to York Region from a revenue perspective. It represents about 3-in-10 of the dollars spent on tourism by visitors to York Region, or \$63.0 million. Domestic visitors account for almost all of the same-day spending in York Region (98%).

Two-fifths of the \$146.2 million in spending on *overnight* visits to York Region or \$60.4 million is done by **Canadians** although these domestic travellers represent close to 8-in-10 overnight person visits to the region. **American** visitors account for about one-sixth of all overnight visits to York Region (17%) but represent twice this share of revenues (\$47.1 million, or 32%).

Even though they constitute a smaller overnight market segment in terms of volume, like their American counterparts, **overseas** visitors spend more money in the region (\$38.8 million or 27%) than their share of overnight visits would lead one to expect (7%). The substantial spending on the part of overseas visitors is linked to their extended stays in York Region (see average length of stay, page 18).

Table 10: A Market Overview of Visits & Spending In York Region

	Person Visits In York Region		Tourism Spending In York Region	
Total	2,976,000		\$209,300,000	
Same-Day				
(Total)	2,178,000	73%	\$63,000,000	30%
Canada	2,150,000	99%	\$61,700,000	98%
U.S.A.	21,000	1%	\$1,000,000	2%
Other Countries	7,000	*	\$400,000	1%
Overnight				
(Total)	798,000	27%	\$146,200,000	70%
Canada	613,000	77%	\$60,400,000	41%
U.S.A.	133,000	17%	\$47,100,000	32%
Other Countries	52,000	7%	\$38,800,000	27%

*Less than 0.5%. Spending estimates rounded to nearest 100,000. Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, 1,2. Percentages may add to more than 100% because of rounding. Figures may not add to total due to rounding.

IV. Trip Characteristics of Overnight Visitors In York Region

A. Purpose Of Trip

1. Volume

The increase in overnight tourism between 2003 and 2004 seems to have been driven by a renewed confidence among travellers to visit friends and relatives in York Region (VFR). In 2004, two-thirds of the 798,000 overnight visits in York Region were made for this primary purpose. The 516,000 VFR person visits represent a 49% increase over 347,000 overnight VFR trips to the region in 2003.

Table 11: Purpose Of Overnight Trips

Overnight Person Visits	798,000	
Pleasure	130,000	16%
Canadians	103,000	13%
Americans	20,000	3%
Overseas	7,000	1%
Business	58,000	7%
Canadians	16,000	2%
Americans	35,000	4%
Overseas	6,000	1%
Visit Friends & Relatives	516,000	65%
Canadians	417,000	52%
Americans	64,000	8%
Overseas	35,000	4%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 1. All percentages are based on total overnight person visits.

While the VFR segment grew substantively between the two years, the *pleasure* market experienced a noticeable decline, from almost 186,000 person visits in 2003 to about 130,000 in 2004 (-30%). Overnight business travel in the region remained relatively stable between 2003 and 2004, at about 58,000 person trips.

When overnight market segments are examined to identify the main source of visitors, it is clear that domestic travellers, primarily from Ontario, predominate in the leisure market. Canadians account for almost 8-in-10 overnight *pleasure* visits (79%) and close to the same proportion of overnight visits made to *see friends and relatives* (81%). In contrast, the overnight *business* market is predominantly American (61%). About 1-in-4 overnight business trips to York Region are made by Canadians (28%).

Table 12: Purpose of Overnight Trips by Place of Residence

	Visit Friends &		
	Pleasure	Relatives	Business
Overnight Person Visits	130,000	516,000	58,000
Canada	79%	81%	28%
USA	15%	13%	61%
Overseas	5%	7%	11%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 1. All percentages are based on total overnight person visits. Percentages may not add to 100% due to rounding.

2. Value

The shift in purpose of travel to York Region between 2003 and 2004 alters the contribution each travel segment makes to total overnight visitor spending within the region. In 2003, pleasure travel generated almost one-third of all overnight visitor spending in the region. This proportion fell to 15% in 2004, representing a substantial year-over-year decline in overnight pleasure visitor spending, from \$40.4 million to \$22.0 million (-46%).

The decline in spending by *pleasure* visitors was more than compensated for by the increase in volume and spending by *VFR* visitors to York Region. Now representing almost half of all overnight spending in the region, the VFR market brought about \$70 million to tourism businesses in the region, up from about \$44.7 million in 2003 (+57%).

Overnight *business* trips contributed more than one-quarter of all overnight spending (\$43.0 million or 29%) in 2004. The actual dollar value of overnight business travel increased over the \$32.5 million in 2003 (+32%), but business travel's share of all overnight spending has remained fairly constant between the two years.

Table 13: Spending On Overnight Trips by Purpose

Total Spending in York Region on Overnight Visits		
	\$146,200,000	
Pleasure	\$22,000,000	15%
Business	\$43,000,000	29%
Visit Friends & Relatives	\$70,000,000	48%
Other	\$11,300,000	8%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 2. All percentages are based on total spending in York Region on overnight person visits. Figures and percentages may not add to total because of rounding.

As in the past, overnight business travel remains *high yield* travel. The segment accounts for less than one-tenth of overnight person visits in York Region (7%) but 29% of all overnight visitor spending. The high yield for overnight business trips is likely a function of business travellers' heavy reliance on commercial lodging and restaurants during their stay in York Region.

