

Ontario Golf Tourism Statistics 2014

Tourism Research Unit
Winter 2017

This report summarizes key characteristics of visitors and visitor spending of trips in Ontario which included the activity of Golf.

Data was sourced from Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey, 2014

Some slides include an index table which simplifies the comparison of Golf and total trip statistics. Since total trips equals 100, an index of 105 indicates Golf is 5% higher than total, similarly an index of 90 signifies Golf is 10% lower than total.

Index

less than 80

80-100

greater than 120

Interpretation

Golf trips underdeveloped versus total trips

Golf trips similar to total trips

Golf trips overdeveloped versus total trips

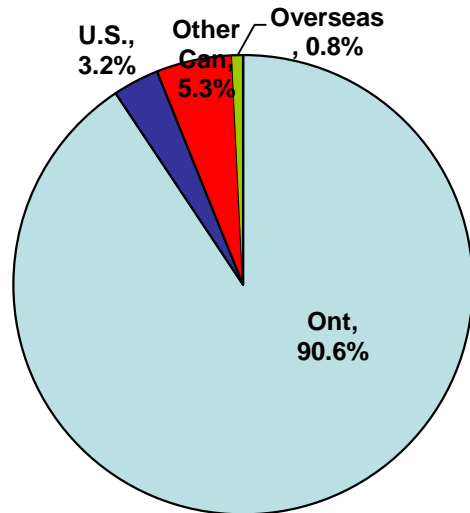
Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario Total	139.5	23.9
Ontario Golf	1.9	0.5
Ontario Golf proportion of Ontario Total	1.4%	2.1%

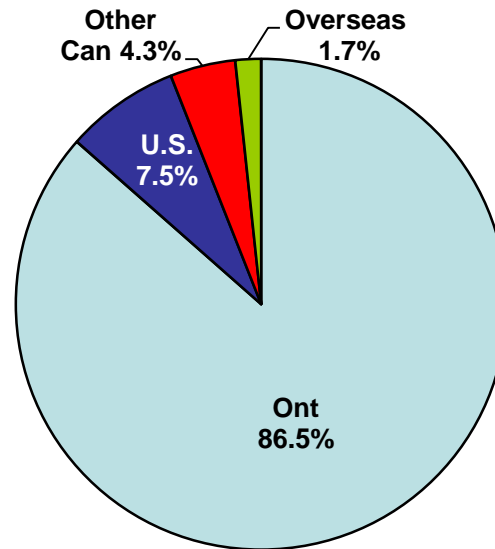
- In 2014, there were 1.9 million Golf visits in Ontario, representing 1.4% of total visits in Ontario
- Golf visitors in spent \$511 million, accounting for 2.1% of total visitor spending in Ontario

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Golf and Total Visits by Origin



Golf Visits by Origin
1.9 million



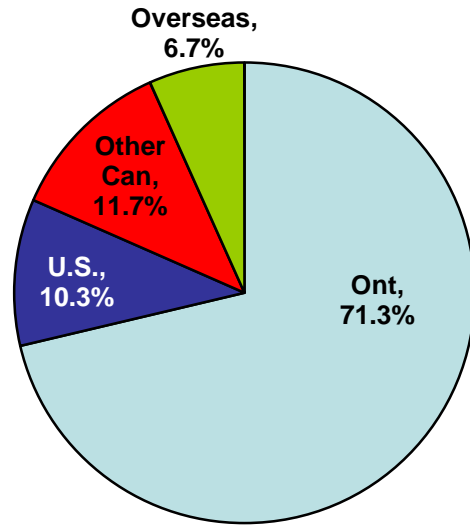
Total Visits by Origin
139.5 million

Golf vs. Total	Visit Index
Ontario	105
U.S.	43
Other Canada	123
Overseas	45

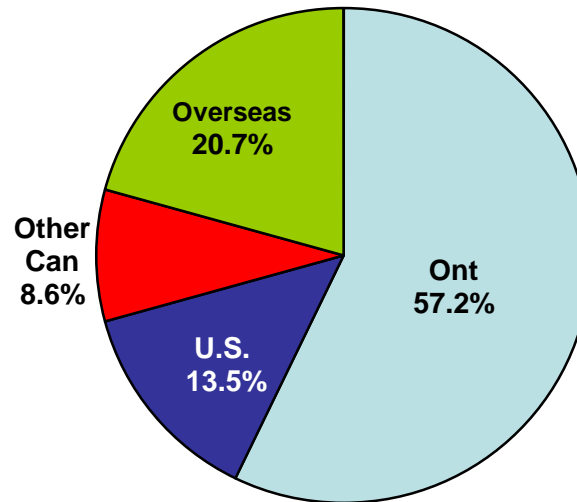
- Ontario residents accounted for the majority of Golf (91%) and total (86%) visits
- U.S. visitors accounted for 3% of Golf visits compared to 8% of total visits
- Visitors from Other Canada comprised 5% of Golf visits and 4% of total visits
- Overseas visitors accounted for 1% of Golf visits and 2% of total visits

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Golf and Total Spending by Origin



Golf Visitor Spending by Origin
\$511 million



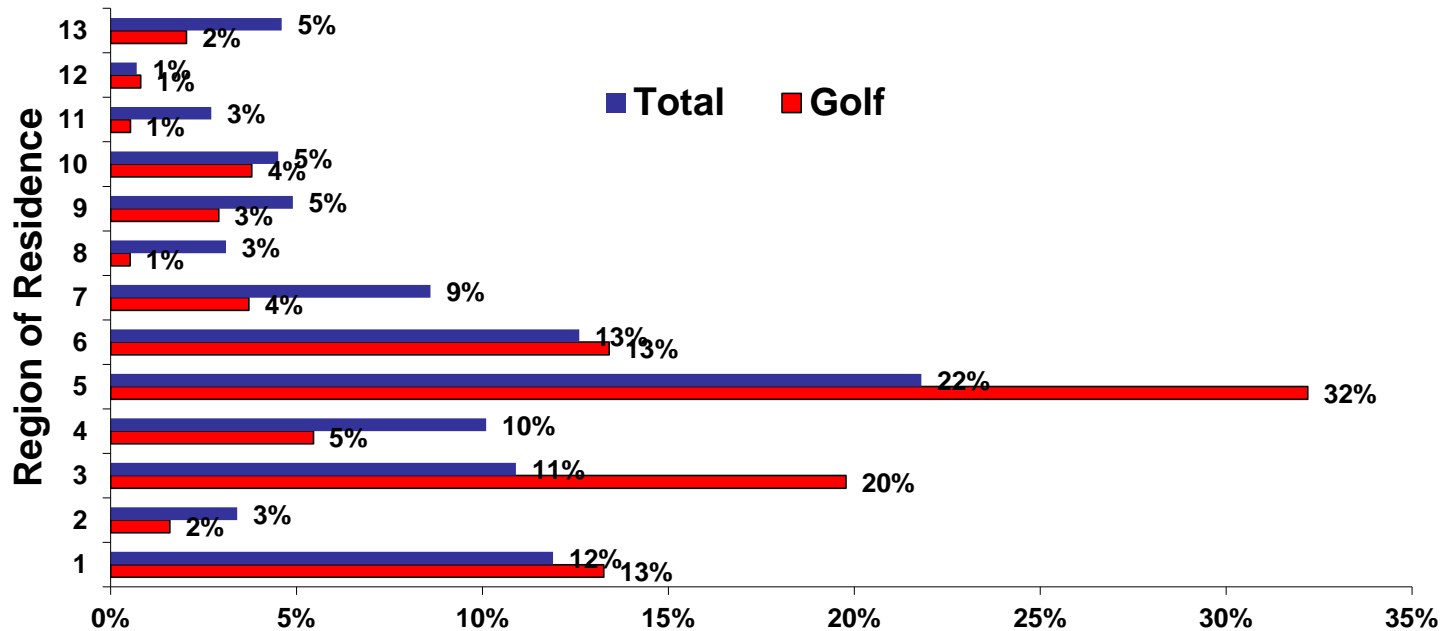
Total Visitor Spending by Origin
\$23.9 billion

