

Ontario Casino Tourism Statistics 2014

Tourism Research Unit
Winter 2017

This report summarizes key characteristics of visitors and visitor spending of trips in Ontario which included going to a casino

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

Index

less than 80

80-100

greater than 120

Interpretation

Casino trips underdeveloped versus total trips

Casino trips similar to total trips

Casino trips overdeveloped versus total trips

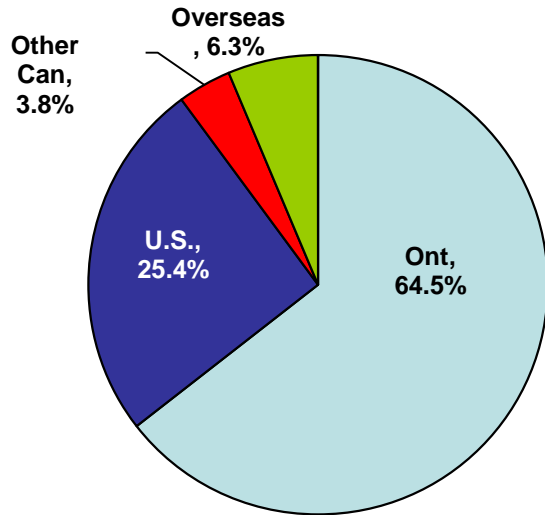
Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario Total	139.5	23.9
Ontario Casino	3.7	1.5
Ontario Casino proportion of Ontario Total	2.6%	6.3%

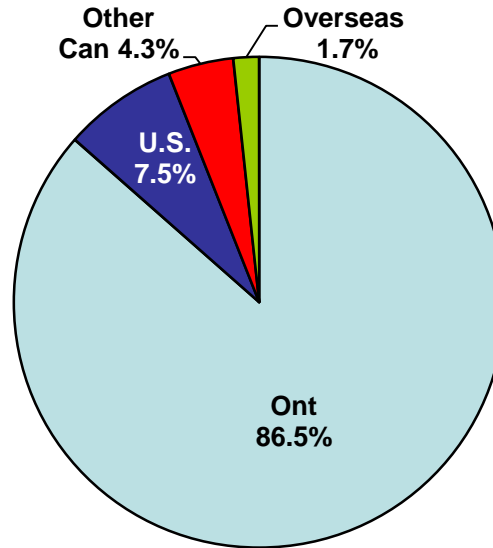
- In 2014, there were 3.7 million Casino visits in Ontario, representing 2.6% of total visits in Ontario
- Casino visitors spent \$1.5 billion, accounting for 6.3% of total visitor spending in Ontario

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

Casino and Total Visits by Origin



Casino Visits by Origin
3.7 million



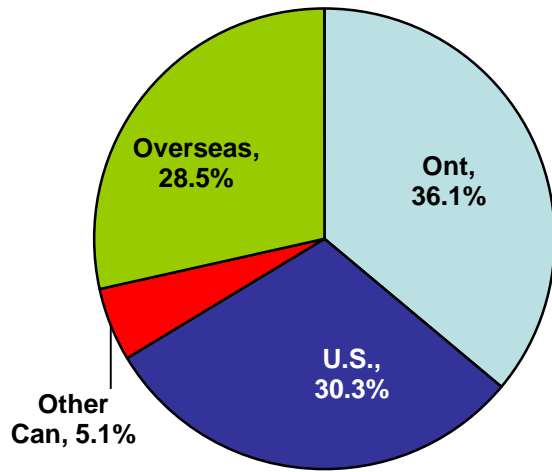
Total Visits by Origin
139.5 million

Casino vs. Total	Visit Index
Ontario	75
U.S.	340
Other Canada	87
Overseas	374

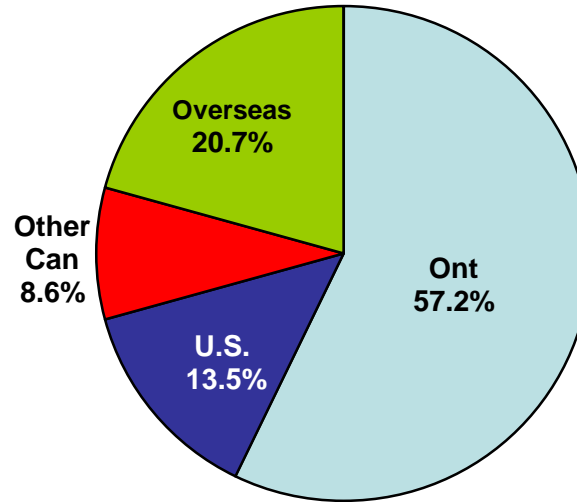
- Ontario residents accounted for the majority of Casino (64%) and total (86%) visits
- U.S. visitors accounted for 25% of Casino visits compared to 8% of total visits
- Visitors from Other Canada comprised 4% of Casino visits and 4% of total visits
- Overseas visitors accounted for 6% of Casino visits 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

Casino and Total Spending by Origin



Casino Visitor Spending by Origin
\$1.5 billion



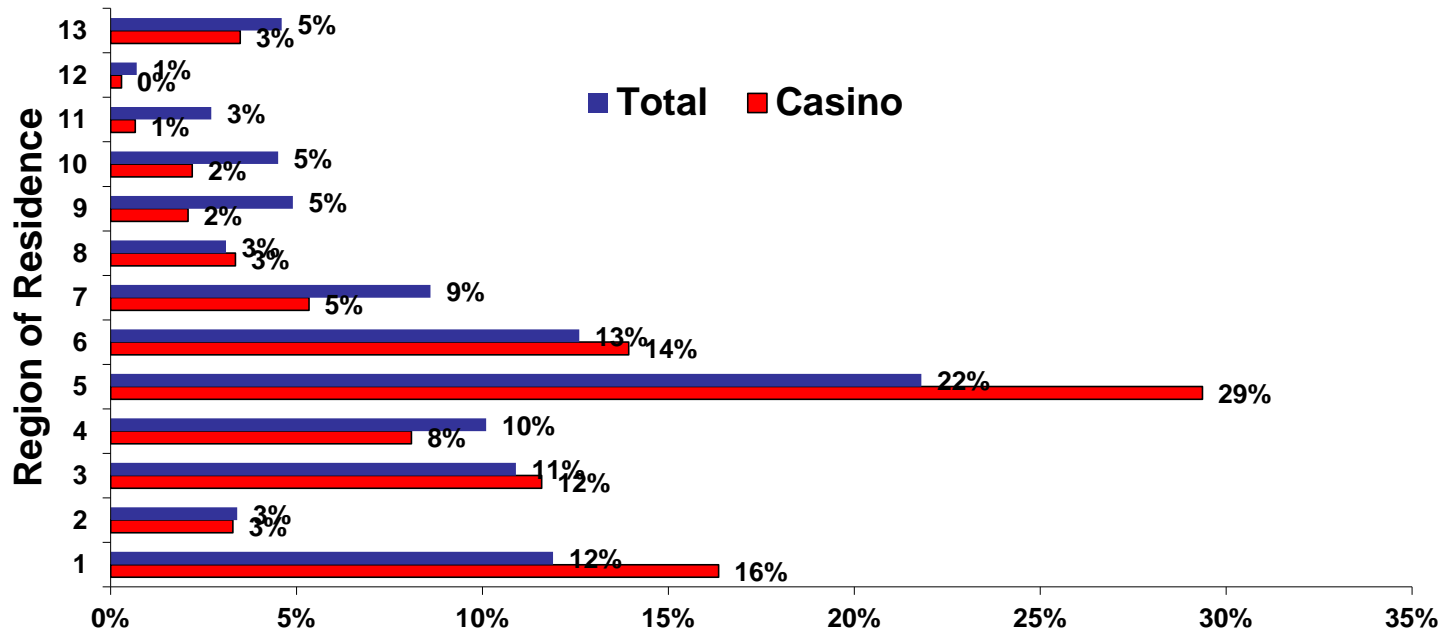
Total Visitor Spending by Origin
\$23.9 billion

