

Ontario Cycling 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 cycling.

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

Index

less than 80

80-100

greater than 120

Interpretation

cycling trips underdeveloped versus total trips

cycling trips similar to total trips

cycling trips overdeveloped versus total trips

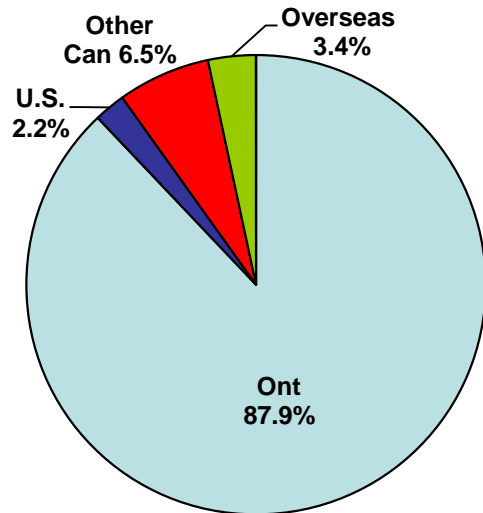
Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario Total	139.5	23.9
Ontario Cycling	1.7	0.4
Ontario Cycling proportion of Ontario Total	1.2%	1.8%

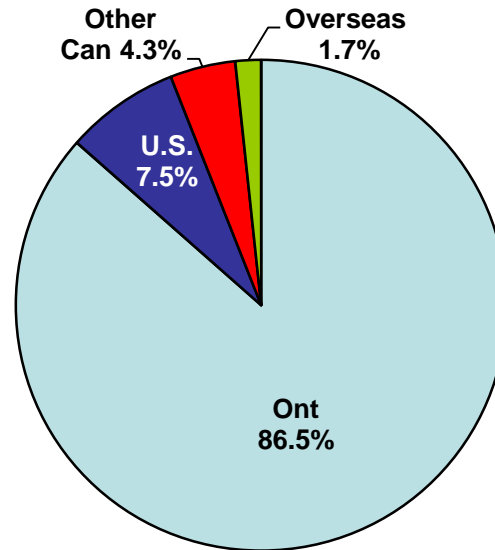
- In 2014, there were 1.7 million cycling visits in Ontario, representing 1.2% of total visits in Ontario
- Cycling visitors in spent \$428 million, accounting for 1.8% of total visitor spending in Ontario

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

Cycling and Total Visits by Origin



Cycling Visits by Origin
1.7 million



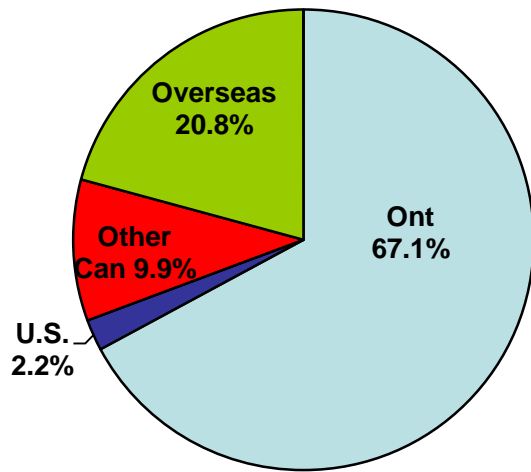
Total Visits by Origin
139.5 million

Cycling vs. Total	Visit Index
Ontario	102
U.S.	29
Other Canada	150
Overseas	198

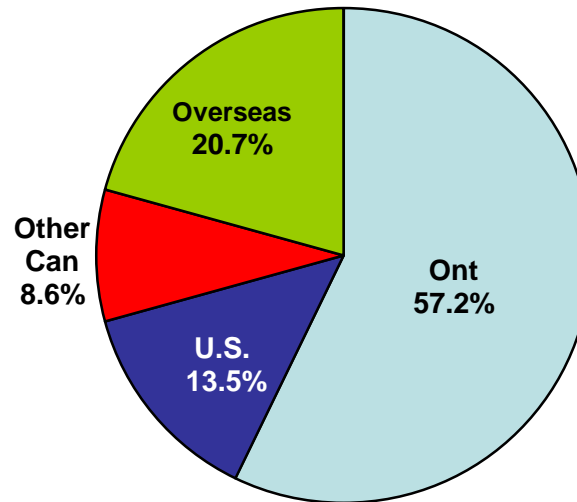
- Ontario residents accounted for the majority of cycling (88%) and total (86%) visits
- U.S. visitors accounted for 2% of cycling visits compared to 8% of total visits
- Visitors from Other Canada comprised 6% of cycling visits and 4% of total visits
- Overseas visitors accounted for 3% of cycling visits 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

Cycling and Total Spending by Origin



Cycling Visitor Spending by Origin
\$428 million



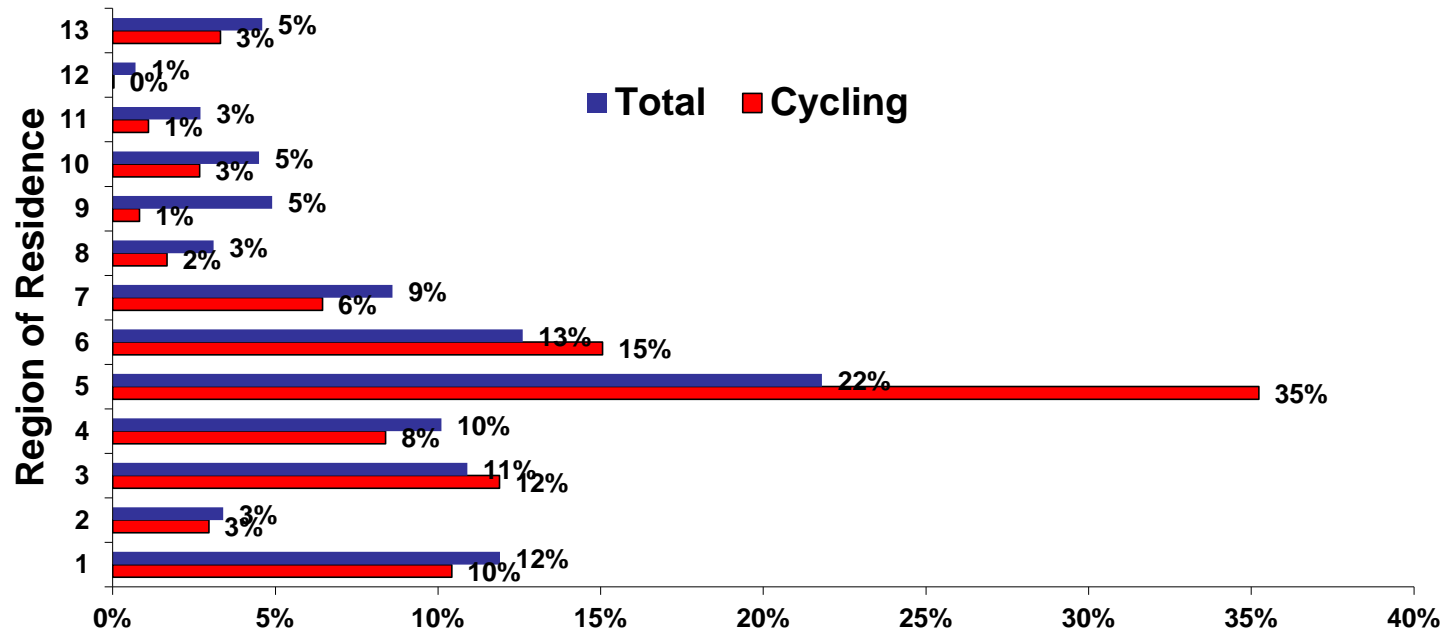
Total Visitor Spending by Origin
\$23.9 billion

