

Ontario Cultural 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 one or more of the following:

Performance such as a play or concert

Museum or Art Gallery

Festival or Fair

Historic Site

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

Index

less than 80

80-100

greater than 120

Interpretation

Cultural trips underdeveloped versus total trips

Cultural trips similar to total trips

Cultural trips overdeveloped versus total trips

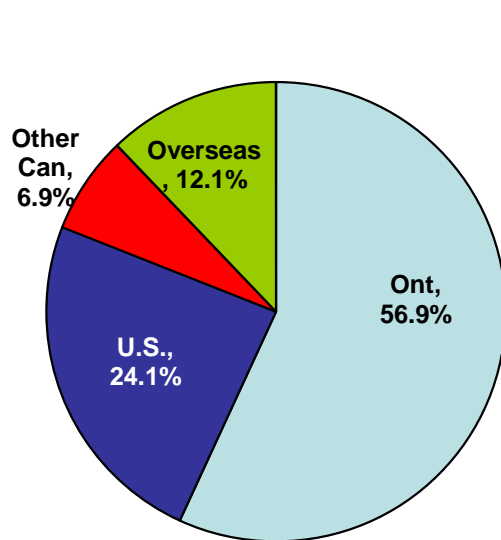
Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario Total	139.5	23.9
Ontario Cultural	12.3	6.5
Ontario Cultural proportion of Ontario Total	8.8%	27.0%

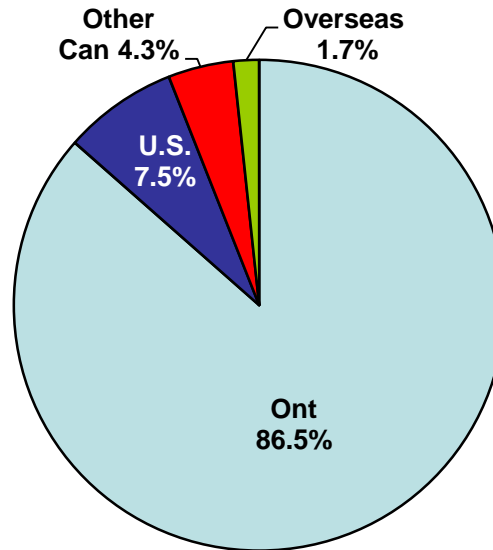
- In 2014, there were 12.3 million Cultural visits in Ontario, representing 8.8% of total visits in Ontario
- Cultural visitors spent \$6.5 billion, accounting for 27.0% of total visitor spending in Ontario

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

Cultural and Total Visits by Origin



Cultural Visits by Origin
12.3 million



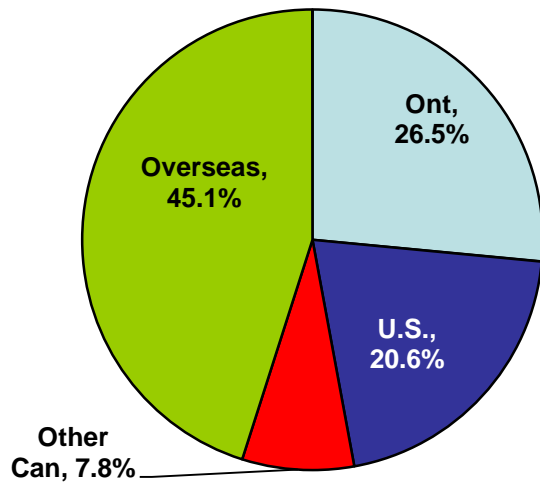
Total Visits by Origin
139.5 million

Cultural vs. Total	Visit Index
Ontario	66
U.S.	323
Other Canada	158
Overseas	716

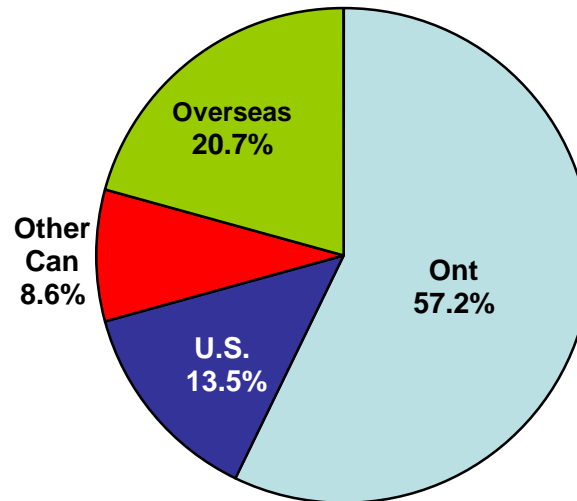
- Ontario residents accounted for the majority of Cultural (57%) and total (86%) visits
- U.S. visitors accounted for 24% of Cultural visits compared to 8% of total visits
- Visitors from Other Canada comprised 7% of Cultural visits and 4% of total visits
- Overseas visitors accounted for 12% of Cultural 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

Cultural and Total Spending by Origin



Cultural Visitor Spending by Origin
\$6.5 billion



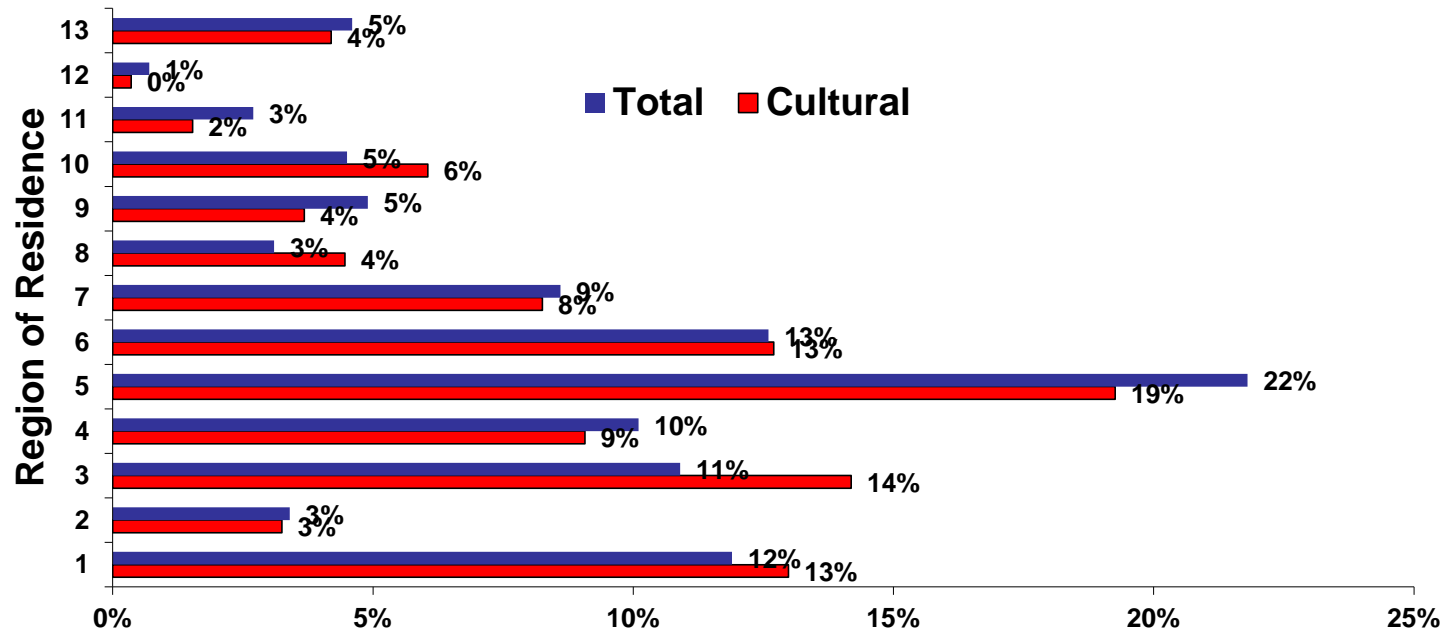
Total Visitor Spending by Origin
\$23.9 billion

