

Ontario Indigenous Tourism Statistics 2014

Tourism Research Unit
Winter 2017

This report summarizes key characteristics of visitors and visitor spending of trips in Ontario which included attending an Indigenous event (pow wow, performance, other)

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 Indigenous and total trip statistics. Since total trips equals 100, an index of 105 indicates Indigenous is 5% higher than total, similarly an index of 90 signifies Indigenous is 10% lower than total.

Index

less than 80

80-100

greater than 120

Interpretation

Indigenous trips underdeveloped versus total trips

Indigenous trips similar to total trips

Indigenous trips overdeveloped versus total trips

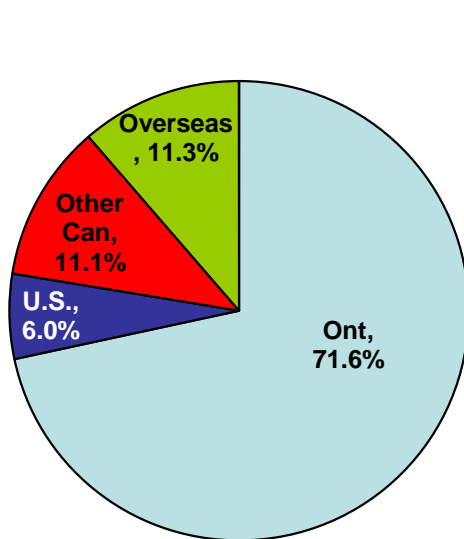
Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario Total	139.5	23.9
Ontario Indigenous	0.2	0.1
Ontario Indigenous proportion of Ontario Total	0.1%	0.3%

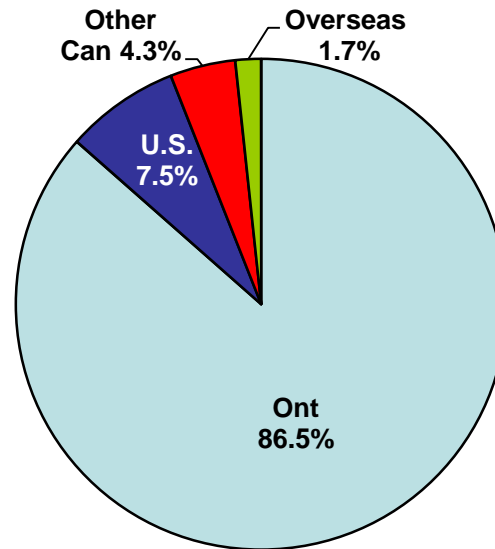
- In 2014, there were 160 thousand Indigenous visits in Ontario, representing 0.1% of total visits in Ontario
- Indigenous visitors spent \$76 million, accounting for 0.3% of total visitor spending in Ontario

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

Indigenous and Total Visits by Origin



Indigenous Visits by Origin
160,000



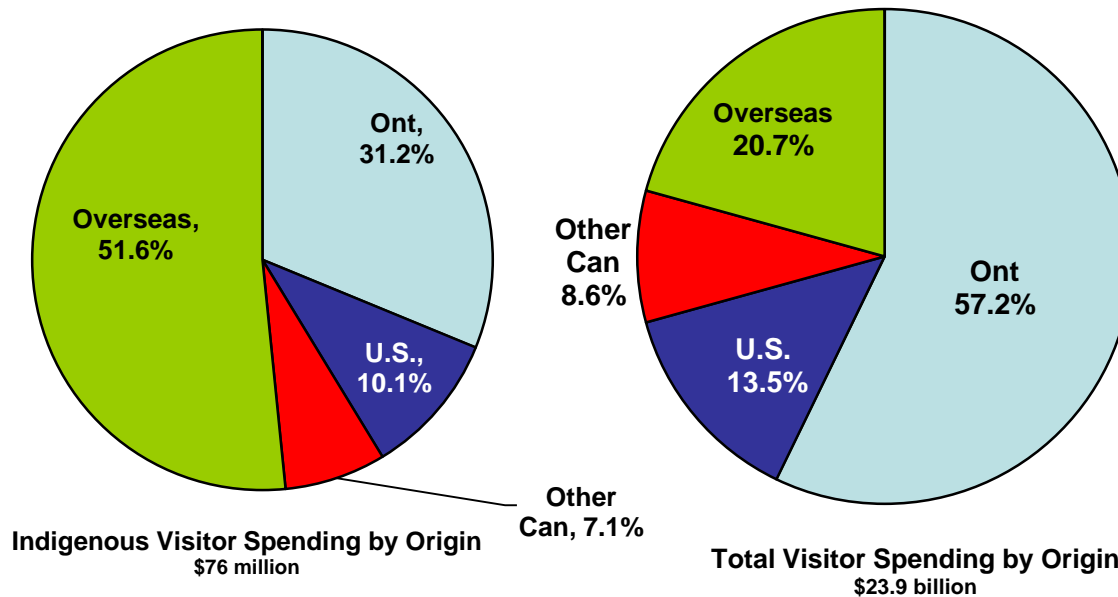
Total Visits by Origin
139.5 million

Indigenous vs. Total	Visit Index
Ontario	83
U.S.	80
Other Canada	255
Overseas	669

- Ontario residents accounted for the majority of Indigenous (72%) and total (86%) visits
- U.S. visitors accounted for 6% of Indigenous visits compared to 8% of total visits
- Visitors from Other Canada comprised 11% of Indigenous visits and 4% of total visits
- Overseas visitors accounted for 11% of Indigenous 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

Indigenous and Total Spending by Origin

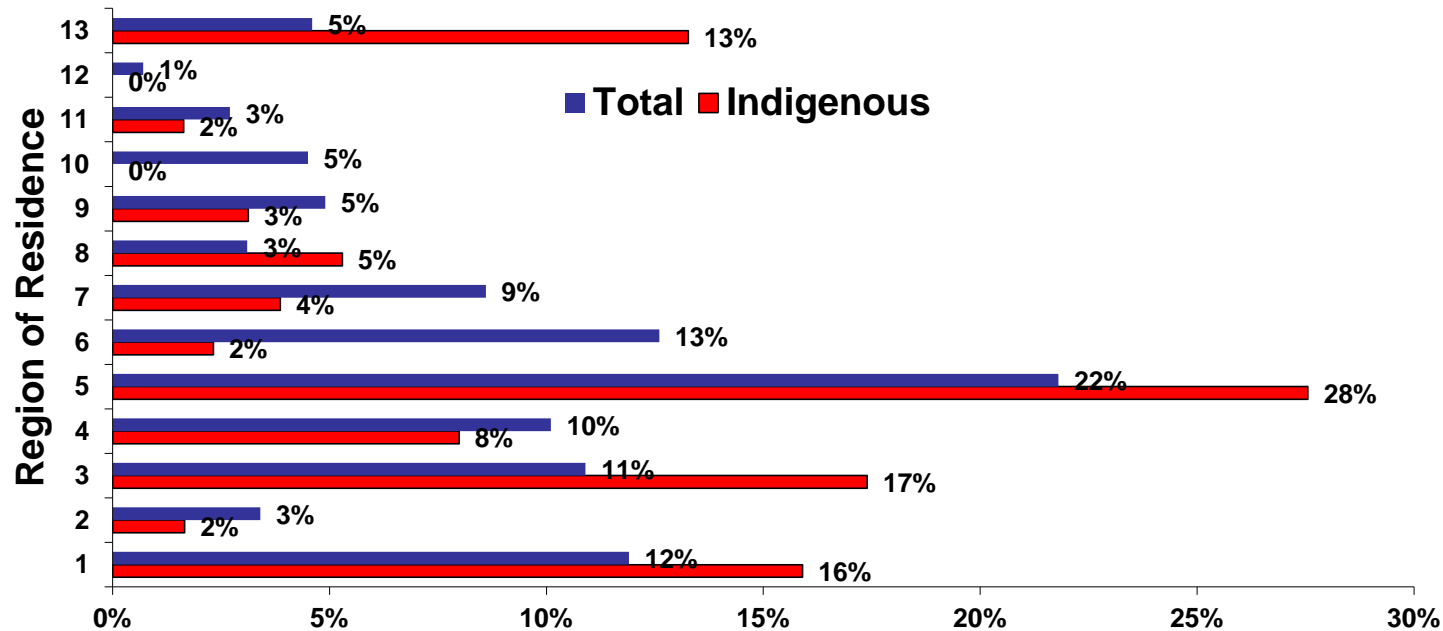


Indigenous vs. Total	Spending Index
Ontario	55
U.S.	74
Other Canada	83
Overseas	250

