



AN OVERVIEW OF TOURISM IN YORK REGION

Domestic & International Travel Surveys (2006)



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Presented to:
The Regional Municipality of York

Presented By:
Research Resolutions & Consulting Ltd.





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

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Table of Contents

I. INTRODUCTION	7
II. EXECUTIVE SUMMARY	9
III. AN OVERVIEW OF TOURISM ACTIVITY IN YORK REGION	13
A. Tourism in 2006	
B. Changes Overtime	
C. Major Markets -Overnight Visits in York Region	
1. The Domestic Market	
2. Key USA Feeder Markets	
3. Overseas	
D. Major Markets – Same-Day Visits in York Region	
IV. TRIP CHARACTERISTICS OF OVERNIGHT VISITORS IN YORK REGION	17
A. Purpose of Trip	
1. Volume	
2. Value	
B. Seasonality	
C. Nights Spent in York Region	
D. Accommodation in York Region	
V. TRAVEL SPENDING IN YORK REGION	21
A. Spending by Category	
B. Average Spending	
VI. OTHER IMPORTANT INFORMATION	25
A. Party Size & Composition	
B. Potential Partners	
C. Economic Impact Estimates for York Region	
VII. APPENDIX	29
A. OMT's Glossary of Economic Impact Terms	
B. Changes Between CTS and TSRC	



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 domestic and international travel surveys (TSRC, ITS¹) made available by the Ontario Ministry of Tourism (OMT). Tourism highlights described in the following pages reflect travel over the 2006 calendar year. Some points to keep in mind:

- "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

- The domestic travel survey was revised in 2005. Now called the Travel Survey of Residents of Canada this survey differs substantively from the previous domestic study (Canadian Travel Survey -CTS).

- Comparisons between historical estimates of domestic tourism volume and value are not provided because of the methodological differences between the TSRC and the CTS.²
- Unless specifically noted, the primary unit of analysis is a person visit --a same-day or overnight stay in York Region.
- Same-day visits by Canadians are those that take them out-of-town and at least 40 kilometres from home (one-way). No distance minimum is imposed on domestic travel for overnight trips or travel of any duration by American or Overseas visitors.
- 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 domestic carrier fares).³ **Within the text and tables provided herein, estimates of spending and economic impact are associated with visits within York Region.**
- People who come to York Region engaged in many different activities while on their trips. In previous reports, this information was provided for all overnight leisure tourists in the region. Unfortunately, usable information on activities among domestic visitors is not available for 2006 and base sizes of leisure tourists from foreign markets are too small to warrant independent analysis. Consequently, no information on trip activities is included in this report.

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.

1 TSRC is the Travel Survey of Residents of Canada; ITS is the International Travel Survey.

2 See Appendix for a description of the key differences between the TSRC and CTS.

3 Consistent with the manner in which the Ontario Ministry of Tourism (OMT) reports visitor spending, domestic carrier fares and some other transportation spending by area residents to leave the region have been excluded (see Research Resolutions' Detailed Tabulations, TSRC, Table 23 for figures). Domestic carrier fares reported by non-domestic visitors to the county that might have been assigned to York Region are also excluded from this analysis.



ii. Executive Summary

In 2006, 2.7 million visitors went to York Region.

Over 2.4 million of these visitors are residents of Canada. In turn, most of these Canadians are residents of Ontario.⁴ The region also attracted increasing numbers of foreign visitors. Tourists from the United States reached 177,000 in 2006, up from about 153,000 in 2004. Growth in the Overseas segment was even more substantial, increasing to 104,000 in 2006 from 59,000 in 2004.

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. Seventy percent of all person visits to the region were same-day excursions in 2006 (1.9 million). About 1.1 million of these visits originated in the Toronto Census Metropolitan Area (CMA).

York Region continues to attract a lower proportion of overnight visitors than does Ontario as a whole.

Of the 103.3 million visitors in Ontario in 2006, approximately 4-in-10 included an overnight stay in the province (42.5 million). In contrast, 3-in-10 of York Region's 2006 tourists spent at least one night in the area (820,000).

Overnight visits by Americans increased from about 133,000 in 2004 to 159,000 in 2006 (+20%). Growth in Overseas overnight visitors was also evident, going from about 52,000 to about 86,000 between 2004 and 2006 (+65%).⁵

Ontario remains York Region's primary feeder market for overnight tourism.

Ontario residents took over half a million overnight trips to York Region (539,000) making them the largest source of tourists for the region. About two-thirds 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 (159,000).

Overseas visitors, primarily from Asia and Europe, represent the smallest overnight tourism flow to York Region (86,000). Because they tend to stay in the region longer than other tourists – the average stay is almost 12 nights – Overseas tourists spend more money in the region than their volume would suggest.

Overnight visitors to York Region from Canada and Overseas countries are most apt to have taken their trip in order to see friends and relatives (VFR).