Cycling vs. Total	Spending Index
Ontario	117
U.S.	16
Other Canada	116
Overseas	101

- Ontario residents accounted for the majority of cycling (67%) and total (57%) spending
- U.S. visitors accounted for 2% of cycling spending compared to 14% of total spending
- Visitors from Other Canada comprised 10% of cycling spending and 9% of total spending
- Overseas visitors accounted for 21% of cycling 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 Cycling Visitors by Region of Residence



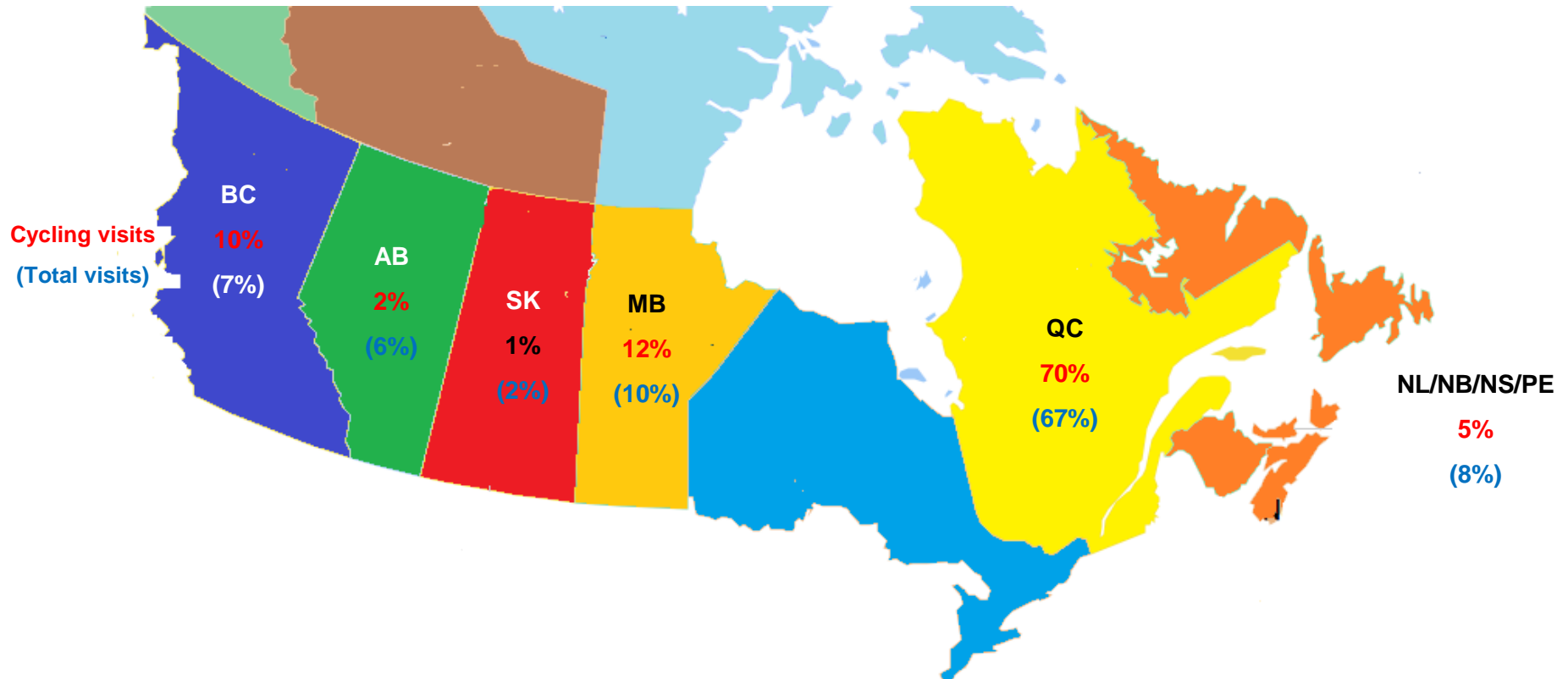
Cycling vs. Total	Visits from Ontario Index
Reg 1	88
Reg 2	87
Reg 3	109
Reg 4	83
Reg 5	162
Reg 6	120
Reg 7	75
Reg 8	54
Reg 9	17
Reg 10	59
Reg 11	41
Reg 12	5
Reg 13	72

•35% Cycling visitors from Ontario are from Region 5 compared to 22% of total visits, 15% from Region 6 (13% total visits), and 12% from Region 3 (11% total visits)

Note: Ontario origin cycling visitors represented 88% (1.5 M) of visits and 67% (\$287 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 Cycling Visitors by Province of Residence



- 70% of Other Canada cycling visitors came from Quebec with 38% from Montreal, similar to total visits (Quebec 67%, Montreal 44%)

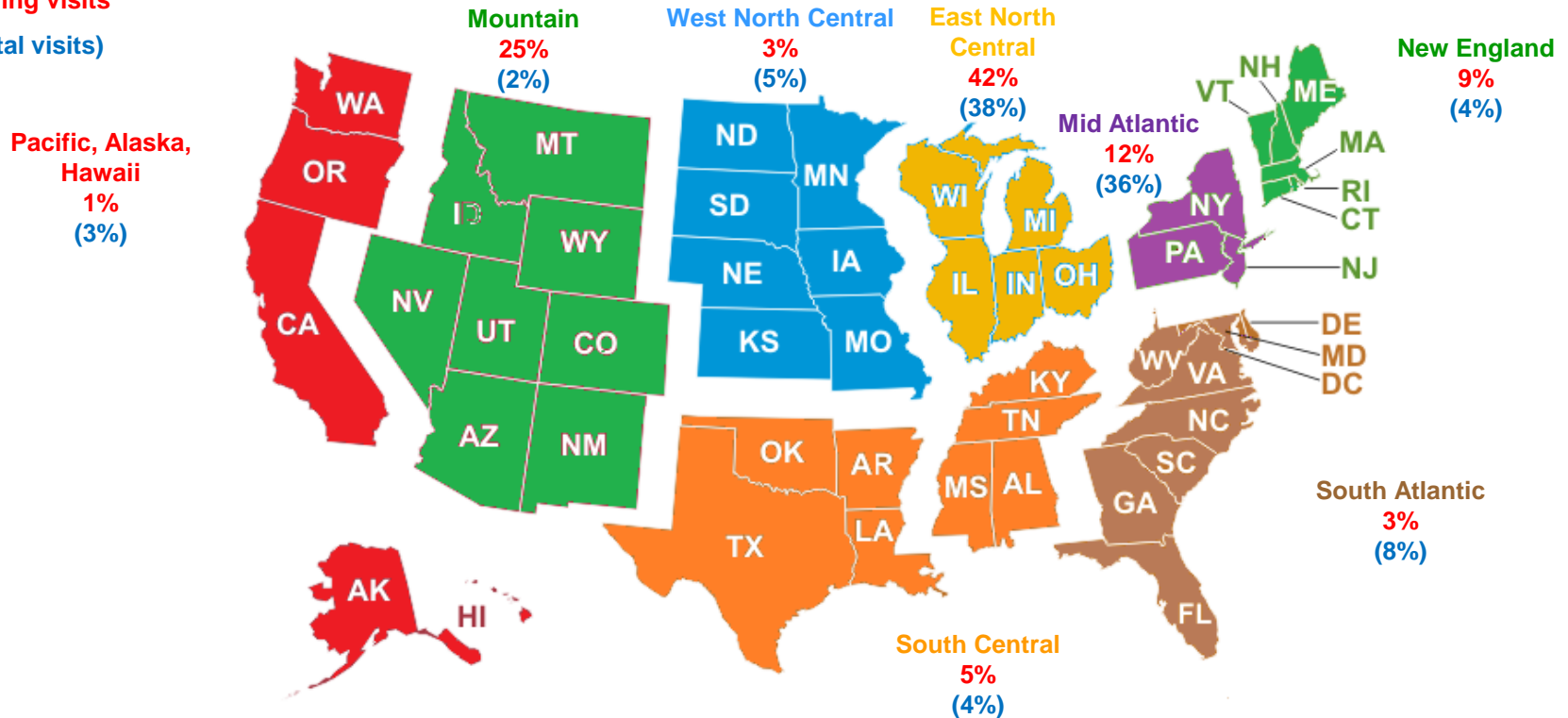
Note: Other Canada cycling visitors represented 6% (110,000) of visits and 10% (\$42 M) of visitor spending