Golf vs. Total	Spending Index
Ontario	125
U.S.	76
Other Canada	136
Overseas	33

- Ontario residents accounted for the majority of Golf (71%) and total (57%) spending
- U.S. visitors accounted for 10% of Golf spending compared to 14% of total spending
- Visitors from Other Canada comprised 12% of Golf spending and 9% of total spending
- Overseas visitors accounted for 7% of Golf spending and 21% of total spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Ontario Golf Visitors by Region of Residence



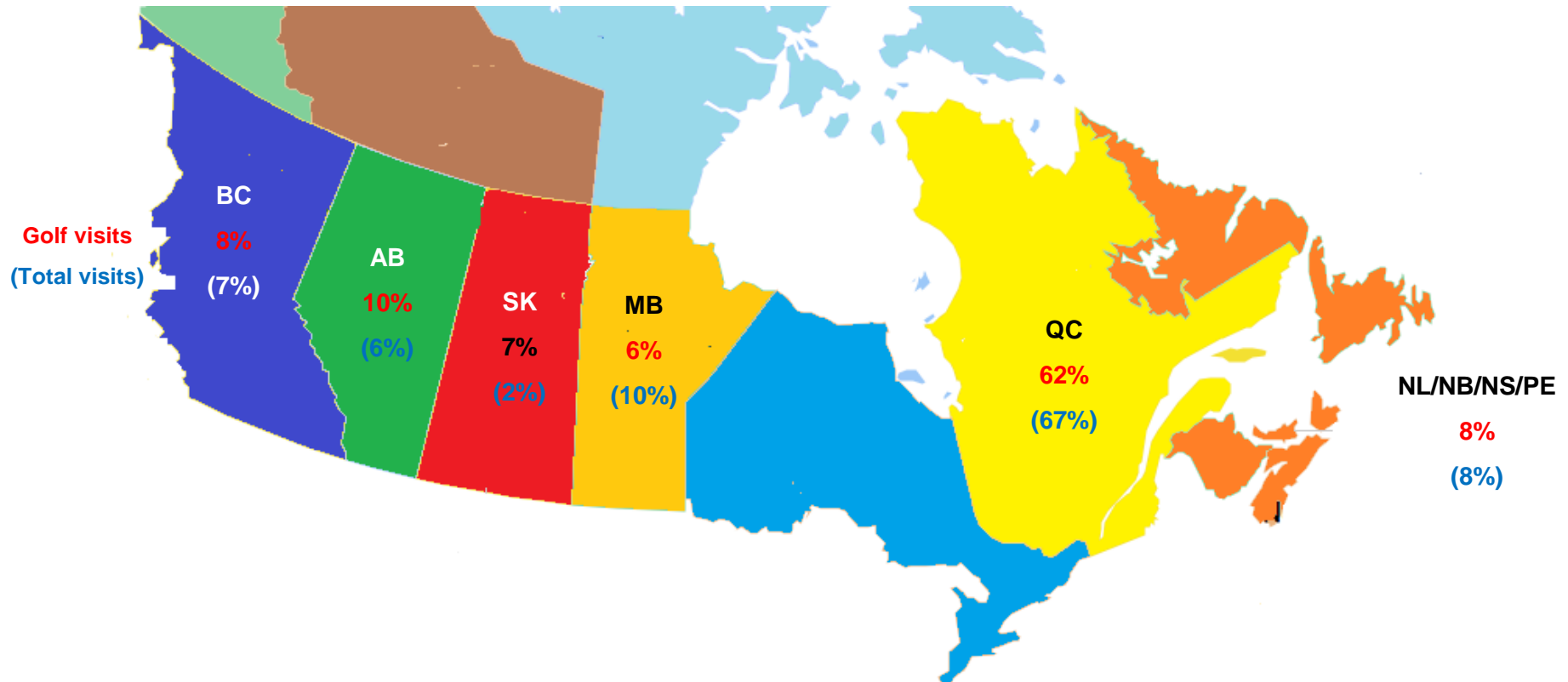
Golf vs. Total	Visits from Ontario Index
Reg 1	111
Reg 2	47
Reg 3	181
Reg 4	54
Reg 5	148
Reg 6	106
Reg 7	43
Reg 8	17
Reg 9	59
Reg 10	84
Reg 11	20
Reg 12	115
Reg 13	44

•32% Golf visitors from Ontario are from Region 5 compared to 22% of total visits, 20% from Region 3 (11% total visits), and 13% from Region 1 (12% total visits)

Note: Ontario origin Golf visitors represented 91% (1.7 M) of visits and 71% (\$364 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Other Canada Golf Visitors by Province of Residence

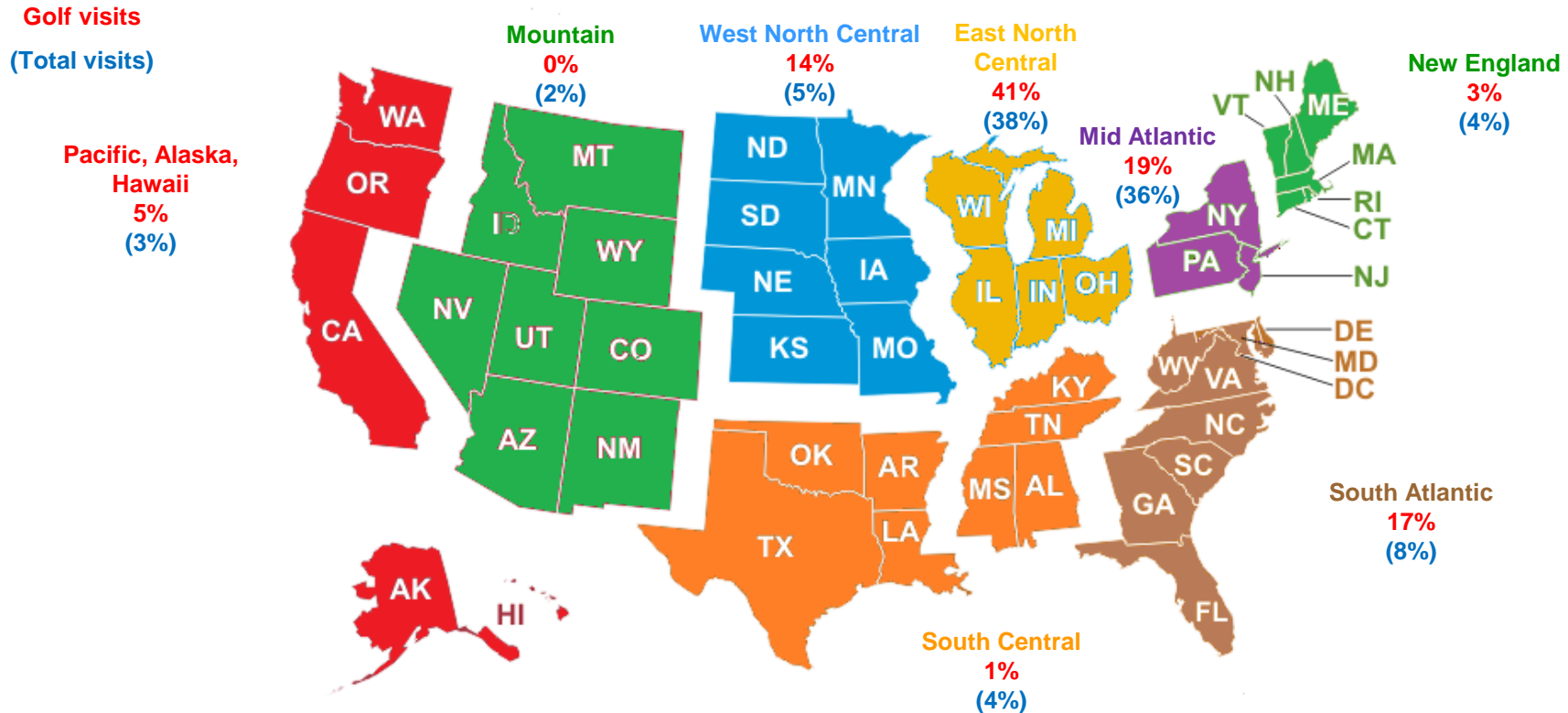


- 62% of Other Canada Golf visitors came from Quebec with 7% from Montreal, (total visits Quebec 67%, Montreal 44%)

Note: Other Canada Golf visitors represented 5% (103,000) of visits and 12% (\$60 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