Casino vs. Total	Spending Index
Ontario	63
U.S.	223
Other Canada	60
Overseas	138

- Ontario residents accounted for 36% of Casino and 57% of total spending
- U.S. visitors accounted for 30% of Casino spending compared to 14% of total spending
- Visitors from Other Canada comprised 5% of Casino spending and 9% of total spending
- Overseas visitors accounted for 28% of Casino 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 Casino Visitors by Region of Residence



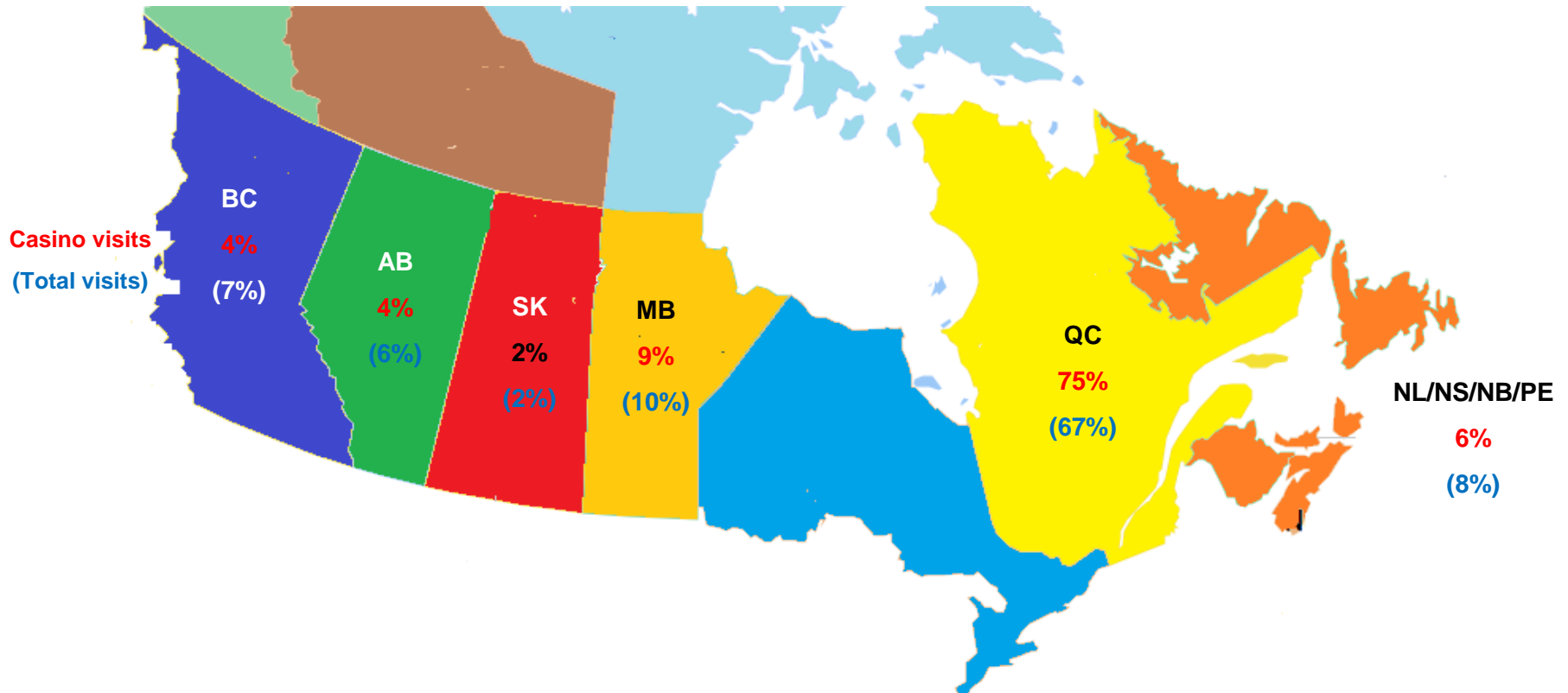
Casino vs. Total	Visits from Ontario Index
Reg 1	137
Reg 2	97
Reg 3	106
Reg 4	80
Reg 5	135
Reg 6	111
Reg 7	62
Reg 8	108
Reg 9	42
Reg 10	49
Reg 11	25
Reg 12	41
Reg 13	76

•29% Casino visitors from Ontario are from Region 5 compared to 22% of total visits, 16% from Region 1 (12% total visits), and 14% from Region 6 (13% total visits)

Note: Ontario origin Casino visitors represented 64% (2.4 million) of visits and 36% (\$540 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 Casino Visitors by Province of Residence



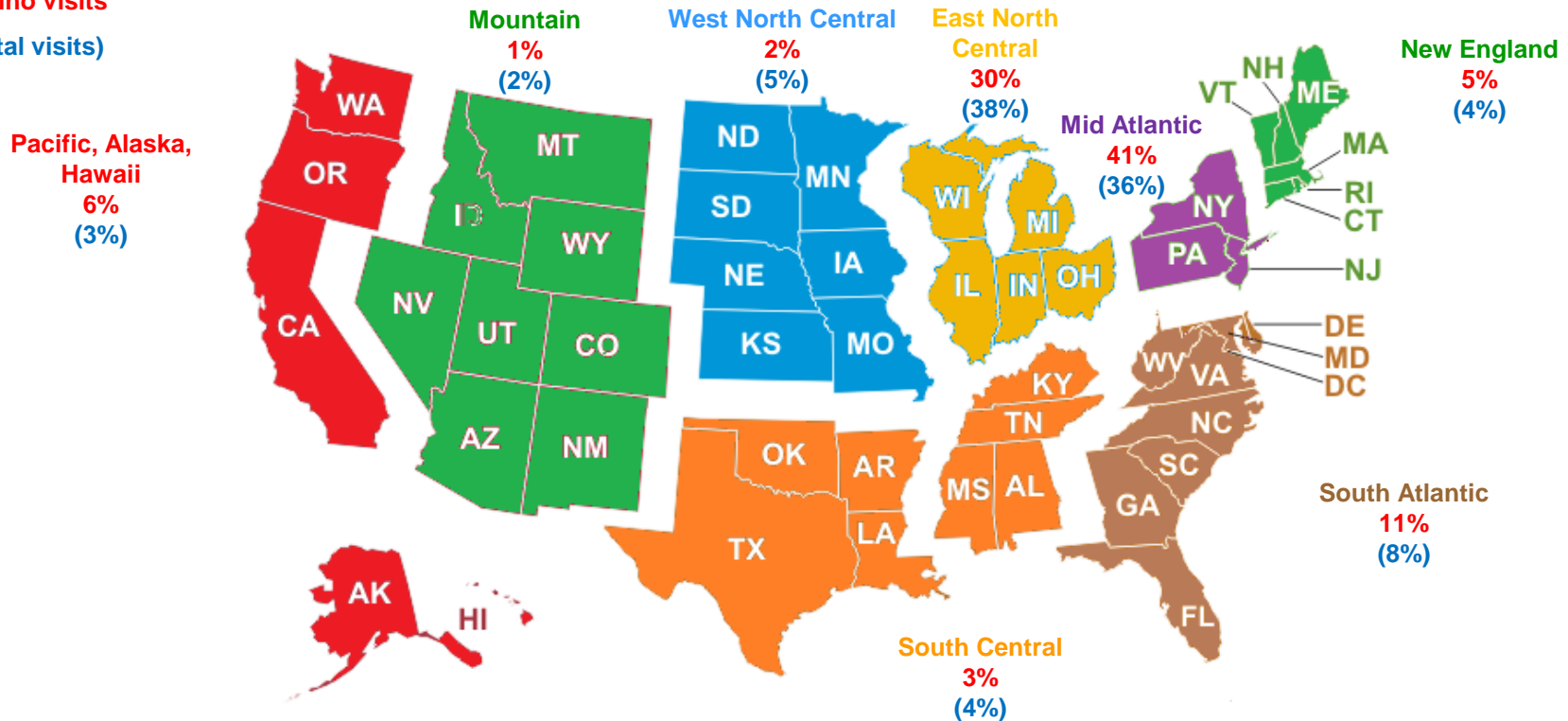
- 75% of Other Canada Casino visitors came from Quebec, compared to 67% of total visits
- Note: Other Canada Casino visitors represented 4% (139,000) of visits and 5% (\$778 M) of visitor spending