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. Cycling Visitors by Region of Residence

Cycling visits

(Total visits)

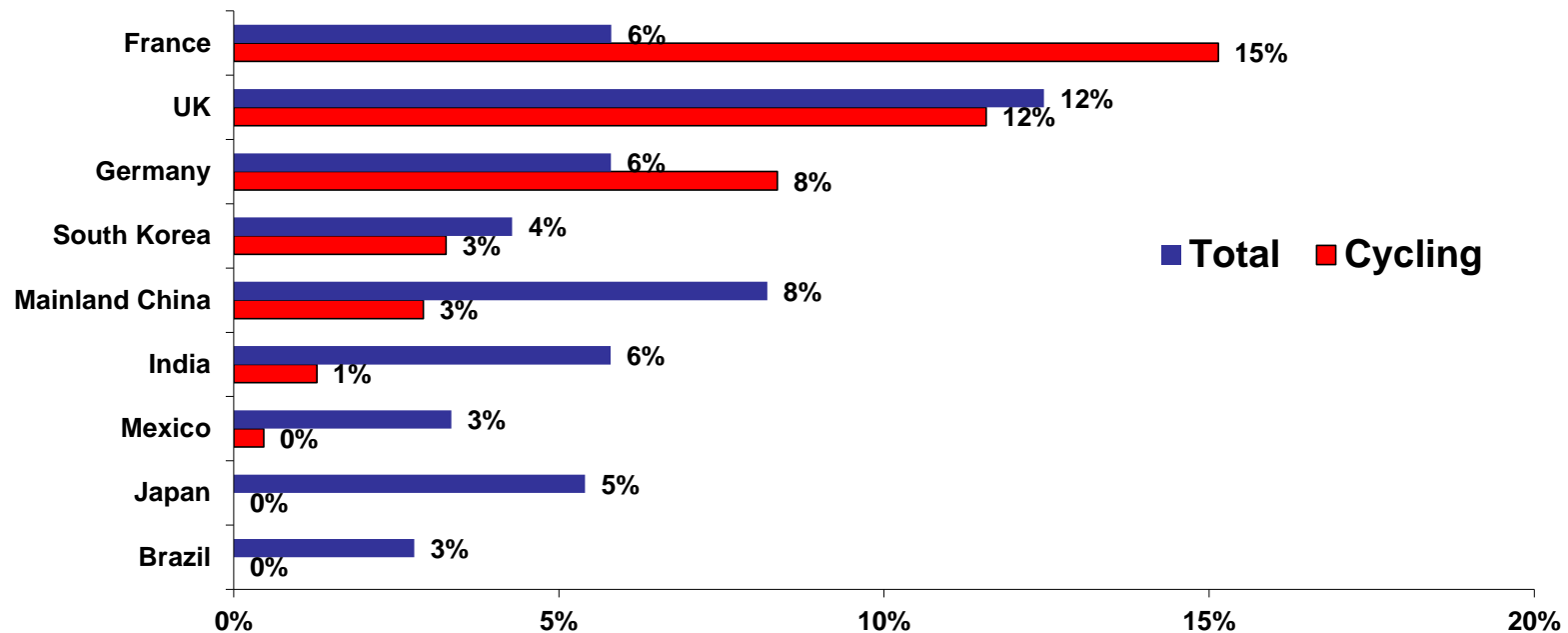


- 42% of U.S. cycling visitors came from East North Central states (Michigan, Ohio, Illinois, Indiana, and Wisconsin) and 25% from Mountain states

Note: U.S. cycling visitors represented 2% (37,000) of visits and 2% (\$9 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 Cycling Visitors by Country of Residence

