

Executive Summary

Based on Statistics Canada's Cities Project 2006 and 2007, the "Tourism in Canada's Capital Region" 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 report is an analysis of domestic and international tourism activity based on the 2006 and 2007 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 and 2007 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).

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

In 2006 and 2007, respectively 7.5 million and 7.6 million visitors¹ (three markets: Canadians, Americans, and overseas) came to Canada's Capital Region, which resulted in over \$1.1 billion and \$1.2 billion in spending. Just fewer than 90% of total visitors to CCR were Canadians, which represented more than 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 6.7 million in 2007, a 2.2% increase over 2006. They spent 901 million dollars (excluding commercial carrier fares) in 2007, a 5.1% increase over 2006. 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 3.7 million in 2007, a 5.4% increase over 2006. Their spending totaled 275 million dollars in 2007, an 11.3% increase over 2006, whereas the number of overnight Canadian visitors to Canada's Capital Region was 3.1 million in 2007, a 1.3% decrease over 2006. Their spending totaled 626 million dollars in 2007, a 2.6% increase over 2006.

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 2006 and 2007.

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 (2006: 20%; 2007: 18%), and Toronto (2006: 9%; 2007: 12%).

The highest volume of Canadian visitors to Canada's Capital Region were respectively in December (10.6%) and in August (12.4%).

In terms of the American market, the number of American visitors to Canada's Capital Region was 481,000 in 2007, a 6.1% increase over 2006. Spending totalled 122 million dollars (excluding commercial carrier fares) in 2007, a 16.8% increase over 2006. The number of same-day American visitors to CCR was 192,000 in 2007, a 10.1% increase over 2006. Spending totalled 10.6 million dollars in 2007, a 26.7% decrease over 2006. Overnight American visitors to Canada's Capital Region numbered 289,000 in 2007, a 3.5% increase over 2006. Spending totalled 111 million dollars in 2007, a 23.8% increase over 2006.

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

Travel to Canada's Capital Region by American residents was primarily for "pleasure", followed by "visiting friends or relatives". "Pleasure" visitors also spent the most in 2006 and 2007.

Canada's Capital Region was the preferred destination for residents from New York State (2006: 38%; 2007: 32%), followed by Massachusetts, and California.

For the overseas market, the number of overseas visitors to Canada's Capital Region was 378,000 in 2007, a 10.3% decrease over 2006. They spent a total of 153 million dollars in 2007, an 8.2% decrease over 2006. The number of same-day overseas visitors to Canada's Capital Region was 63,000 in 2007, a 20% decrease over 2006. They spent 3.1 million dollars in 2007, a 16.2% decrease over 2006, whereas overnight overseas visitors to CCR were 316,000 in 2007, an 8.3% decrease over 2006. They spent 149 million dollars in 2007, an 8% decrease over 2006.

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 (2006: 60%; 2007: 54%) followed by Asia (2006: 20%; 2007: 19%). The European segment also spent the most in Canada's Capital Region, which represents 45% of total overseas spending for 2006 and 49% for 2007.