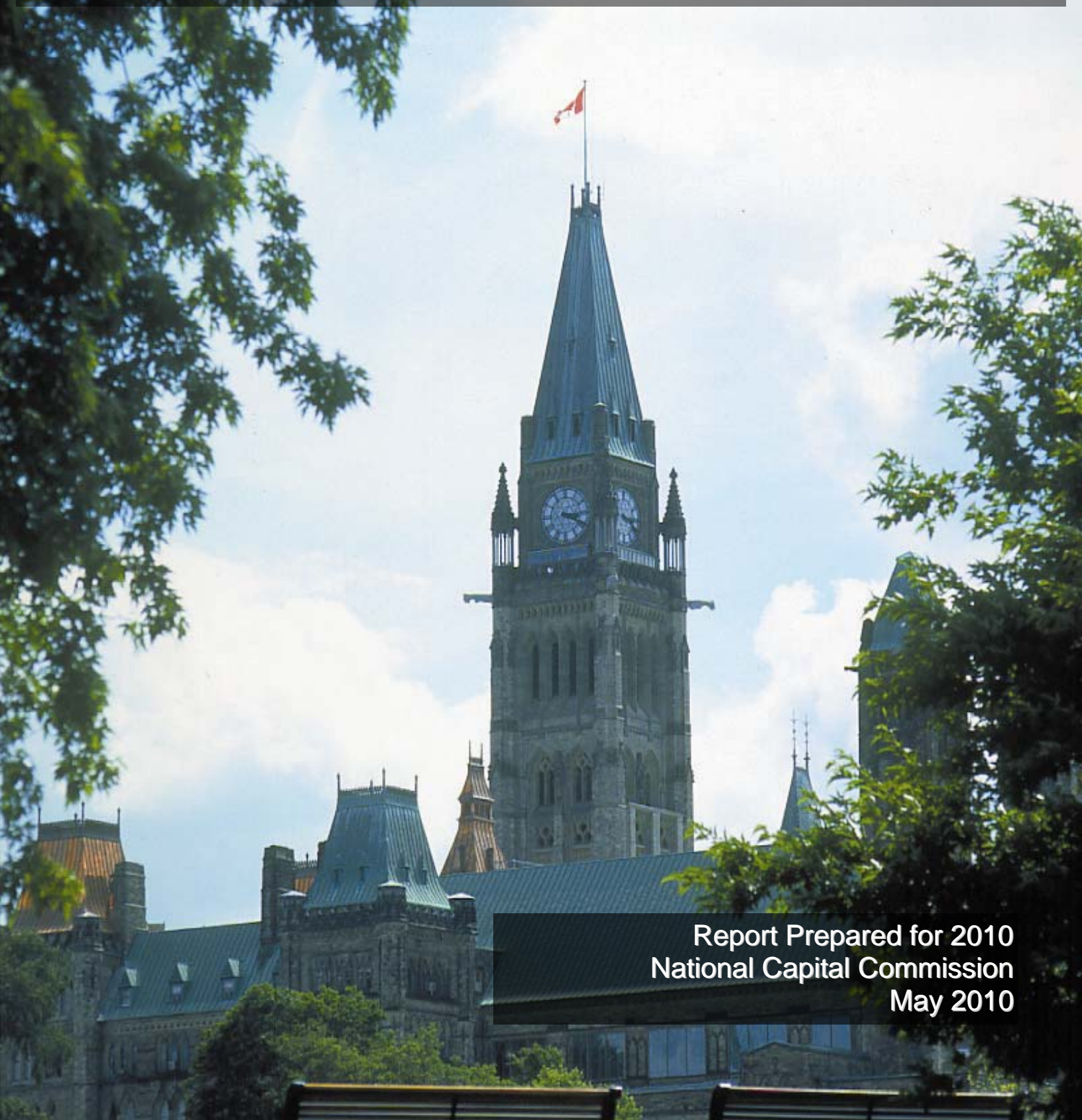


TOURISM IN CANADA'S CAPITAL REGION 2010



Report Prepared for 2010
National Capital Commission
May 2010

Executive Summary

Based on Statistics Canada's Cities Project 2008, the "Tourism in Canada's Capital Region 2010" report was created primarily to provide a detailed synopsis of the three major visiting markets to Canada's Capital Region: the domestic "Canadian" market, travelers from the United States and overseas visitors. These markets are further profiled by same-day and overnight visits.

The report will provide an understanding of the nature and volume of the market that visits Canada's Capital Region. It can be used both as an information and planning tool for future programming, marketing, and outreach networks, development of the Capital's Core Area, urban parks and Gatineau Park.

The report is divided into four chapters. Chapter I includes an overall outlook on all visits to Canada's Capital Region (Canadians, Americans and overseas) providing the reader with the "big picture" of tourism in Canada's Capital Region. Chapter II contains a detailed analysis of the Canadian travel market through tables and charts.

Chapters III and IV examine the American and overseas markets respectively.