In 2006, two-thirds of the 575,000 overnight visits in York Region by Canadians were made for this primary purpose (377,000). On a smaller scale, the same proportion of the 86,000 overnight visits in York Region by Overseas tourists were made to see friends and relatives (68%).

At 72,000 or 45% of their 159,000 overnight trips, American tourists also come to York Region on trips to see friends and relatives. They are, however, especially likely to be on business trips (64,000). In fact, of the 87,000 overnight business trips to the region in 2006, Americans account for three-quarters (73%). If the local business environment remains robust, York Region may avoid some of the downturn in tourism from the U.S. that is being experienced in other parts of Canada as fuel prices and border issues erode the U.S. leisure market.

Visitors spent \$248.4 million in York Region during 2006.

In spite of the brevity of their stays in the region, same-day visitors contributed more than one-third of all tourism spending in the region in 2006, or about \$91.1 million. The balance of the \$248.4 million spent on tourism in York Region, or \$157.3 million was spent by overnight visitors.

The VFR and business segments contribute most to overnight spending in York Region.

Because of their high volume, overnight trips to see friends and relatives account for close to half of all overnight spending in the region (\$70.7 million). In contrast, overnight business travellers account for comparatively little overnight tourism volume (11%) but contribute \$51.9 million or one-third of all the overnight spending in York Region (33%).

4 Change over time in the domestic estimates is not provided because the study used to estimate domestic tourism in Canada changed substantially between 2004 and 2006. See Appendix for more information on the changes.

5 See note above regarding change over time in the domestic market. Note that change over time in the US and Overseas markets should be interpreted with caution because of comparatively small sample sizes.

Same-day visitors bring considerable revenue to many sectors of York Region's economy.

Although they do not contribute to the lodging infrastructure in the region, same-day visitors spend considerable amounts of money at the region's gas stations/auto rental companies (\$12.9 million), on food and beverages, primarily in restaurants but also in stores (\$29.6 million), at attractions and recreational events (\$16.8 million) and, of course in the many retail establishments throughout York Region (\$30.9 million).

One-quarter of the \$157.3 million spent by overnight tourists was at York Region's lodging establishments.

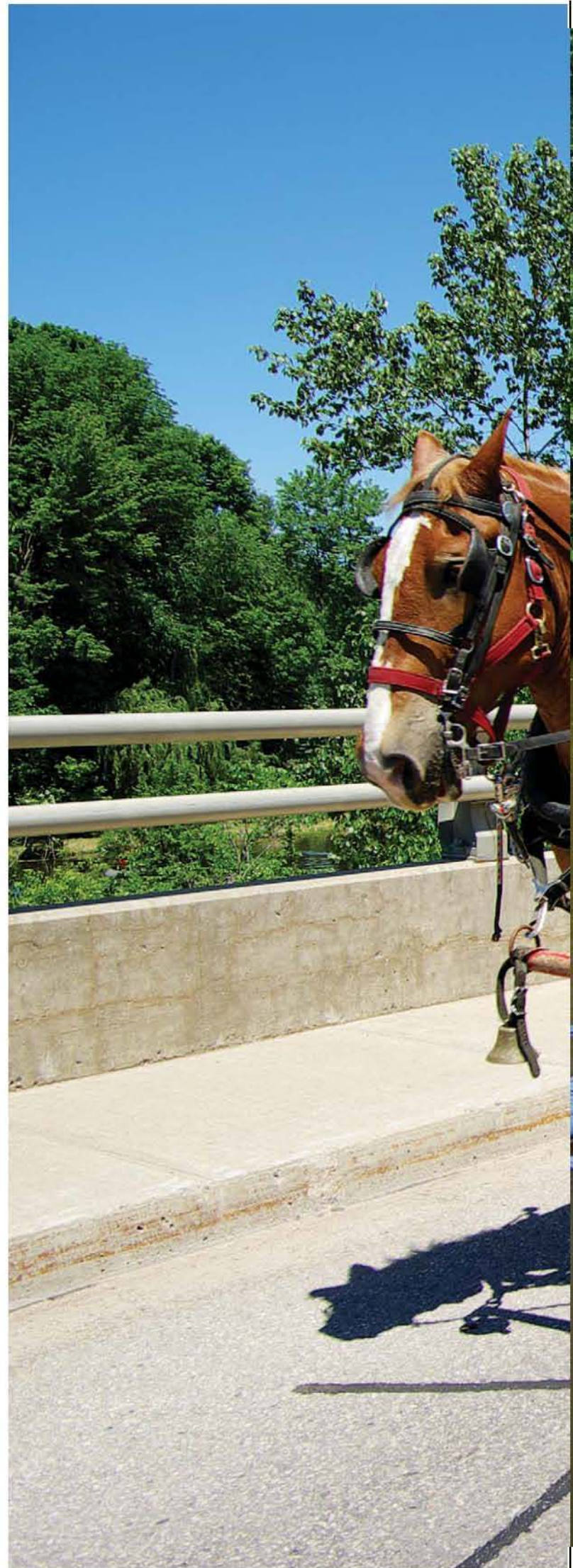
In addition to \$38.7 million on lodging in the region, overnight visitors spent money at the region's gas stations/auto rental companies (\$24.0 million), on food and beverages at restaurants and stores (\$44.7 million), at attractions and recreational events (\$12.5 million) and at retail establishments throughout York Region (\$33.2 million).