Cultural vs. Total	Spending Index
Ontario	46
U.S.	152
Other Canada	91
Overseas	218

- Ontario residents accounted for 26% of Cultural and 57% of total spending
- U.S. visitors accounted for 21% of Cultural spending compared to 14% of total spending
- Visitors from Other Canada comprised 8% of Cultural spending and 9% of total spending
- Overseas visitors accounted for 45% of Cultural 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 Cultural Visitors by Region of Residence



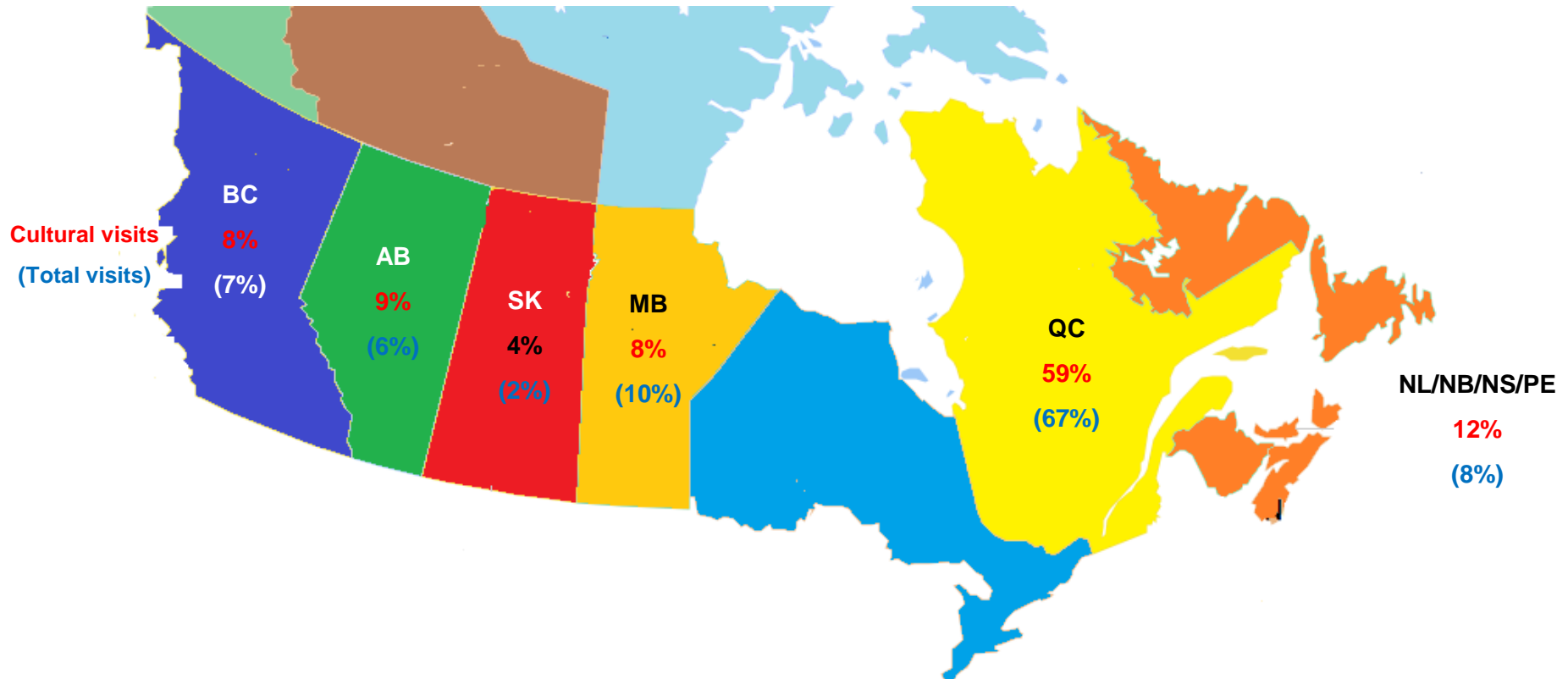
Cultural vs. Total	Visits from Ontario Index
Reg 1	109
Reg 2	96
Reg 3	130
Reg 4	90
Reg 5	88
Reg 6	101
Reg 7	96
Reg 8	144
Reg 9	75
Reg 10	135
Reg 11	57
Reg 12	50
Reg 13	91

•19% Cultural visitors from Ontario are from Region 5 compared to 22% of total visits, 14% from Region 3 (11% total visits), and 13% from Region 1 (12% total visits)

Note: Ontario origin Cultural visitors represented 57% (7 million) of visits and 27% (\$1.7 B) 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 Cultural Visitors by Province of Residence



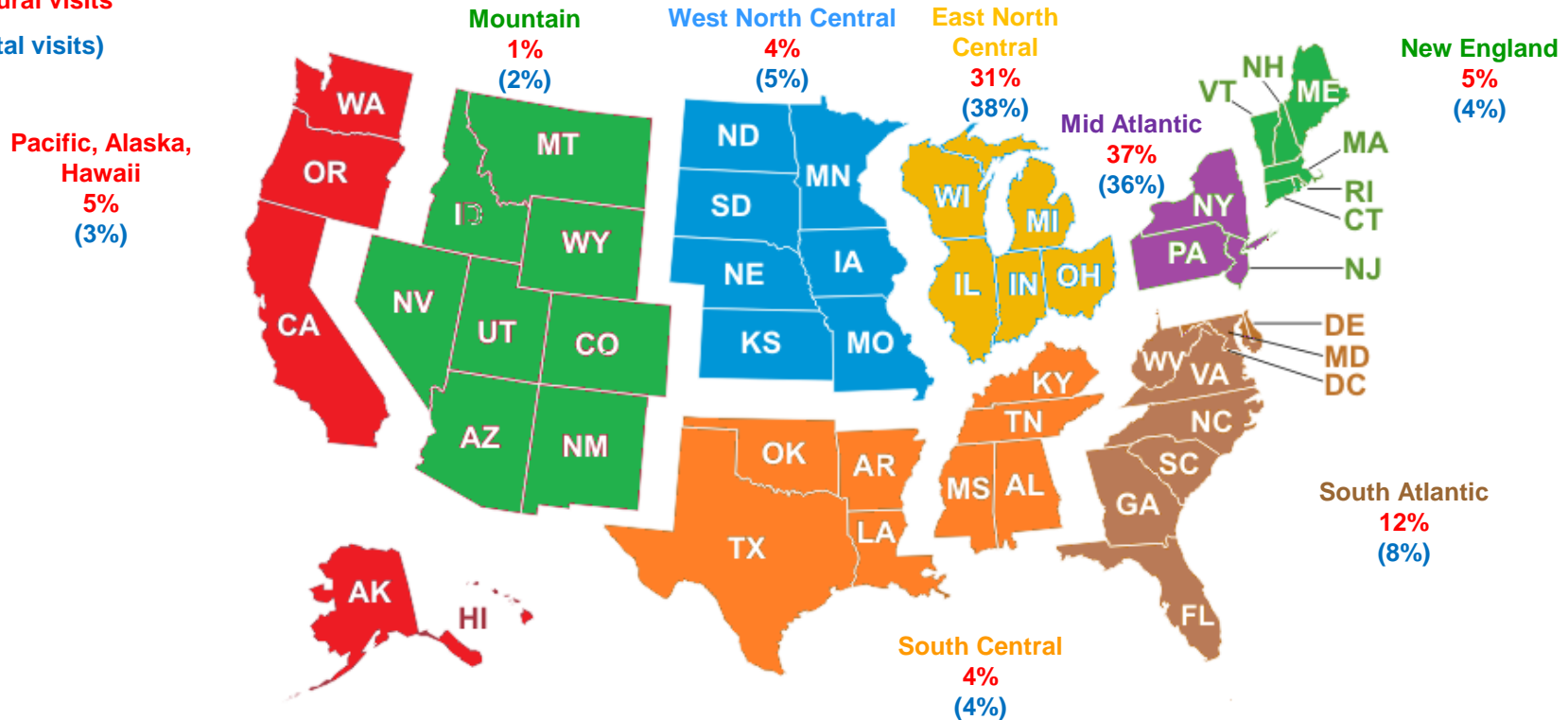
- 59% of Other Canada Cultural visitors came from Quebec, compared to 67% of total visits
- Note: Other Canada Cultural visitors represented 7% (841,000) of visits and 8% (\$507 M) of visitor spending