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. Casino Visitors by Region of Residence

Casino visits

(Total visits)

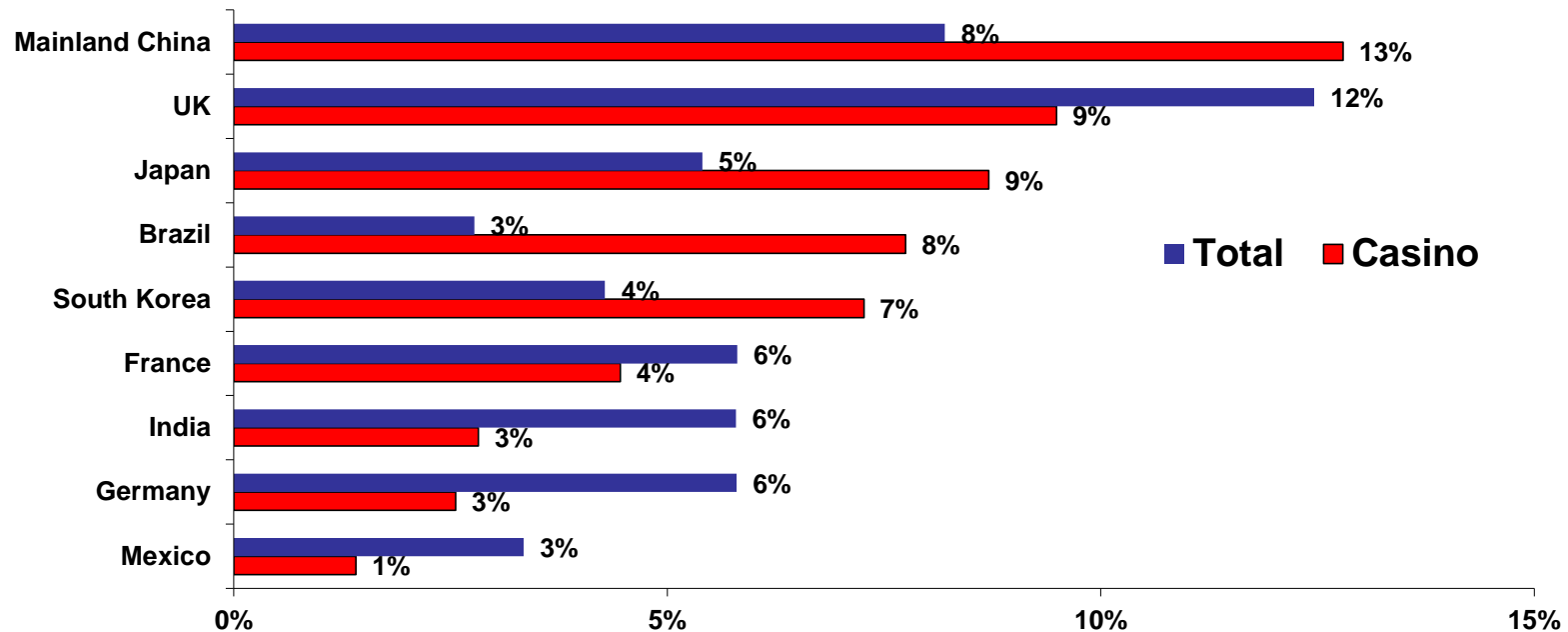


- 41% of U.S. Casino visitors came from Mid Atlantic states (New York, New Jersey, Pennsylvania) and 30% from East North Central states (Michigan, Ohio, Illinois, Indiana, and Wisconsin)

Note: U.S. Casino visitors represented 25% (933,000) of visits and 30% (\$453 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 Casino Visitors by Country of Residence

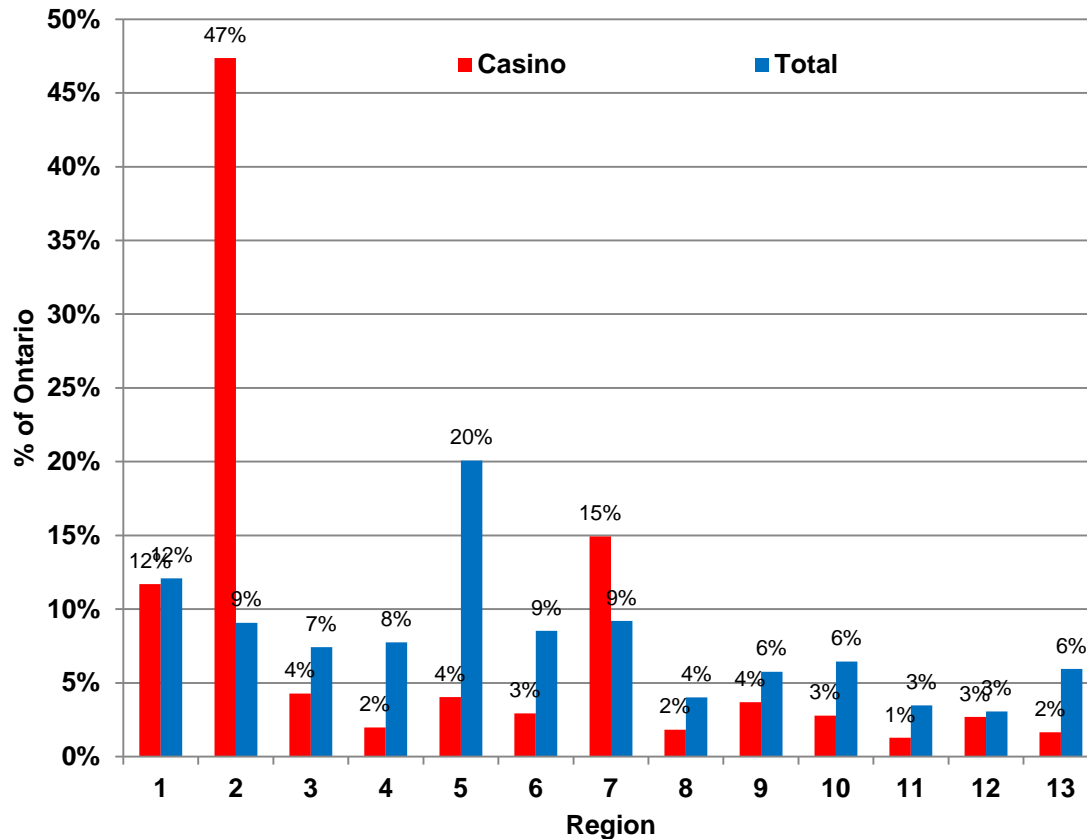


- Ontario's 9 overseas target markets represent 57% of overseas Casino visitors versus 54% of total overseas visits

Note: Overseas Casino visitors represented 6% (233,000) of visits and 28% (\$427 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 – Casino Visits by Region