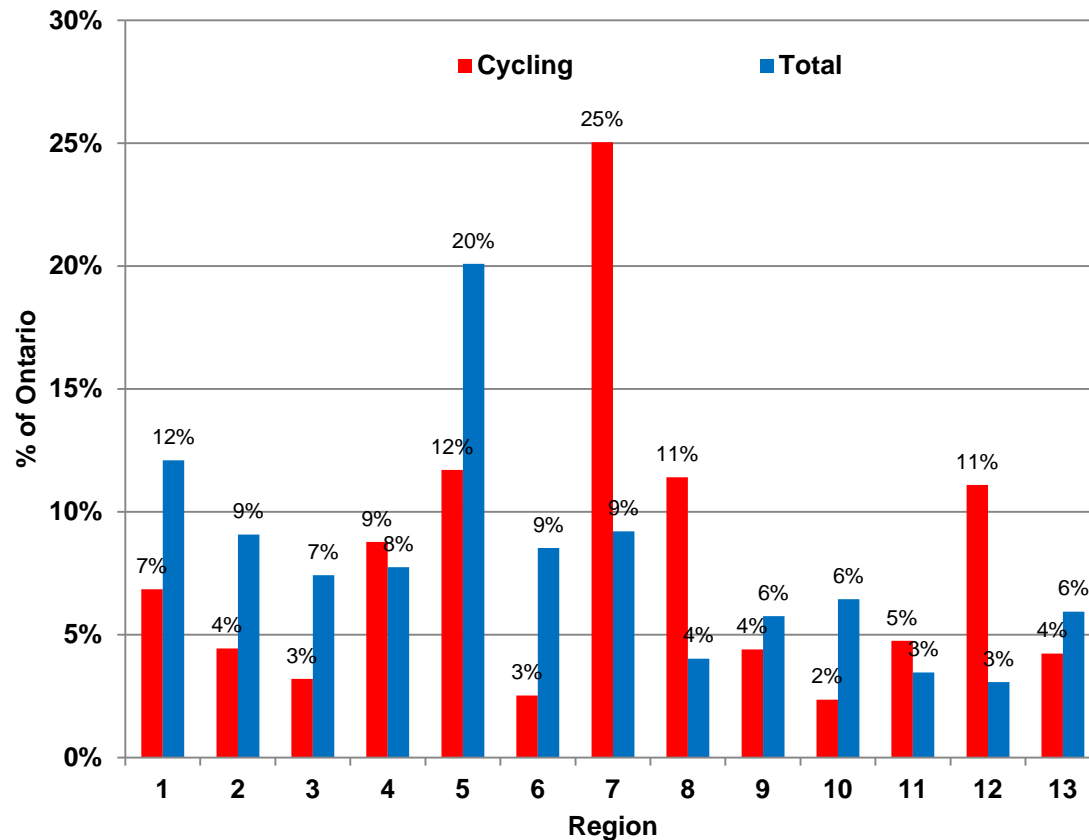


- Ontario's 9 overseas target markets represent 43% of overseas cycling visitors versus 54% of total overseas visits

Note: Overseas cycling visitors represented 3% (57,000) of visits and 21% (\$89 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 – Cycling Visits by Region

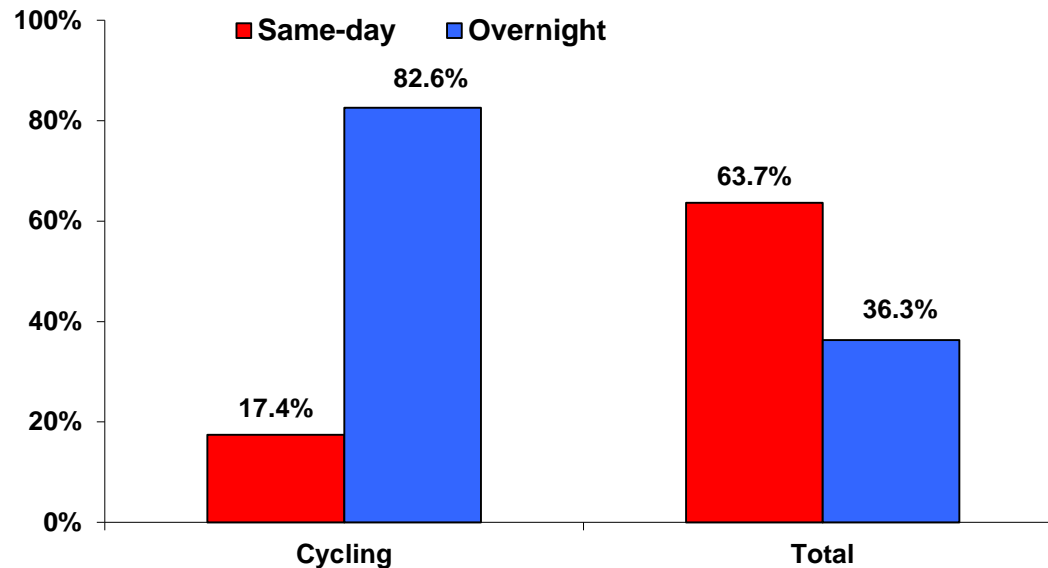


Cycling vs. Total	Destination Index
Reg 1	57
Reg 2	49
Reg 3	43
Reg 4	113
Reg 5	58
Reg 6	30
Reg 7	272
Reg 8	283
Reg 9	76
Reg 10	37
Reg 11	137
Reg 12	362
Reg 13	71

- 25% of cycling visits took place in Region 7 compared to 9% of total visits, 12% in Region 5 (20% total), and 11% in each of Region 8 and 12

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

Cycling Visits by Length of Stay

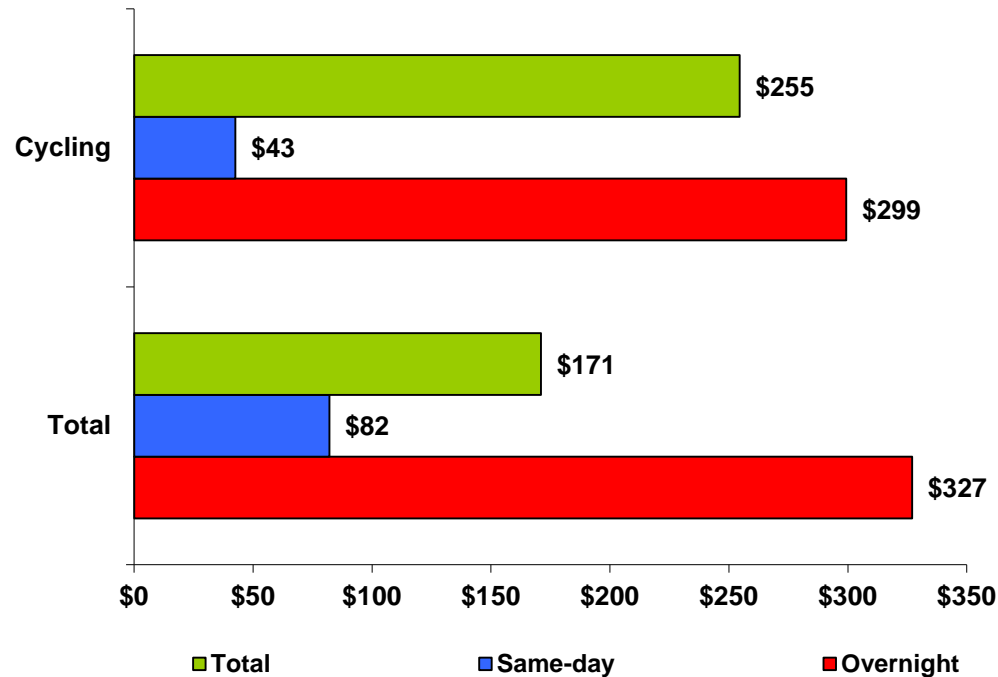


Cycling vs. Total	Length of Stay Index
Same-day	27
Overnight	227
Avg # nights	109

- The majority (83%) of cycling visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits
- The average number of nights spent on cycling visits was 3.4, slightly 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