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. Cultural Visitors by Region of Residence

Cultural visits

(Total visits)

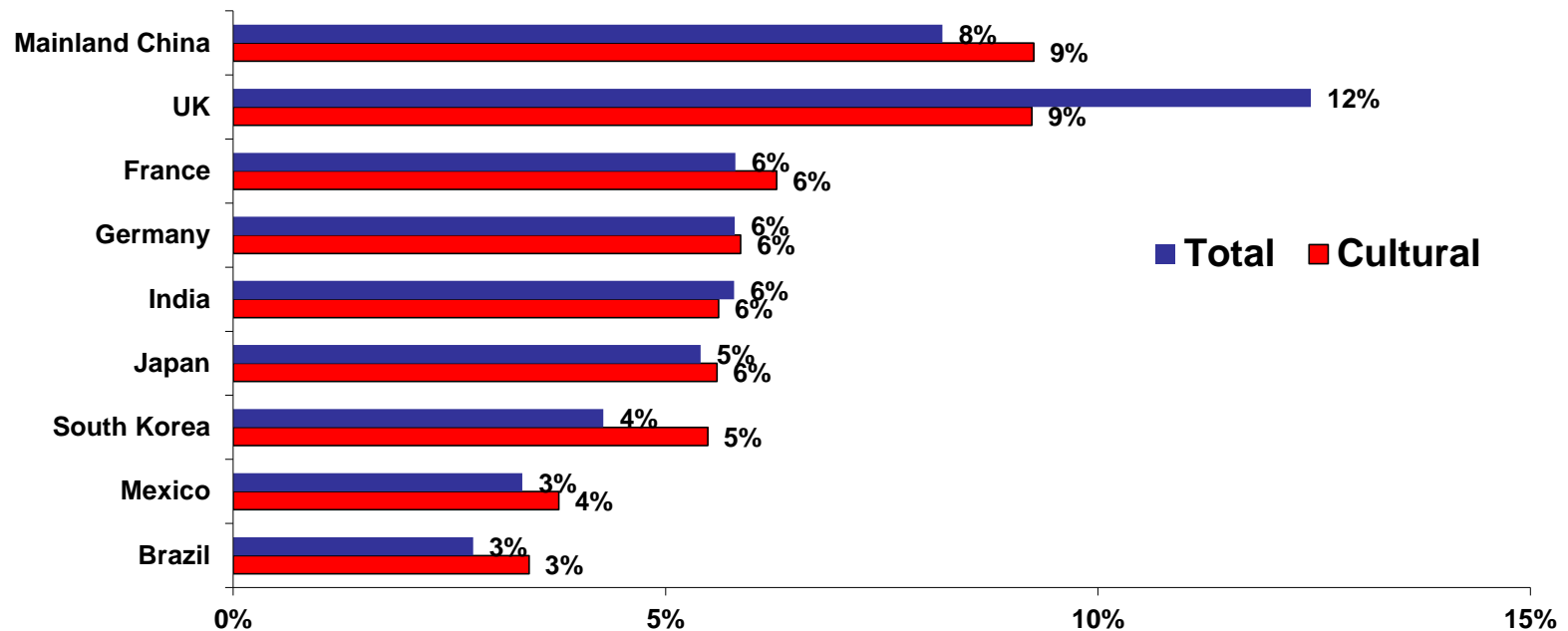


- 37% of U.S. Cultural visitors came from Mid Atlantic states (New York, New Jersey, Pennsylvania) and 31% from East North Central states (Michigan, Ohio, Illinois, Indiana, and Wisconsin)

Note: U.S. Cultural visitors represented 24% (3.0 M) of visits and 21% (\$1.3 B) 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 Cultural Visitors by Country of Residence

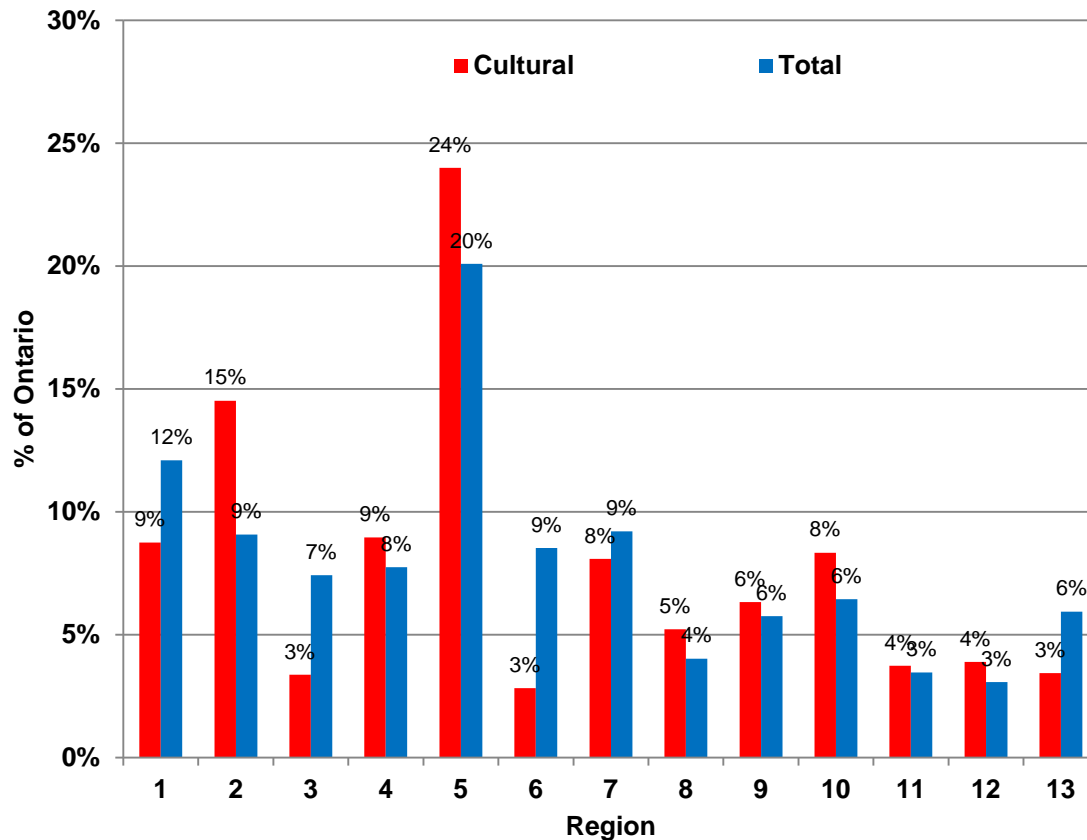


- Ontario's 9 overseas target markets represent 55% of overseas Cultural visitors versus 54% of total overseas visits

Note: Overseas Cultural visitors represented 12% (1.5 M) of visits and 45% (\$2.9 B) 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 – Cultural Visits by Region