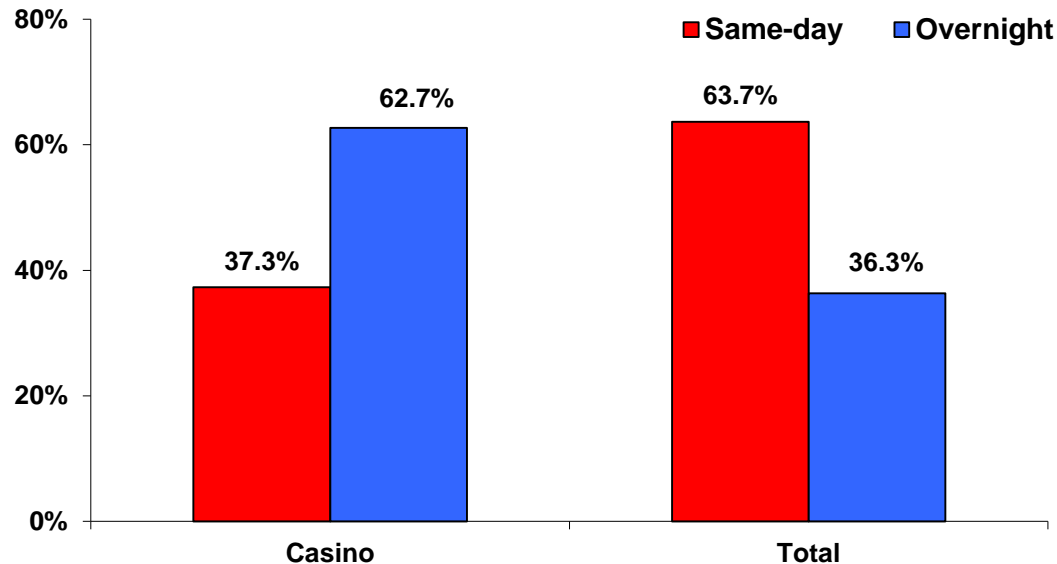


Casino vs. Total	Destination Index
Reg 1	97
Reg 2	522
Reg 3	58
Reg 4	26
Reg 5	20
Reg 6	34
Reg 7	162
Reg 8	45
Reg 9	64
Reg 10	43
Reg 11	37
Reg 12	88
Reg 13	28

- 47% of Casino visits took place in Region 2 compared to 9% of total visits, 15% in Region 7 (9% total), and 12% in Region 1 (12% total)

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

Casino Visits by Length of Stay

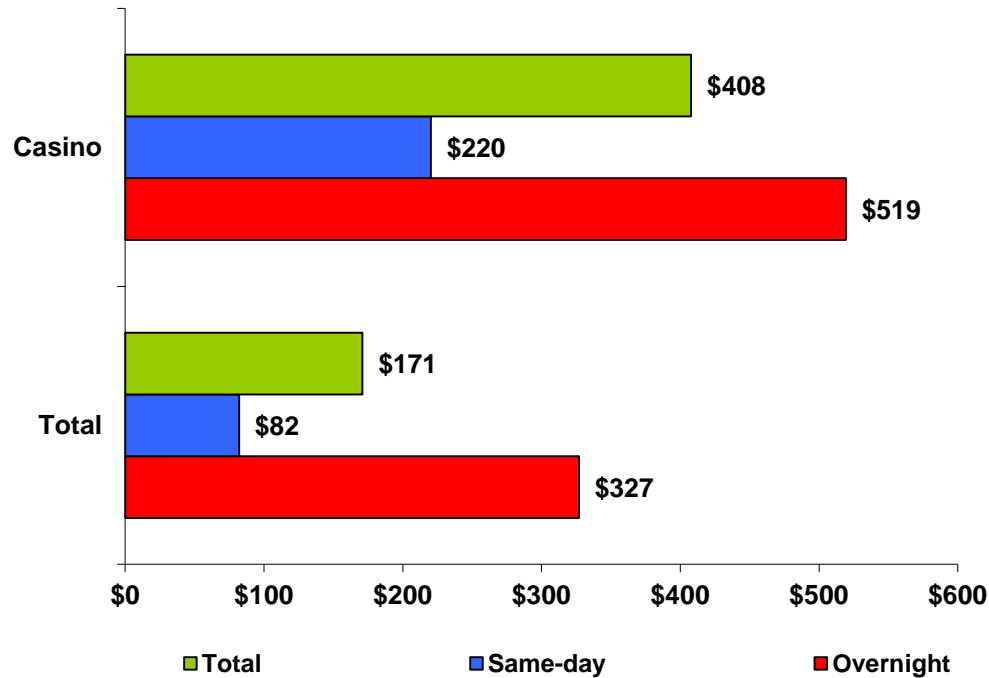


Casino vs. Total	Length of Stay Index
Same-day	59
Overnight	173
Avg # nights	115

- The majority (63%) of Casino visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits
- The average number of nights spent on Casino 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

Casino \$/Trip by Length of Stay



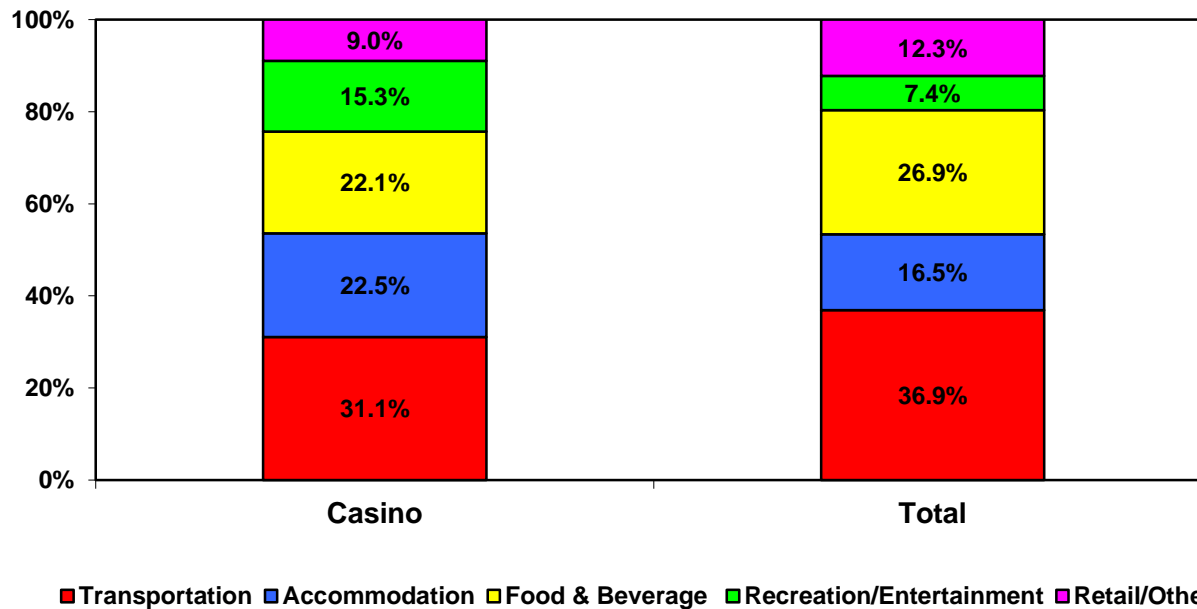
Casino vs. Total	\$/Trip Index
Total	238
Same-day	267
Overnight	159

- Casino visitors spent an average of \$408/trip (\$171/trip for total trips)

Total trip spending, not just spending on Casino

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

Casino Spending by Category



Casino vs. Ontario	Spending Index
Transportation	84
Accommodation	137
Food & Beverage	82
Rec./Entertain.	207
Retail/Other	73