- Ontario residents accounted for 31% of Indigenous and 57% of total spending
- U.S. visitors accounted for 10% of Indigenous spending compared to 14% of total spending
- Visitors from Other Canada comprised 7% of Indigenous spending and 9% of total spending
- Overseas visitors accounted for 52% of Indigenous 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 Indigenous Visitors by Region of Residence



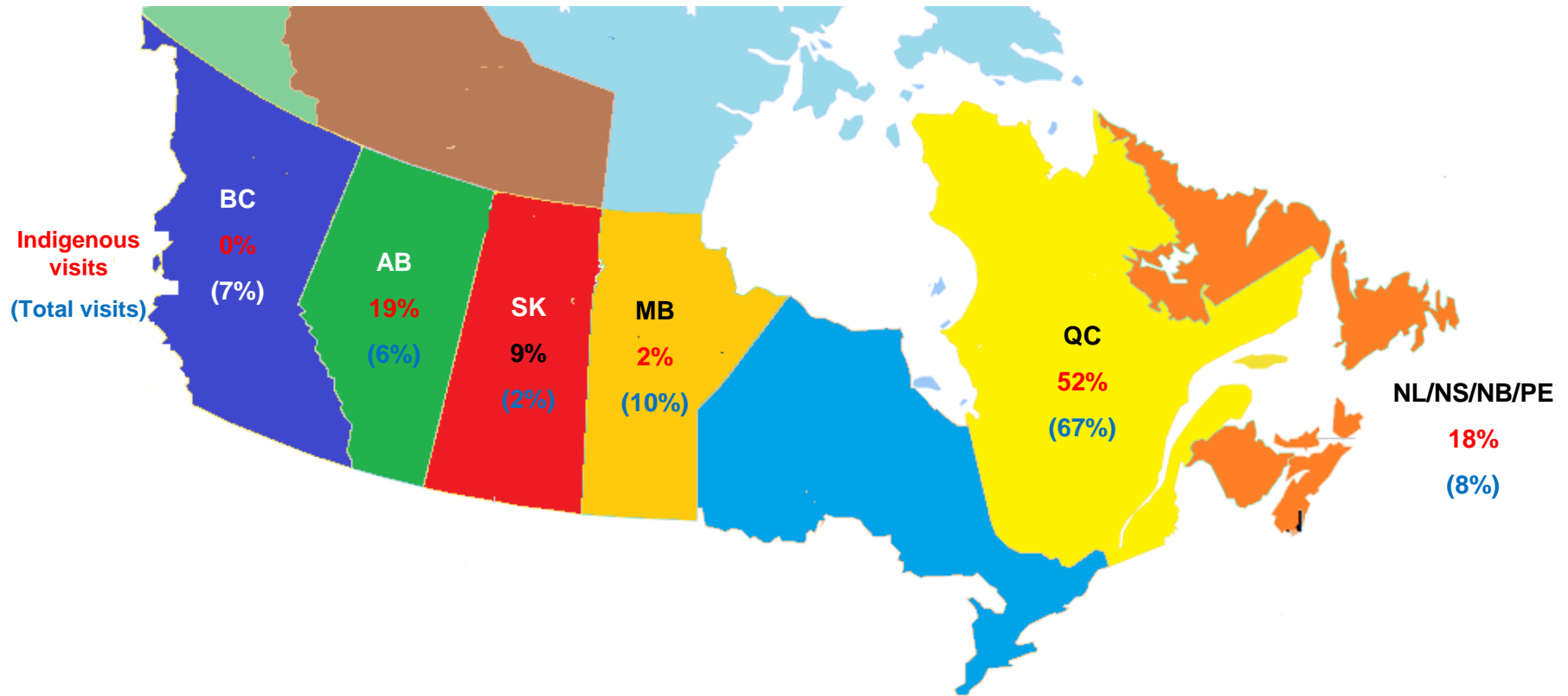
Indigenous vs. Total	Visits from Ontario Index
Reg 1	134
Reg 2	49
Reg 3	160
Reg 4	79
Reg 5	126
Reg 6	18
Reg 7	45
Reg 8	171
Reg 9	64
Reg 10	0
Reg 11	61
Reg 12	0
Reg 13	288

•28% Indigenous visitors from Ontario are from Region 5 compared to 22% of total visits, 17% from Region 3 (11% total visits), and 16% from Region 1 (12% total visits)

Note: Ontario origin Indigenous visitors represented 72% (114,000) of visits and 31% (\$24 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

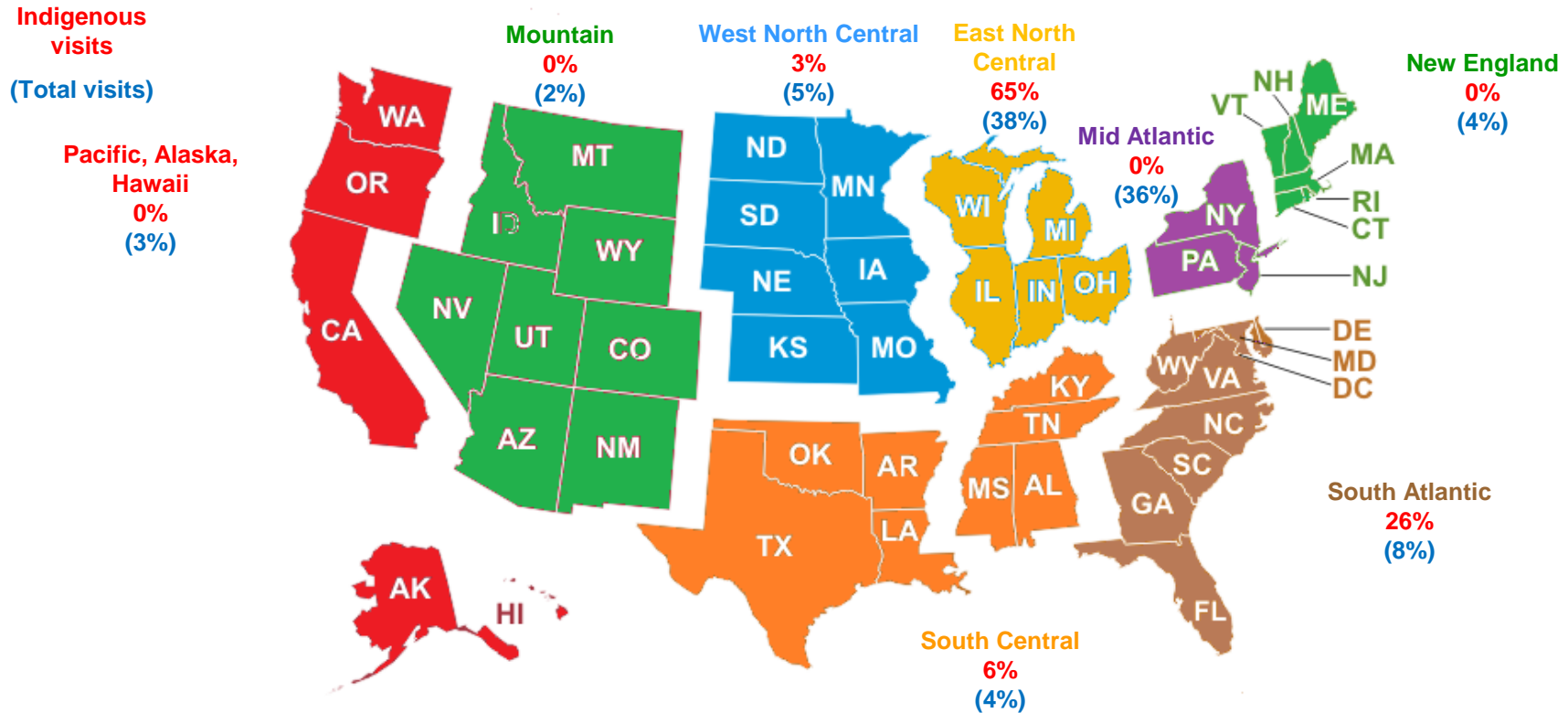
Other Canada Indigenous Visitors by Province of Residence