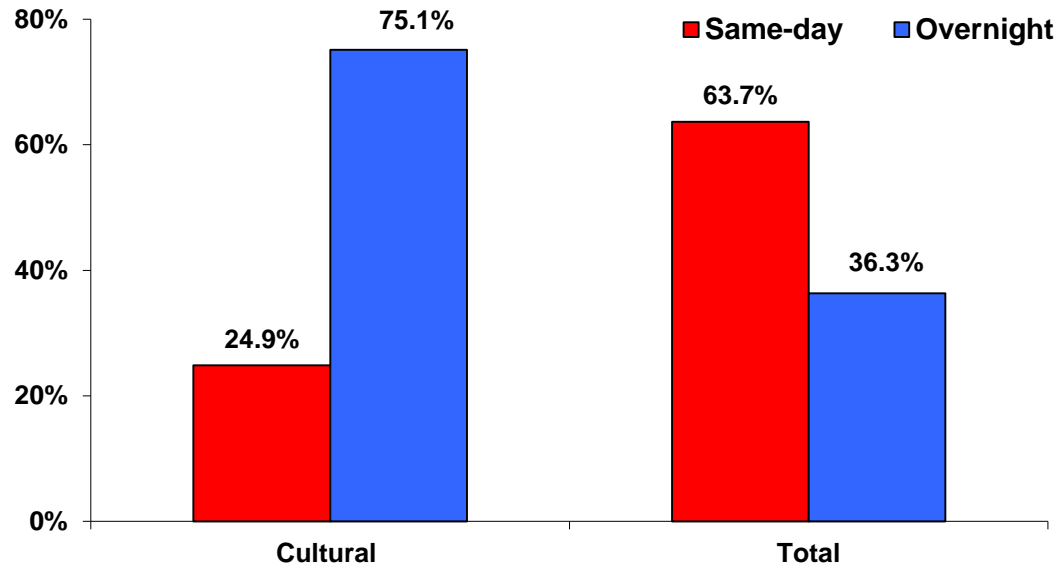


Cultural vs. Total	Destination Index
Reg 1	72
Reg 2	160
Reg 3	45
Reg 4	116
Reg 5	119
Reg 6	33
Reg 7	88
Reg 8	130
Reg 9	110
Reg 10	129
Reg 11	108
Reg 12	127
Reg 13	58

- 24% of Cultural visits took place in Region 5 compared to 20% of total visits, 15% in Region 2 (9% total), and 9% in Region 4 (8% total)

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

Cultural Visits by Length of Stay

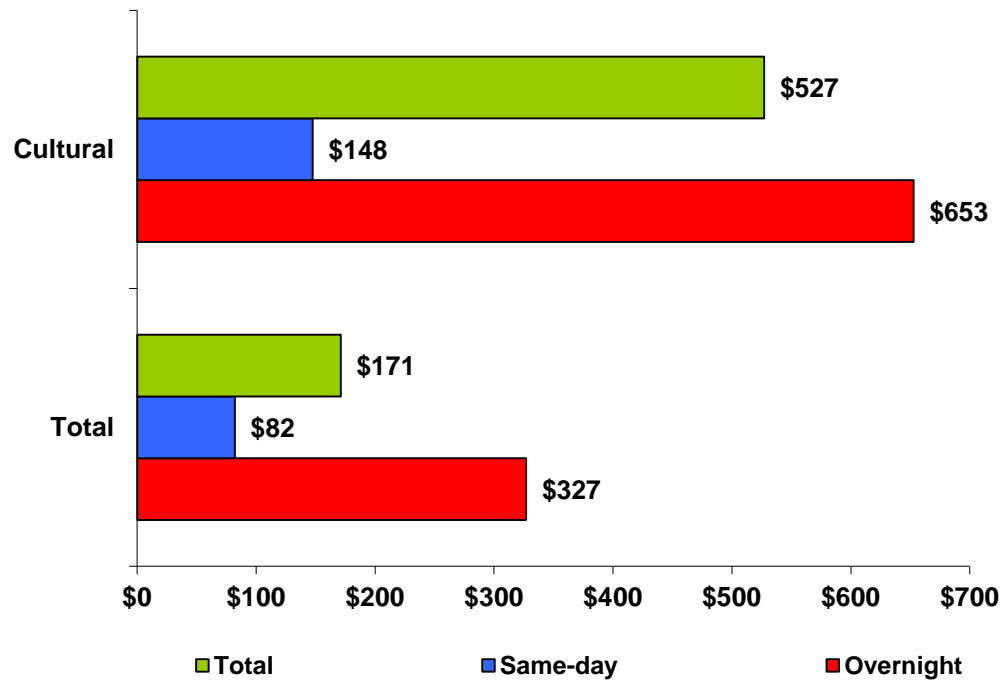


Cultural vs. Total	Length of Stay Index
Same-day	39
Overnight	207
Avg # nights	161

- The majority (75%) of Cultural visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits
- The average number of nights spent on Cultural visits was 5.0, 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

Cultural \$/Trip by Length of Stay



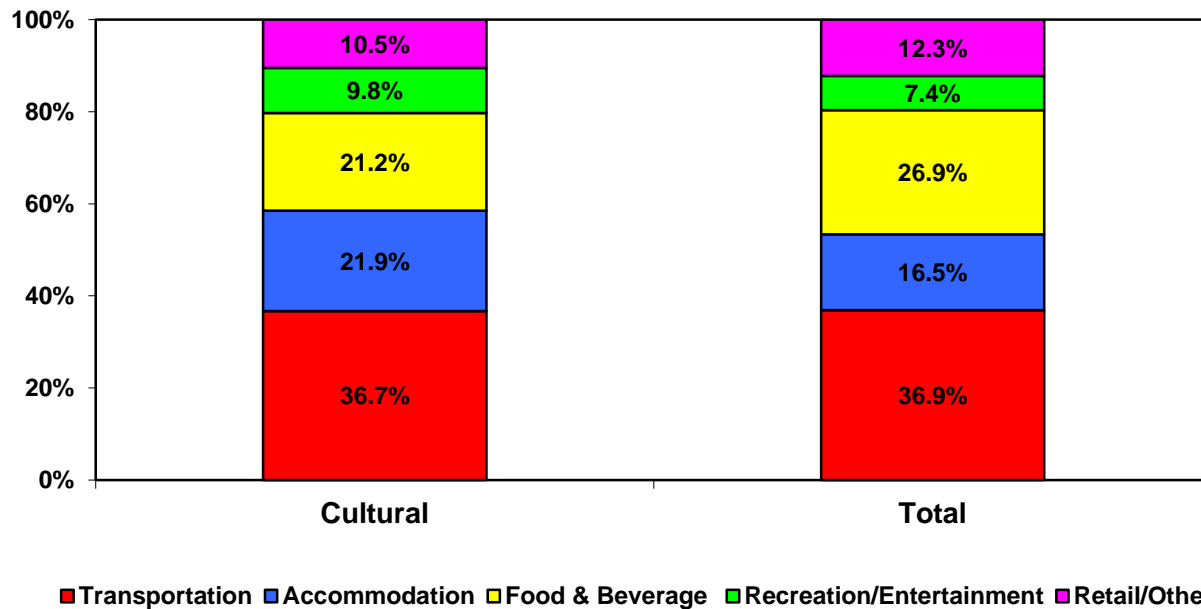
Cultural vs. Total	\$/Trip Index
Total	308
Same-day	179
Overnight	200

- Cultural visitors spent an average of \$527/trip (\$171/trip for total trips)

Total trip spending, not just spending on Cultural

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

Cultural Spending by Category



Cultural vs. Ontario	Spending Index
Transportation	99
Accommodation	133
Food & Beverage	79
Rec./Entertain.	132
Retail/Other	85