B. Seasonality

York Region supports a variety of traditional outdoor and recreational *peak season* activities and many opportunities for indoor events and attractions in the winter and shoulder seasons. Because the region attracts so much tourism associated with visiting friends and family, it is not as subject to traditional fair weather peaks as are many other parts of Canada. For these reasons, there is not as much disparity between the *peak* third calendar quarter (July through September) and the other quarters as is often seen for Canadian destinations.

The importance of family visits within the *domestic* market is evident in the strong showings of the first (27%) and fourth (29%) calendar quarters

among Canadians. Many of these tourists are likely coming to York Region to celebrate one or more of the major holidays that take place during the shoulder and winter months (Christmas, Thanksgiving, etc.).

Possibly because of SARS and related events in 2003, seasonal travel patterns for *pleasure* travellers were quite different from those found in 2002. In 2004, yet another pattern is evident, with a particularly high concentration of overnight pleasure trips to York Region taking place in the *peak* third calendar quarter. Close to half of all overnight pleasure trips to the region occurred between July and September 2004.

Table 14: Calendar Quarter -- Overnight Visits in 2004

Quarter	All Markets	Canada	USA	Overseas
1 st Quarter (Jan-Mar)	25%	27%	17%	18%
2 nd Quarter (Apr-June)	18%	17%	20%	24%
3 rd Quarter (July-Sept)	29%	27%	38%	36%
4 th Quarter (Oct-Dec)	28%	29%	25%	22%

Source Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Table 7.

Overnight Pleasure Visitors By Calendar Quarter

	2002	2003	2004
1 st Quarter (Jan-Mar)	10%	18%	10%
2 nd Quarter (Apr-June)	35%	23%	11%
3 rd Quarter (July-Sept)	39%	35%	47%
4 th Quarter (Oct-Dec)	16%	24%	32%

C. Nights Spent In York Region

Canadian overnight visitors to York Region spend two nights, on average, in the region (2.2). American overnight visitors spend close to three nights (2.8) and overseas visitors spend about 14 nights in York Region.

When the number of nights spent is combined with the number of visitors in each travel party, an estimate of “person nights” is obtained. Over the course of 2004, visitors spent 2.4 million person nights in York Region, with more than half of these nights spent by Canadians (1,345,000) and over one-quarter spent by overseas visitors (705,000). The remaining person nights were spent by American visitors to the region (367,000). These estimates reflect the appreciably longer stays of overseas visitors relative to their U.S.A. and Canadian counterparts.

Table 15: Average Length of Stay in York Region

Overnight Person Visits	Total	Canada	USA	Overseas
Average person nights	3.0	2.2	2.8	13.6
Average party size	1.6	1.6	1.8	1.4
Total person nights	2,416,000	1,345,000	367,000	705,000

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Tables 5, 8.

D. Accommodation In York Region

As noted in the previous section, overnight visitors to York Region spent approximately 2.4 million person nights in private and commercial accommodation facilities during 2004. Close to four-fifths of these person nights were spent in non-commercial accommodation – private homes or private

Table 16: Lodging Nights in York Region

	All Markets
Total Person Nights in York Region	2,416,000
Roofed Commercial Accommodation	287,000
Campgrounds/Trailer Parks	118,000
Private Homes/Private Cottages	1,910,000
Accommodation Type Unknown	101,000

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 5.

cottages (1.9 million, or 79%). About one-eighth were spent in hotels, motels, bed and breakfast establishments or other forms of roofed commercial lodging (12%).

Because of the high level of overnight tourists who are visiting friends and relatives in York Region, it is not surprising that so many of the nights spent in the region, particularly by Canadian and overseas visitors are spent in private homes (or cottages). In both these

market segments, over 8-in-10 nights spent in York Region are in *unpaid* lodging.

Canadians and Americans are equally responsible for nights spent in commercial properties in York Region, each utilizing about 123,000 commercial person nights. American overnight visitors are more apt to rely on *hotels* (107,000 person nights) than are Canadians (64,000) but Canadians rely more heavily on *motels* (56,000) than do their U.S.A. counterparts (14,000). Canadians are particularly likely to be found in campgrounds or trailer parks in York Region (118,000 person nights).

From a *proportional* perspective, however, Americans are the most reliant on commercial accommodation. Three-in-ten of the nights they spent in York Region in 2004 were in hotels (107,000) and a further 14,000 were spent in motels.

This utilization of commercial accommodation reflects the importance of the **business travel** market to York Region's lodging properties.

American visitors represent three-fifths of all the overnight business trips to York

Region and they far surpass overseas visitors in utilization of hotels, motels and other roofed commercial lodging (123,000 person nights) despite overseas visitors' lengthier stays in York Region (overseas, 42,000 person nights).

Table 17: Lodging Used in York Region – By Market

	Canada	USA	Overseas
Total Person Nights	1,345,000	367,000	705,000
Hotel	64,000	107,000	41,000
Motel	56,000	14,000	1,000
Other Roofed Commercial	3,000	1,000	**
Camping or trailer park	118,000	**	**
Private home*	1,104,000	227,000	578,000
Other	**	17,000	84,000

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 5. *Home of friend/relative or private cottage. **Less than 0.5%.

V. Travel Spending In York Region

A. Spending by Category

Visitor spending in York Region benefits many sectors of the local economy. The \$209.3 million spent in the area contributes to the accommodation sector (\$34.5 million, or 17%), restaurants, bars

and grocery stores (\$68.3 million, or 33%), vehicle operation and rental (\$22.4 million, or 11%), attractions (\$17.5 million or 8%) and the retail sector (\$61.2 million, or 29%).