U.S. Golf Visitors by Region of Residence

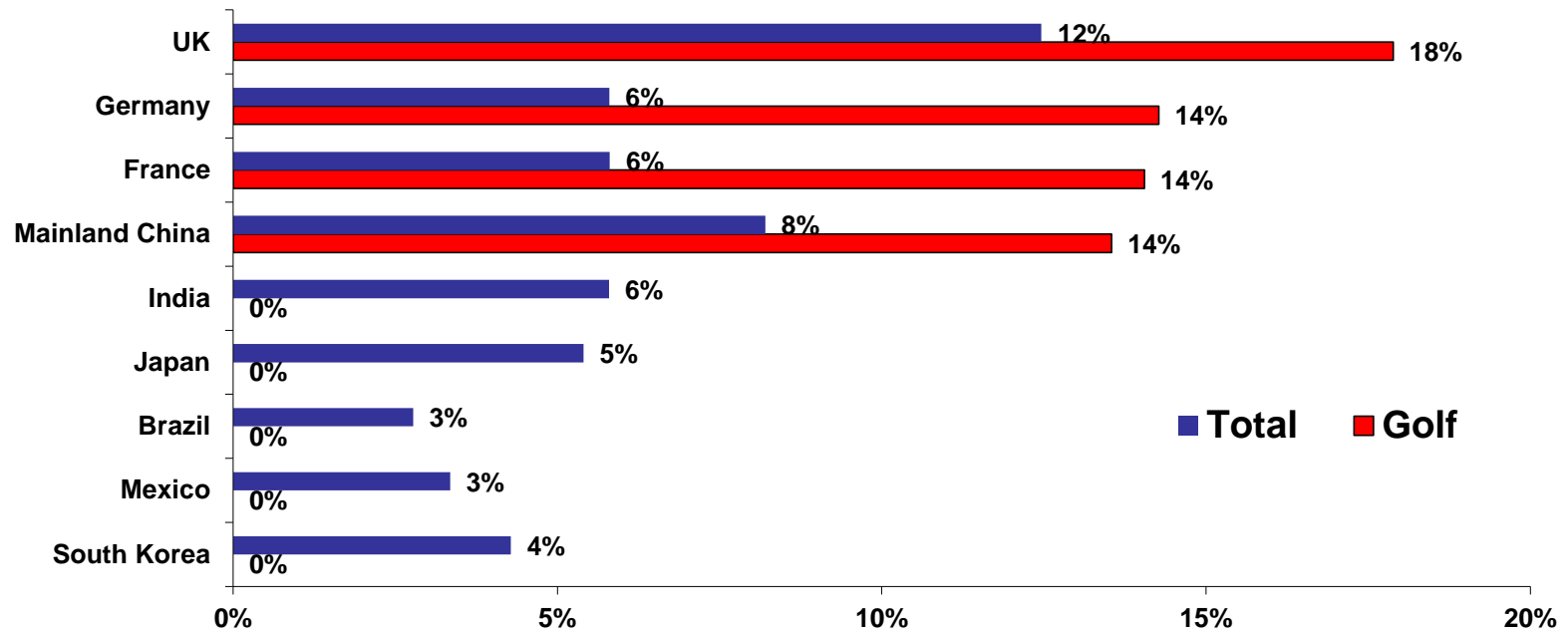


- 41% of U.S. Golf visitors came from East North Central states (Michigan, Ohio, Illinois, Indiana, and Wisconsin) and 19% from Mid Atlantic states

Note: U.S. Golf visitors represented 3% (62,000) of visits and 10% (\$53 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Overseas Golf Visitors by Country of Residence

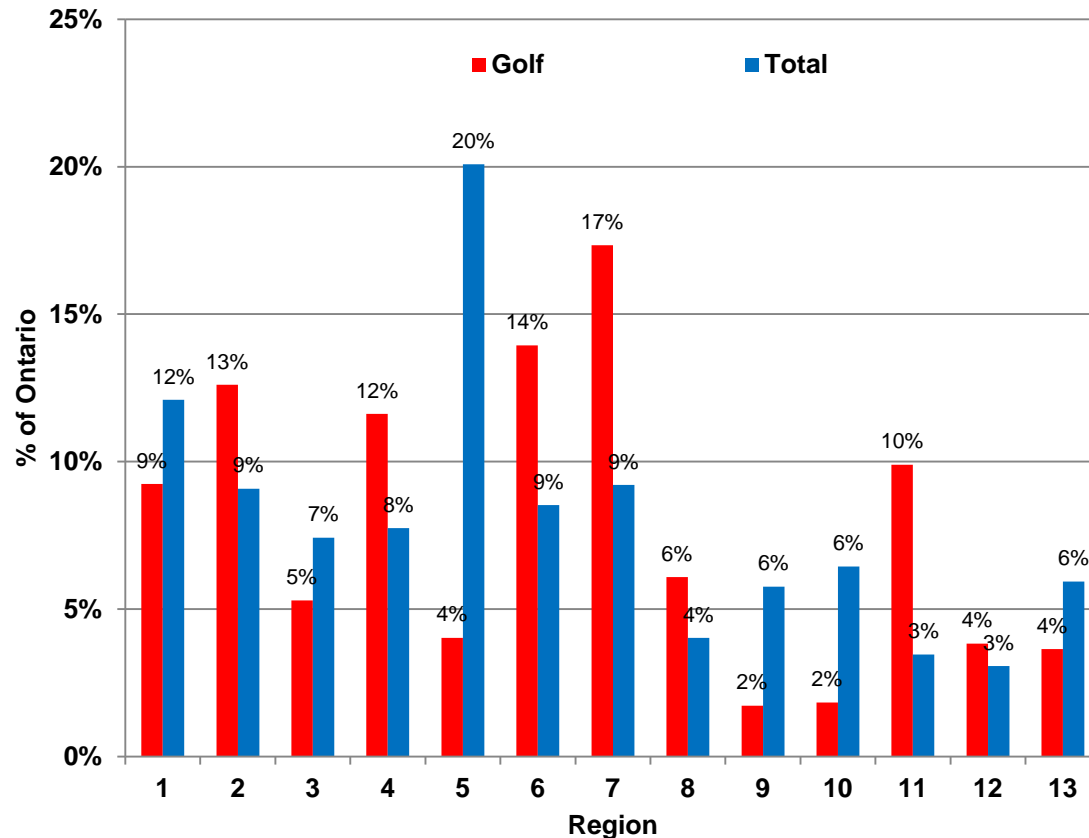


- Ontario's 9 overseas target markets represent 60% of overseas Golf visitors versus 54% of total overseas visits

Note: Overseas Golf visitors represented 1% (15,000) of visits and 7% (\$34 M) of visitor spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Destination – Golf Visits by Region

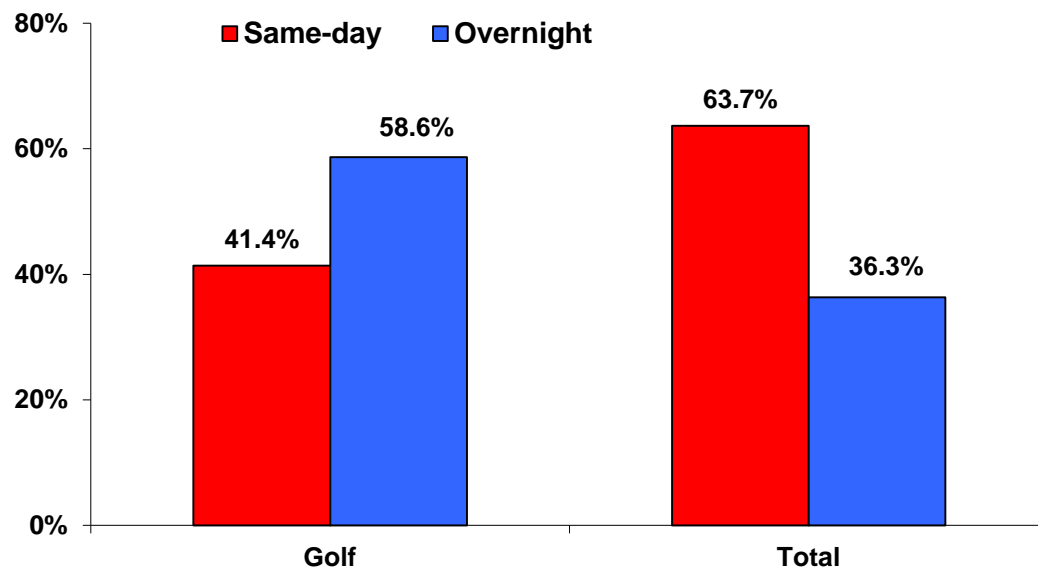


Golf vs. Total	Destination Index
Reg 1	76
Reg 2	139
Reg 3	71
Reg 4	150
Reg 5	20
Reg 6	164
Reg 7	188
Reg 8	151
Reg 9	30
Reg 10	28
Reg 11	286
Reg 12	125
Reg 13	61