Tourism generated 2,285 direct jobs and an additional 564 indirect and induced jobs in York Region and about \$168.5 million in Gross Domestic Product (GDP) for the municipality during 2006.⁶

Based on the \$248.4 million in spending in 2006, tourism activity generated approximately 3,850 direct, indirect and induced jobs throughout Ontario, with 74% of them or about 2,850 jobs in York Region per se. Of the jobs retained in the region, 2,285 were direct jobs – those directly required to deliver goods and services to tourists. In turn, all jobs generated by visitors to York Region yielded \$139.2 million in wages and salaries province-wide. Two-thirds of these wages and salaries, or \$92.0 million (direct, indirect and induced) were retained by York Region.

All levels of government benefited from tourism spending in York Region. Tourism generated \$129.4 million in taxes (direct, indirect, and induced) province-wide. These taxes included \$3.2 million at the municipal level, of which about \$407,000 were retained by the region.

⁶ Includes \$123.2 million in direct GDP, \$21.9 million in indirect and \$23.3 million in induced GDP attributable to York Region.







iii.
*An Overview
Of Tourism Activity
In York Region*

A. Tourism in 2006

York Region attracted 2.7 million person visits in 2006 or between two and three percent of the 103.3 million person visits that took place in Ontario during the year. Canadians, Americans and visitors from other countries spent approximately \$248.4 million on touristic activities in the region.

Table 1: Overview of Tourism in York Region, 2006

	Person Visits		Tourism Spending	
Total	2,716,000		\$248,400,000	
Canada				
USA	180,000	7%	\$62,200,000	
Overseas	100,000	4%	\$45,100,000	
Same-Day Visit			\$91,100,000	
Canada			\$89,200,000	
USA	18,000	1%	\$1,000,000	1%
Overseas	18,000	1%	\$800,000	1%
Overnight Visit	820,000			
Canada	575,000		\$51,800,000	
USA	159,000		\$61,300,000	
Overseas	86,000		\$44,200,000	

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Tables 1, 2, Harmonized. Note: estimates for domestic visitors include adults only (18 years of age or over).

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.

Seven-in-ten of all visits to York Region were same-day excursions (1.9 million).⁷ The remainder were overnight visits (820,000). Even though same-day trips represent most of the volume of tourism in the region, overnight trips represent most of the value. Almost two-thirds of all spending in the region, or \$157.3 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 2.4 million visits to the region and \$141.0 million in travel spending. Americans account for about 177,000 visits (7%) but a considerably higher proportion of tourism spending --\$62.2 million or 25%. While only 1-in-25 visits were made to the region by Overseas travellers in 2006 (104,000), these tourists contributed almost one-fifth of tourism spending or \$45.1 million (18%).

As has been the case historically, York Region attracts a higher proportion of same-day excursionists (70%) than does the province as a whole (59%). Within the overnight market, most trips to York Region are made to visit with friends and relatives (VFR, 62%). A further 1-in-4 overnight visitors to the region are travelling for pleasure purposes and about one-tenth are on overnight business trips.

Overnight pleasure travel is less common in York Region (25%) than it is in the province as a whole (47%). Conversely, overnight VFR travel is an appreciably more common trip driver for the region (62%) than is the case in Ontario (41%).

Table 2: Tourism in 2006 York versus Ontario

	York Region		Ontario	
Total Person Visits	2,700,000		103,300,000	
Same-day				
Overnight (Total)	820,000			
Visit Friends/Relatives	508,000			
Pleasure	203,000			
Business	87,000		2,000,000	8%
Other	23,000	3%	1,200,000	4%

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Table 1. Note: estimates for domestic visitors include adults only (18 years of age or over). Figures rounded to nearest 100,000.

⁷ Same-day excursions include out-of-town trips of 40 kilometres one way from home made by residents of Ontario.

B. Changes Over Time

As noted in the introduction to this report, direct comparisons in domestic tourism volume and value are not provided because of the major changes made by Statistics Canada in the methodology for the domestic travel survey between 2004 and 2006.⁸

The U.S. and Overseas markets would appear to have increased in size for York Region between 2004 and 2006 although because of small sample sizes, these growth estimates should be interpreted with caution. Over the two year period, overnight and same-day visitors from the U.S. increased by about 16%, from 153,000 in 2004 to 177,000 in 2006. Even more substantive growth seems to have been experienced in the Overseas market, increasing from about 59,000 in 2004 to approximately 104,000 in 2006 (+76%).