- The largest proportions of expenditures were spent on Transportation (37% Cultural, 37% total), Accommodations (22% Cultural, 16% total) and Food & Beverage (21% Cultural, 27% 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 Cultural Visitors

Activity	Cultural Visit Participation	Index vs Total
Performance such as a play or concert	44%	1138
Historic Sites	36%	1138
Museums/Art Galleries	35%	1138
Festivals/Fairs	32%	1138
Any Outdoor/Sports Activity	24%	139
Sightseeing	22%	415
Visit Friends or Relatives	21%	64
Shopping	20%	228
Restaurant or bar	18%	334
National/Provincial Nature Parks	15%	497

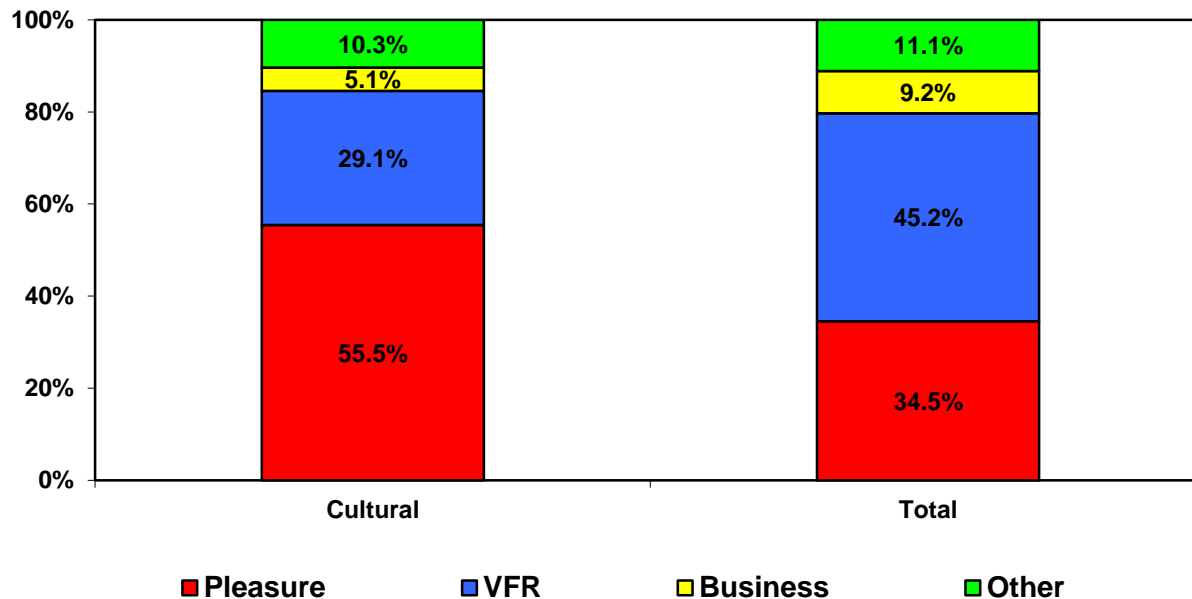
Activity	Cultural Visit Participation	Index vs Total
Casinos	11%	430
Hiking	10%	255
Zoos/Aquariums/Botanical Gardens	10%	647
Visit a beach	9%	197
Boating	8%	178
Wildlife/Bird watching	8%	350
Sports Events	8%	192
Theme Parks	4%	348
Camping	4%	121
Fishing	3%	92

Activity	Cultural Visit Participation	Index vs Total
Cycling	3%	261
Business Meeting/Conference/Seminar	2%	54
Play a sport	2%	122
Movies	2%	252
Golfing	2%	144
Indigenous	1%	1138
Skiing/Snowboarding	1%	65
Medical/Dental appointment	0%	13
Hunting	0%	54
ATV	0%	54
Snowmobiling	0%	13

- Cultural visitors participate in a variety of activities with 44% attending a performance such as a play or concert, 36% visiting a historic site, 35% visiting a museum/art gallery, and 32% went to 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 Cultural Visit

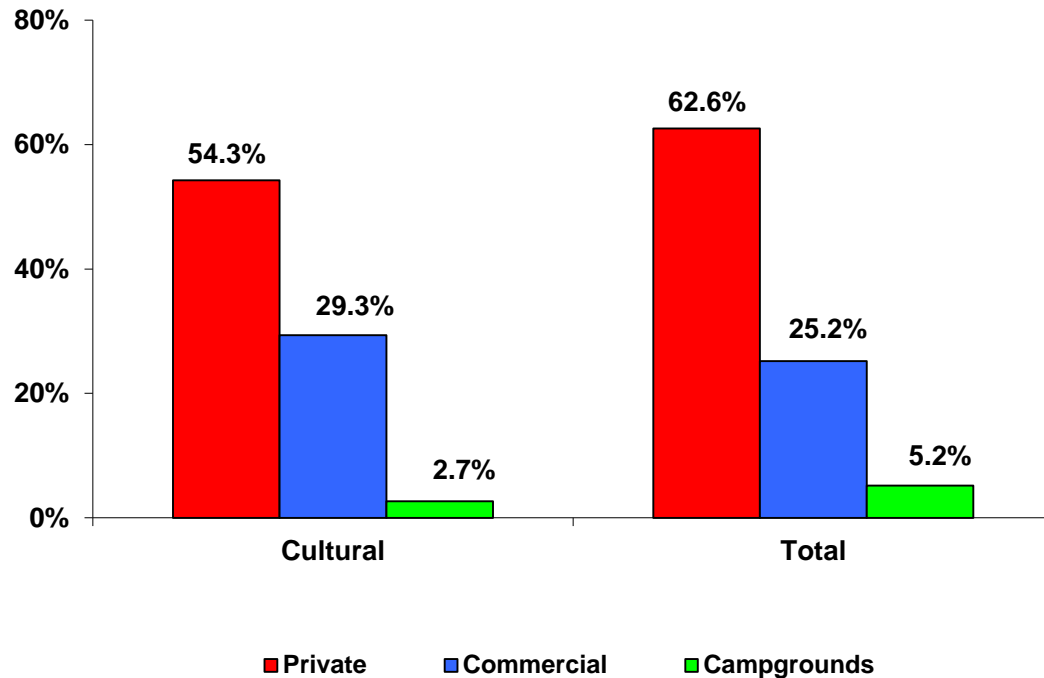


Cultural vs. Total	Purpose Index
Pleasure	161
VFR	64
Business	56
Other	93
VFR: Visiting Friends and / or Relatives	

- Most trips were pleasure trips (56% 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