- 17% of Golf visits took place in Region 7 compared to 9% of total visits, 14% in Region 6 (9% total), and 13% in Region 2 (9% total)

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Golf Visits by Length of Stay

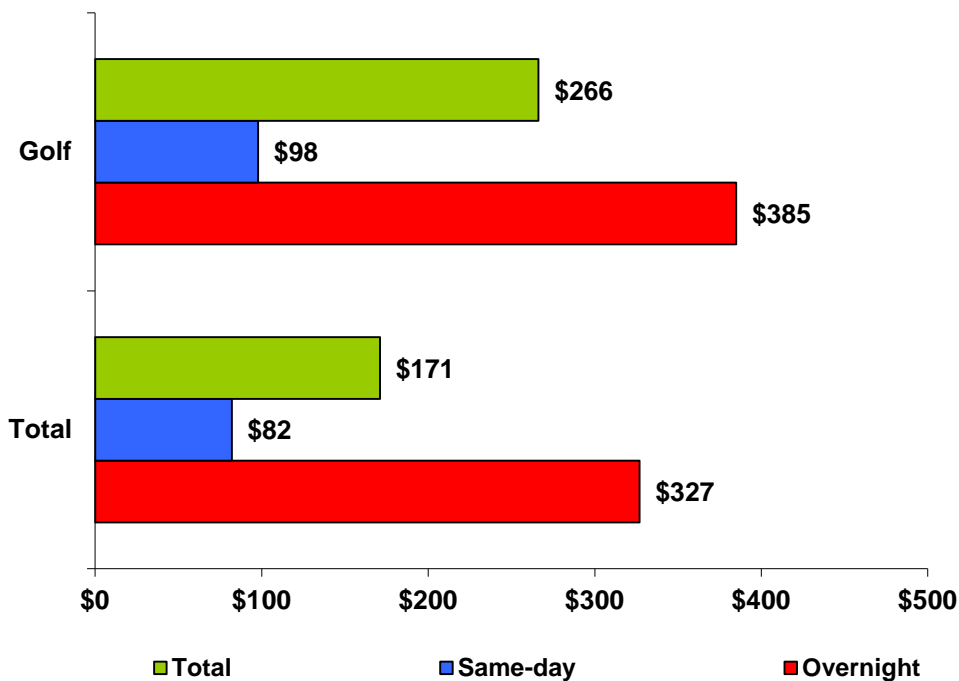


Golf vs. Total	Length of Stay Index
Same-day	65
Overnight	161
Avg # nights	116

- The majority (59%) of Golf visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits
- The average number of nights spent on Golf visits was 3.6, above Ontario's average of 3.1 nights

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Golf \$/Trip by Length of Stay



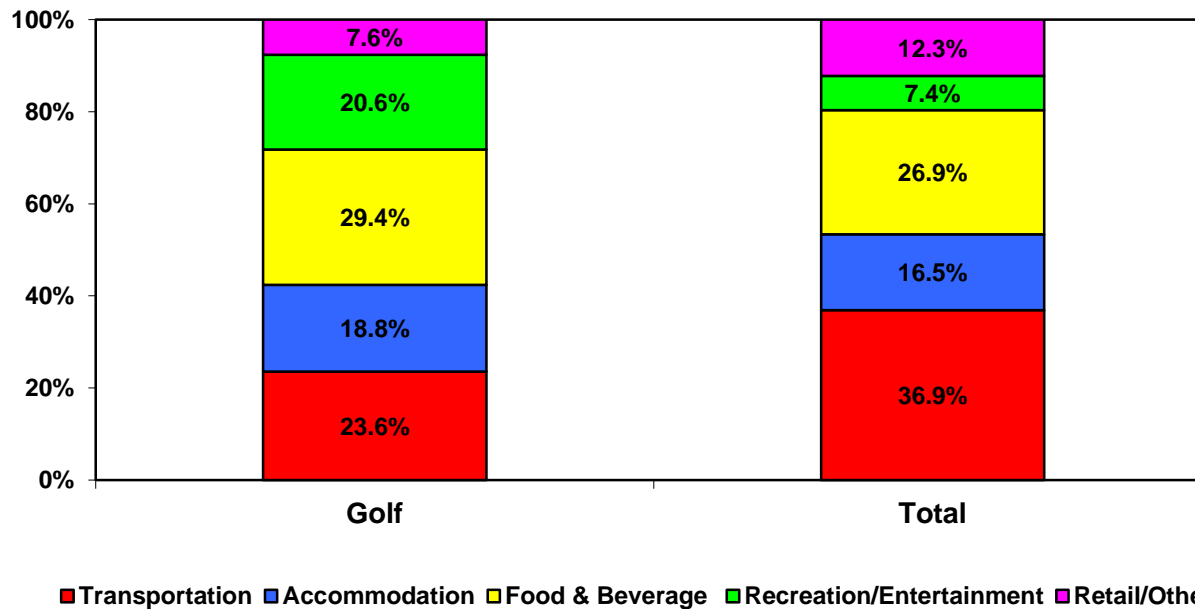
Golf vs. Total	\$/Trip Index
Total	155
Same-day	119
Overnight	118

- Golf visitors spent an average of \$266/trip (\$171/trip for total trips)
- On average, overnight visitors spent almost four times as much per trip as same-day visitors

Total trip spending, not just spending on Golf

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Golf Spending by Category



Golf vs. Ontario	Spending Index
Transportation	64
Accommodation	114
Food & Beverage	109
Rec./Entertain.	278
Retail/Other	62

- The largest proportions of expenditures were spent on Food & Beverage (29% Golf, 27% total) and Transportation (24% Golf, 37% total)
- Golf visitors spent a larger proportion on recreation, 21%, than total visitors, 7%

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Other Activities done by Golf Visitors

Activity	Golf Visit Participation	Index vs Total
Any Outdoor/Sports Activity	100%	592
Golfing	100%	7268
Boating	20%	422
Visit a beach	17%	372
Hiking	14%	335
Fishing	12%	335
Camping	10%	275
Wildlife/Bird watching	8%	368
National/Provincial Nature Parks	8%	266
Cycling	7%	613

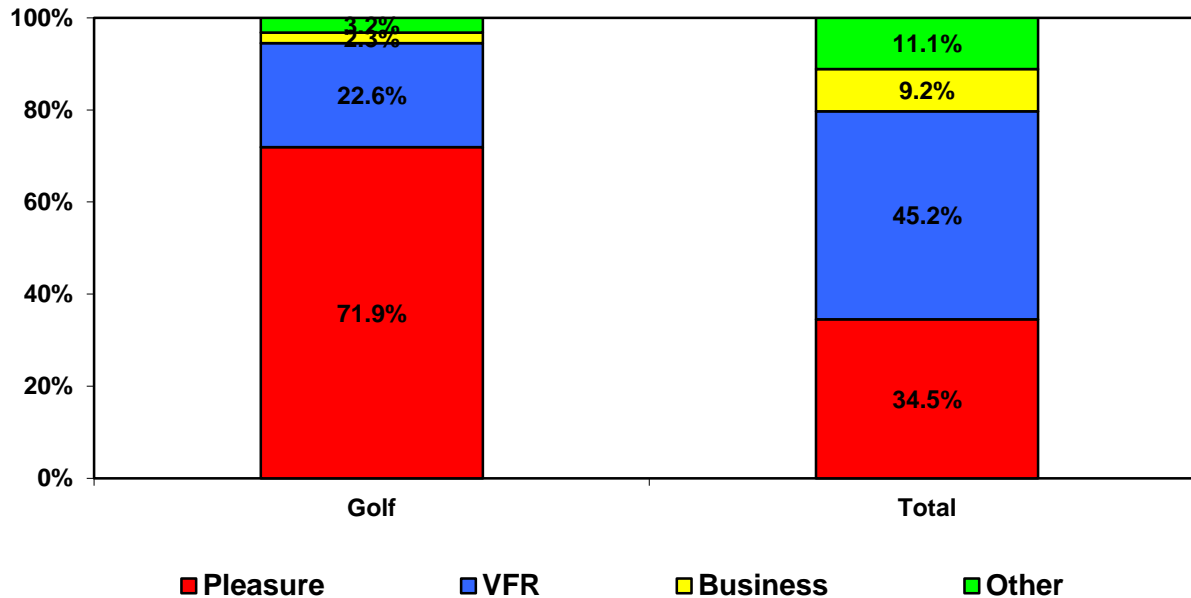
Activity	Golf Visit Participation	Index vs Total
Festivals/Fairs	6%	198
Play a sport	6%	285
Visit Family or Relatiaves	5%	14
Historic Sites	4%	135
Cultural Performances	4%	108
Sports Events	4%	97
Museums/Art Galleries	4%	119
Restaurant or bar	3%	62
Shopping	3%	34
Sightseeing	3%	58