Cycling \$/Trip by Length of Stay



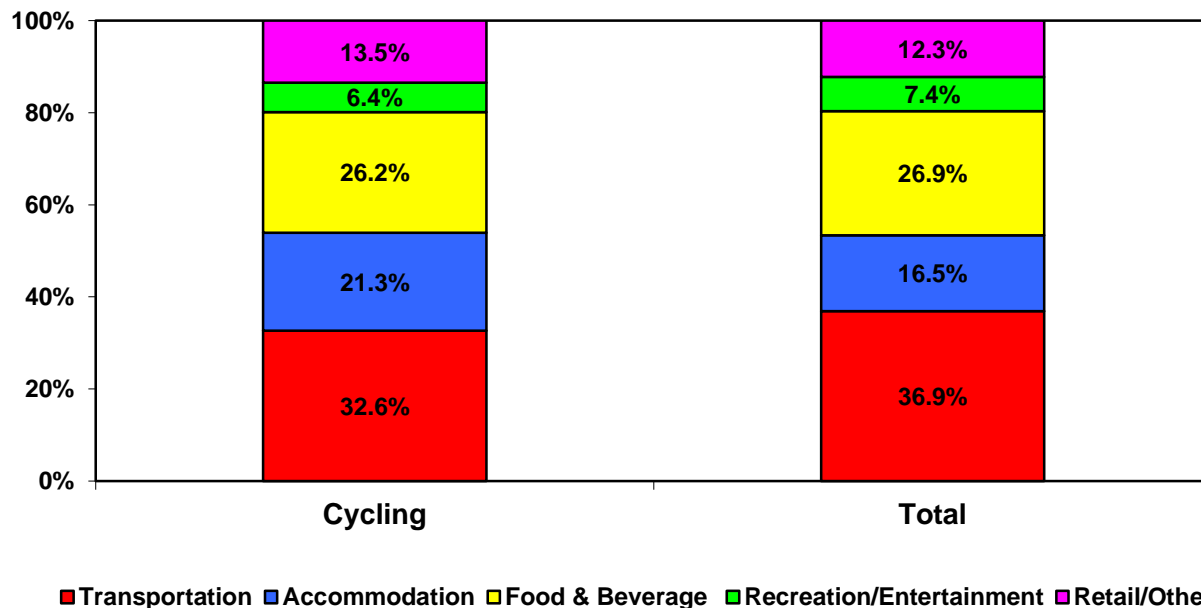
Cycling vs. Total	\$/Trip Index
Total	149
Same-day	52
Overnight	92

- Cycling visitors spent an average of \$255/trip (\$171/trip for total trips)
- On average, overnight visitors spent seven times as much per trip as same-day visitors

Total trip spending, not just spending on cycling

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

Cycling Spending by Category



Cycling vs. Ontario	Spending Index
Transportation	88
Accommodation	129
Food & Beverage	97
Rec./Entertain.	86
Retail/Other	110

- The largest proportions of expenditures were spent on Transportation (33% cycling, 37% total) and Food & Beverage (26% cycling, 27% total)
- Cycling visitors spent a larger proportion on accommodations, 21%, 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 Cycling Visitors

Activity	Cycling Visit Participation	Index vs Total
Cycling	100%	8293
Visit a beach	49%	1049
Hiking	38%	945
Boating	37%	795
Camping	28%	817
National/Provincial Nature Parks	25%	847
Wildlife/Bird watching	22%	1011
Fishing	20%	567
Historic Sites	14%	439
Museums/Art Galleries	13%	425

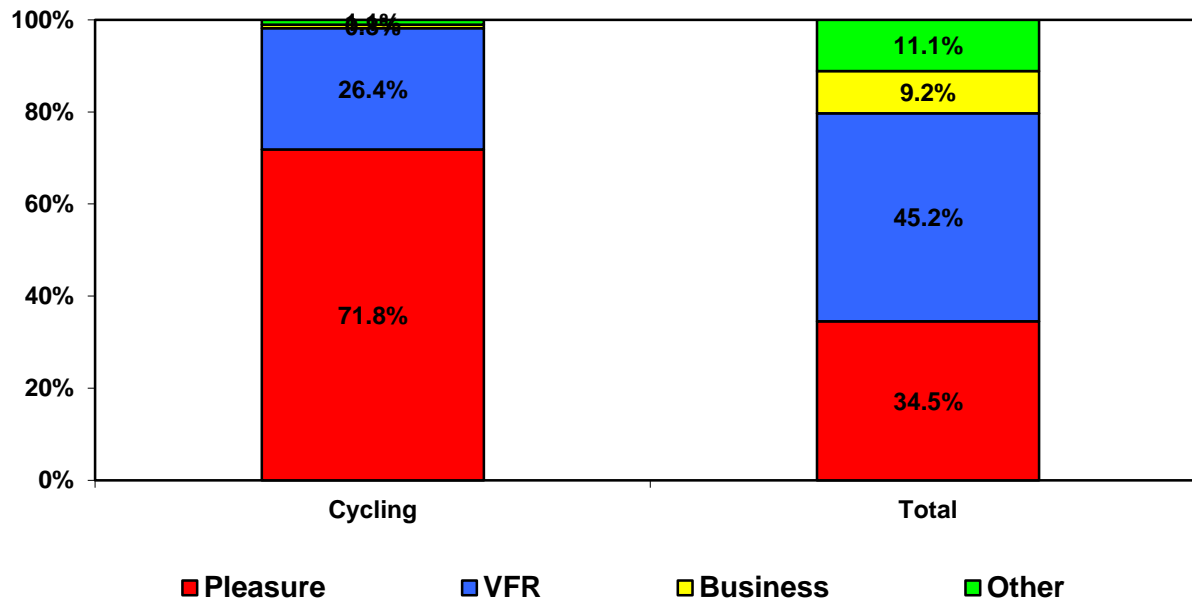
Activity	Cycling Visit Participation	Index vs Total
Play a sport	11%	581
Golfing	8%	613
Festivals/Fairs	8%	281
Performance such as a play or concert	6%	163
Visit Friends or Relatives	6%	18
Shopping	6%	65
Restaurant or bar	6%	101
Sightseeing	6%	105
Sports Events	4%	109
Zoos/Aquariums/Botanical Gardens	3%	219

Activity	Cycling Visit Participation	Index vs Total
Casinos	3%	100
Theme Parks	2%	182
Movies	1%	140
Hunting	1%	246
Indigenous	0%	317
Business Meeting/Conference/Seminar	0%	7
ATV	0%	49
Medical/Dental appointment	0%	3
Snowmobiling	0%	8
Skiing/Snowboarding	0%	1

- Cycling visitors participate in a variety of outdoor activities with 49% visiting a beach, 38% hiking, and 37% 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 Cycling Visit