Table 3: Change over Time –International Person Visits

	2001	2002	2003	2004	2005
USA					
	46,000	44,000	44,000	59,000	

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Table 1. 2004 Overview of Tourism in York Region Report.

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 2006, Ontario residents made 539,000 overnight person visits to York Region, or 66% of all overnight visits. Relatively little overnight visitation to York Region originates in other parts of Canada (4%). In fact, half of all overnight trips by Canadians from other provinces originate in Montréal at 18,000 (2%).

The Toronto CMA, including Metro Toronto and portions of York Region itself, is the largest single market for overnight tourism in the region (30%). Other Ontario centres that make noteworthy contributions to overnight tourism in York Region are Ottawa-Gatineau (3%) and the Niagara Regional Municipality (3%).

Table 4: Key Overnight Markets

Overnight Person Visits		
Total	820,000	100%
<i>In rank order within major origin group</i>		
Canada	575,000	70%
Ontario (Total)	539,000	66%
Toronto CMA	243,000	30%
Metro Toronto (CD 20)	105,000	13%
York Region	83,000	10%
Ottawa-Gatineau CMA	21,000	3%
Montréal CMA	18,000	2%
Niagara Falls CMA	16,000	2%
U.S.A.	159,000	19%
Michigan	29,000	4%
California	21,000	3%
New York	16,000	2%
New Jersey	11,000	1%
Pennsylvania	10,000	1%
Other Countries	86,000	11%
Asia	39,000	5%
Israel	10,000	1%
Europe	33,000	4%
United Kingdom	11,000	1%

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Table 3.

2. KEY USA FEEDER MARKETS

Americans represent almost one-fifth of all overnight visitors to York Region, or 159,000 person visits (19%). The region tends to draw overnight American visitors from traditional feeder states including Michigan (29,000), New York (16,000), New Jersey (11,000) and Pennsylvania (10,000). The region also drew about 21,000 overnight visitors from California.



3. OVERSEAS

One-tenth of York Region's overnight visitors in 2006 were from Overseas, representing about 86,000 visitors. Historically, Overseas visitors from Europe predominated in York Region but in 2006, Asian visitors (39,000) surpassed those from Europe (33,000). The United Kingdom (11,000) was the most prominent source of European visitors whereas Israel (10,000), followed by Hong Kong, China and Japan were key Asian feeder markets.⁹

The overnight visitor pattern for York Region is very similar to the provincial pattern with respect to visitor origin. There are, however, indications to suggest that York was slightly more successful than was the province as a whole in attracting overnight visitors from Overseas countries in 2006:

- 8-in-10 overnight visitors to Ontario live in Canada;
- 1-in-6 overnight visitors live in the U.S.A.; and
- 1-in-25 live in other countries.

Table 5: Overnight Visitors 2006 York versus Ontario

	York Region		Ontario	
Total Overnight Person Visits	820,000		42,500,000	
Canada	575,000	70%	33,700,000	79%
USA	159,000	19%	6,900,000	16%
Overseas	86,000	11%	1,900,000	4%

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized, Table 3. Note: estimates for domestic visitors include adults only (18 years of age or over). Figures are rounded to the nearest 100,000.

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

Ontario residents made almost all of the 1,895,000 same-day person visits to York Region in 2006 (98%). Almost three-fifths of the region's same-day trips originate in the Toronto Census Metropolitan Area (CMA, 1,087,000, or 57%). When combined with the 243,000 overnight trips residents of the Toronto CMA made to York Region in 2006 (30% of all overnight trips to the region), Toronto is the largest single feeder market for tourism in York Region, by far.

Americans and visitors from other countries each took about 18,000 same-day excursions York Region during 2006. 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.

Table 6: Key Same-day Markets

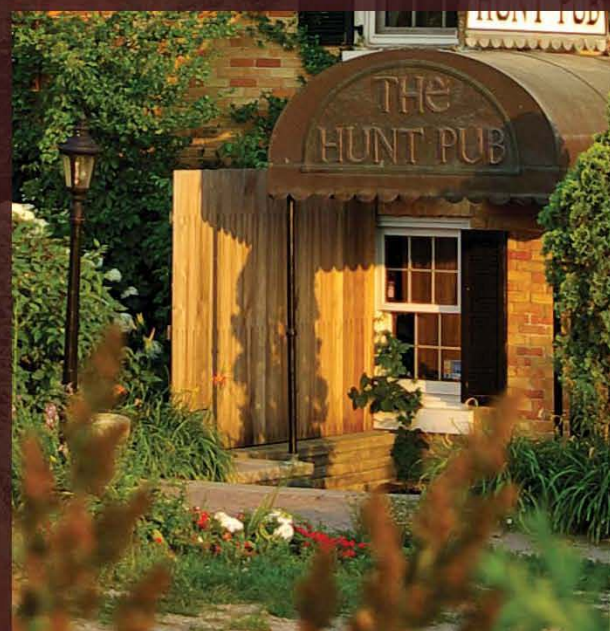
	Same-day Person Visits	
Total	1,895,000	
Canada	1,859,000	98%
U.S.A.	18,000	1%
Other Countries	18,000	1%
Ontario (Total)	1,858,000	98%
Toronto CMA	1,087,000	57%
Metro Toronto (CD 20)	570,000	30%
York Region	155,000	8%

Source: Research Resolutions, 2006, Harmonized TSRC/ITS Detailed Tables, Harmonized Table 3.