Activity	Golf Visit Participation	Index vs Total
Casinos	3%	114
Zoos/Aquariums/Botanical Gardens	2%	164
Theme Parks	2%	162
Movies	1%	111
Hunting	1%	219
Aboriginal	1%	543
Business Meeting/Confere nce/Seminar	0%	5
Medical/Dental appointment	0%	8
ATV	0%	46
Skiing/Snowboar ding	0%	5

- 20% of Golf visitors went boating, 17% visited a beach, 14% went hiking, and 12% went fishing

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Main Purpose of Golf Visit

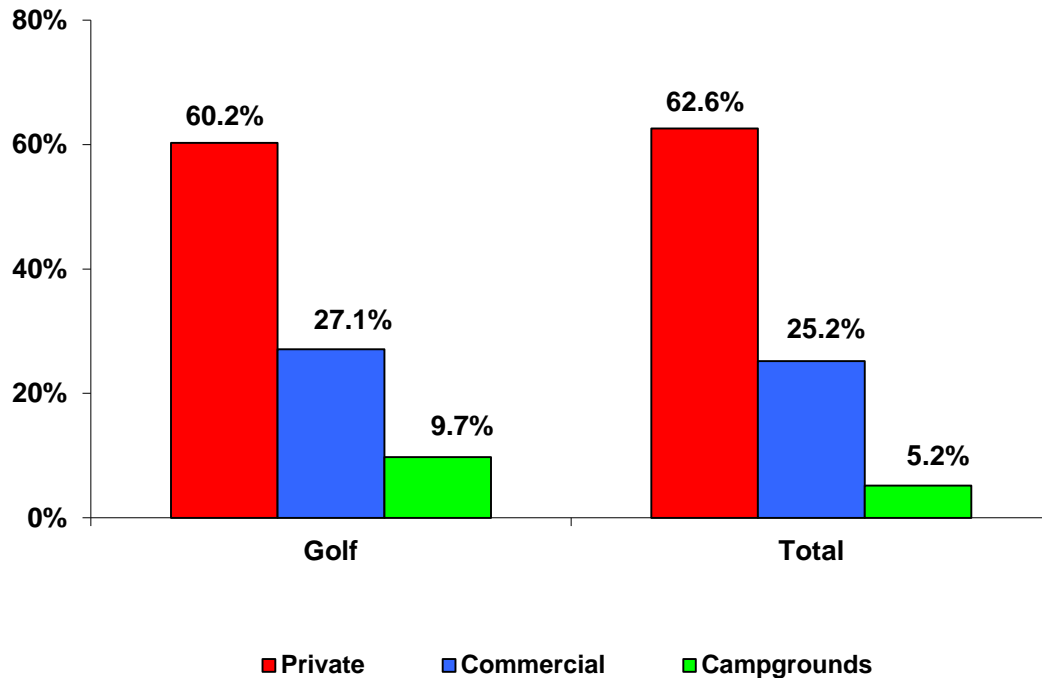


Golf vs. Total	Purpose Index
Pleasure	208
VFR	50
Business	25
Other	29
VFR: Visiting Friends and / or Relatives	

- Most trips were pleasure trips (72% compared to 34% of total trips)
- Other includes shopping, medical, religious, hobby/trade show, etc.

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Golf Visits by Accommodation Type

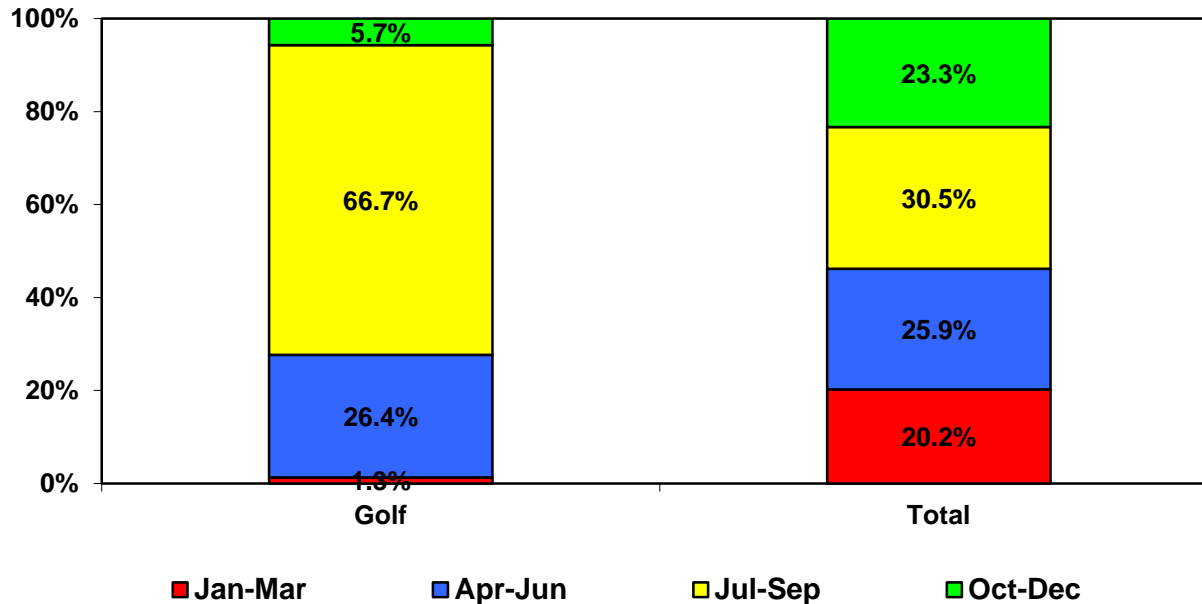


Golf vs. Total	Type Index
Private	96
Commercial	108
Campground	188

- The majority (60%) of overnight Golf visits were spent at unpaid accommodations such as private homes and cottages, compared to 63% of total visits
- 10% of overnight Golf visits were spent in camping/RV facilities versus 5% of total visits

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Golf Visits by Time of Year

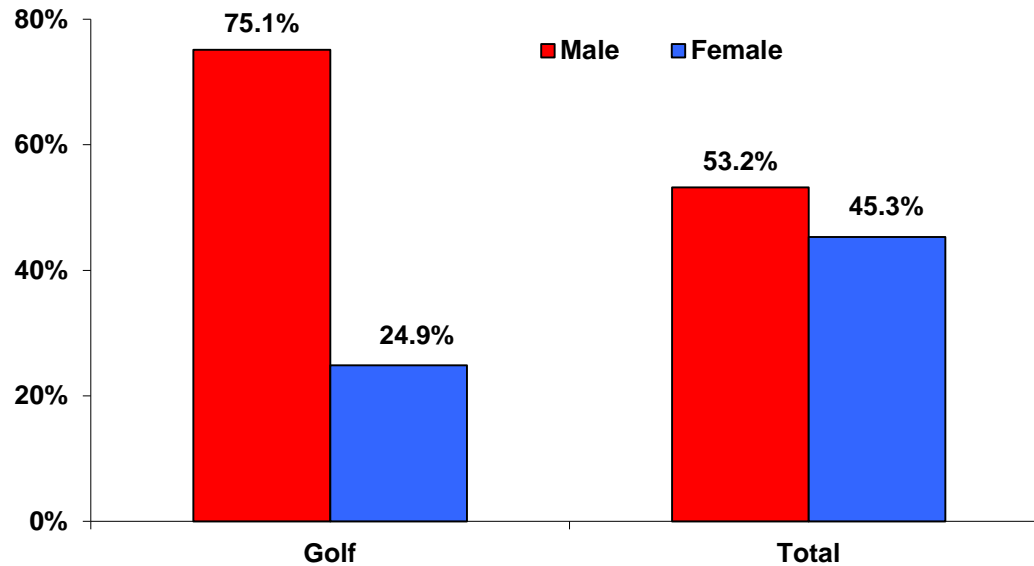


Golf vs. Total	Quarter Index
Jan-Mar	6
Apr-Jun	102
Jul-Sept	218
Oct-Dec	24

- The largest proportion of trips occur in the summer months with 67% of Golf trips taking place in Jul-Sep versus 30% of total trips