Within the overnight travel sector, spending patterns for the major flows of tourists – Canada, U.S.A. and overseas – differ somewhat. Canadians, because they are most apt to travel to

York Region in their private vehicles and because they are likely to stay with friends and relatives while in the area, spend a higher proportion than their U.S.A. or overseas counterparts on *vehicle operation* (21%) and a lower proportion on *accommodation* (15%). Americans, on the other hand, tend to concentrate more of their spending on *accommodation* (37%) than are visitors from other parts of the world. Overseas visitors spend the highest proportion on *retail* (39%).

Historically, the **same-day** market segment made an especially significant contribution to *recreation and entertainment* spending in York Region. For example, in 2003, these visitors accounted for \$13.6 million of the \$24.9 million spent in the region on recreation and entertainment (55%). In 2004, however, the same-day market contributes only about one-third of all

spending on *recreation and entertainment* but is making a much more significant contribution to *retail* spending. This market segment now contributes about half of all retail spending in the region (49%), compared to about one-third in 2003 (37%).

Table 18: Total Spending By Category - Amounts

All Markets (\$)	Total	Same-day	Overnight
All Categories	\$209,300,000	\$63,000,000	\$146,200,000
Canadian Carrier Fares	\$3,500,000	\$200,000	\$3,300,000
Taxis, Local Buses	\$2,000,000	*	\$2,000,000
Automobile Operation/Rental	\$22,400,000	\$1,400,000	\$21,000,000
Accommodation	\$34,500,000	-	\$34,500,000
Food/Beverages	\$68,300,000	\$25,100,000	\$43,200,000
Recreation/Entertainment	\$17,500,000	\$6,300,000	\$11,100,000
Retail/Other	\$61,200,000	\$29,900,000	\$31,200,000

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 11. Numbers may not add to total due to rounding. *Less than 0.5%

Table 19: Total Spending By Category - Percentages

All Markets (\$)	Total	Same-day	Overnight
All Categories	\$209,300,000	\$63,000,000	\$146,200,000
Canadian Carrier Fares	2%	*	2%
Taxis, Local Buses	1%	*	1%
Automobile Operation/Rental	11%	2%	14%
Accommodation	17%	-	24%
Food/Beverages	33%	40%	30%
Recreation/Entertainment	8%	10%	8%
Retail/Other	29%	48%	21%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 11. Percentages may not add to total due to rounding. *Less than 0.5%.

The shift from *entertainment* to *retail* spending may be a function of new shopping facilities in the region (e.g., new “box stores” at major highway intersections) and/or retailers’ increasing focus on “shopping-as-recreation”. The shift away from cultural pursuits and towards shopping activities evident among same-day visitors to York Region in 2004 warrants on-going attention to determine whether this is a *once-off* occurrence or is indicative of a trend. Regardless of whether they are spending their money on *recreation* or *retail*, “day visitors” add substantively to the financial health of businesses in York Region.

B. Average Spending

Every same-day visit to York Region generates about \$29.00 in consumer spending and every overnight visit generates more than six times this amount, or about \$183.00 per person.

At \$129.00, American visitors have especially high *per person per night* spending, largely because about one-quarter of them are on business trips and as a consequence, tend to rely on commercial lodging while in the region. In contrast, overseas visitors spend only \$52.00 per person per night but have the highest *per person visit* spending (\$746.00), largely because they spend extended periods of time in York Region (about 14 nights).

When adjustments are made for different party sizes and different lengths of stay, it is clear that the American overnight visitor is the highest per-capita-per-night spender in the region. For each

Table 20: Average Spending in York Region – By Market

Average Spending	All Markets	Canada	USA	Overseas
Per Person Same-day	\$29.00	\$29.00	N/A	N/A
Overnight per person per visit	\$183.00	\$99.00	\$355.00	\$746.00
Overnight per person per night	\$56.00	\$42.00	\$129.00	\$52.00

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 12; CTS Tabulations, Table 18. Base sizes for same-day U.S.A and overseas visitors are too small to warrant analysis.

night that each American visitor spends in York Region, \$129.00 are left in the community. The corresponding estimate for Canadians is \$42.00. Overseas visitors spend \$52.00 per-person-per-night during their stay in York Region.

VI. Activities On The Trip

A. All Overnight Leisure Visitors

People who come to York Region engaged in many different activities while on their trips. Information on activities is, however, limited by the items included in the Statistics Canada surveys. Activities reported by visitors could have taken place in York Region or in other destinations they visited on their *trip in Canada*. It is most likely that a reported activity took place in York Region among domestic and American visitors to the area since these travellers tend to visit only *one* location on their overnight trips in Canada. For overseas visitors, on the other hand, overnight stops in other destinations while on the trip in Canada are relatively prevalent, making it difficult to know *where* on the trip specific activities took place.