8 See appendix for a description of major changes between the Canadian Travel Survey and the Travel Survey of Residents of Canada.

9 See detailed tabulations for figures.

iv.
*Trip Characteristics of
Overnight Visitors
In York Region*



A. Purpose Of Trip

1. VOLUME

Visiting friends and relatives (VFR) is the most prominent motivator for overnight trips to York Region. VFR travellers represent over three-fifths of the overnight tourist market, dominated by Canadians (377,000). One-quarter of the region's overnight market was motivated by pleasure (203,000), again, dominated by the domestic market (172,000). The overnight business tourism market represents about one-tenth of all overnight touristic activity in York Region.

Table 7: Purpose of Overnight Trips		
	Overnight Person Visits	
Overnight Person Visits	820,000	
Pleasure	203,000	25%
Canadians	172,000	21%
Americans	19,000	2%
Overseas	11,000	1%
Business	87,000	11%
Canadians	16,000	2%
Americans	64,000	8%
Overseas	8,000	1%
Visit Friends & Relatives	508,000	62%
Canadians	377,000	46%
Americans	72,000	9%
Overseas	59,000	7%

Source: Research Resolutions, 2006, Harmonized TSRC/ITS Detailed Tables, Harmonized Table 3. Figures do not add to total because "Other purposes" is not displayed.

Unlike other purpose segments, the business market tends to be dominated by Americans. At 64,000 of the 87,000 overnight business trips to the region over the year, Americans account for almost 3-in-4 of these trips.

Table 8: Purpose of Overnight Trips By place of residence			
	Pleasure	Visit Friends & Relatives	Business
Overnight Person Visits	203,000	508,000	87,000
Canada	85%	74%	18%
USA	9%	14%	73%
Overseas	6%	12%	9%

Source: Research Resolutions, 2006, Harmonized TSRC/ITS Detailed Tables, Harmonized Table 1. Figures do not add to total because "Other purposes" is not displayed. All percentages are based on total overnight person visits. Percentages may not add to 100% due to rounding.

2. VALUE

Spending by overnight visitors to York Region is dominated by those travelling for business and to see friends and relatives. The overnight VFR market represents close to half of all overnight spending in the region or about \$70.7 million (45%). The important contribution this sector makes to tourism revenue in York Region has more to do with the number of visitors it represents and, in the case of Overseas visitors, their length of stay than with the amount each visitor spends.

Table 9: Spending in York Region on Overnight Visits		
Total	\$157,300,000	
Pleasure	\$25,300,000	16%
Business	\$51,900,000	33%
Visit Friends & Relatives	\$70,700,000	45%
Other	\$9,400,000	6%

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized 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. Values are rounded to nearest 100,000.

Overnight business trips contributed one-third of all overnight spending (\$51.9 million or 33%) in 2006. As in the past, overnight business travel remains high yield travel. The segment accounts for about one-tenth of overnight person visits in York Region (11%) but three times this proportion in overnight visitor spending (33%). 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.

Nonetheless, overnight visitors in 2006 were about twice as likely to be in York Region during each of the spring (30%) and summer (29%) calendar quarters as they were to visit during the heart of the winter (16%). One-quarter of York Region's overnight tourists came during the autumn/early winter (October – December), possibly to celebrate family-oriented holidays such as Thanksgiving and Christmas.

Table 10: Calendar Quarter of Overnight Visits

Quarter	All Markets	Canada	USA	Overseas
1st Quarter (Jan-Mar)	16%	14%	18%	22%
2nd Quarter (Apr-June)	30%	34%	23%	17%
3rd Quarter (July-Sept)	29%	27%	33%	34%
4th Quarter (Oct-Dec)	25%	25%	26%	27%

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Table 6.

While all overnight trips are evenly distributed between the second (30%) and third calendar quarters (29%), this is not the case within the pleasure travel segment. Appreciably more of York Region's overnight pleasure trips occurred between July and September 2006 (39%) than between April and June (22%).

2006

1st Quarter (Jan-Mar)	15%
2nd Quarter (Apr-June)	22%
3rd Quarter (July-Sept)	39%
4th Quarter (Oct-Dec)	25%

C. Nights Spent In York Region

Canadian overnight visitors to York Region spend about two nights, on average, in the region (2.0). American overnight visitors spend three nights (3.0) and Overseas visitors spend almost 12 nights, on average, in York Region.