Cultural Visits by Accommodation Type

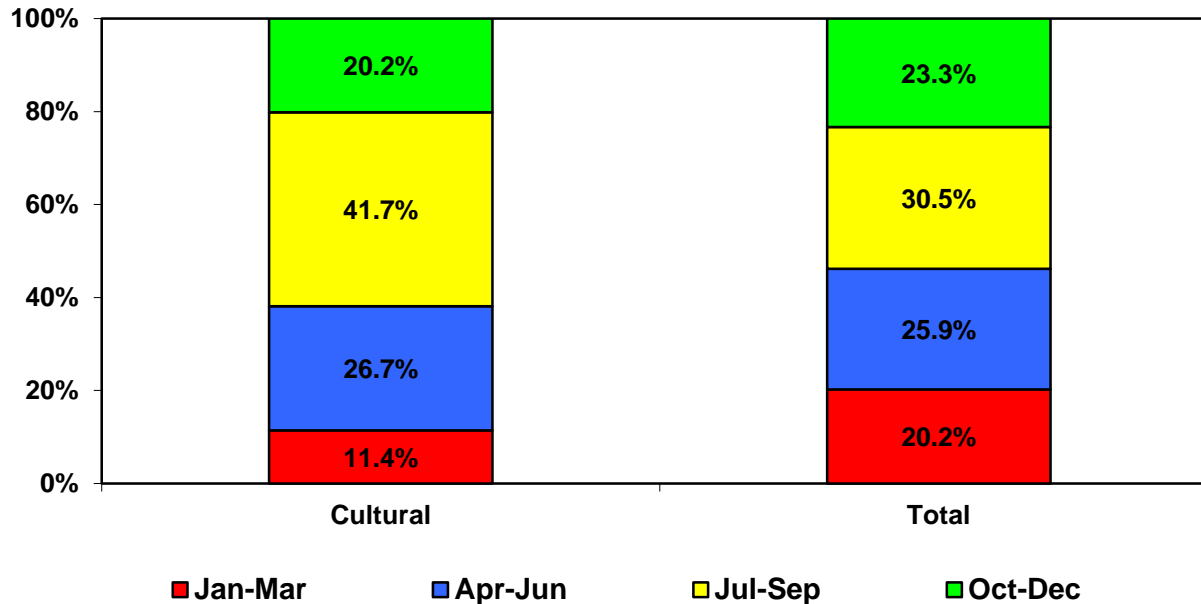


Cultural vs. Total	Type Index
Private	87
Commercial	117
Campground	52

- 29% of overnight Cultural visits were spent at commercial accommodations compared to 25% of total visits
- 3% of overnight Cultural 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

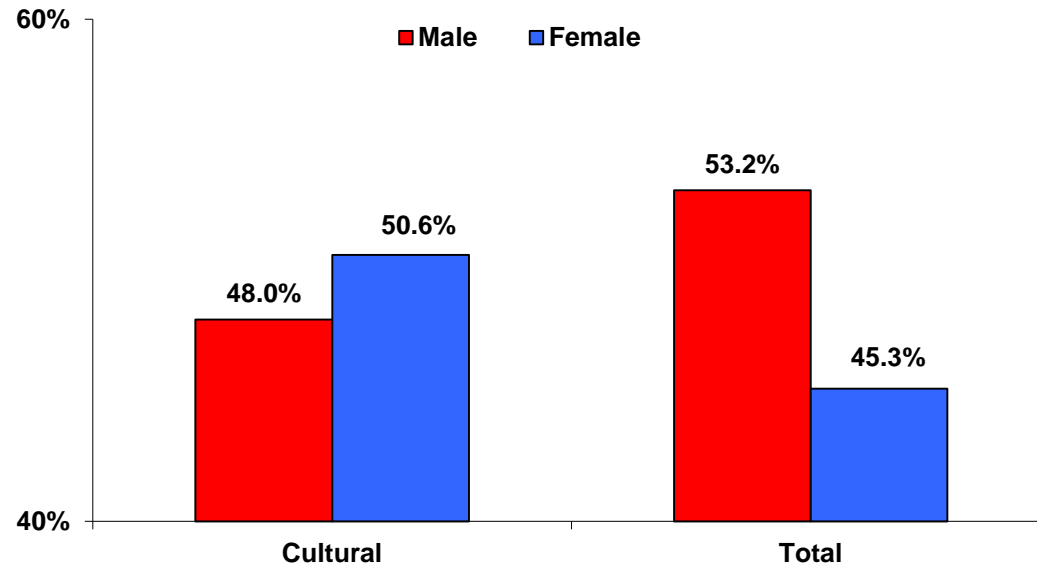
Cultural Visits by Time of Year



Cultural vs. Total	Quarter Index
Jan-Mar	57
Apr-Jun	103
Jul-Sept	137
Oct-Dec	87

- The largest proportion of trips occur in Jul-Sep (42% Cultural vs 30% total)

Cultural Visits by Gender

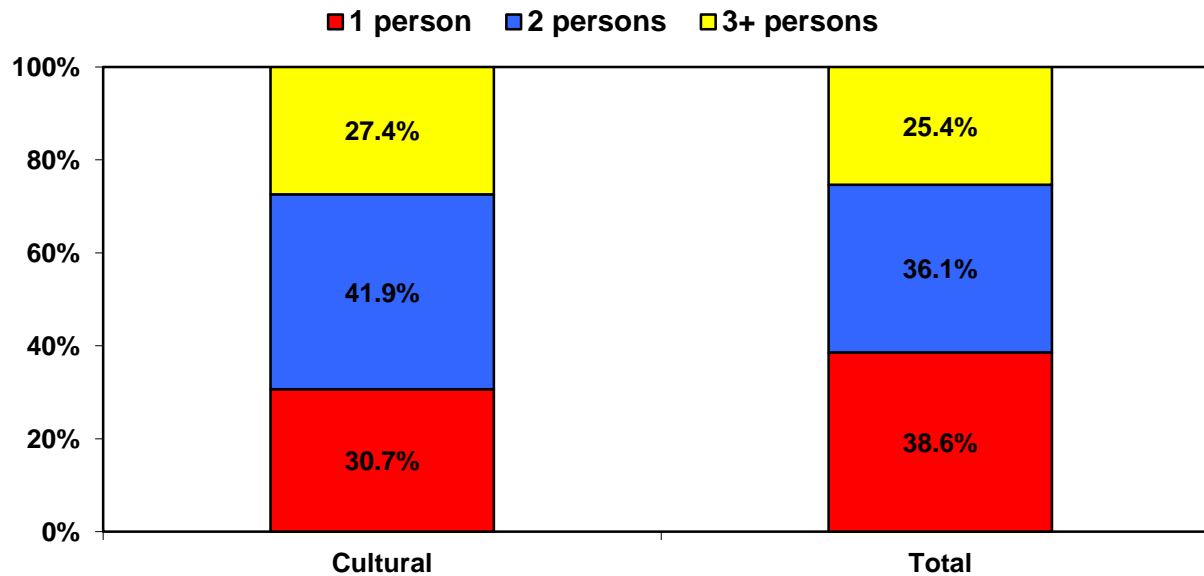


Cultural vs. Total	Gender Index
Male	90
Female	112

- Females made the majority (51%) of Cultural visits. For comparison, 45% of total visits in Ontario were among female visitors

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

Cultural Visits by Party Size



Cultural vs. Total	Party Size Index
1 person	79
2 persons	116
3+ persons	108
Avg party size	116
With children	102

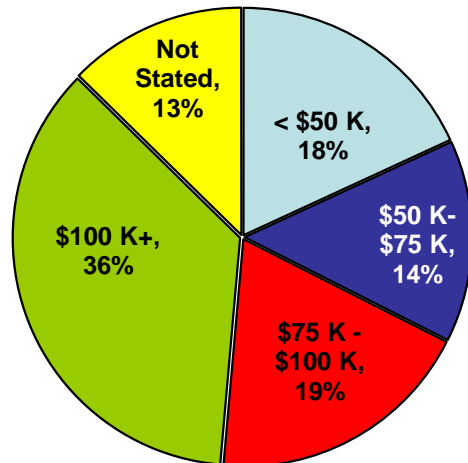
Avg Party Size	2.8	2.4
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With children	13%	13%
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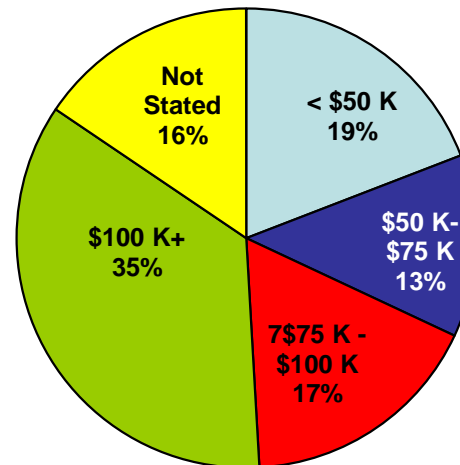
- 42% of Cultural visits were among groups of 2 people compared to 36% of total visits
- 13% of Cultural visits included children similar to total visits