- The largest proportions of expenditures were spent on Transportation (31% Casino, 37% total), Food & Beverage (22% Casino, 27% total) and Accommodations (22% Casino, 16% total)

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 Casino Visitors

Activity	Casino Visit Participation	Index vs Total
Casinos	100%	3799
Performance such as a play or concert	25%	630
Historic Sites	25%	767
Festivals/Fairs	21%	753
Sightseeing	20%	372
Visit Friends or Relatives	20%	60
Shopping	18%	207
Museums/Art Galleries	18%	595
Sports Events	13%	314
Zoos/Aquariums/Botanical Gardens	12%	810

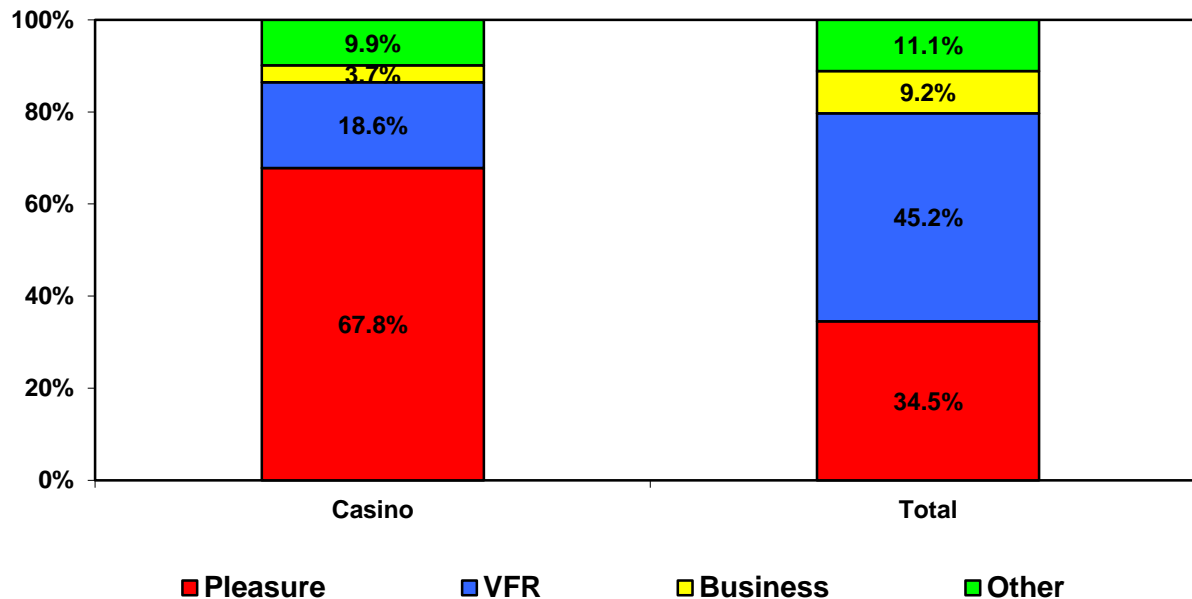
Activity	Casino Visit Participation	Index vs Total
Any Outdoor/Sports Activity	10%	60
Restaurant or bar	10%	178
National/Provincial Nature Parks	8%	253
Theme Parks	5%	416
Visit a beach	4%	81
Wildlife/Bird watching	3%	156
Boating	2%	53
Hiking	2%	53
Fishing	2%	51
Golfing	2%	114

Activity	Casino Visit Participation	Index vs Total
Camping	1%	42
Play a sport	1%	70
Cycling	1%	100
Movies	1%	106
Business Meeting/Conference/Seminar	1%	18
Skiing/Snowboarding	1%	50
Indigenous	1%	489
Medical/Dental appointment	0%	8
Hunting	0%	20
Snowmobiling	0%	2
ATV	0%	0

- 25% of Casino visitors attended a cultural performance, 25% went to a historical site, 21% visited a festival/fair

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 Casino Visit

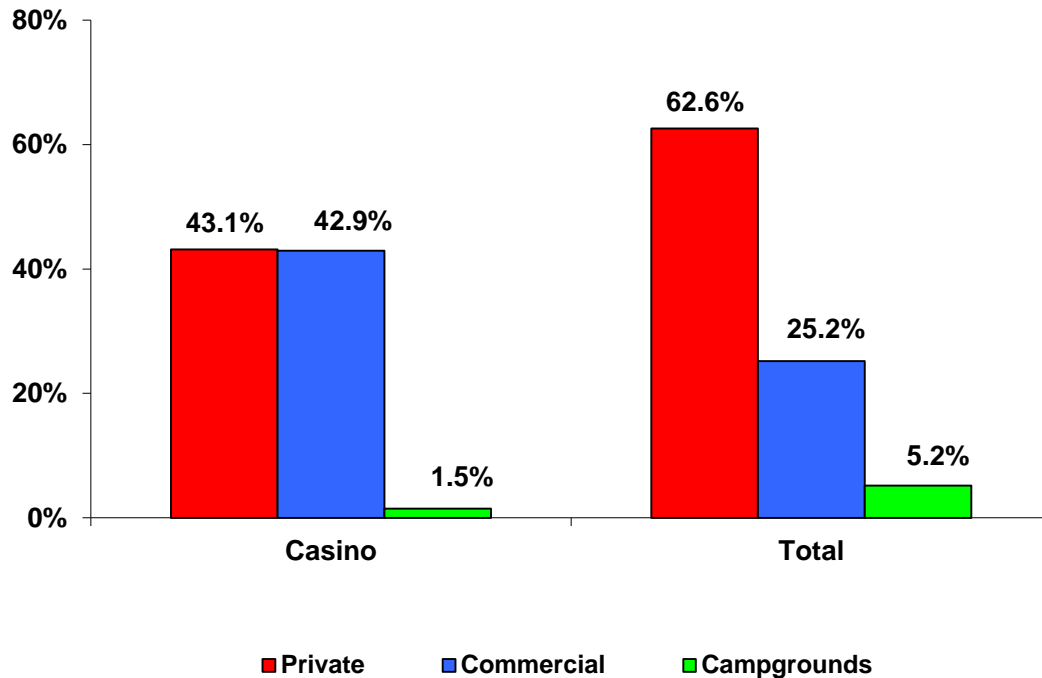


Casino vs. Total	Purpose Index
Pleasure	196
VFR	41
Business	40
Other	89
VFR: Visiting Friends and / or Relatives	

- Most trips were pleasure trips (68% Casino 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