Table 11: Average Length of Stay in York Region

Overnight Person Visits	Total	Canada	USA	Overseas
Average person nights	3.2	2.0	3.0	11.6
Average party size	1.6	1.7	1.4	1.6
Total person nights	2,604,000	1,131,000	473,000	1,000,000

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Tables 5, 7.

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 2006 visitors spent 2.6 million person nights in York Region. More than two-fifths of these nights were spent by Canadians (1,131,000 or 43%). Reflecting their lengthy stay in the region, Overseas visitors spent almost as many nights as did Canadians (1,000,000 or 38%). The remaining person nights were spent by American visitors to the region (473,000).

D. Accommodation In York Region

As noted in the previous section, overnight visitors to York Region spent approximately 2.6 million person nights in private and commercial accommodation facilities during 2006. Close to four-fifths of these person nights were spent in non-commercial accommodation – private homes or private cottages (2.1 million, or 79%). About 360,000 or one-seventh were spent in hotels, motels, bed and breakfast establishments or other forms of roofed commercial lodging (14%).

Table 12: Lodging Nights in York Region

	All Markets
Total Person Nights in York Region	2,600,000
Roofed Commercial Accommodation	360,000
Campgrounds/Trailer Parks	93,000
Private Homes/Private Cottages	2,100,000
Accommodation Type Unknown	98,000

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Table 5.

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). Within the domestic market, over 8-in-10 nights spent in York Region are in unpaid lodging. This proportion increases to 9-in-10 within the Overseas market.



Table 13: Lodging Nights in York Region

	Canada	USA
Total Person Nights in York Region		
Hotel	62,000	25,000
Motel	19,000	18,000 **
Other Roofed Commercial	56,000	15,000 **
Camping or trailer park	91,000	** 2,000
Private home*	902,000	903,000
Other	**	28,000 70,000

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Table 5. *Home of friend/relative or private cottage. **Less than 0.5%.

American overnight visitors are more apt to rely on hotels (165,000 person nights) than are Canadians (62,000) but Canadians rely more heavily on motels and other forms of commercial lodging (75,000) than do their U.S.A. counterparts (33,000). Compared to foreign tourists, Canadians are particularly likely to be found in campgrounds or trailer parks in York Region (91,000 person nights).

Americans' reliance on commercial accommodation reflects the importance of business travel to York Region's properties. If the local business environment remains robust, York Region may avoid some of the downturn in tourism from the U.S. that is being experienced in other parts of Canada as fuel prices and border issues erode the U.S. leisure market.



v.
*Travel Spending
in York Region*

A. Spending by Category

Visitor spending in York Region benefits many sectors of the local economy. The \$248.4 million spent in the area contributes to the accommodation sector (\$38.7 million, or 16%), restaurants, bars and grocery stores (\$74.3 million, or 30%), vehicle operation and rental (\$37.0 million, or 15%), attractions (\$29.3 million or 12%) and the retail sector (\$64.0 million, or 26%).

Table 14: Visitor Spending in York Region, By Category - Amounts

	Total	Same-day	Overnight
All Categories (\$)	\$248,400,000	\$91,100,000	\$157,300,000
Canadian Carrier Fares	\$2,400,000	\$100,000	\$2,300,000
Taxis, Local Buses	\$2,700,000	\$800,000	\$1,900,000
Automobile Operation/Rental	\$37,000,000	\$12,900,000	\$24,000,000
Accommodation	\$38,700,000	-	\$38,700,000
Food/Beverages	\$74,300,000	\$29,600,000	\$44,700,000
Recreation/Entertainment	\$29,300,000	\$16,800,000	\$12,500,000
Retail/Other	\$64,000,000	\$30,900,000	\$33,200,000

Source: 2006 TSRC, ITSUS and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files, Harmonized Table 10. All percentages are based on total spending in York Region. Figures and percentages may not add to total because of rounding. Figures are rounded to nearest 100,000. *Less than 0.5%

Not surprisingly, the overnight market contributes substantially to the lodging sector but the same-day market spends a substantive amount of money at York Regions restaurants, bars, and food stores (\$29.6 million) and at its gas stations (\$12.9 million). In fact, the same-day market spends almost the same amount of money at retail establishments (\$30.9 million) and more at the region's recreation and entertainment facilities (\$16.8 million) than does the overnight market (retail, \$33.2 million; recreation/entertainment, \$12.5 million).

Table 15: Visitor Spending in York Region, By Category - Proportions

	Total	Same-day	Overnight
All Categories (\$)	\$248,400,000	\$91,100,000	\$157,300,000
Canadian Carrier Fares	1%	*	2%
Taxis, Local Buses	1%	1%	1%
Automobile Operation/Rental	15%	14%	15%
Accommodation	16%	-	25%
Food/Beverages	30%	33%	28%
Recreation/Entertainment	12%	19%	8%
Retail/Other	26%	34%	21%

Source: 2006 TSRC, ITSUS and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files, Harmonized Table 10. All percentages are based on total spending in York Region. Figures and percentages may not add to total because of rounding. *Less than 0.5%



Within the overnight travel segment, 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 (24%) and a lower proportion on accommodation (15%). Americans, on the other hand, tend to concentrate more of their spending on accommodation (43%) than do visitors from other parts of the world. Overseas visitors spend the highest proportion on retail (46%).