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

Domestic Cultural Visitor's Income



Cultural Visits



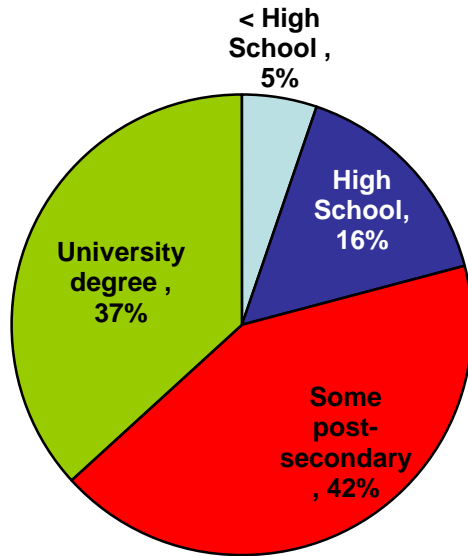
Total Visits

Cultural vs. Total	Income Index
< \$50 K	95
\$50 K - \$75 K	112
\$75 K - \$100 K	111
\$100 K+	102

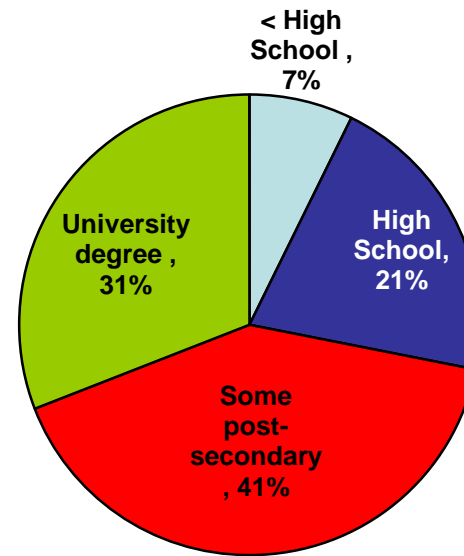
- 36% of Canadian Cultural visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors

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

Domestic Cultural Visitor's Education



Cultural Visits



Total Visits

Cultural vs. Ontario	Education Index
< High School	72
High School	75
Some post-secondary	103
University degree	119

- 37% of Canadian Cultural 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

Cultural Summary

- In 2014, there were 12.3 million Cultural visits in Ontario, representing 8.8% of total visits to Ontario. Cultural visitors spent \$6.5 billion, or 27.0% of total visitor spending in Ontario.
- Ontario residents accounted for 57% of visits and 26% of spending, residents of Other Canada accounted for 7% of visits and 8% of spending, U.S. visitors represented 24% of visits and 21% of expenditures, and overseas visitors accounted for 12% of visits and 45% of spending
- 19% Cultural visitors from Ontario are from Region 5 compared to 22% of total visits, 14% from Region 3 (11% total visits), and 13% from Region 1 (12% total visits)
- 24% of Cultural visits took place in Region 5 compared to 20% of total visits, 15% in Region 2 (9% total), and 9% in Region 4 (8% total)

Cultural Summary

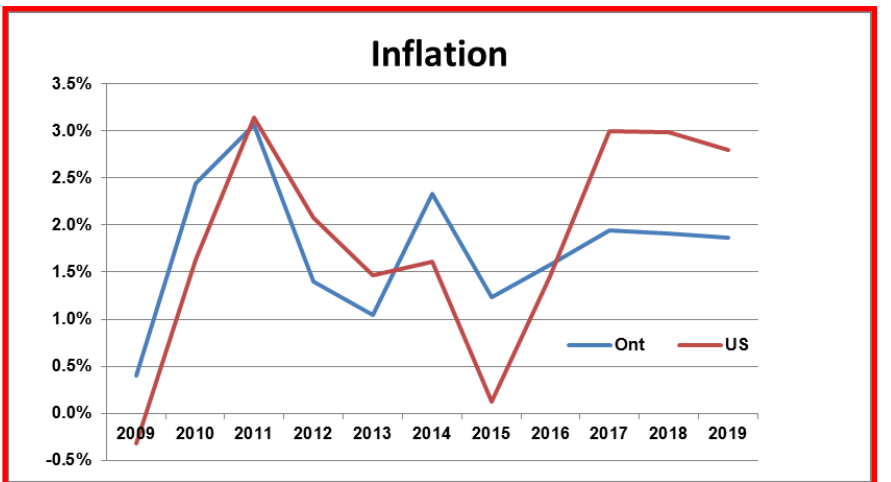
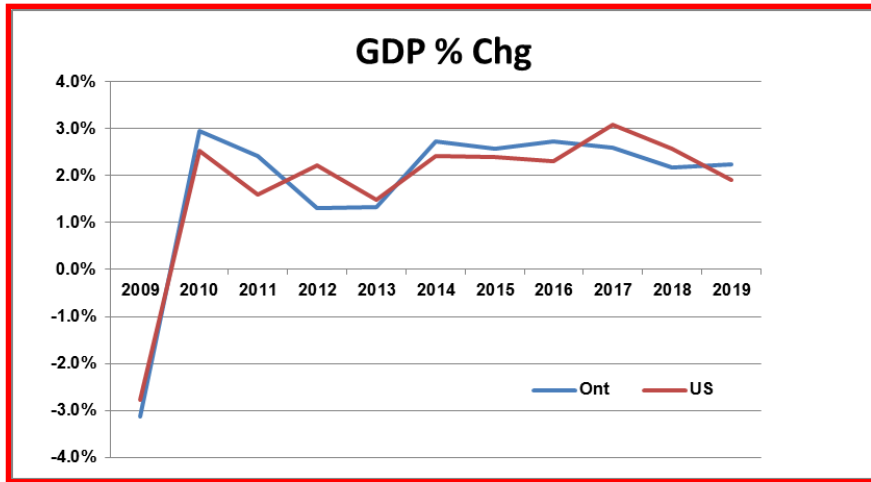
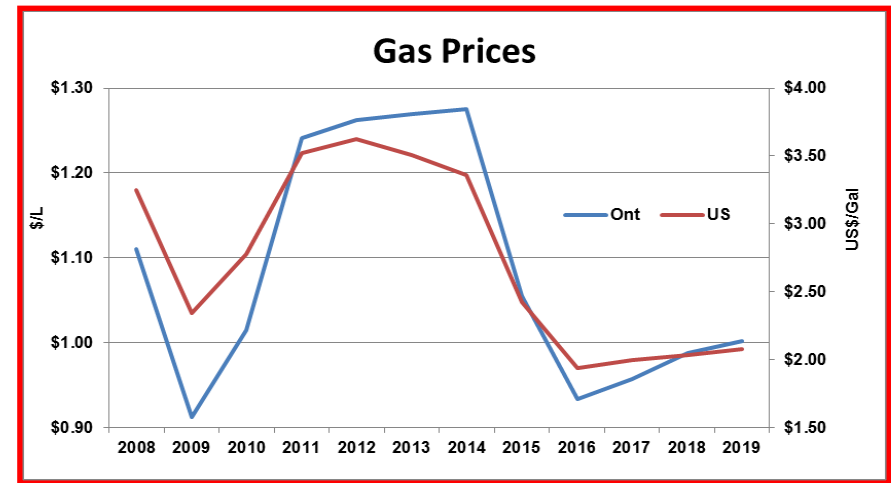
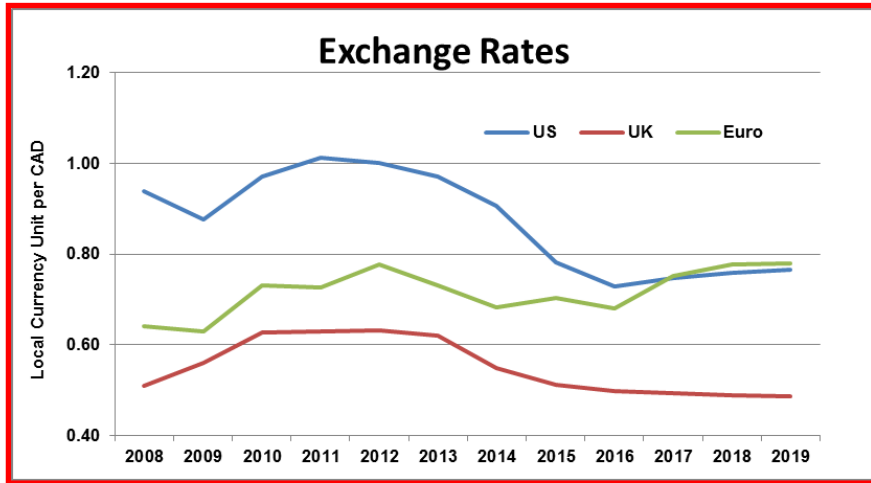
- The majority (75%) of Cultural visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits. The average number of nights spent on Cultural visits was 5.0, above Ontario's average of 3.1 nights
- Cultural visitors spent an average of \$527/trip (\$171/trip for total trips)
- The largest proportions of expenditures were spent on Transportation (37% Cultural, 37% total), Accommodations (22% Cultural, 16% total) and Food & Beverage (21% Cultural, 27% total)
- Cultural visitors participate in a variety of activities with 44% attending a performance such as a play or concert, 36% visiting a historic site, 35% visiting a museum/art gallery, and 32% went to a festival/fair
- Most trips were pleasure trips (56% compared to 34% of total trips)