Casino Visits by Accommodation Type

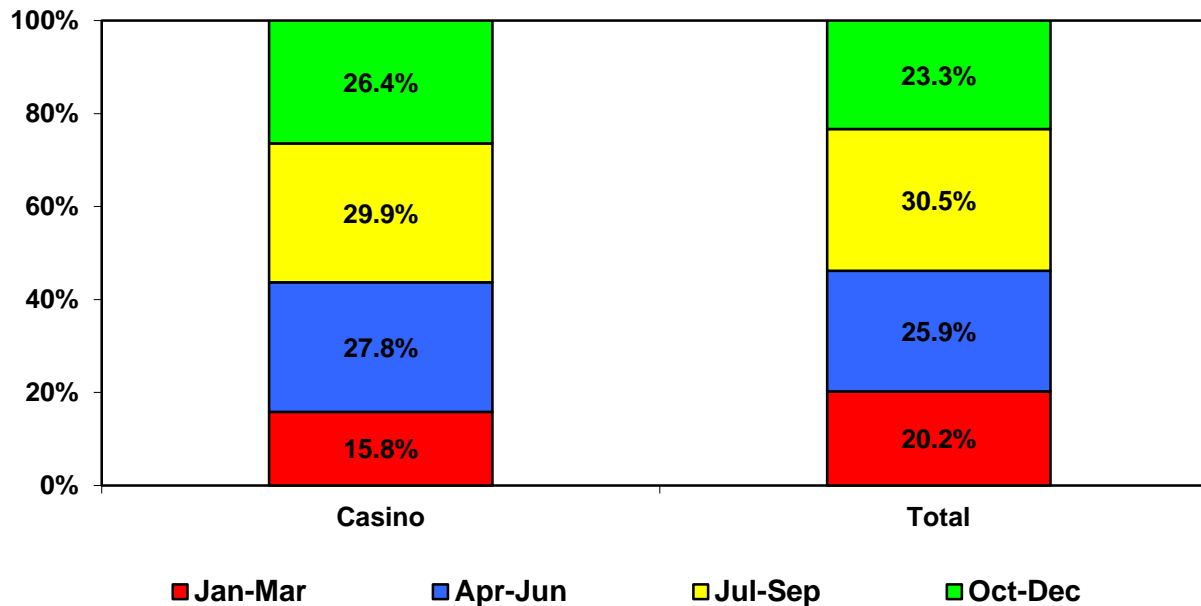


Casino vs. Total	Type Index
Private	69
Commercial	171
Campground	29

- 43% of overnight Casino visits were spent at commercial accommodations compared to 25% of total visits
- 2% of overnight Casino 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

Casino Visits by Time of Year

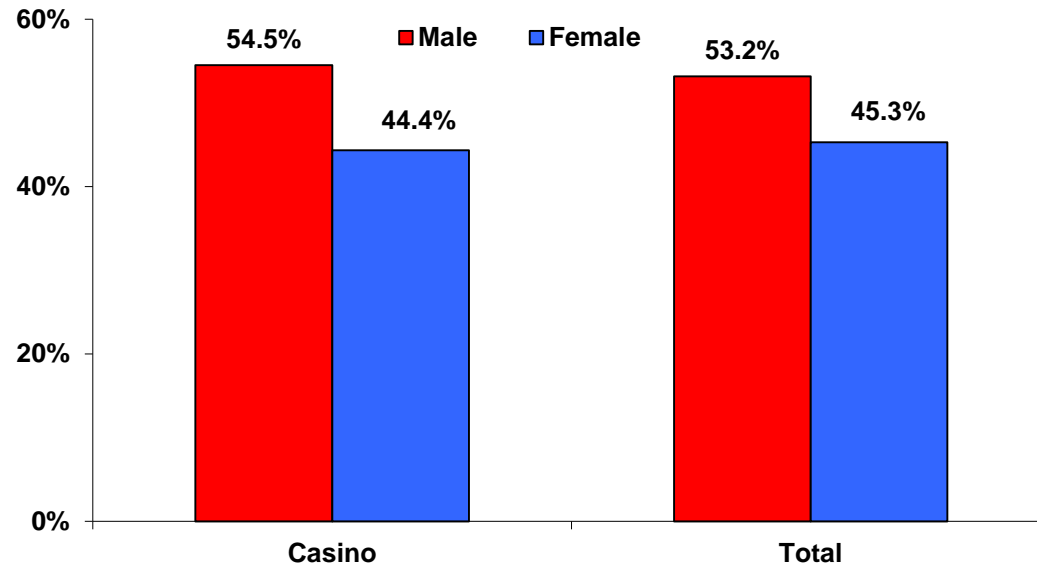


Casino vs. Total	Quarter Index
Jan-Mar	78
Apr-Jun	107
Jul-Sept	98
Oct-Dec	113

- The largest proportions of trips occur in Jul-Sep (30% Casino vs 30% total), Apr-Jun (28% Casino, 26% total) and Oct-Dec (26% Casino, 23% total)

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

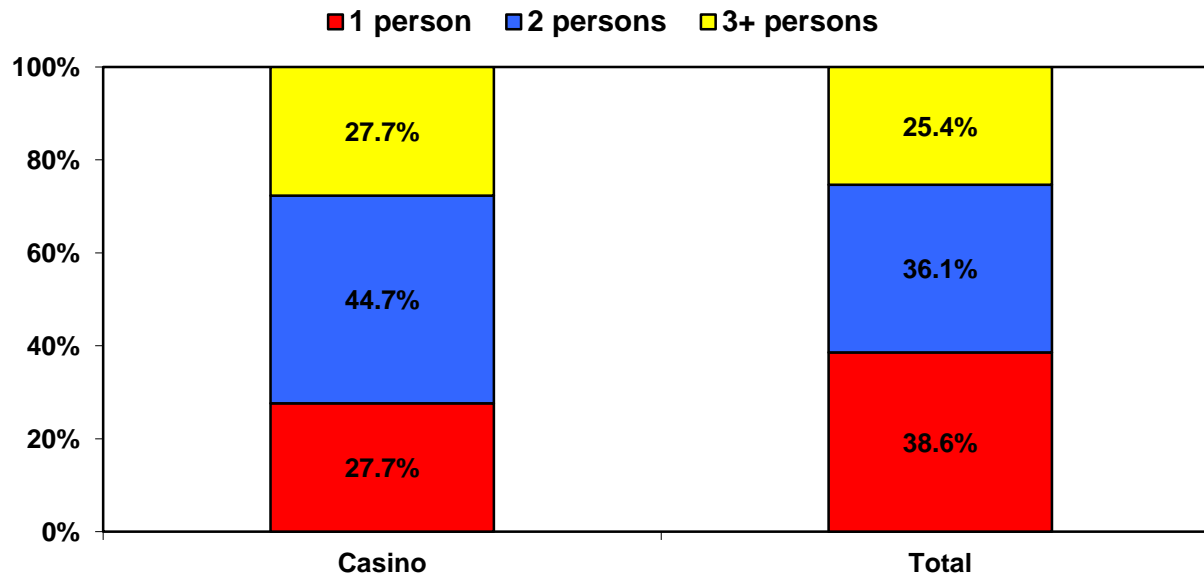
Casino Visits by Gender



Casino vs. Total	Gender Index
Male	103
Female	98

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

Casino Visits by Party Size



Casino vs. Total	Party Size Index
1 person	72
2 persons	124
3+ persons	109
Avg party size	139
With children	65

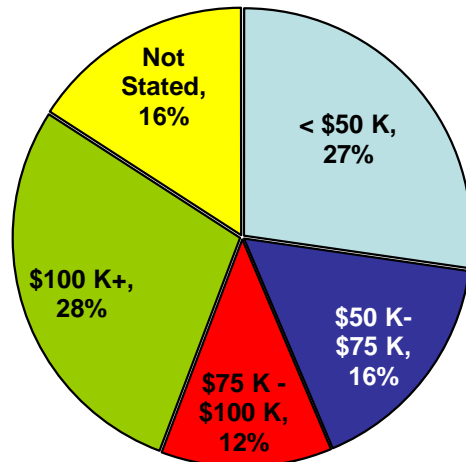
Avg Party Size	3.4	2.4
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With children	8%	13%
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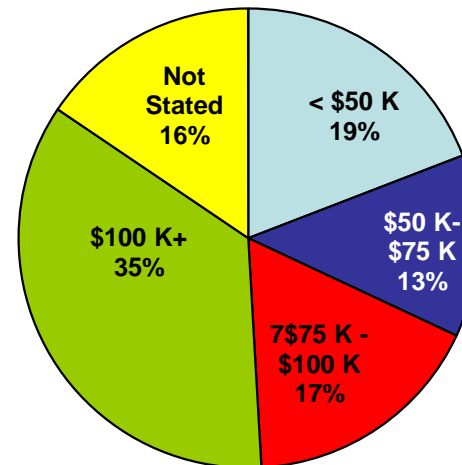
- 45% of Casino visits were among groups of 2 people compared to 36% of total visits
- 8% of Casino visits included children versus 13% of total visits