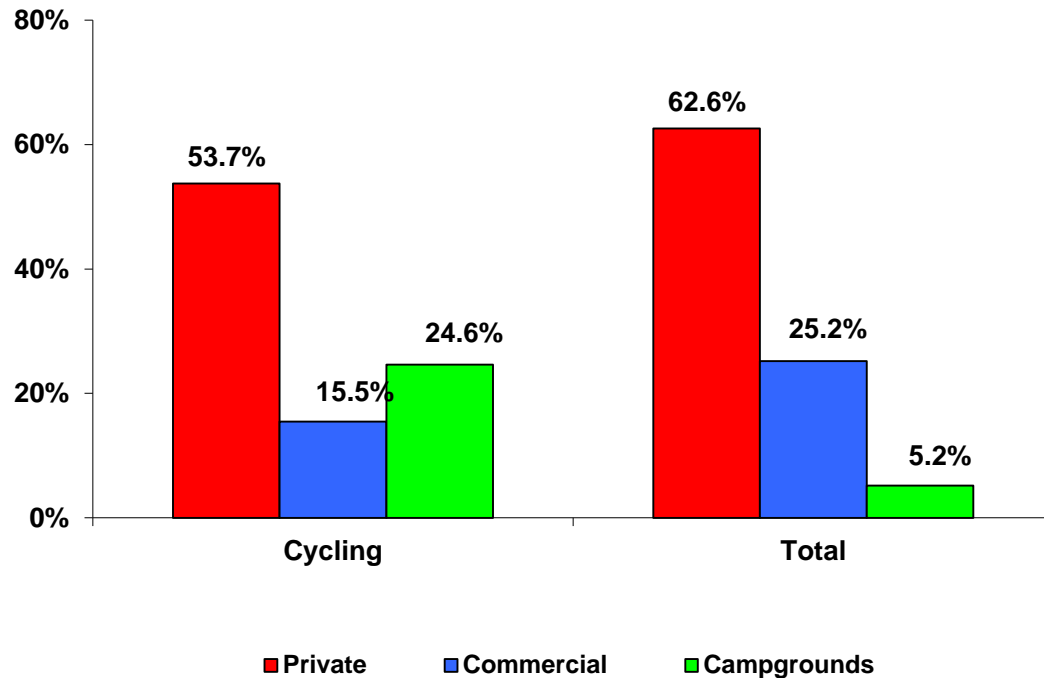


Cycling vs. Total	Purpose Index
Pleasure	208
VFR	58
Business	8
Other	10
VFR: Visiting Friends and / or Relatives	

- 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

Cycling Visits by Accommodation Type

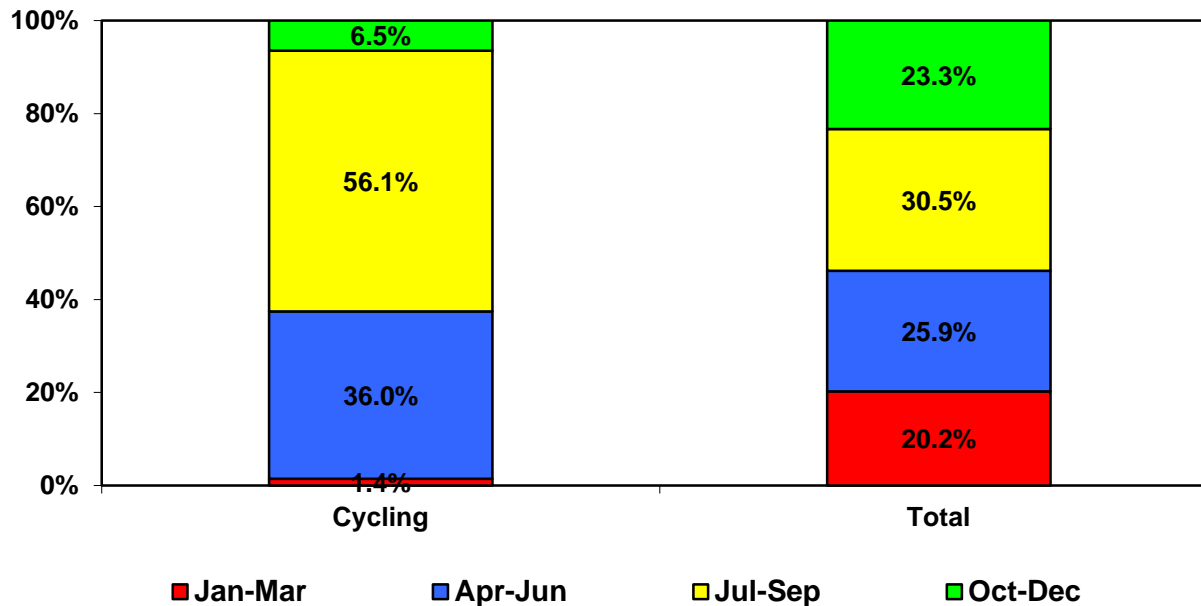


Cycling vs. Total	Type Index
Private	86
Commercial	62
Campground	475

- The majority (54%) of overnight cycling visits were spent at unpaid accommodations such as private homes and cottages, compared to 63% of total visits
- 25% of overnight cycling 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

Cycling Visits by Time of Year

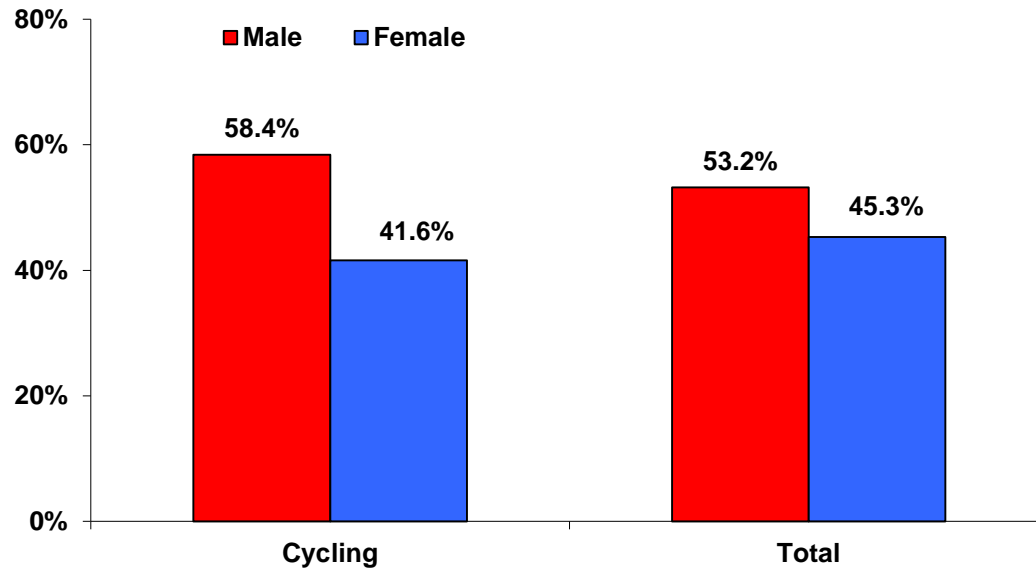


Cycling vs. Total	Quarter Index
Jan-Mar	7
Apr-Jun	139
Jul-Sept	184
Oct-Dec	28

- The largest proportion of trips occur in the summer months with 56% of cycling 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