Table 21: Participation In Specific Activities

All Markets	Total	Same-Day	Overnight	Pleasure O'night
Total Asked About Activities	2,976,000	2,178,000	798,000	130,000
Visit Friends/Relatives	60%	51%	84%	62%
Shopping	33%	30%	43%	68%
Sports Events	10%	12%	4%	11%
Sightseeing	9%	4%	20%	29%
Theme Parks	7%	8%	6%	15%
Bars/Nightclubs	6%	2%	18%	13%
Cultural Performances	2%	1%	3%	4%
Museums/Art Galleries	2%	1%	4%	15%
Zoos/Aquariums/Botanical Gardens	2%	1%	3%	7%
National/Provincial Nature Parks	2%	1%	4%	8%
Historic Sites	2%	1%	6%	15%
Festivals/Fairs	1%	1%	3%	6%
Casinos	1%	1%	3%	7%
Any Outdoor/Sports Activity	19%	15%	30%	54%
Boating	1%	*	2%	3%
Golfing	2%	1%	5%	14%
Fishing	2%	3%	2%	10%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 6. Excludes U.S. same-day visitors to Canada and non-responders. *Less than 0.5%

Consistent with their primary reason for taking a trip, many visitors to York Region spent some time visiting with friends and relatives. Three-fifths of *all* visitors to the region claim to do some visiting and the same proportion of overnight visitors with a main purpose of *pleasure* also state that visiting with friends and relatives was an activity on their trip. Shopping is done by one-third of all visitors and by two-thirds of the overnight *pleasure* market in York Region. The *shopping*

figures represent a striking departure from 2003 findings. In that year, less than 1-in-4 of all visitors were *shopping* and about half of the pleasure market was going to stores and shops on their trip. The increase in *shopping* as an activity in 2004, possibly associated with new shopping opportunities at box stores near the intersection of highways 407 and 400, is consistent with shifts in spending patterns noted in Section V-B. As described in that section, a considerably higher proportion of total spending in York Region is attributable to *shopping* than was the case historically, particularly within the *same-day* market.

Participating in outdoor recreational or sporting activities such as golfing, swimming, boating and fishing is characteristic of more than 2-in-10 same-day and overnight visitors (all purposes) and of about 5-in-10 tourists in the overnight *pleasure* segment. Although various types of cultural events and attractions are more popular within the overnight pleasure segment than within the overnight visitor population as a whole, they are not widely patronized by York Region visitors. In fact, no more than 1-in-50 overnight and same-day visitors to the region go to a cultural performance, museum or art gallery or festival or historic site (2% each) while on their trips.

B. Canadian Overnight Leisure Visitors

Canadians who take overnight leisure trips (for pleasure or to visit friends and relatives) to York Region are people-oriented. They are visiting friends and relatives to a much greater extent than

Table 22: Participation In Specific Activities - Canadian Overnight Leisure Visitors*

	520,000
Visiting Friends/Relatives	91%
Shopping	39%
Participate In Sports/Outdoor ¹	32%
Sightseeing	13%
Went To A Bar Or Nightclub	12%
Visit A Theme Or Amusement	6%
Visit A Museum Or Art Gallery	3%
Visit An Historic Site	3%
Attend Cultural Events	2%
Attend Sports Event	2%
Visit A Zoo, Aquarium, Botanical Garden	2%
Went To A Casino	2%
Attend A Festival, Fair	1%
Visit A National Or Provincial Nature Park	1%
Took A Cruise Or Boat Trip	1%
Attend Aboriginal/Native Cultural Activity	**

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, CTS Detailed Tables, Table 9. ¹Details of outdoor activities are provided on the following table. **"Leisure" is a main purpose of pleasure or visit friends and relatives. **Less than 0.5%.

they are taking advantage of the attractions, events and outdoor activities available in the region. Nine-in-ten of them spend time visiting with friends and relations, about two-fifths of them shop, and one-third participate in some form of outdoor sporting activity (see following page for details of outdoor activities). One-fifth claim to do some general *sightseeing* on their overnight trip. With the exception of general *sightseeing* and going to bars and clubs on the trip, no other activity achieves a participation level of even 1-in-10 Canadian overnight leisure visitors to the region.

Of the attractions available in York Region, theme parks such as Canada's Wonderland at 6%

are the most popular among these leisure visitors. Museums or galleries such as McMichael Canadian Art Collection attract only 1-in-33 Canadian overnight leisure visitors.

As noted in previous reports, the high level of interaction between tourists and the local population because of so much visiting of friends and family in the region creates an opportunity to market the attractions and events in York Region *through* hosts. To increase tourist participation in various activities, encouragement may have to be offered to hosts to take their guests out to "see and do" in York Region. In turn, the resident population may require education about the attractions and events available in their own communities. They may also be more inclined to take their guests to local attractions, events and sites if they are provided with some form of incentive (e.g., vouchers that discount admission fees for out-of-town guests, etc.).

Within the overnight domestic leisure market, walking or hiking is the most popular outdoor activity, attracting 2-in-10 of these Canadian visitors. Other outdoor activities that attract at least

some interest among this group of Canadians include swimming, boating, golfing, fishing and cycling (see Table 23).

**Table 23: Participation In Outdoor Activities -
Canadian Leisure Overnight Visitors***

	520,000
Participate In Sports/Outdoor ¹	32%
Walking Or Hiking	19%
Swimming	10%
Golfing	5%
Boating	2%
Fishing	2%
Bird Or Wildlife Viewing	1%
Cycling	1%
Snowmobiling	**

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, CTS Detailed Tables, Table 9. *"Leisure" is a main purpose of pleasure or visit friends and relatives. **Less than 0.5%.

C. American Overnight Visitors

Americans on overnight trips who spent at least one night in York Region (all purposes) are particularly likely to visit friends and relatives (71%) and to shop (53%). Sightseeing, going to bars and clubs and participating in outdoor sports or activities attract between 2-in-10 and 3-in-10 of York Region's overnight American visitors. About 1-in-10 claim to visit historic sites (11%), go to sporting events (11%) or theme parks (8%) while on their trip. Golfing attracts over 1-in-8 American overnight visitors to York Region (13%).