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

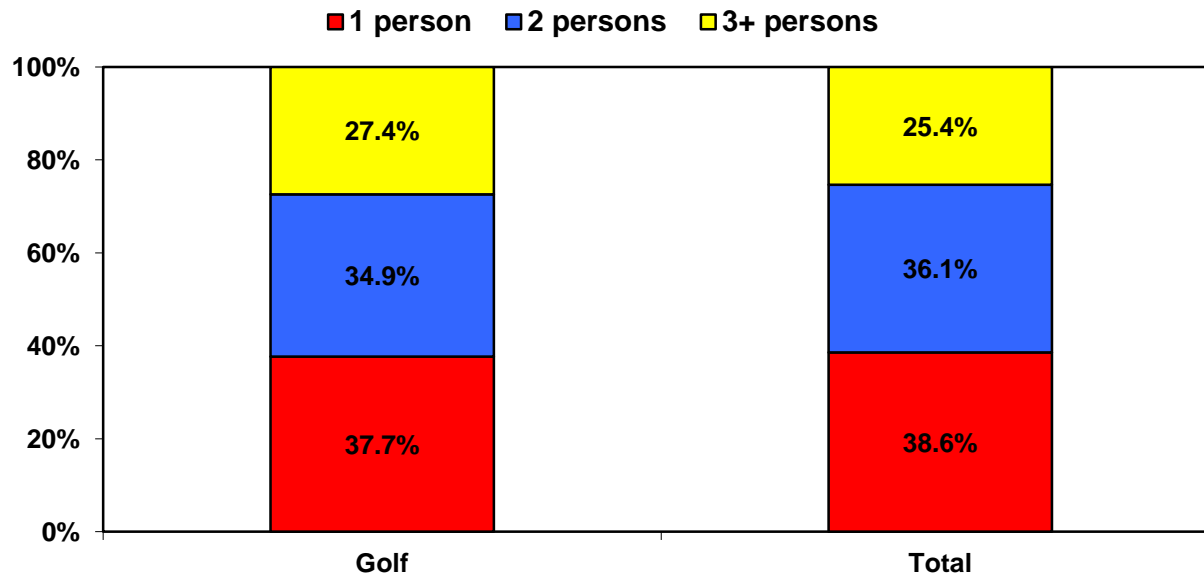
Golf Visits by Gender



Golf vs. Total	Gender Index
Male	141
Female	55

- Males made the majority (75%) of Golf visits. For comparison, 53% of total visits in Ontario were among male visitors

Golf Visits by Party Size



Golf vs. Total	Party Size Index
1 person	98
2 persons	97
3+ persons	108
Avg party size	101
With children	68

Avg Party Size

2.5

2.4

With children

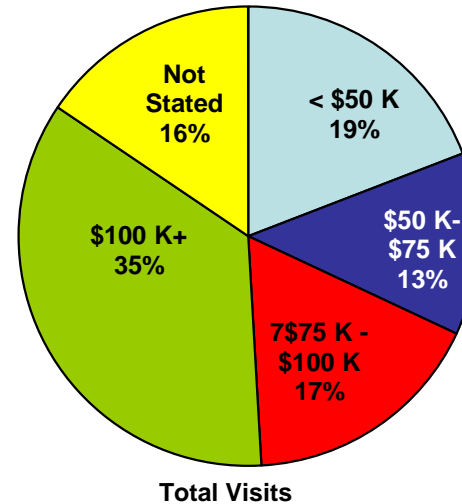
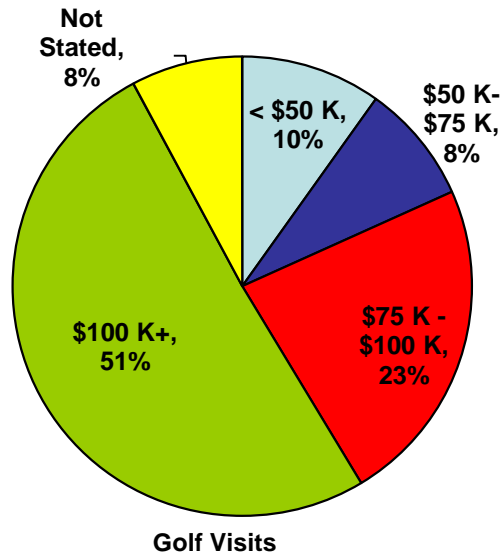
9%

13%

- 27% of Golf visits were among groups of 3 or more people compared to 25% of total visits
- 9% of Golf visits included children versus 13% of total visits

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Domestic Golf Visitor's Income

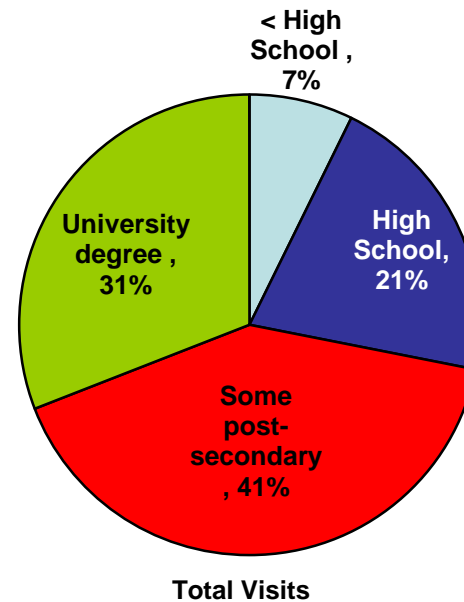
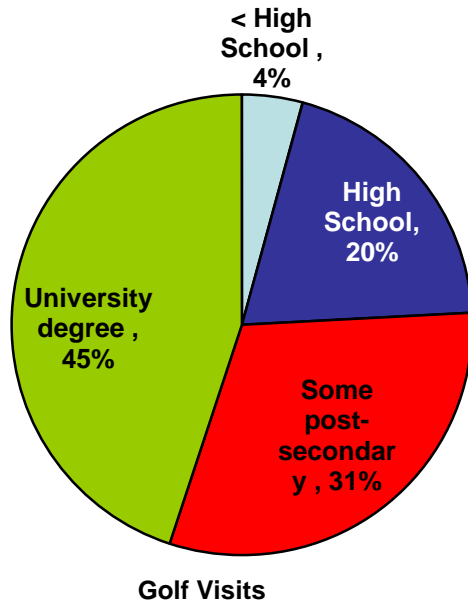


Golf vs. Total	Income Index
< \$50 K	52
\$50 K- \$75 K	65
\$75 K - \$100 K	135
\$100 K+	144

- 51% of Canadian Golf visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors

Source: Statistics Canada's Travel Survey of the Residents of Canada 2014; Ontario Ministry of Tourism, Culture and Sport

Domestic Golf Visitor's Education



Golf vs. Ontario	Education Index
< High School	58
High School	96
Some post-secondary	75
University degree	145

- 45% of Canadian Golf visitors in Ontario had a university degree compared with 31% of total visits

Source: Statistics Canada's Travel Survey of the Residents of Canada 2014; Ontario Ministry of Tourism, Culture and Sport

