The Attractions Sector in Ontario Soaring to New Heights

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Reinvestment

• Many of our tourism attractions are old and in need of redevelopment.
• Accessing the capital necessary to make this happen is difficult as banks do not want to loan money to what they see as a risky investment.
Reinvestment

- Still we have seen significant new investment in the past 5 years:
  - Edge Walk at CN Tower
  - Ripley’s Aquarium
  - Legoland Discovery Centre
  - Calypso Waterpark
  - Two new roller coasters at Canada’s Wonderland
  - Lots of new zip line and outdoor adventure attractions
Changing nature of attractions

• Attractions are looking at a diversification of what they offer to attract new people.
  – Horseshoe Resort Adventure Park
  – Fright Night at Fort Henry
  – Zombies at the Bunker at Diefenbunker
  – Edge Walk at CN Tower
Architectural Facelifts

• Things are becoming bigger and better.
• Competition is global; people’s expectations are growing, making attractions change to keep up.
• Places need to stand out.
Demographics

• Bulk of visitors are middle class
• Children are having a bigger role in deciding where to go
• We are seeing more multi-generational families (i.e. moms and dads, kids, grandparents)
• Older couples without kids
• New Canadians
• Millennials are not a significant new growth area for our attractions.
Demographics

Our attractions are seeing more local visitors.
More visitors from inside Ontario and International visitors as well.
Rest of Canada and US visitation is down.
VIP Experiences

A VIP Tour at Canada's Wonderland will include these exclusive benefits:

- A Personal Canada's Wonderland Tour Guide who will facilitate your entire visit
- Exclusive Front-of-the-Line Ride Access
- Priority Parking
- VIP Admission and Badge
- Two Complimentary on-ride photos (where available)
- Lunch or Dinner at The Marketplace
- Unlimited Soft Drinks
- Priority Live Show Seating
- Price: $350 per person (plus applicable taxes)
VIP Experiences

Niagara Helicopters: Heli-Wineries

- A helicopter tour of local Niagara Wineries
- Recognized as a Canadian Tourism Commission Signature Experience.
• **Canadian Signature Experiences (CSE)** collection – once-in-a-lifetime travel experiences found in Canada.

• Selected CSEs include:
  – CliffWalk! – Capilano Suspension Bridge Park
  – The Greatest Outdoor Show on Earth – Calgary Stampede
  – Polar Bears by Tundra Buggy – Frontiers North
  – Take your passion for Shakespeare beyond the stage – Stratford Shakespeare Festival
  – Millionaire’s Row Cruise aboard the R.M.S. Segwun – Muskoka Steamships
  – Journey behind the Falls – Niagara Parks Commission
  – Celebrating a Frozen Mardi Gras in the Streets of Old Québec City – Quebec Winter Carnival
  – Celebrate Celtic Music throughout Cape Breton – Celtic Colours International Festival
  – Take your place among the Vikings – L’Anse aux Meadows National Historic Site of Canada
Guest Empowerment

• Guests are interacting with attractions in many new ways.
  – Internet
  – Travel Review Sites
  – Social Media
  – Smartphones
  – Mobile Technology
Guest Empowerment

- 74% of our attractions rated third party online forums (like Trip Advisor) as important or very important to their business.
- 55.6% are checking their online presence at least once a week.
- 76.9% are formally responding to negative online reviews
Technology

• 56% of our attractions surveyed felt that social media was not driving ticket purchases for them.

• More are selling tickets online.

• Some are using technology to improve guest interaction at their locations.
  – GPS enabled screens that provide information on site seeing tours.
  – E-mail souvenir photos.
Technology

• Mobile technology still isn’t quite there yet:
  – 51% of travelers browse the web using a mobile device.
  – 39% upload photos to social networks while traveling.
  – 34% post updates on social networks while traveling.
  – 33% find local activities on mobile devices while traveling.
  – 26% are downloading destination specific apps.
  – 17% booked accommodations or attractions via mobile.
  – 12% accessed a discount or coupon via mobile.

Source: Trip Advisor Trip Barometer, January 2013
Tourism in Ontario supports businesses and workers in every riding.

• More than 600,000 Ontarians directly or indirectly rely on tourism for their livelihood.

• As tourism increases, so do the number of jobs available to Ontarians.

• Ontario is Canada’s largest and most diverse tourism destination and labour market. The tourism industry represents 9% of total employment in Ontario (40% of all tourism employment in Canada is in Ontario) and 17% of the province’s businesses, from small rural outfitters to large corporate hotel chains.

• There are 149,000 tourism businesses in Ontario.
Tourism Creates Jobs and Drives the Economy

• At $23.6B in receipts, tourism, as an industry, contributes more to the provincial GDP than the entire primary sector, including forestry, agriculture and mining.

• Last year, Ontario collected $4 billion in tax revenue from the tourism industry, proving that investing in tourism is a great return on investment for governments.

• Overseas entries to Ontario are growing, and the emerging markets leading the way.
  • China (+39%)
  • Hong Kong (+26%)
  • India (+12%)

• While emerging market numbers are strong, U.S. visitors still account for 87% of all international travellers coming into Ontario.
Future Outlook

• 66.7% of respondents said that the last 5 years have been profitable ones for their business.
• Only 7.4% said that times have been tough.
• 70.4% are optimistic that times will continue to improve.
• 0% were pessimistic about our future in tourism.
Thank You

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