Table 24: Participation In Specific Activities - American Overnight Visitors

	133,000
Visit Friends/Relatives	71%
Shopping	53%
Sightseeing	30%
Bars/Nightclubs	21%
Any Outdoor/Sports Activity	20%
Historic Sites	11%
Sports Events	10%
Theme Parks	8%
National/Provincial Nature Parks	8%
Golfing*	7%
Museums/Art Galleries	6%
Festivals/Fairs	5%
Cultural Performances	5%
Zoos/Aquariums/Botanical Gardens	4%
Casinos	4%
Fishing*	3%
Boating*	3%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, CTS/ITS Harmonized Detailed Tables, Table 6. *Included in Sports /Outdoor Activity.

VII. Other Important Information

A. Party Size & Composition

Most York Region visitors are travelling in small groups, and almost all are in adult-only parties (no children under 15 years). Party composition is relatively consistent across all markets, but overseas (6%) visitors to York Region are less likely to be travelling with children than are Canadian overnight visitors (15%).

Table 25: Party Size and Composition – Overnight Visitors 2004

	Canada	USA	Overseas
Average Party Size	1.6	1.8	1.4
Party Composition			
Adults Only	85%	90%	94%
With Children Under 15 Years	15%	10%	6%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 8.

B. Potential Partners

By examining where *else* people stay who spend at least one night in York Region, it is possible to identify *routes* and, in turn, potential partners for packaging and promotion. As is evident from the figures, there is very little multiple-location activity within York Region's domestic or

Table 26: Other Locations Visited on Trips with an Overnight Stay In York Region

	Canada	USA	Overseas
Niagara Falls	1%	1%	8%
Montréal	*	1%	6%
Quebec City	*	*	2%

Source: Ontario Ministry of Tourism & Research Resolutions, 2004, Harmonized CTS/ITS Detailed Tables, Table 15. *Less than 0.5%.

American markets. In other words, Canadians and Americans who spend nights in York Region tend *only* to spend nights in this municipality.

Overseas York Region visitors are more likely than their American or Canadian counterparts to have spent

at least one night in Niagara Falls (8%) or Montréal (6%), but even overseas visitors tend to restrict their stay in Canada to York Region.

C. Economic Impact Estimates for York Region

Visitors to York Region spent approximately \$209.3 million on tourism activities and services in the region.⁵ This spending ripples through the regional and provincial economy, generating additional economic activity including contributions to Gross Domestic Product (GDP); jobs in tourism-related sectors such as accommodation, transportation, food services and in other sectors such as manufacturing and agriculture. It also generates tax revenue for federal, provincial and municipal governments.

Some of the economic impact of tourism in York Region is retained in the region and some “leaks” out of York Region, benefiting other parts of Ontario and, of course, other parts of Canada and other countries. In some parts of the province, the **amount of economic activity** *within* the region is *smaller* than **visitor spending**. York Region is one of these communities. This situation occurs when a sizeable proportion of the economic activity required to create the goods and services consumed by tourists occurs outside the region. For example, much of the food prepared in restaurants *in* York Region is grown *outside* the area. Consequently, much of the economic activity associated with restaurant meals takes place outside the region. Similarly, materials required to build hotels, motels and other lodging establishments are created *outside* York Region and generate economic activity in communities where the materials are *produced*.

Thus, even though visitors actually spent approximately \$209.3 million *in* York Region, their spending generated about \$148.6 million in total economic activity (GDP) that was retained in the region and an additional \$39.1 million that benefited economies in other parts of the province. Of the \$158.6 million in GDP retained in York Region, about \$101.3 million were “direct” impacts.³ Tourism spending in York Region produced about 2,646 jobs retained in the region and a further 539 that benefited other parts of Ontario, for a total of 3,184 jobs. Eighty percent of the jobs retained in York Region were “direct jobs” (2,121).

In turn, these jobs generated \$100.1 million in **wages and salaries** province-wide, with three-quarters of this amount or \$76.5 million retained by York Region. Two-thirds of the labour income/wages retained within the region were direct (\$50.9 million) and the remainder (\$25.6 million) were indirect and induced.

All levels of government benefited from tourism spending in York Region as it generated \$88.6 million in **taxes for all levels of government** (direct, indirect, and induced) province-wide. These taxes included \$6.4 million at the municipal level of which \$4.9 million were retained by the region. Tourism in the region also generated \$36.2 million in taxes at the provincial level and \$46.0 million at the federal level.

³ *Direct* refers to the impact generated in businesses or sectors that produce or provide products and services directly to travellers such as accommodation, restaurants, recreation, travel agents, transportation and retail enterprises. *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. And *induced* is the impact associated with the re-spending of labour income and /or profits earned in the industries that serve travellers directly and indirectly. (See OMT’s Glossary, appended for more definitions.)