- 52% of Other Canada Indigenous visitors came from Quebec, compared to 67% of total visits
- Note: Other Canada Indigenous visitors represented 11% (17,000) of visits and 7% (\$5 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. Indigenous Visitors by Region of Residence

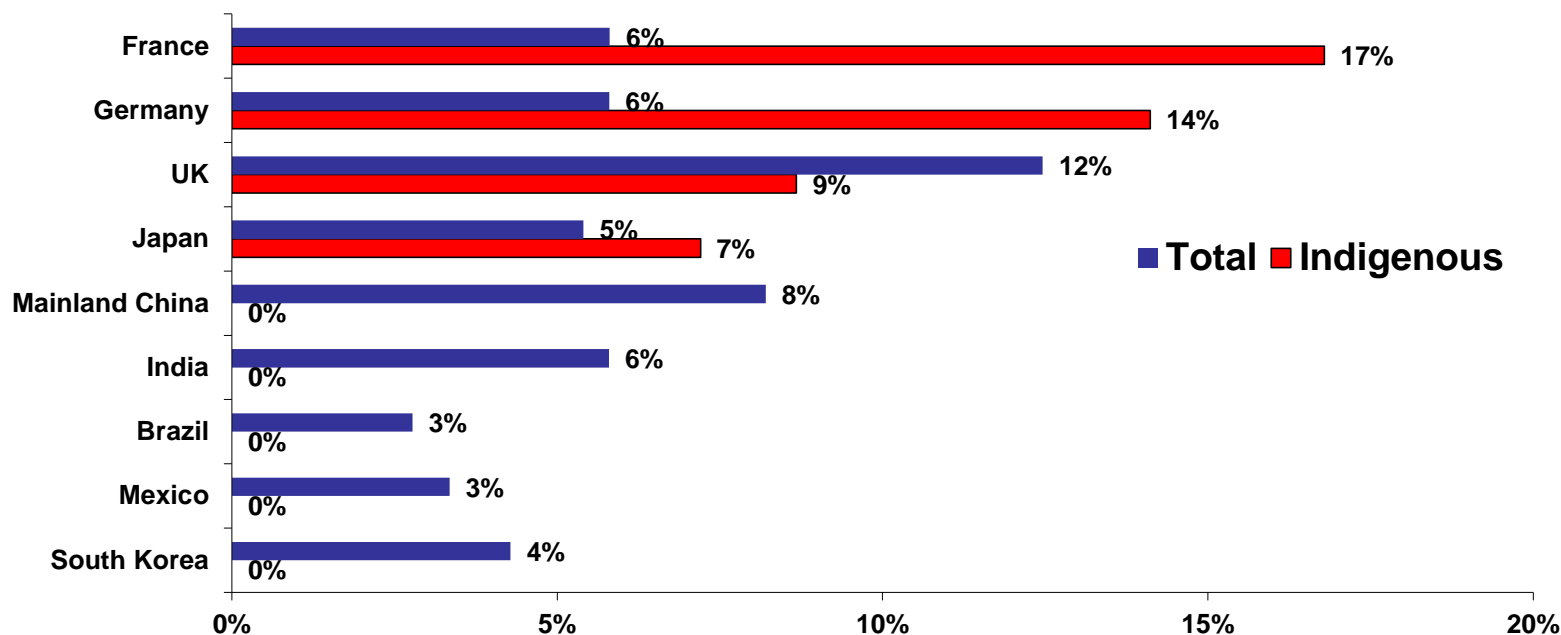


- 65% of U.S. Indigenous visitors came from East North Central states (Michigan, Ohio, Illinois, Indiana, and Wisconsin)

Note: U.S. Indigenous visitors represented 6% (10,000) of visits and 10% (\$8 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 Indigenous Visitors by Country of Residence

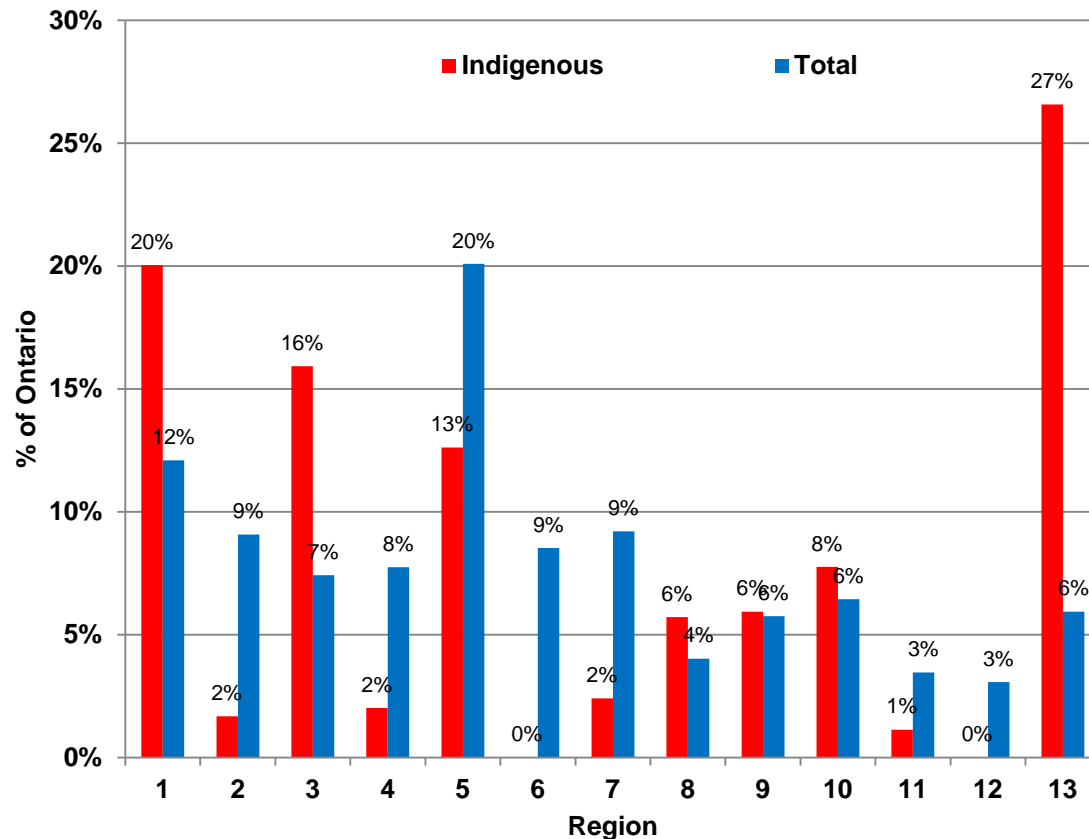


- Ontario's 9 overseas target markets represent 47% of overseas Indigenous visitors versus 54% of total overseas visits

Note: Overseas Indigenous visitors represented 11% (18,000) of visits and 52% (\$39 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 – Indigenous Visits by Region