Table 16: Visitor Spending in York Region, By Category - Proportion

	Overnight Visitors		
	Canada	USA	Overseas
Overnight Visitor Spending All Categories	\$51,800,000	\$61,300,000	\$ 44,200,000
Canadian Carrier Fares	3%	1%	1%
Taxis, Local Buses	1%	1%	1%
Automobile Operation/Rental	24%	15%	5%
Accommodation	15%	43%	11%
Food/Beverages	34%	26%	25%
Recreation/Entertainment	8%	6%	10%
Retail/Other	17%	7%	46%

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files, Harmonized Table 10. All percentages are based on total spending in York Region. Figures and percentages may not add to total because of rounding.

B. Average Spending

Every same-day visit to York Region generates about \$36.00 in consumer spending and every overnight visit generates almost five times this amount, or about \$164.00 per person.

At \$129.00, American visitors have especially high per person per night spending, largely because about two-fifths of them are on business trips. For most of these business travellers, spending in the region includes payment for commercial lodging. In contrast, Overseas visitors spend only \$41.00 per person per night but have the highest per person visit spending (\$512.00). These low per night but high per trip averages reflect the propensity of Overseas visitors to billet with friends and relatives, thereby reducing their costs for room and board and their comparatively lengthy stays in York Region (about 12 nights, on average).

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 night that each American visitor spends in York Region, \$129.00 are left in the community. The corresponding estimate for Canadians is \$37.00. Overseas visitors spend \$41.00 per-person-pernight during their stay in York Region.

Table 17: Average Spending in York Region

Average Spending	All Markets	Canada	USA	Overseas
Per Person Same-day	\$36.00	\$36.00	N/A	N/A
Overnight per person per visit	\$164.00	\$73.00	\$385.00	\$512.00
Overnight per person per night	\$53.00	\$37.00	\$129.00	\$41.00

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Table 11. Base sizes for same-day U.S.A and Overseas visitors are too small to warrant analysis.



RECREATION TOURISM IN YOUR REGION



vi.
*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 18 years for Canadians; under 15 years for foreign visitors). Likely because so many of them are travelling on business trips, Americans are most apt to be travelling in adult-only parties (98%).

Table 18: Party Size & Composition – Overnight Visitors			
	Canada	USA	Overseas
Average Party Size	1.7	1.4	1.6
Party Composition			
Adults Only	81%	98%	88%
With Children	19%	2%	12%

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. "Children" are under 15 years for international origins and under 18 years for domestic origins. Harmonized Table 7.

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

Table 19: Other Locations Visited on Trips with an Overnight Stay in York Region			
	Canada	USA	Overseas
Niagara Falls	2%	*	6%
Ottawa/	*	*	6%
Montréal	*	2%	7%
Québec City	*	1%	4%

Source: 2006 TSRC, ITS US and ITS OVS special tabulations, prepared by Research Resolutions from Statistics Canada's public use micro data files. Harmonized Table 14. *Less than 0.5%.

Overseas York Region visitors are more likely than their American or Canadian counterparts to have spent at least one night in Niagara Falls (6%) or Montréal (7%), 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 \$248.4 million on tourism activities and services in the region.¹⁰ 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.

Table 20: Tourism Economic Impact 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)	\$168,485,000	\$73,648,000	\$242,133,000
Direct	\$123,237,000	\$11,545,000	\$134,782,000
Indirect	\$21,935,000	\$32,328,000	\$54,263,000
Induced	\$23,313,000	\$29,775,000	\$53,088,000
Labour Income/Wages	\$92,038,000	\$47,191,000	\$139,229,000
Direct	\$64,258,000	\$7,966,000	\$72,224,000
Indirect	\$14,887,000	\$21,686,000	\$36,573,000
Induced	\$12,900,000	\$17,539,000	\$30,439,000
Number of Jobs	2,849	1,004	3,853
Direct	2,285	194	2,479
Indirect	312	440	752
Induced	252	370	622
Taxes (All Levels)	\$98,487,000	\$30,935,000	\$129,422,000
Federal	\$51,217,000	\$16,053,000	\$67,270,000
Provincial	\$46,863,000	\$12,100,000	\$58,963,000
Local	\$407,000	\$2,782,000	\$3,189,000

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

¹⁰ "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 correspond to those provided by the Ministry for visitor spending.