Golf Summary

- In 2014, there were 1.9 million Golf visits, accounting for 1.4% of total visits to Ontario. Golf visitors spent \$511 million, or 2.1% of total visitor spending in Ontario.
- Ontario residents accounted for 91% of visits and 71% of spending, residents of Other Canada accounted for 5% of visits and 12% of spending, U.S. visitors represented 3% of visits and 10% of expenditures, and overseas visitors accounted for 1% of visits and 7% of spending
- 32% Golf visitors from Ontario are from Region 5 compared to 22% of total visits, 20% from Region 3 (11% total visits), and 13% from Region 1 (12% total visits)
- 17% of Golf visits took place in Region 7 compared to 9% of total visits, 14% in Region 6 (9% total), and 13% in Region 2 (9% total)

Golf Summary

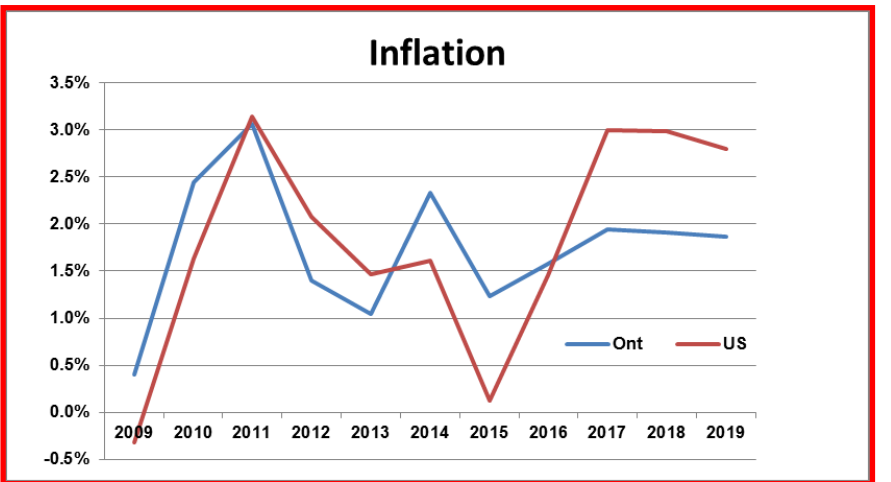
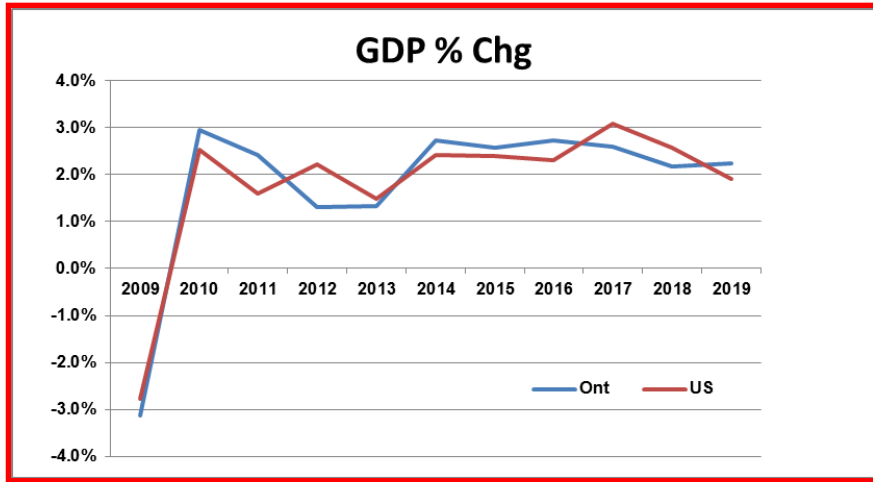
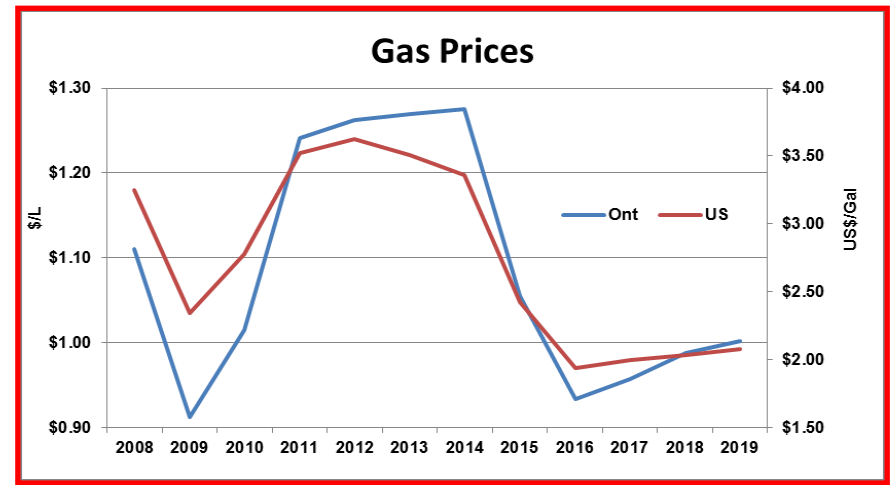
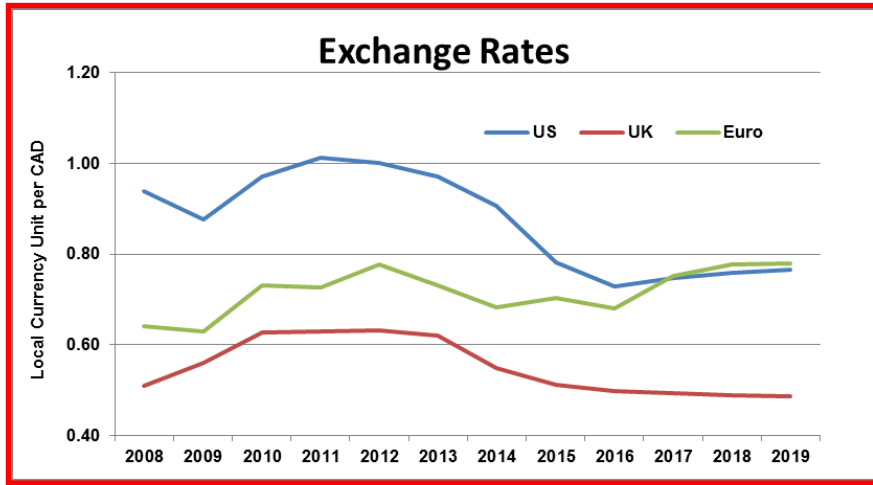
- The majority (59%) of Golf visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits. The average number of nights spent on Golf visits was 3.6, above Ontario's average of 3.1 nights
- Golf visitors spent an average of \$266/trip (\$171/trip for total trips). On average, overnight visitors spent almost four times as much per trip as same-day visitors
- The largest proportions of expenditures were spent on Food & Beverage (29% Golf, 27% total) and Transportation (24% Golf, 37% total). Golf visitors spent a larger proportion on recreation, 21%, than total visitors, 7%
- 20% of Golf visitors went boating, 17% visited a beach, 14% went hiking, and 12% went fishing
- Most trips were pleasure trips (72% compared to 34% of total trips)

Golf Summary

- The majority (60%) of overnight Golf visits were spent at unpaid accommodations such as private homes and cottages, compared to 63% of total visits. 10% of overnight Golf visits were spent in camping/RV facilities versus 5% of total visits
- The largest proportion of trips occur in the summer months with 67% of Golf trips taking place in Jul-Sep versus 30% of total trips
- 27% of Golf visits were among groups of 3 or more people compared to 25% of total visits. 9% of Golf visits included children versus 13% of total visits
- 51% of Canadian Golf visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors
- 45% of Canadian Golf visitors in Ontario had a university degree compared with 31% of total visits