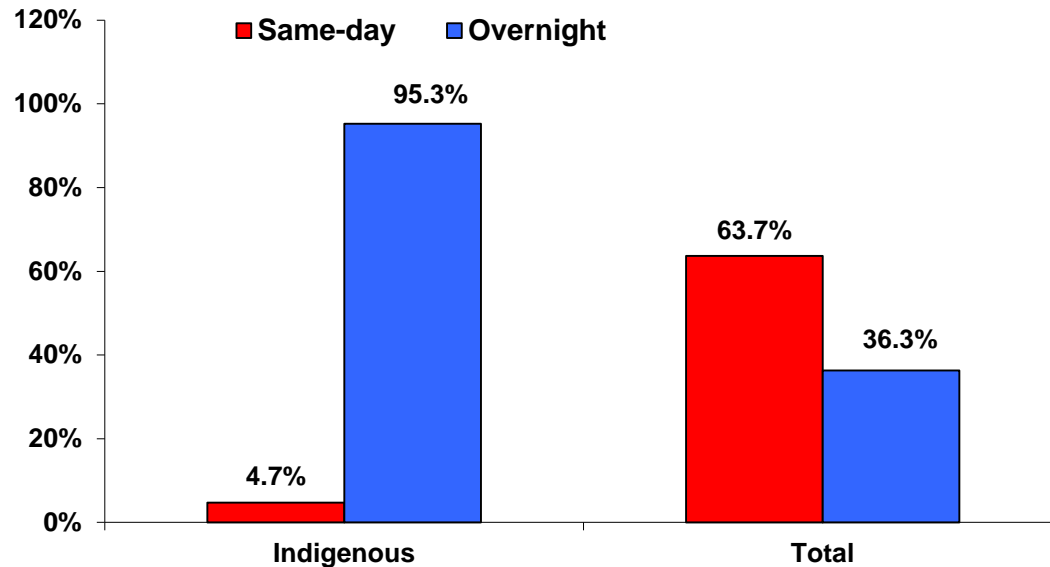


Indigenous vs. Total	Destination Index
Reg 1	166
Reg 2	18
Reg 3	215
Reg 4	26
Reg 5	63
Reg 6	0
Reg 7	26
Reg 8	142
Reg 9	103
Reg 10	120
Reg 11	33
Reg 12	0
Reg 13	448

- 27% of Indigenous visits took place in Region 13 compared to 6% of total visits, 20% in Region 1 (12% total), and 16% in Region 3 (7% total)

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

Indigenous Visits by Length of Stay

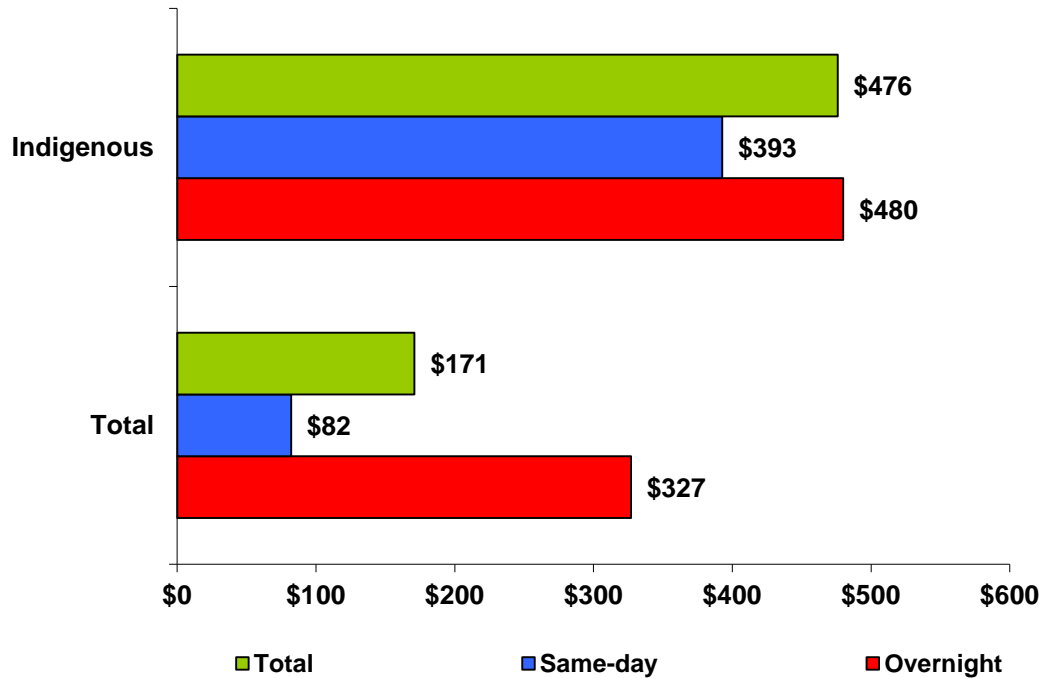


Indigenous vs. Total	Length of Stay Index
Same-day	7
Overnight	262
Avg # nights	121

- The majority (95%) of Indigenous visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits
- The average number of nights spent on Indigenous visits was 3.8, 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

Indigenous \$/Trip by Length of Stay



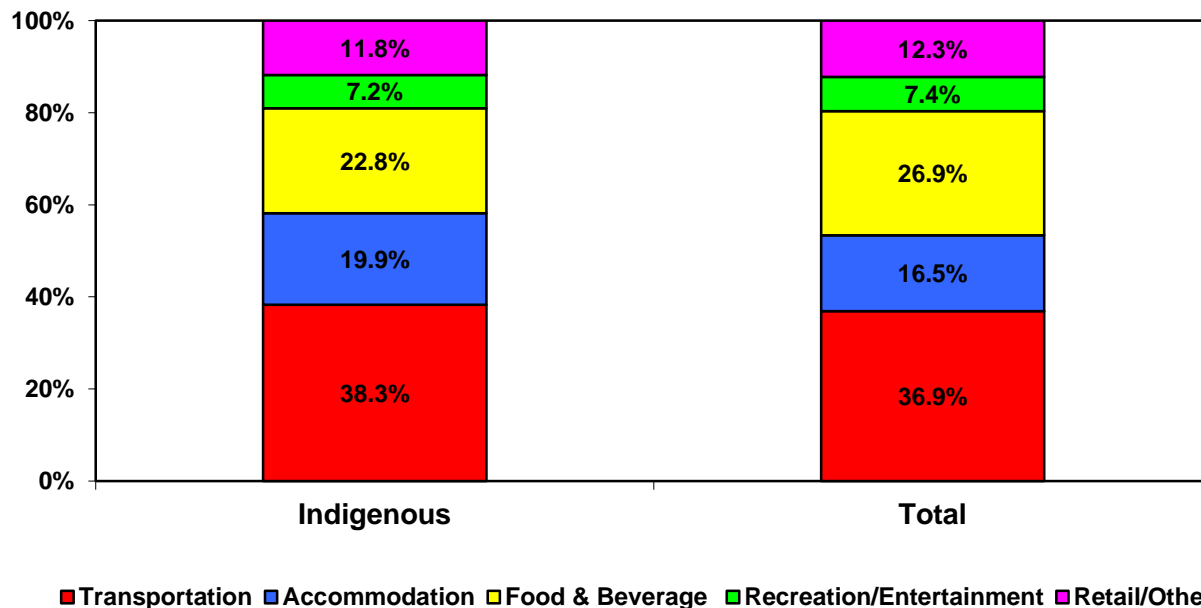
Indigenous vs. Total	\$/Trip Index
Total	278
Same-day	476
Overnight	147

- Indigenous visitors spent an average of \$476/trip (\$171/trip for total trips)

Total trip spending, not just spending on Indigenous

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

Indigenous Spending by Category



Indigenous vs. Ontario	Spending Index
Transportation	104
Accommodation	121
Food & Beverage	85
Rec./Entertain.	97
Retail/Other	96