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 \$248.4 million in York Region, their spending generated about \$168.5 million in total economic activity (GDP) that was retained in the region and an additional \$73.6 million that benefited economies in other parts of the province. Of the \$168.5 million in GDP retained in York Region, about \$123.2 million were “direct” impacts.¹¹

Tourism spending in York Region produced about 2,850 jobs retained in the region and a further 1,000 that benefited other parts of Ontario, for a total of about 3,850 jobs. Eighty percent of the jobs retained in York Region were “direct jobs” – those directly required to deliver goods and services to tourists (2,285). In turn, all jobs generated by visitors to York Region yielded \$139.2 million in wages and salaries province-wide. Two-thirds of these wages and salaries, or \$92.0 million (direct, indirect and induced) were retained by York Region.

All levels of government benefited from tourism spending in York Region. Tourism generated \$129.4 million in taxes (direct, indirect, and induced) province-wide. These taxes included \$3.2 million at the municipal level, of which about \$407,000 were retained by the region. Tourism in the region also generated almost \$59.0 million in taxes at the provincial level and \$67.3 million at the federal level.

11 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. 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.)



vii. *Appendix*

A. OMT's Glossary of Economic Impact Terms

The Economic Impact of Visits in York Regional Municipality and other Ontario regions: since no Ontario region is economically self-sustaining, in order to produce the goods and services demanded by its visitors, it will need to import some goods and services from other regions. As such, some of the economic benefits of the visitors' spending in York Regional Municipality will spill over to other Ontario regions, such as the one you have selected as "additional". If the second column of Table 1 contains only zeros, then that means that York Regional Municipality does not trade with that region.

Gross Domestic Product (GDP): value of goods and services produced by labour and capital located 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.

Direct impact: refers to the impact generated in businesses or sectors that produce or provide goods and services directly to travelers, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc. Direct impact on GDP, employment and tax revenues is also called tourism GDP, tourism employment and tourism tax revenues.

Indirect impact: refers to the impact resulting from the expansion of demand from businesses or sectors directly produce or provide goods and services to travelers, to other businesses or sectors.

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

Employment: refers to number of jobs, include full-time, part-time, seasonal employment, as well as both employed and self-employed.

Federal tax revenues: include personal income tax, corporate income tax, commodity tax (GST, gas tax, excise tax, excise duty, air tax and trading profits) and payroll deduction that collected by the federal government.

Provincial tax revenues: include personal income tax, corporate income tax, commodity tax (PST, gas tax, liquor gallonage tax, amusement tax and trading profits) and employer health tax that collected by Ontario provincial government.

Municipal tax revenues: include business and personal property taxes that collected by the municipalities. Collection, however, does not follow immediately the consumption or production of goods and services in a municipality by visitors (as is the case with GST or personal income taxes). Rather, these taxes show the percent of the total property taxes collected by a municipality that can be attributed to tourism because of tourism's contribution to the economic activity of the municipality and hence its tax base.

Industry: The industry follows Statistics Canada's 1997 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.



B. Changes between CTS and TSRC

CHART 1 MAJOR DIFFERENCES BETWEEN TSRC AND CTS		
	TSRC	CTS
Whose travel is being measured?	Adult residents of Canada's ten provinces (18 years of age or over).	Residents of Canada's ten provinces 15 years of age or over are sampled and children's travel is estimated.
Tourism trips – main purpose	Out-of-town trips with main purpose of visiting friends or relatives, for pleasure, vacation or holiday, for personal or business reasons (main reason the trip took place).	Trips taken for reasons such as visiting friends and relatives, pleasure, personal or business trips (respondent's main reason for taking the trip).
Main purpose categories available for analysis	1. Pleasure, vacation or holiday 2. Visit friends or relatives 3. Conference or convention (includes both business and non-business) 4. Other Business, non-routine 5. Shopping, non-routine 6. Other	1. Pleasure, vacation, holiday 2. To visit friends and relatives 3. For business 4. Other reason 5. A convention (business & non-business)
Non-tourism trips (out-of-scope)	• Travel by members of the crews of airlines, trains, ships, etc. • Regular commuting to work • Commuting to school • Travel in ambulance to a hospital or clinic • Trips that did not originate in Canada • Trips longer than one year • Travel by truck drivers • Travel to conduct routine sales or service calls • Travel for military and diplomatic reasons • Routine trips (e.g., errands, household grocery shopping, standing appointments, etc.). • Moving (or helping someone) to a new residence (or school)	
Other out-of-scope	Trips with a main reason of funerals are excluded from TSRC processing/estimates	
Proxy for outside usual environment - overnight trip	Out-of-town (no distance minimum)	
Proxy for outside usual environment same-day trip	Out-of-town and 40 kms or more one-way from home (all provinces)	
Where Canadian airline fares are assigned.	Distributed to census division and sub-division of the main airport associated with each of (1) the trip's origin, (2) Canadian locations in which overnight stops were made, and (3) Canadian destination.	





*Markham • Vaughan • Richmond Hill • Newmarket • Aurora
Georgina • Whitchurch-Stouffville • East Gwillimbury • King*

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