Appendix

Economic Indicators



Source: Oxford Economics; Ontario Ministry of Tourism, Culture and Sport

2014 Notable Events

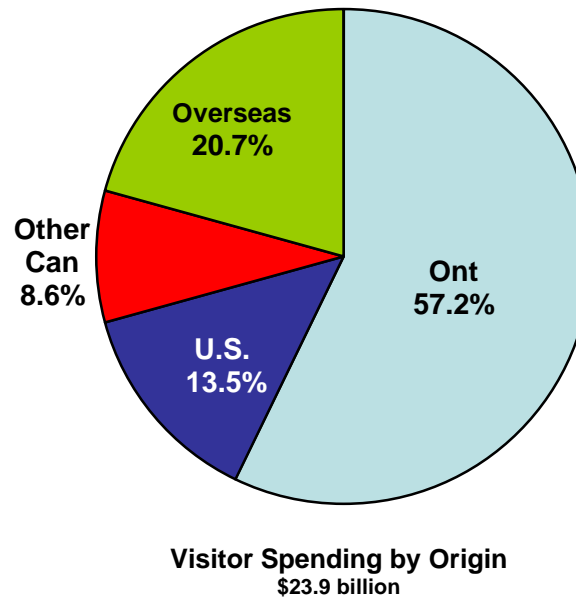
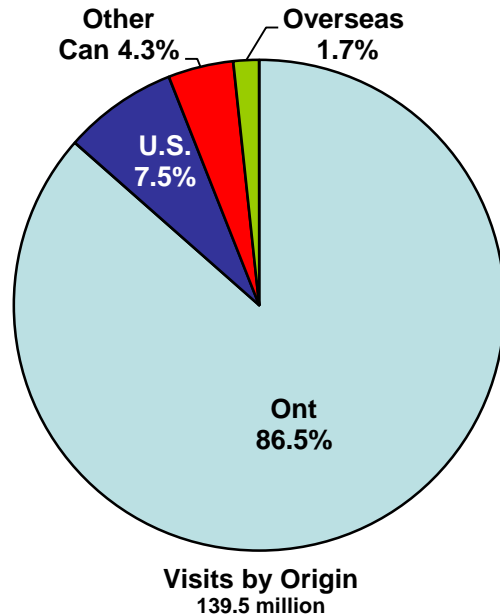
- February 7–23 – The XXII **Olympic Winter Games** are held in Sochi, Russia
- March 8 – **Malaysia Airlines Flight 370**, a Boeing 777 airliner en route to Beijing from Kuala Lumpur, disappears over the Gulf of Thailand with 239 people on board. The aircraft is presumed to have crashed into the Indian Ocean
- **Ebola Epidemic** becomes Global Health Crisis
- June 12 – July 13 – The 2014 **FIFA World Cup** are held in Brazil
- July 23 - August 3 - **XX Commonwealth Games** are held in Glasgow, Scotland
- **World oil prices** plunge to historic low
- October 22 - In the **shootings at Parliament Hill**, a gunman fatally shot a Canadian Forces soldier at the National War Memorial in Ottawa, then entered the Parliament buildings where he was killed by security forces

Ontario Tourism

Economic Impact of Tourism in Ontario 2014

- Tourism receipts totalled **\$29.8 billion**
- Total GDP (direct, indirect and induced) generated by tourism related spending amounted to **\$26.6 billion**, 3.7% of Ontario's GDP
- The total tourism employment impact (direct, indirect and induced) of tourism receipts reached **371,968 jobs**, accounting for 5.3% of Ontario's total employment
- Total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to **\$12.8 billion**. \$6.4 billion were federal tax revenues, \$5.1 billion were provincial and \$1.3 billion were municipal
- Tourism is an important export industry, contributing **\$8.5 billion** to Ontario's foreign earnings

Ontario Visits and Spending by Origin

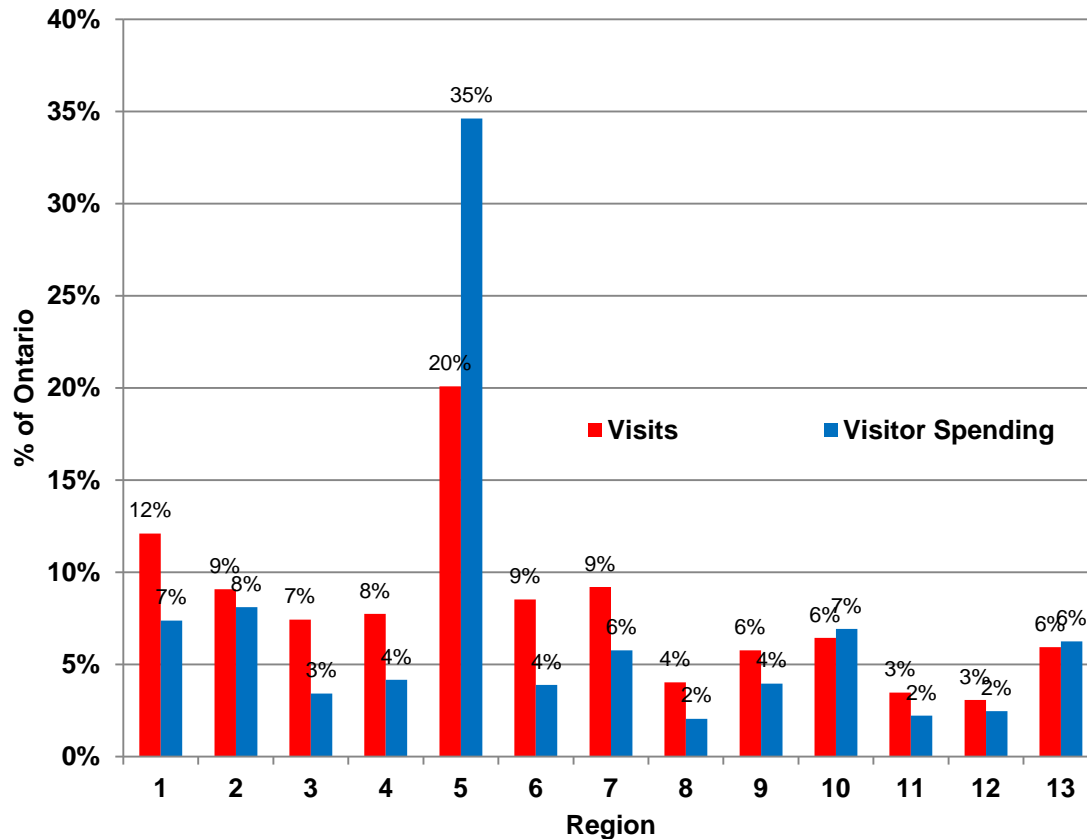


Ontario	2014	VS 2012
Visits	139.5M	-1.0%
Visitor Spending	\$23.9B	5.1%

- In 2014, there were 139.5 million visits in Ontario and visitors spent \$23.9 billion
- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 8% of visits and 14% of expenditures
- Overseas visitors account for 2% of visits and 21% of spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Destination - Visits and Spending by Region



Tourism Regions

- 1 Southwest Ontario
- 2 Niagara Region
- 3 Hamilton, Halton, Brant
- 4 Huron, Perth, Waterloo, Wellington
- 5 Greater Toronto Area
- 6 York, Durham, Hills of Headwaters
- 7 Bruce Peninsula, Southern Georgian Bay and Lake Simcoe
- 8 Kawartha and Northumberland
- 9 South Eastern Ontario
- 10 Ottawa and Countryside
- 11 Haliburton Highlands to the Ottawa Valley
- 12 Muskoka, Parry Sound and Algonquin Park
- 13 Northern Ontario

- Region 5 is the largest region representing 20% of visits and 35% of spending

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2014; Ontario Ministry of Tourism, Culture and Sport

Ontario Summary

- In 2014, there were 139.5 million visits in Ontario and visitors spent \$23.9 billion. Visits were down 1.0%, while spending grew 5.1% compared to 2013
- Ontario residents accounted for the majority of visits (86%) and spending (57%)
- U.S. visitors represented 8% of visits and 14% of expenditures
- Overseas visitors accounted for 2% of visits and 21% of spending
- Region 5 (GTA) is the largest Region representing 20% of visits and 35% of spending
- Visitors spent an average of \$171/trip in Ontario
- The largest proportions of expenditures were spent on Transportation (37%) and Food & Beverage (27%)

Ontario Summary

- 67% of Other Canada visitors came from Quebec with 44% from Montreal
- 38% of U.S. visitors come from East North Central (Michigan, Ohio, Illinois, Indiana, and Wisconsin) and 36% from Mid Atlantic (New York, Pennsylvania, and New Jersey)
- Ontario's 9 target overseas markets (U.K., Japan, Germany, France, Mexico, India, China, South Korea and Brazil) represented 54% of overseas visitors to Ontario. The U.K. was the leading overseas source market at 12% of overseas visits
- 64% of visits were same-day visits driven by Ontario residents
- Most trips were to visit friends and relatives (45%) or for pleasure (34%)
- The majority of overnight visitors stayed in private homes (63%) except U.S. visitors who are more likely to stay at a hotel/motel (46%)

We Know. Just Ask.

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