- The largest proportions of expenditures were spent on Transportation (38% Indigenous, 37% total) and Food & Beverage (23% Indigenous, 27% total)
- Indigenous visitors spent a larger proportion on accommodations, 20%, than total visitors, 16%

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 Indigenous Visitors

Activity	Indigenous Visit Participation	Index vs Total
Indigenous	100%	87514
Any Outdoor/Sports Activity	55%	324
Historic Sites	37%	1146
National/Provincial Nature Parks	34%	1149
Boating	31%	668
Festivals/Fairs	30%	1082
Museums/Art Galleries	30%	990
Visit a beach	28%	594
Sightseeing	22%	409
Restaurant or bar	21%	384

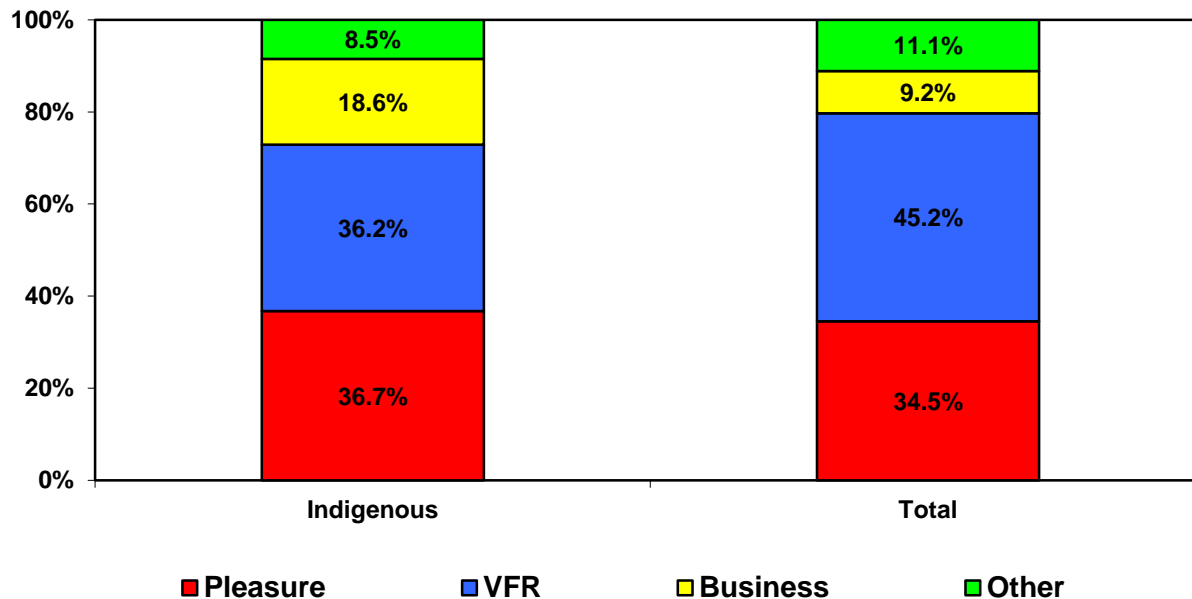
Activity	Indigenous Visit Participation	Index vs Total
Performance such as a play or concert	21%	527
Hiking	19%	468
Wildlife/Bird watching	18%	807
Shopping	17%	194
Visit Friends or Relatives	14%	44
Fishing	14%	392
Camping	14%	398
Casinos	13%	489
Sports Events	13%	319
Theme Parks	10%	837

Activity	Indigenous Visit Participation	Index vs Total
Zoos/Aquariums/Botanical Gardens	10%	669
Business Meeting/Conference/Seminar	8%	185
Golfing	7%	543
Cycling	4%	317
Hunting	4%	1137
Play a sport	3%	138
Movies	2%	169
Medical/Dental appointment	1%	74
Skiing/Snowboarding	0%	0
Snowmobiling	0%	0
ATV	0%	0

- Indigenous visitors participate in a variety of activities with 37% visiting a historic site, 34% going to a park, and 31% boating

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 Indigenous Visit

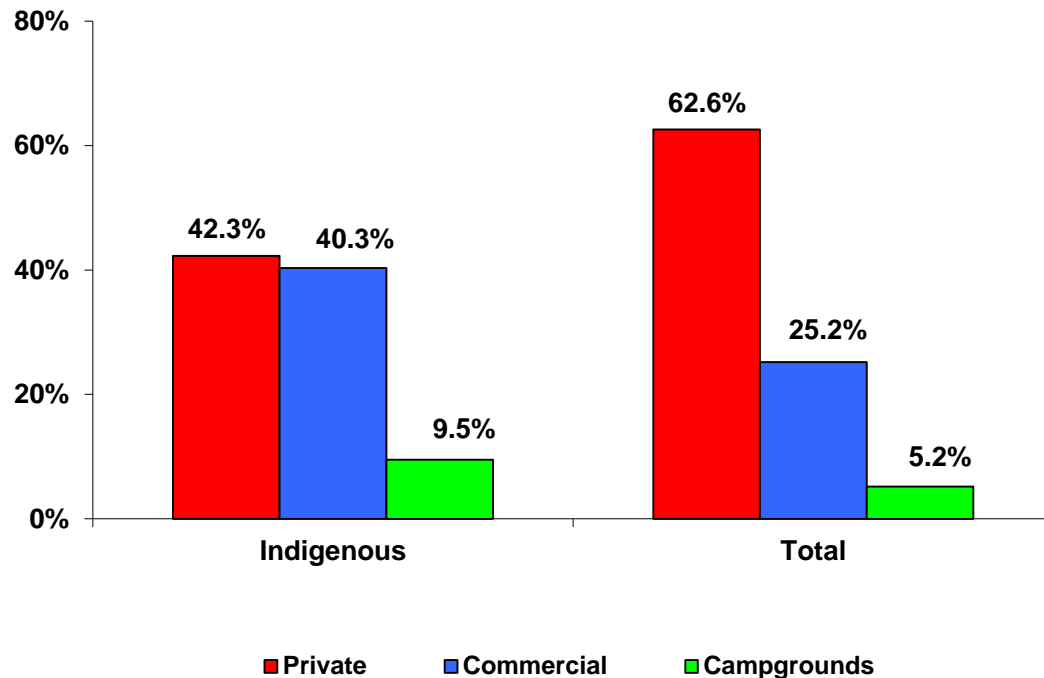


Indigenous vs. Total	Purpose Index
Pleasure	106
VFR	80
Business	203
Other	77
VFR: Visiting Friends and / or Relatives	

- Most trips were pleasure trips (37% 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