Methodology

The Tourism in Canada's Capital Region 2010 report is an analysis of domestic and international tourism activity based on the 2008 Travel Survey of Residents of Canada (TSRC) and the International Travel Survey (ITS) conducted by Statistics Canada. Financed by a federal/provincial/territorial (FPT) partnership of tourism departments, Research Resolutions & Consulting Ltd. customizes the survey data to reflect spending and lodging in provinces, cities and other administrative areas. The FPT partnership made the adjusted data files available to interested Canadian municipal bureaus of tourism and convention at no charge.

The estimates provided to a consortium of these municipal bureaus of tourism and convention provide 2006, 2007 and 2008 profiles of the three main components of the Canadian tourism clientele, i.e. the domestic market, the American market and the overseas market. The report outlines the same variables for major urban markets across Canada.

The TSRC is conducted by Statistics Canada for its System of National Accounts and for national and provincial tourism authorities. It is a telephone survey among approximately 14,000 randomly selected household members each month. Respondents are drawn from Statistics Canada's Labour Force Survey's household sampling frame. Selected adults (18+ years) are asked to report on out-of-town trips they took in the month immediately preceding the interview period. Details are then obtained about each trip that qualifies as a tourism trip.

Data for tourists from the United States and overseas are taken from the ITS. Foreign travellers are asked to report on the characteristics of their trip to Canada, including lodging, activities, spending and travel party details. The ITS includes self-completion entry surveys and exit surveys at Canada's major airports among tourists in key overseas markets. Questionnaire data are projected to frontier counts (all ports of entry) as captured by Canada Border Security Agency (CBSA).

There are certain limitations to the 2008 data set which do not allow for comparisons of US and overseas estimates with those from previous years, notably the application of the Primary Automated Lookout System (PALS) Adjustment and a software error in processing ITS Overseas records. These limitations are reflected in this report's content. For further information, please consult "*A User's Guide: Customized Tabulations of International & Domestic Travel Surveys*" in appendix A.

Visitors to Canada's Capital Region ... at a glance

In 2008, 7.0 million visitors¹ (three markets: Canadians, Americans, and overseas) came to Canada's Capital Region, which resulted in over \$1.2 billion in spending. In 2008, just fewer than 90% of total visitors to CCR were Canadians, which represented nearly 75% of total spending. The average length of stay ranges between 1 and 3 nights, consistently for all three markets. The travelling party size is also consistent for all three markets. Tourists to Canada's Capital Region tend to visit alone or in couples.

The number of Canadian visitors to Canada's Capital Region was 6.1 million in 2008, a 9.5% decrease from 2007. They spent 893 million dollars (excluding commercial carrier fares), a 1% decrease from 2007. Over half of these visitors did not stay overnight in the capital. The number of same-day Canadian visitors to Canada's Capital Region was 3.2 million in 2008, a 12% decrease from 2007. Their spending totaled 238 million dollars in 2008, a 13.5% decrease from 2007, whereas the number of overnight Canadian visitors to Canada's Capital Region was 2.9 million in 2008, a 6.4% decrease from 2007. Their spending totaled 655 million dollars in 2008, a 4.6% increase over 2007.

Trips taken by Canadians to Canada's Capital Region were primarily for "visiting friends or relatives", followed by "pleasure". Although "visiting friends or relatives" captured the highest volume of visitors to CCR, "pleasure" visitors spent the most in 2008.

Just over 60% of visitors to Canada's Capital Region were from Ontario and over 30% from Quebec.

Among the metropolitan areas, most of the visitors to Canada's Capital Region originated from Montreal (2007: 18%, 2008: 18%), and Toronto (2007: 12%, 2008: 10%).

¹ For the purpose of this report, Visitors might include more than one visit to the Region in a given year

The highest volume of Canadian visitors to Canada's Capital Region was in August (10%) compared to August (12.4%) in 2007 and December (10.6%) in 2006.

In terms of the American market, the number of American visitors to Canada's Capital Region was 421,000 in 2008. Spending totaled 132 million dollars (excluding commercial carrier fares) in 2008. The number of same-day American visitors to CCR was 113,000 in 2008. Spending totaled 5 million dollars in 2008.

Overnight American visitors to Canada's Capital Region numbered 307,000 and spent 127 million dollars in 2008.

Travel to Canada's Capital Region by American residents was primarily for "pleasure", followed by "visiting friends or relatives". However, "Business" visitors spent the most in 2008.

Canada's Capital Region was the preferred destination for residents from New York State (27.6%), followed by California and Pennsylvania.

For the overseas market, the number of overseas visitors to Canada's Capital Region was 427,000 in 2008 and they spent a total of 175 million dollars. The number of same-day overseas visitors to Canada's Capital Region in 2008 was 66,000 and they spent 3.2 million dollars, whereas overnight overseas visitors to CCR were 361,000 and they spent 172 million dollars.

Travel to Canada's Capital Region by overseas residents was primarily for "pleasure", followed by "visiting friends or relatives".

The largest segment of overseas visitors came from Europe (60.3%) followed by Asia (16.9%). The European segment also spent the most in Canada's Capital Region, which represents 60% of total overseas spending for 2008.