Table 27: Economic Impact of 2004 Visitor Spending in York Region

	Impacts Retained in York Regional Municipality	Impacts That Accrue to Other Parts of Ontario	Total Impacts of York Regional Municipality's Visitor Spending in Ontario
	[A]	[B]	[A+B]
Gross Domestic Product (GDP)	\$148,637,000	\$39,073,000	\$187,710,000
Direct	\$101,343,000	\$6,721,000	\$108,064,000
Indirect	\$18,116,000	\$15,140,000	\$33,256,000
Induced	\$29,178,000	\$17,213,000	\$46,391,000
Labour Income/Wages	\$76,467,000	\$23,699,000	\$100,166,000
Direct	\$50,917,000	\$4,431,000	\$55,348,000
Indirect	\$10,515,000	\$9,201,000	\$19,716,000
Induced	\$15,036,000	\$10,066,000	\$25,102,000
Number of Jobs	2,646	539	3,184
Direct	2,121	123	2,244
Indirect	213	195	408
Induced	312	221	532
Taxes (All Levels)	\$75,329,000	\$13,296,000	\$88,625,000
Federal	\$38,260,000	\$7,752,000	\$46,012,000
Provincial	\$32,141,000	\$4,028,000	\$36,169,000
Local	\$4,929,000	\$1,515,000	\$6,444,000

Preliminary and subject to change due to further revision. *Jobs = full time, part-time and seasonal employment. See Glossary for definitions. Sources: Statistics Canada, Canadian Travel Survey and International Travel Survey; Ontario Ministry of Tourism, Tourism Regional Economic Impact Model (TREIM).

A table displaying the economic impact of tourism spending in York Region in 2002 and 2003 is presented on the following page for comparative purposes. The figures displayed in Table 28 are comparable to those presented in Column "A" of Table 27.

Table 28: Economic Impacts Retained in York Region: 2003 and 2002 (Revised)

	2003	2002 Revised
Dollars in 000s		
Total Visitor Spending	\$184,000	\$172,000
Gross Domestic Product (GDP)	\$ 136,710	\$ 130,723
Direct	\$ 93,788	\$ 90,067
Indirect	\$ 16,759	\$ 16,205
Induced	\$ 26,163	\$ 24,451
Labour Income/Wages	\$ 73,113	\$ 68,812
Direct	\$ 48,879	\$ 46,051
Indirect	\$ 10,216	\$ 9,810
Induced	\$ 14,018	\$ 12,951
Number of Jobs*	2,480	2,421
Direct	1,990	1,932
Indirect	205	208
Induced	285	280
Taxes (All Levels)	\$ 69,033	\$ 65,788
Direct	\$ 51,269	\$ 49,124
Indirect	\$ 5,264	\$ 5,046
Induced	\$ 12,500	\$ 11,618
Total Taxes by Level		
Federal	\$ 34,279	\$ 32,285
Provincial	\$ 30,296	\$ 29,230
Local	\$ 4,458	\$ 4,273

Preliminary and subject to change due to further revision. *Jobs = full time, part-time and seasonal employment. Jobs are actual numbers, not in 000's. See Glossary for definitions. Sources: Statistics Canada, Canadian Travel Survey and International Travel Survey; Ontario Ministry of Tourism, Tourism Regional Economic Impact Model (TREIM).

VIII. Appendix

A. Glossary of Economic Impact Terms⁶

Directly Attributable To Tourism refers to the portion of the tourism-related sectors' economic activity that is attributed to the tourists' spending.

Direct Impact refers to the impact that the tourists' spending has on the front-line businesses serving these tourists (i.e. the tourism-related sectors).

Employment jobs that are *attributed to tourism* are generated by OMT's economic impact model, which essentially converts tourists' expenditures in a particular industry to jobs according to the industry's production process and part-time/full-time ratios.

GDP this figure refers to the total value of wages & salaries, profits and indirect taxes (less subsidies) generated in the industries involved in the production process that is initiated with the tourists' spending.

Gross Output refers to the total sales achieved by all industries (direct and indirect) that participate in the production process initiated by the tourists' spending.

Indirect Impact refers to the economic impact resulting from the expansion of demand from the industries involved in the direct supply of goods and services to tourists, to other industries.

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

Initial Impact refers to the impact on GDP, labor income, jobs or taxes generated by tourism spending in tourism front-line businesses. These front-line businesses are those that sell products and services directly to tourists, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc.

Jobs Ontario's Tourism Regional Economic Impact Model (TREIM) uses the Statistics Canada's Labour Force Survey (LFS) definition of a job. Thus, jobs generated by the model include part-time and full-time as well as seasonal. They also include paid employees as well as unpaid family employees. See *Employment* for jobs that are "attributed to tourism".

Municipal Taxes refers to business and property taxes collected by municipalities. Although in the long-term these taxes are correlated with the economic health of the community, in the short-term these taxes may not be related to the community's economic fluctuations.

Tourism Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.⁷ In Ontario, the definition of tourism also excludes same day travellers who, in order to reach their destination, travelled less than 40 kms (one way) away from home.

Tourism Related Industries refers to the sectors that supply the goods and services consumed by tourists. These sectors are: transportation (air, rail, bus and local), accommodation services, food & beverage services, amusement & recreation services, retail and “other” services (car rental, travel agents). Although these sectors supply the goods and services consumed by tourists, they also supply goods and services consumed by non-tourists. As such not all of these sectors’ revenues and jobs are attributed to tourists spending.