Indigenous Visits by Accommodation Type

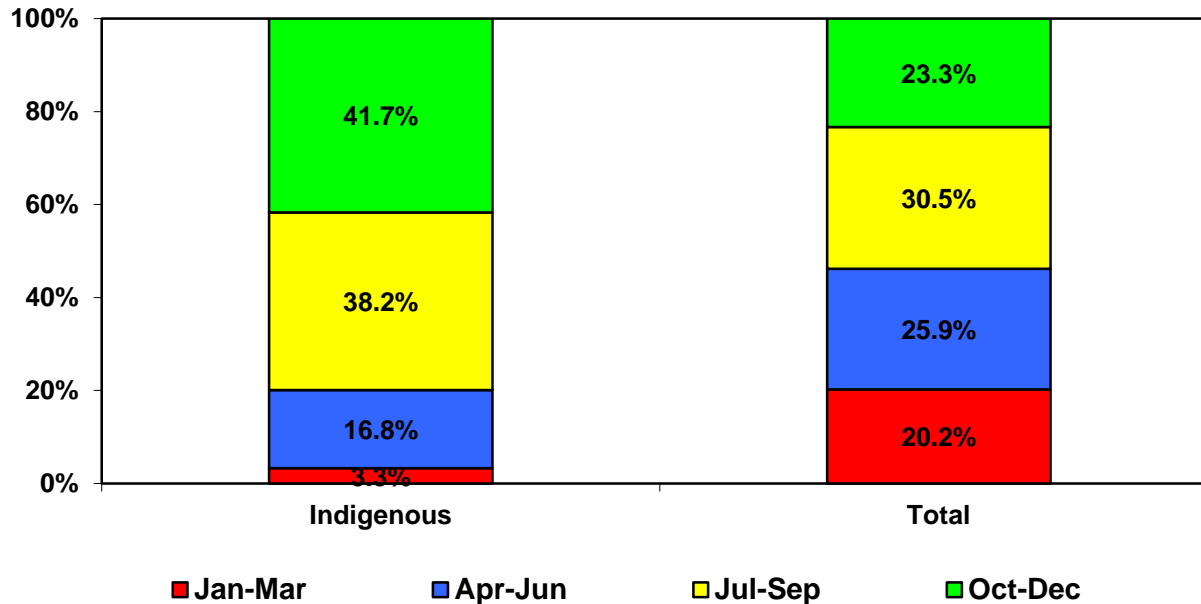


Indigenous vs. Total	Type Index
Private	67
Commercial	160
Campground	183

- 40% of overnight Indigenous visits were spent at commercial accommodations compared to 25% of total visits
- 10% of overnight Indigenous 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

Indigenous Visits by Time of Year

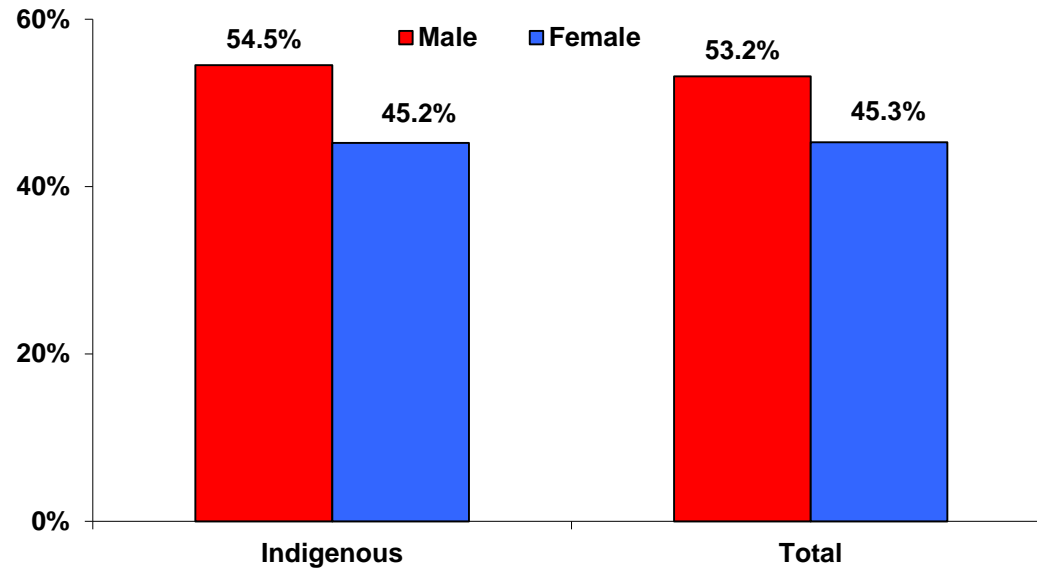


Indigenous vs. Total	Quarter Index
Jan-Mar	16
Apr-Jun	65
Jul-Sept	125
Oct-Dec	179

- The largest proportions of trips occur in Oct-Dec (42% Indigenous vs 23% total) and Jul-Sep (38% Indigenous vs 30% total)

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

Indigenous Visits by Gender

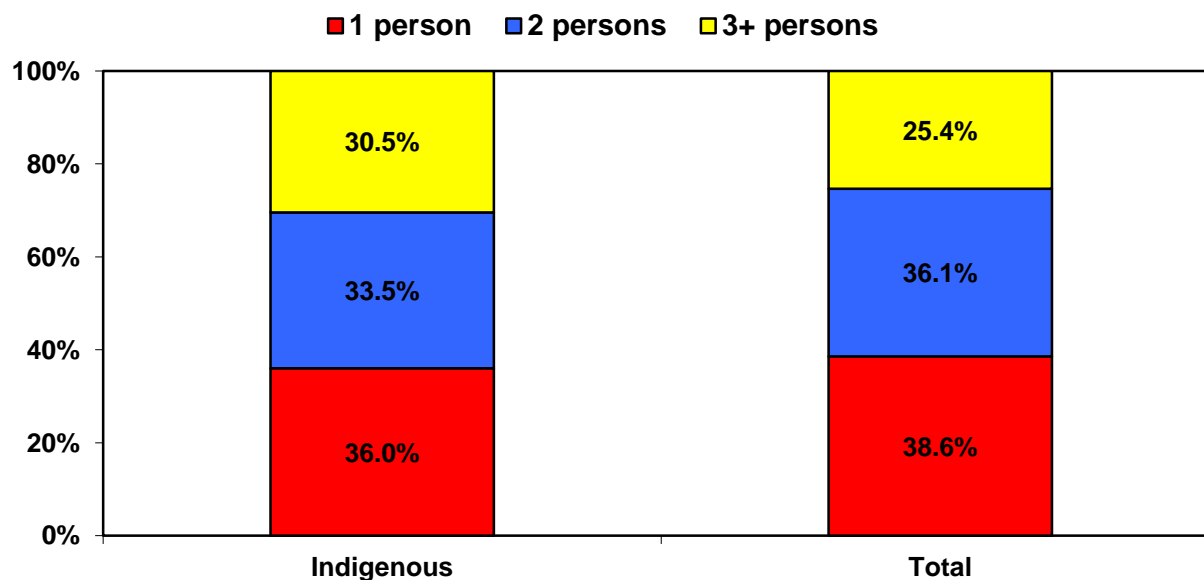


Indigenous vs. Total	Gender Index
Male	103
Female	100

- Males made the majority (54%) of Indigenous visits. For comparison, 53% of total visits in Ontario were among male visitors

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

Indigenous Visits by Party Size



Indigenous vs. Total	Party Size Index
1 person	93
2 persons	93
3+ persons	120
Avg party size	108
With children	100

Avg Party Size

2.5

2.4

With children

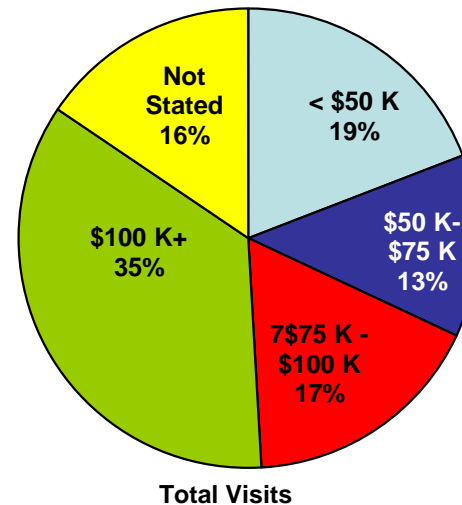
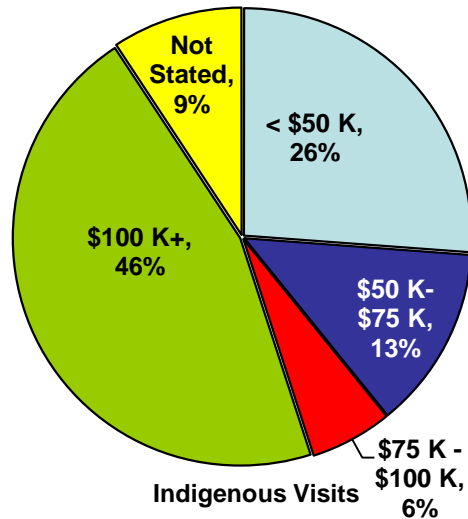
13%