Cycling Visits by Gender

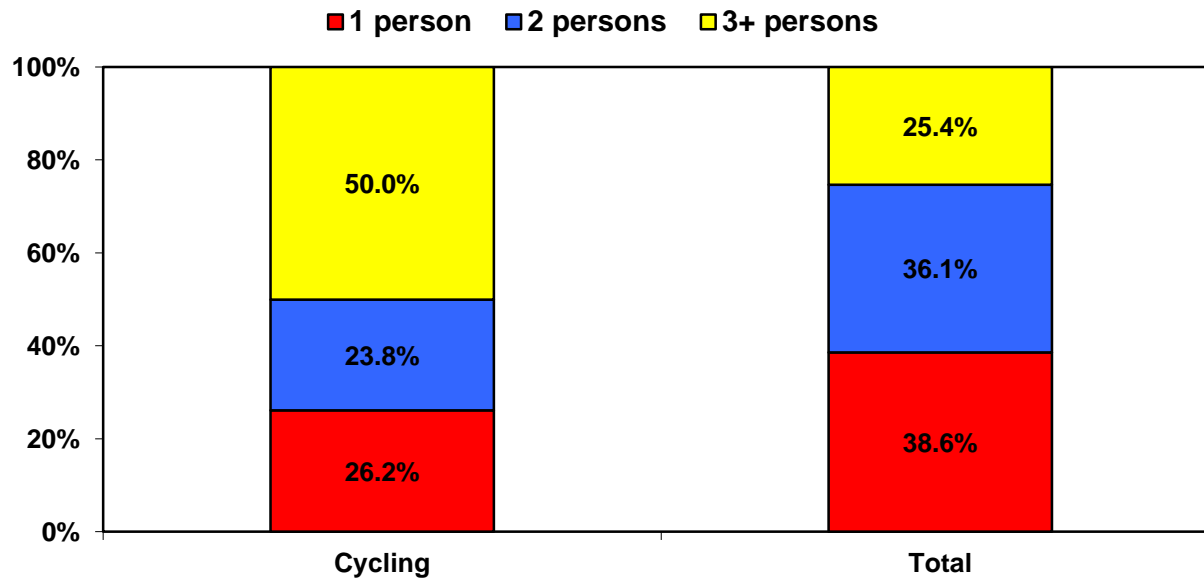


Cycling vs. Total	Gender Index
Male	110
Female	92

- Males made the majority (58%) of cycling 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

Cycling Visits by Party Size



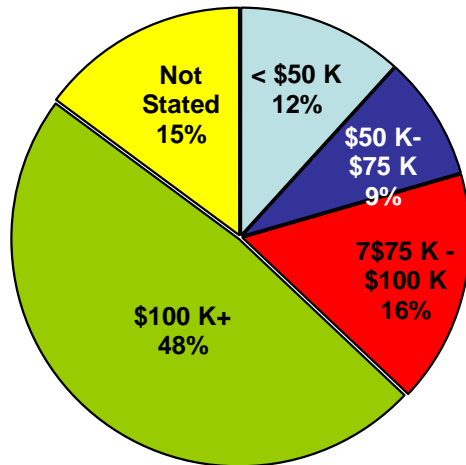
Cycling vs. Total	Party Size Index
1 person	68
2 persons	66
3+ persons	197
Avg party size	148
With children	238

Avg Party Size
3.6
2.4
With children
31%
13%

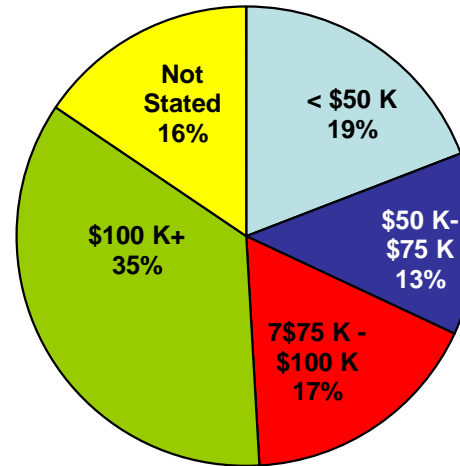
- 50% of cycling visits were among groups of 3 or more people compared to 25% of total visits
- 31% of cycling visits included children versus 13% of total visits

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

Domestic Cycling Visitor's Income



Cycling Visits



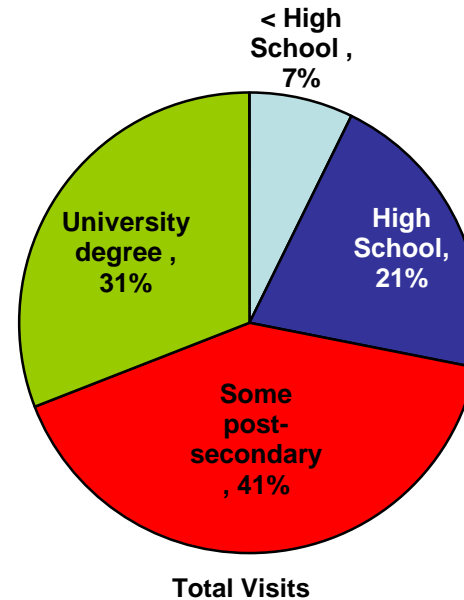
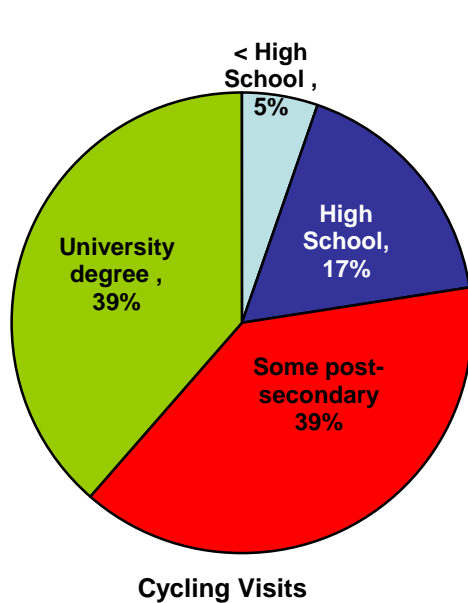
Total Visits

Cycling vs. Total	Income Index
< \$50 K	61
\$50 K - \$75 K	68
\$75 K - \$100 K	97
\$100 K+	136

- 48% of Canadian cycling 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 Cycling Visitor's Education



Cycling vs. Ontario	Education Index
< High School	73
High School	83
Some post-secondary	95
University degree	125

- 39% of Canadian cycling 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

Cycling Summary

- In 2014, there were 1.7 million cycling visits, accounting for 1.2% of total visits to Ontario. Cycling visitors spent \$428 million, or 1.8% of total visitor spending in Ontario.
- Ontario residents accounted for 88% of visits and 67% of spending, residents of Other Canada accounted for 6% of visits and 10% of spending, U.S. visitors represented 2% of visits and 2% of expenditures, and overseas visitors accounted for 3% of visits and 21% of spending
- 35% Cycling visitors from Ontario are from Region 5 compared to 22% of total visits, 15% from Region 6 (13% total visits), and 12% from Region 3 (11% total visits)
- 25% of cycling visits took place in Region 7 compared to 9% of total visits, 12% in Region 5 (20% total), and 11% in each of Region 8 and 12