B. Supplementary Information on Activities by Ontario & York Region Tourists

Proportion of Ontario Person Visits with Each Activity on Trip - 2004

Province of Ontario	All Visits to Ontario				Overnight Visits to Ontario				Overnight Pleasure Visits to Ontario			
	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas
2004												
Visit Friends/Relatives	50%	58%	12%	60%	62%	68%	32%	64%	41%	47%	18%	46%
Festivals/Fairs	4%	4%	3%	13%	7%	6%	8%	14%	9%	9%	9%	15%
Cultural Performances	5%	4%	6%	15%	7%	6%	13%	15%	10%	7%	17%	17%
Museums/ Art Galleries	5%	4%	7%	34%	9%	6%	17%	35%	12%	8%	20%	45%
Zoos/Aquariums/Botanical Gardens	3%	3%	2%	22%	4%	3%	5%	23%	6%	5%	7%	32%
Sports Events	6%	6%	2%	11%	6%	6%	5%	10%	8%	8%	6%	11%
Shopping	32%	33%	22%	85%	45%	40%	57%	88%	50%	45%	64%	90%
Sightseeing	20%	19%	19%	72%	33%	28%	47%	74%	47%	42%	58%	90%
Bars/Nightclubs	9%	9%	8%	28%	16%	14%	22%	30%	17%	16%	22%	29%
Casinos	4%	4%	4%	10%	6%	6%	8%	11%	9%	9%	10%	11%
Theme Parks	3%	3%	2%	12%	4%	4%	4%	13%	6%	5%	5%	15%
National/Provincial Nature Parks	7%	6%	7%	42%	12%	9%	17%	43%	18%	15%	23%	60%
Historic Sites	6%	5%	9%	37%	11%	7%	23%	38%	16%	10%	29%	51%

Proportion of Ontario Person Visits with Each Activity on Trip - 2003

Province of Ontario	All Visits to Ontario				Overnight Visits to Ontario				Overnight Pleasure Visits to Ontario			
	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas
2003												
Visit Friends/Relatives	48%	57%	11%	64%	61%	66%	34%	67%	42%	48%	19%	50%
Festivals/Fairs	4%	4%	3%	12%	6%	6%	8%	12%	8%	8%	9%	15%
Cultural Performances	5%	5%	6%	15%	7%	5%	13%	14%	9%	7%	17%	15%
Museums/ Art Galleries	5%	4%	5%	35%	9%	6%	16%	35%	12%	9%	19%	48%
Zoos/Aquariums/Botanical Gardens	3%	3%	2%	20%	4%	3%	5%	20%	6%	5%	7%	32%
Sports Events	6%	7%	2%	10%	7%	7%	5%	9%	9%	10%	5%	11%
Shopping	32%	34%	19%	85%	45%	41%	57%	87%	49%	44%	63%	91%
Sightseeing	20%	20%	16%	72%	32%	28%	45%	74%	45%	40%	56%	90%
Bars/Nightclubs	9%	9%	7%	30%	17%	15%	22%	31%	16%	14%	21%	35%
Casinos	3%	3%	3%	9%	5%	4%	8%	10%	6%	5%	10%	14%
Theme Parks	3%	3%	1%	12%	4%	3%	4%	13%	5%	5%	5%	15%
National/Provincial Nature Parks	6%	6%	6%	40%	11%	9%	17%	39%	17%	14%	24%	57%
Historic Sites	6%	5%	8%	38%	11%	8%	22%	39%	16%	12%	29%	55%

Change in Proportion of Ontario Person Visits with Each Activity on Trip – 2003 to 2004

Province of Ontario	All Visits to Ontario				Overnight Visits to Ontario				Overnight Pleasure Visits to Ontario			
	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas
Changes in Percentages 2003 to 2004												
Visit Friends/Relatives	4%	2%	9%	-6%	1%	2%	-5%	-5%	-3%	-1%	-6%	-7%
Festivals/Fairs	3%	-1%	16%	4%	8%	8%	2%	9%	6%	5%	4%	3%
Cultural Performances	-2%	-6%	11%	0%	7%	8%	0%	3%	7%	6%	0%	10%
Museums/Art Galleries	2%	-7%	21%	-3%	3%	-5%	9%	1%	2%	-7%	6%	-6%
Zoos/Aquariums/Botanical Gardens	-2%	-10%	17%	8%	2%	-5%	-1%	14%	3%	-4%	-1%	2%
Sports Events	-2%	-5%	13%	7%	-12%	-16%	6%	7%	-12%	-16%	15%	0%
Shopping	0%	-3%	14%	0%	-1%	-2%	0%	1%	3%	2%	1%	-1%
Sightseeing	2%	-3%	18%	-1%	2%	0%	4%	0%	5%	3%	3%	0%
Bars/Nightclubs	2%	-2%	16%	-5%	-3%	-5%	2%	-5%	11%	13%	7%	-17%
Casinos	21%	22%	14%	5%	29%	41%	-1%	8%	46%	72%	-1%	-19%
Theme Parks	-4%	-9%	23%	1%	8%	6%	5%	4%	7%	5%	6%	-1%
National/Provincial Nature Parks	6%	3%	10%	6%	1%	-2%	-4%	9%	8%	7%	-2%	5%
Historic Sites	-1%	-11%	20%	-2%	-3%	-13%	4%	0%	-1%	-10%	2%	-8%