13%

- 30% of Indigenous visits were among groups of 3 or more people compared to 25% of total visits
- 13% of Indigenous visits included children similar to 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 Indigenous Visitor's Income

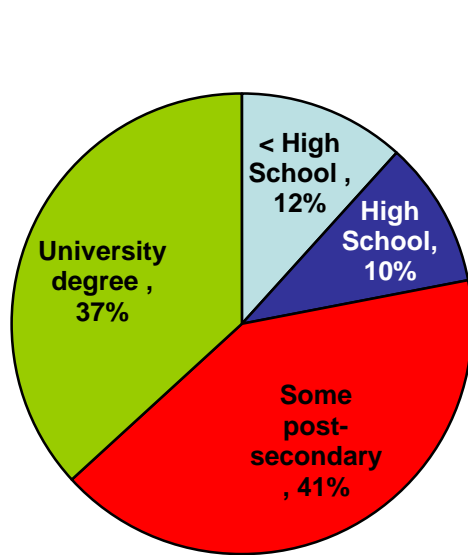


Indigenous vs. Total	Income Index
< \$50 K	137
\$50 K - \$75 K	101
\$75 K - \$100 K	34
\$100 K+	129

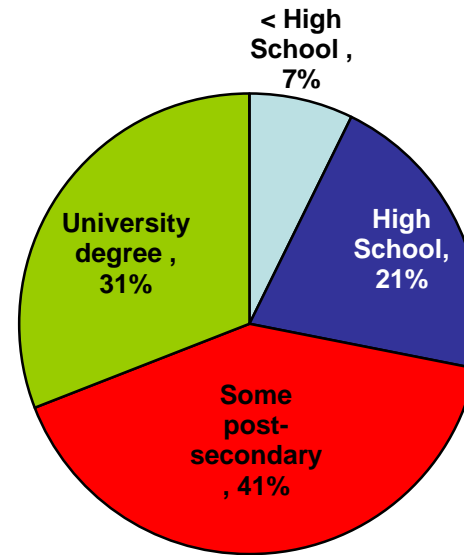
- 46% of Canadian Indigenous visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors
- 26% of Canadian Indigenous visitors in Ontario had an household income less than \$50,000 compared to 19% of total visitors

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

Domestic Indigenous Visitor's Education



Indigenous Visits



Total Visits

Indigenous vs. Ontario	Education Index
< High School	161
High School	49
Some post-secondary	101
University degree	119

- 37% of Canadian Indigenous 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

Indigenous Summary

- In 2014, there were 160 thousand Indigenous visits in Ontario, representing 0.1% of total visits to Ontario. Indigenous visitors spent \$76 million, or 0.3% of total visitor spending in Ontario.
- Ontario residents accounted for 72% of visits and 31% of spending, residents of Other Canada accounted for 11% of visits and 7% of spending, U.S. visitors represented 6% of visits and 10% of expenditures, and overseas visitors accounted for 11% of visits and 52% of spending
- 28% Indigenous visitors from Ontario are from Region 5 compared to 22% of total visits, 17% from Region 3 (11% total visits), and 16% from Region 1 (12% total visits)
- 27% of Indigenous visits took place in Region 13 compared to 6% of total visits, 20% in Region 1 (12% total), and 16% in Region 3 (7% total)

Indigenous Summary

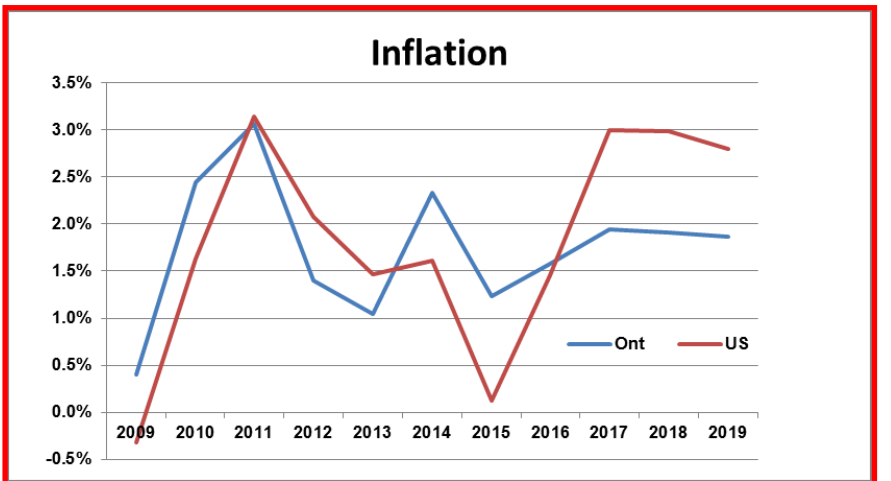
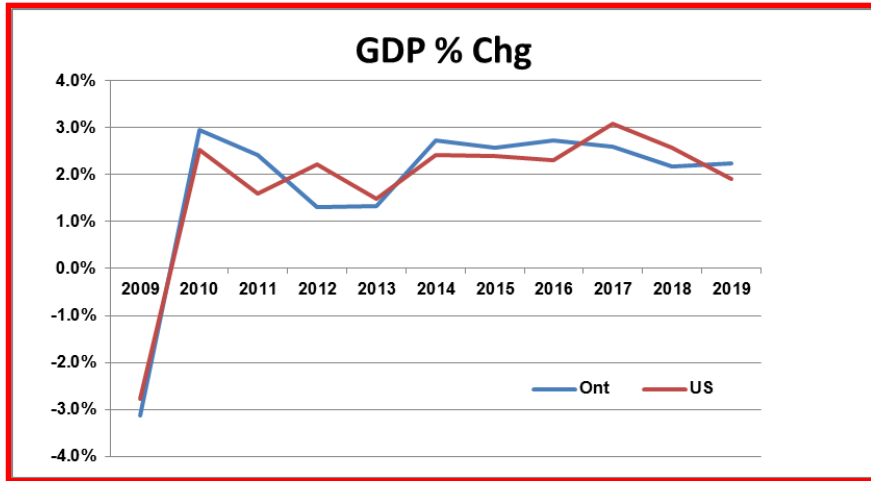
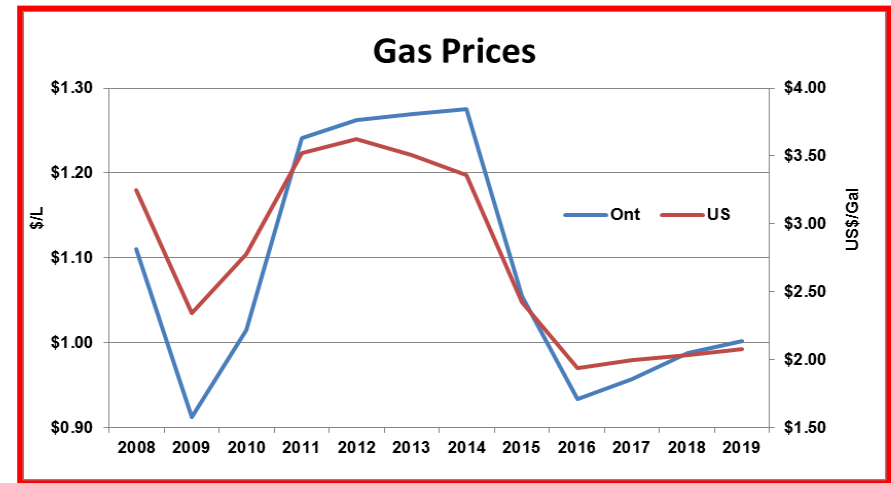
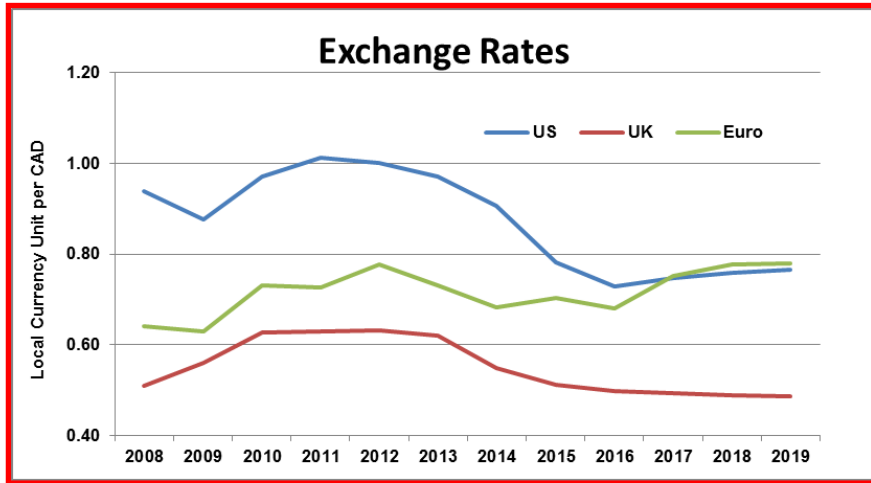
- The majority (95%) of Indigenous visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits. The average number of nights spent on Indigenous visits was 3.8, above Ontario's average of 3.1 nights
- Indigenous visitors spent an average of \$476/trip (\$171/trip for total trips)
- The largest proportions of expenditures were spent on Transportation (38% Indigenous, 37% total) and Food & Beverage (23% Indigenous, 27% total). Indigenous visitors spent a larger proportion on accommodations, 20%, than total visitors, 16%
- Indigenous visitors participate in a variety of activities with 37% visiting a historic site, 34% going to a park, and 31% boating
- Most trips were pleasure trips (37% compared to 34% of total trips)