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

Domestic Casino Visitor's Income



Casino Visits



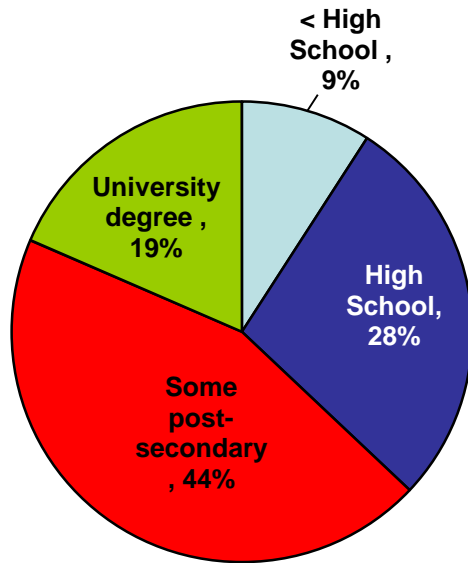
Total Visits

Casino vs. Total	Income Index
< \$50 K	143
\$50 K - \$75 K	127
\$75 K - \$100 K	71
\$100 K+	80

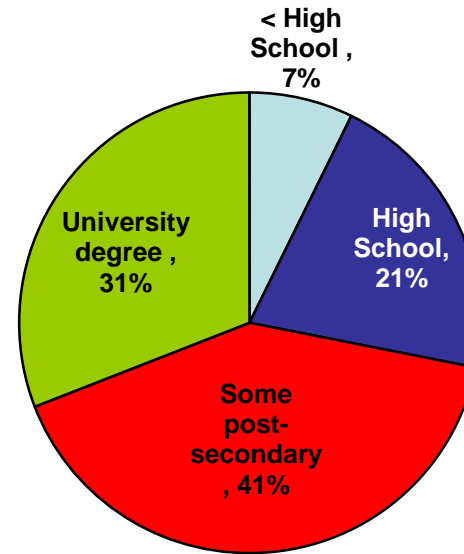
- 27% of Canadian Casino visitors in Ontario had an household income less than \$50,000 compared to 19% of total visitors

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

Domestic Casino Visitor's Education



Casino Visits



Total Visits

Casino vs. Ontario	Education Index
< High School	126
High School	134
Some post-secondary	109
University degree	60

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

Casino Summary

- In 2014, there were 3.7 million Casino visits in Ontario, representing 2.6% of total visits to Ontario. Casino visitors spent \$1.5 billion, or 6.3% of total visitor spending in Ontario.
- Ontario residents accounted for 64% of visits and 36% of spending, residents of Other Canada accounted for 4% of visits and 5% of spending, U.S. visitors represented 25% of visits and 30% of expenditures, and overseas visitors accounted for 6% of visits and 28% of spending
- 29% Casino visitors from Ontario are from Region 5 compared to 22% of total visits, 16% from Region 1 (12% total visits), and 14% from Region 6 (13% total visits)
- 47% of Casino visits took place in Region 2 compared to 9% of total visits, 15% in Region 7 (9% total), and 12% in Region 1 (12% total)

Casino Summary

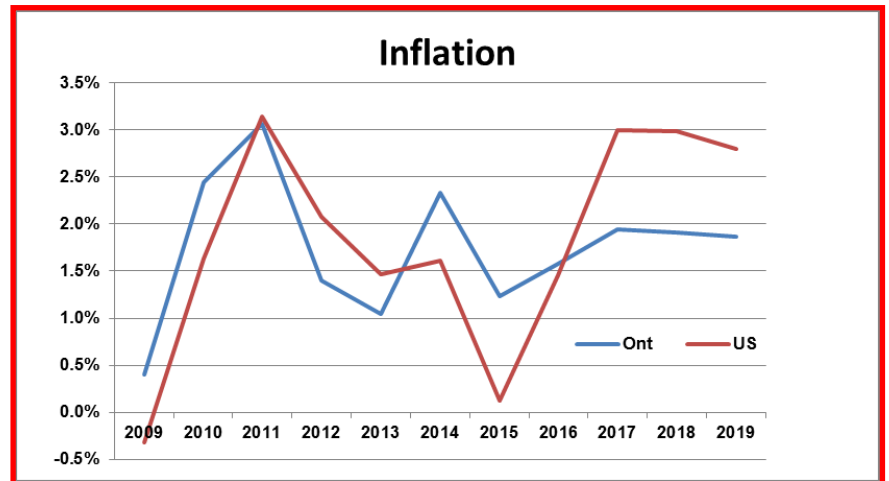
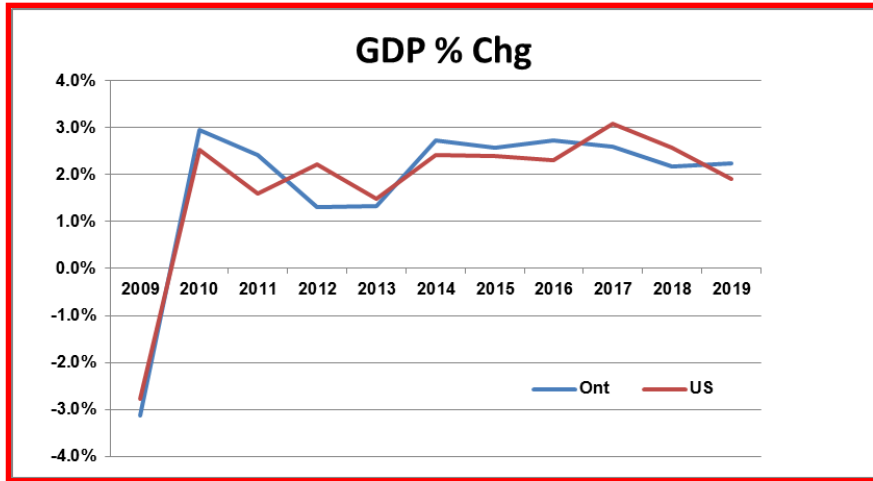
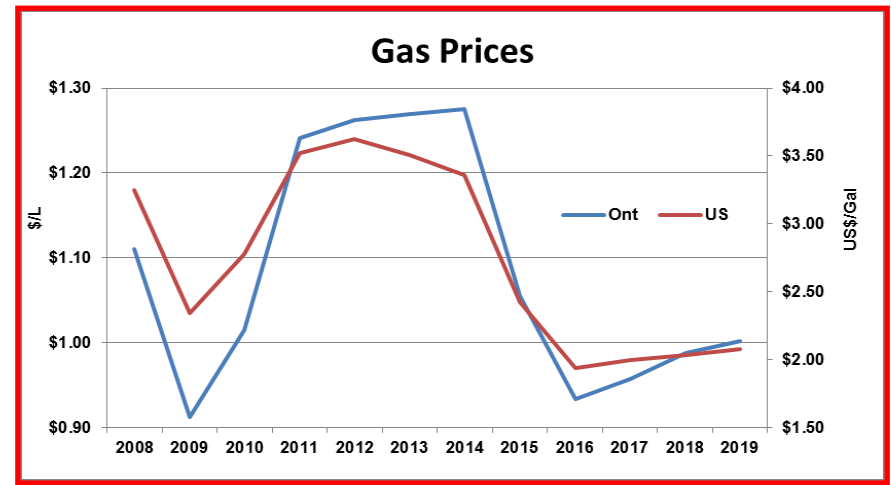
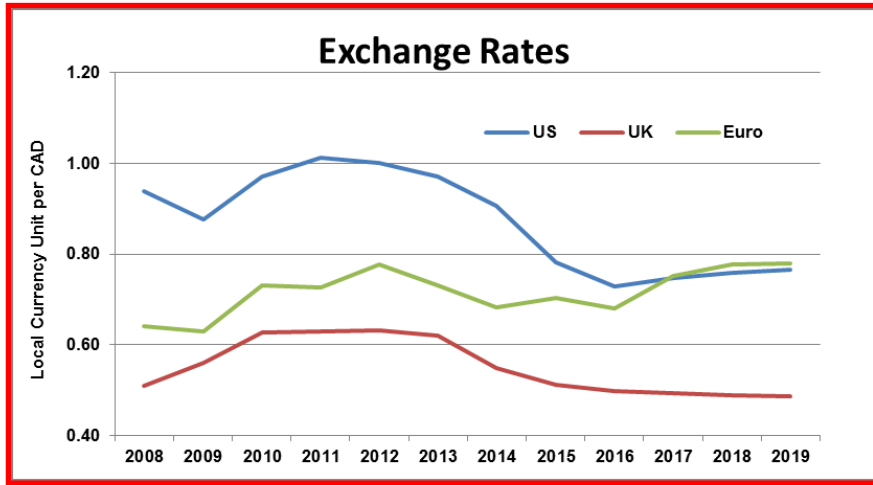
- The majority (63%) of Casino visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits. The average number of nights spent on Casino visits was 3.6, above Ontario's average of 3.1 nights
- Casino visitors spent an average of \$408/trip (\$171/trip for total trips)
- The largest proportions of expenditures were spent on Transportation (31% Casino, 37% total), Food & Beverage (22% Casino, 27% total) and Accommodations (22% Casino, 16% total)
- 25% of Casino visitors attended a cultural performance, 25% went to a historical site, 21% visited a festival/fair
- Most trips were pleasure trips (68% compared to 34% of total trips)