Proportion of York Region CD 19 Person Visits with Each Activity on Trip - 2004

York Region CD 19	All Visits to Region				Overnight Visits to Region			
	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas
2004								
Visit Friends/Relatives	59%	58%	67%	88%	84%	87%	71%	86%
Festivals/Fairs	1%	1%	4%	13%	3%	1%	5%	15%
Cultural Performances	2%	1%	5%	11%	3%	2%	5%	10%
Museums/Art Galleries	2%	1%	5%	15%	4%	3%	6%	14%
Zoos/Aquariums/Botanical Gardens	2%	1%	4%	12%	3%	2%	4%	11%
Sports Events	10%	10%	9%	13%	4%	2%	10%	11%
Shopping	33%	31%	52%	90%	42%	36%	53%	90%
Sightseeing	8%	6%	28%	59%	20%	15%	30%	57%
Bars/Nightclubs	6%	5%	19%	26%	18%	16%	21%	28%
Casinos	1%	1%	3%	16%	3%	2%	4%	14%
Theme Parks	7%	7%	9%	13%	6%	5%	8%	13%
National/Provincial Nature Parks	2%	1%	8%	25%	4%	1%	8%	26%
Historic Sites	2%	1%	10%	23%	6%	4%	11%	23%

Proportion of York Region CD19 Person Visits with Each Activity on Trip - 2003

York Region CD19	All Visits to Region				Overnight Visits to Region			
	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas
2003								
Visit Friends/Relatives	63%	62%	72%	87%	69%	67%	74%	86%
Festivals/Fairs	6%	6%	5%	13%	4%	4%	5%	9%
Cultural Performances	2%	1%	7%	18%	4%	3%	8%	19%
Museums/Art Galleries	2%	1%	5%	15%	3%	2%	6%	15%
Zoos/Aquariums/Botanical Gardens	4%	3%	6%	22%	3%	2%	4%	19%
Sports Events	12%	12%	9%	12%	10%	10%	11%	10%
Shopping	23%	20%	65%	92%	47%	40%	68%	91%
Sightseeing	13%	11%	28%	66%	21%	17%	28%	60%
Bars/Nightclubs	5%	4%	23%	29%	14%	11%	24%	27%
Casinos	1%	1%	4%	15%	3%	2%	4%	12%
Theme Parks	13%	13%	7%	14%	6%	5%	6%	13%
National/Provincial Nature Parks	4%	3%	6%	23%	6%	4%	8%	24%
Historic Sites	2%	2%	11%	22%	4%	2%	13%	17%

Change in Proportion of York Region CD 19 Person Visits with Each Activity on Trip – 2003 to 2004

York Region CD 19	All Visits to Region				Overnight Visits to Region			
	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas
Changes in Percentages 2003 to 2004								
Visit Friends/Relatives	-6%	-6%	-6%	1%	22%	29%	-3%	0%
Festivals/Fairs	-80%	-87%	-12%	3%	-38%	-71%	-12%	63%
Cultural Performances	-19%	-14%	-37%	-37%	-33%	-37%	-32%	-44%
Museums/Art Galleries	6%	2%	8%	1%	34%	57%	5%	-5%
Zoos/Aquariums/Botanical Gardens	-55%	-60%	-31%	-47%	-14%	-2%	-18%	-44%
Sports Events	-19%	-20%	-4%	2%	-62%	-82%	-6%	6%
Shopping*	44%	56%	-20%	-2%	-9%	-9%	-22%	-2%
Sightseeing	-35%	-44%	2%	-10%	-6%	-16%	6%	-5%
Bars/Nightclubs	31%	49%	-17%	-9%	28%	46%	-14%	6%
Casinos	5%	0%	-11%	6%	5%	-2%	-16%	10%
Theme Parks	-45%	-48%	32%	-5%	1%	-7%	27%	-3%
National/Provincial Nature Parks	-46%	-64%	21%	11%	-32%	-74%	4%	11%
Historic Sites	-13%	-25%	-10%	4%	36%	78%	-19%	32%

*The “increase” in shopping in the “total market” in York Region suggests a change in same-day visitors’ activities rather than overnight visitors’ activities. In fact, *overnight* visitors’ are less apt to shop in 2004 than they were in 2003.

Shopping	All Visits to Region				Overnight Visits to Region			
	Total	Canada	USA	Overseas	Total	Canada	USA	Overseas
Changes in Percentages 2003 to 2004								
Ontario	0%	-3%	14%	0%	-1%	-2%	0%	1%
York Region CD 19	44%	56%	-20%	-2%	-9%	-9%	-22%	-2%

C. Notes

¹ Touristic spending that accrues to York Region for residents of the region who are taking trips elsewhere, and fares by non-domestic visitors to the county are not included in the main analysis.

² Total spending assigned to York Region for residents *leaving* the region for other parts of Canada or foreign destinations is estimated to be \$457.0 million. By excluding spending for carrier fares, vehicle rental and operation to leave the region and foreign tourists' domestic carrier fares, York Region obtains a more realistic estimate of the impact of its efforts to attract visitors to the region but represents a departure from the manner in which estimates of tourism spending are often reported. The exclusion noted here is, however, consistent with the manner in which Research Resolutions has reported spending for York Region in historical reports.

³ See note above (#2).

⁴ See detailed tabulations for figures.

⁵ "Visitor spending" estimates of economic impacts of tourism provided by the Ontario Ministry of Tourism generally *exclude* spending on transportation for residents to leave their place of residence. The Ministry also provides a set of estimates of economic impact based on *tourism receipts*. These estimates *include* carrier fares. The estimates provided herein are identical to those provided by the Ministry for *visitor spending*.

⁶ Modified from *Glossary* prepared by Alex Athanassakos, Ontario Ministry of Tourism.

⁷ Excluded from the definition of tourism are: border workers and other travellers that commute to work, temporary immigrants, permanent immigrants, nomads, transit passengers, refugees, members of armed forces, and representatives of consulates and diplomats.



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