Cultural Summary

- 29% of overnight Cultural visits were spent at commercial accommodations compared to 25% of total visits. 3% of overnight Cultural visits were spent in camping/RV facilities versus 5% of total visits
- The largest proportion of trips occur in Jul-Sep (42% Cultural vs 30% total)
- 42% of Cultural visits were among groups of 2 people compared to 36% of total visits. 13% of Cultural visits included children similar to total visits
- 36% of Canadian Cultural visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors
- 37% of Canadian Cultural 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

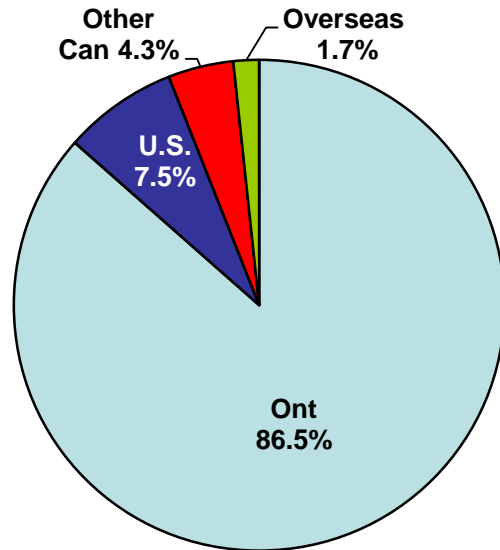
- February 7–23 – The XXII **Olympic Winter Games** are held in Sochi, Russia
- March 8 – **Malaysia Airlines Flight 370**, a Boeing 777 airliner en route to Beijing from Kuala Lumpur, disappears over the Gulf of Thailand with 239 people on board. The aircraft is presumed to have crashed into the Indian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

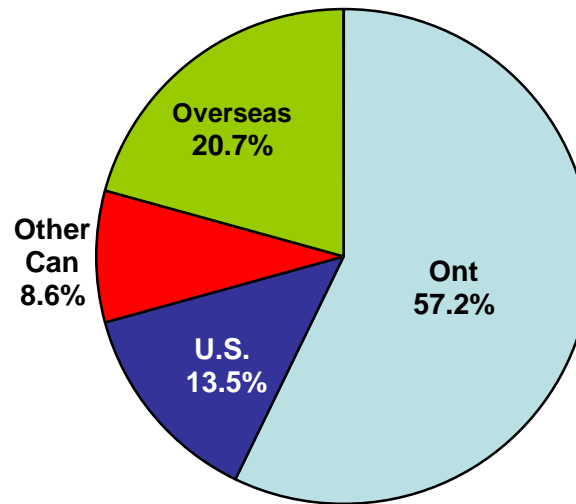
Economic Impact of Tourism in Ontario 2014

- 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



Visits by Origin
139.5 million



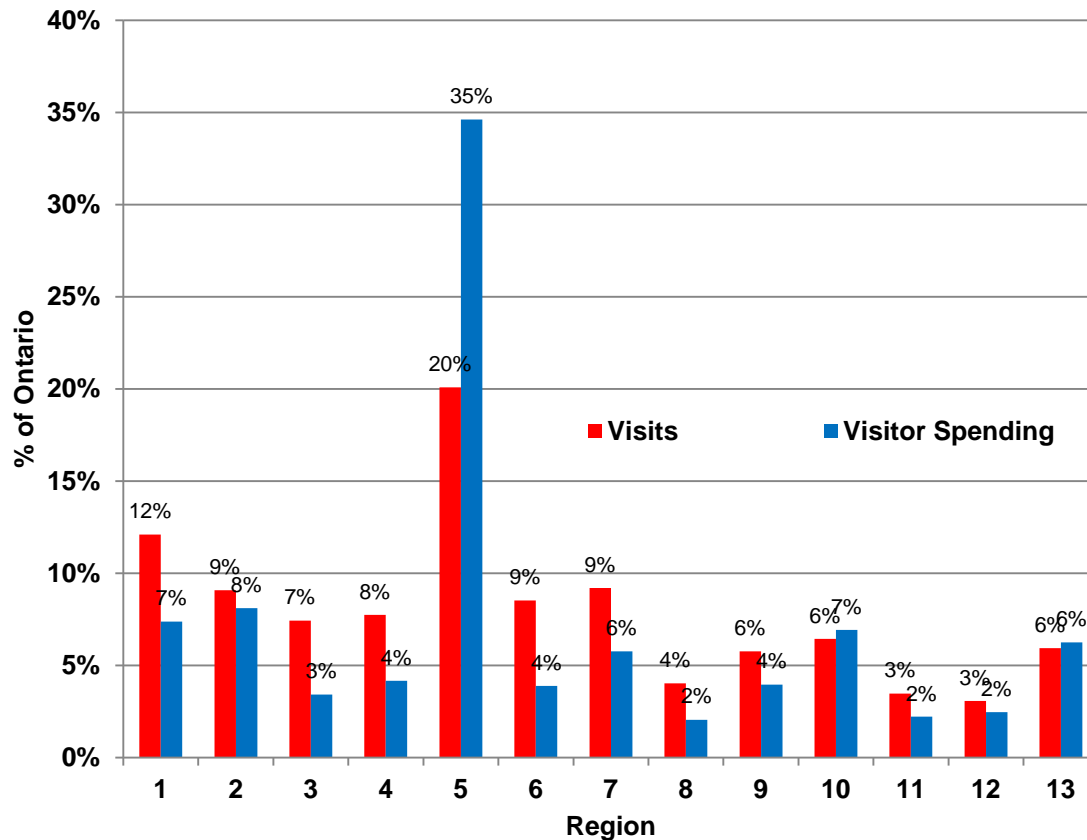
Visitor Spending by Origin
\$23.9 billion

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 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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