Indigenous Summary

- 40% of overnight Indigenous visits were spent at commercial accommodations compared to 25% of total visits. 10% of overnight Indigenous visits were spent in camping/RV facilities versus 5% of total visits
- The largest proportions of trips occur in Oct-Dec (42% Indigenous vs 23% total) and Jul-Sep (38% Indigenous vs 30% total)
- 30% of Indigenous visits were among groups of 3 or more people compared to 25% of total visits. 13% of Indigenous visits included children similar to total visits
- 46% of Canadian Indigenous visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors
- 37% of Canadian Indigenous 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

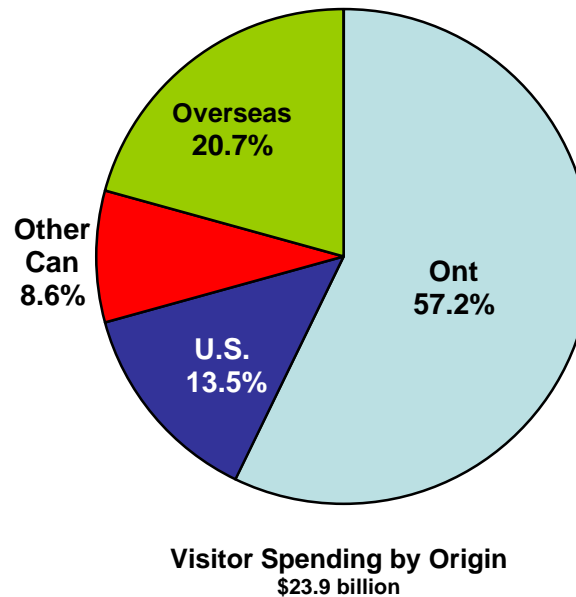
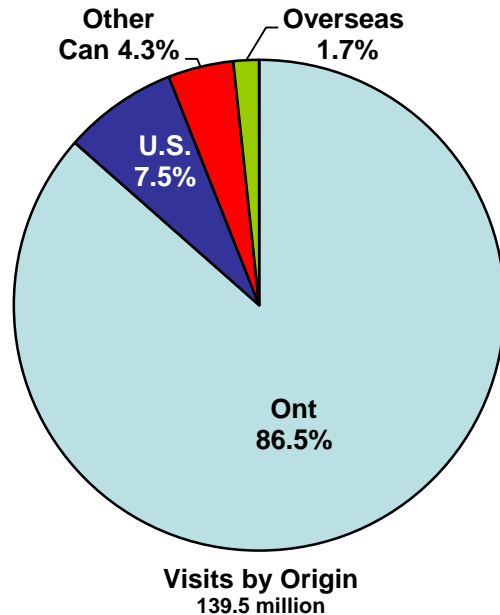
- February 7–23 – The XXII **Olympic Winter Games** are held in Sochi, Russia
- March 8 – **Malaysia Airlines Flight 370**, a Boeing 777 airliner en route to Beijing from Kuala Lumpur, disappears over the Gulf of Thailand with 239 people on board. The aircraft is presumed to have crashed into the Indian 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

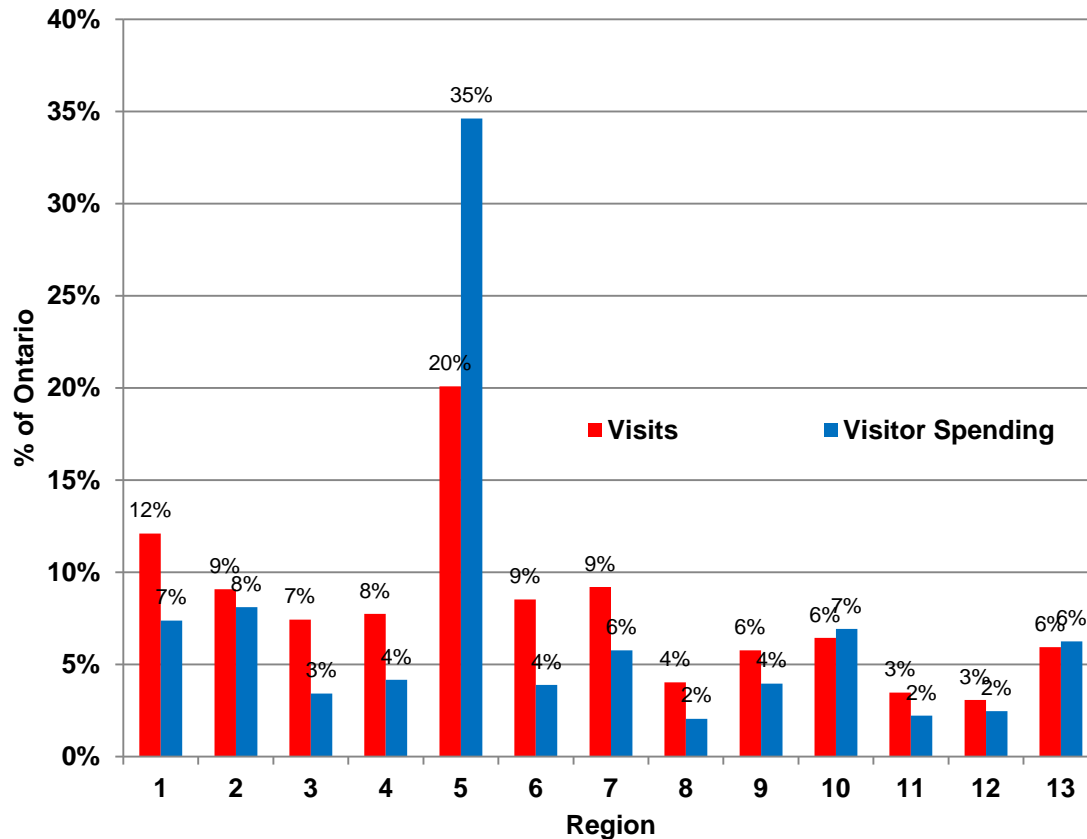


Ontario	2014	VS 2012
Visits	139.5M	-1.0%
Visitor Spending	\$23.9B	5.1%

- 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.

tourism.research@ontario.ca

(416) 325-8287