Casino Summary

- 43% of overnight Casino visits were spent at commercial accommodations compared to 25% of total visits. 2% of overnight Casino visits were spent in camping/RV facilities versus 5% of total visits
- The largest proportions of trips occur in Jul-Sep (30% Casino vs 30% total), Apr-Jun (28% Casino, 26% total) and Oct-Dec (26% Casino, 23% total)
- 45% of Casino visits were among groups of 2 people compared to 36% of total visits. 8% of Casino visits included children versus 13% of total visits
- 27% of Canadian Casino visitors in Ontario had an household income less than \$50,000 compared to 19% of total visitors

Appendix

Economic Indicators



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

2014 Notable Events

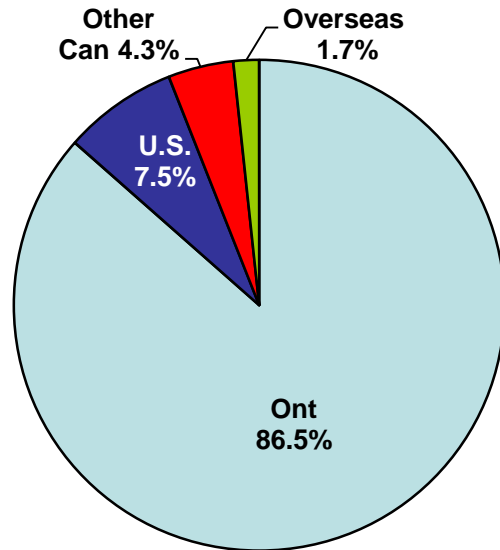
- February 7–23 – The XXII **Olympic Winter Games** are held in Sochi, Russia
- March 8 – **Malaysia Airlines Flight 370**, a Boeing 777 airliner en route to Beijing from Kuala Lumpur, disappears over the Gulf of Thailand with 239 people on board. The aircraft is presumed to have crashed into the Indian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

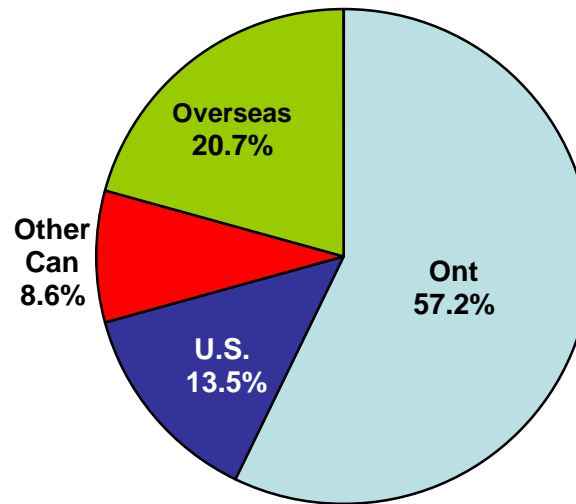
Economic Impact of Tourism in Ontario 2014

- 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



Visits by Origin
139.5 million



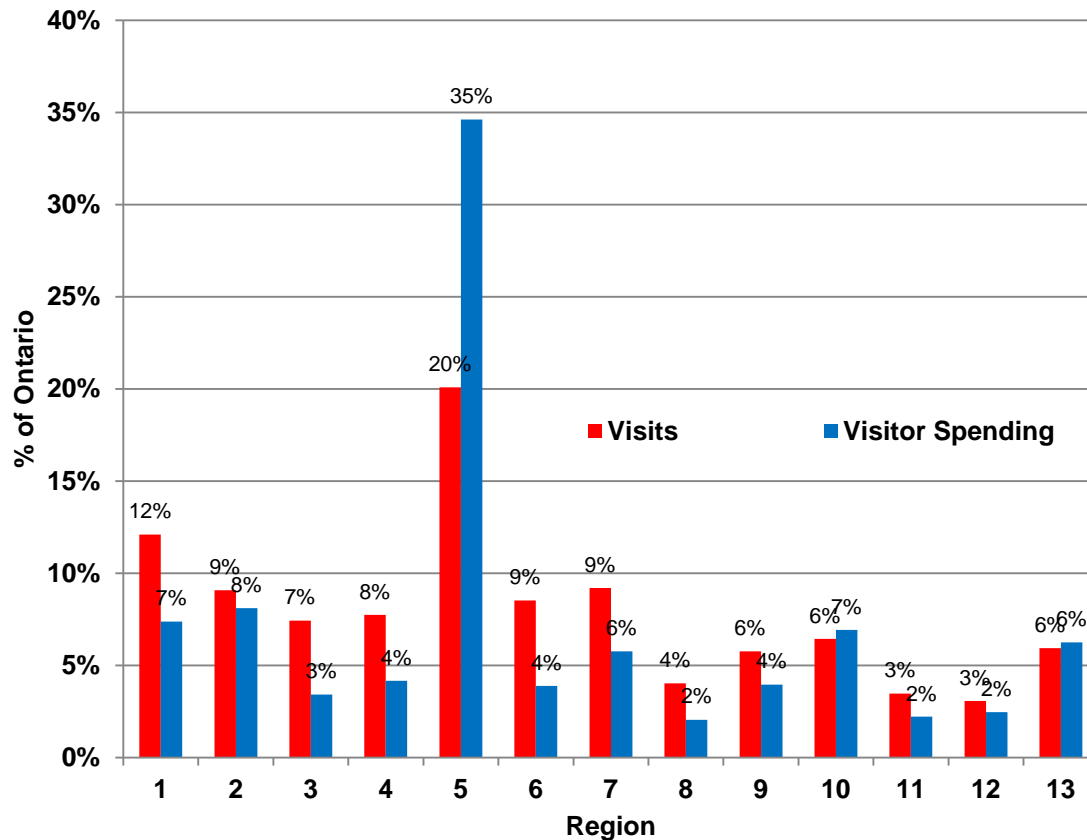
Visitor Spending by Origin
\$23.9 billion

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 TranCasinoation (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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