Cycling Summary

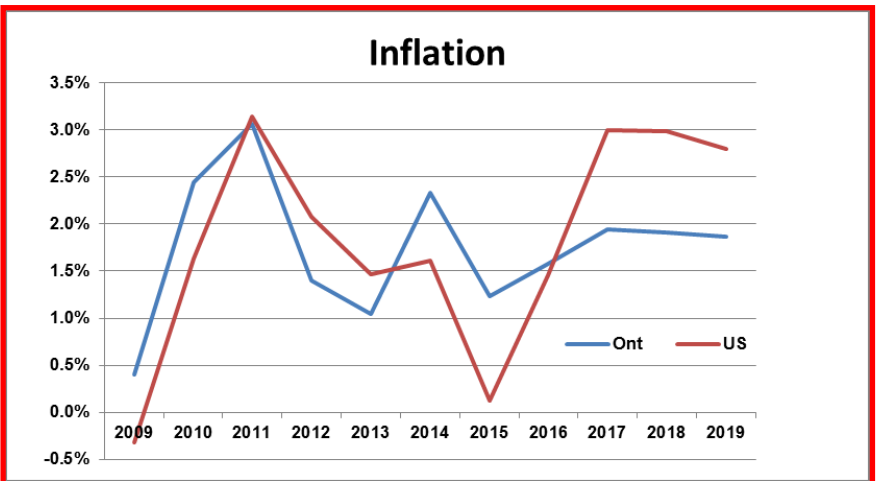
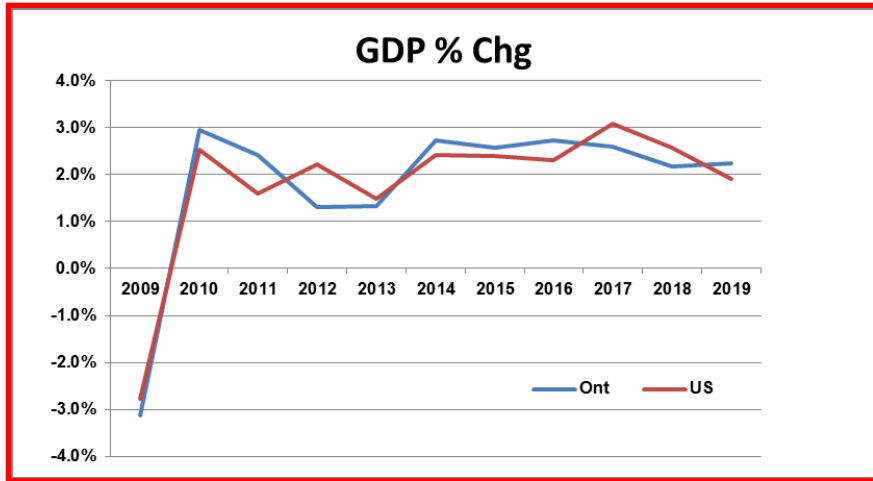
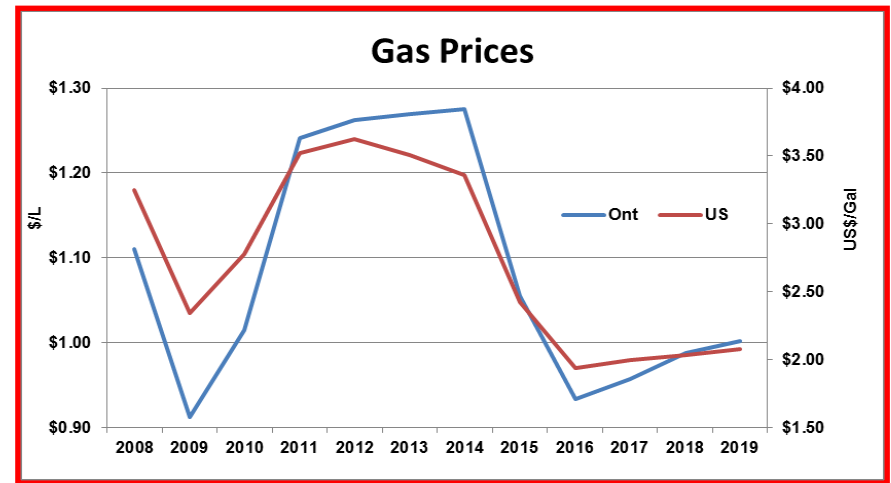
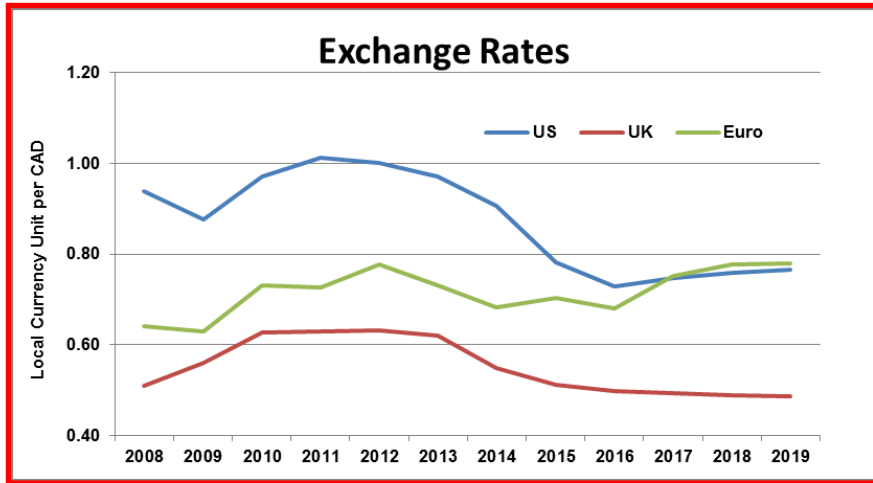
- The majority (83%) of cycling visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits. The average number of nights spent on cycling visits was 3.4, slightly above Ontario's average of 3.1 nights
- Cycling visitors spent an average of \$255/trip (\$171/trip for total trips). On average, overnight visitors spent seven times as much per trip as same-day visitors
- The largest proportions of expenditures were spent on Transportation (33% cycling, 37% total) and Food & Beverage (26% cycling, 27% total). Cycling visitors spent a larger proportion on accommodations, 21%, than total visitors, 16%
- Cycling visitors participate in a variety of outdoor activities with 49% visiting a beach, 38% hiking, and 37% boating
- Most trips were pleasure trips (72% compared to 34% of total trips)

Cycling Summary

- The majority (54%) of overnight cycling visits were spent at unpaid accommodations such as private homes and cottages, compared to 63% of total visits. 25% of overnight cycling visits were spent in camping/RV facilities versus 5% of total visits
- The largest proportion of trips occur in the summer months with 56% of cycling trips taking place in Jul-Sep versus 30% of total trips
- 50% of cycling visits were among groups of 3 or more people compared to 25% of total visits. 31% of cycling visits included children versus 13% of total visits
- 48% of Canadian cycling visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors
- 39% of Canadian cycling 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

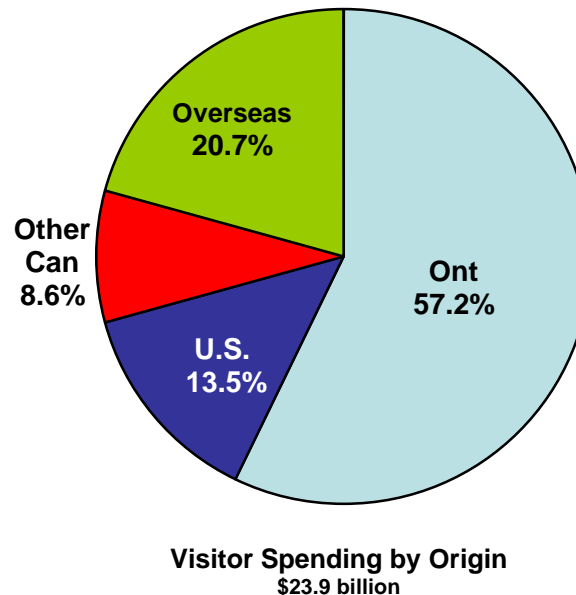
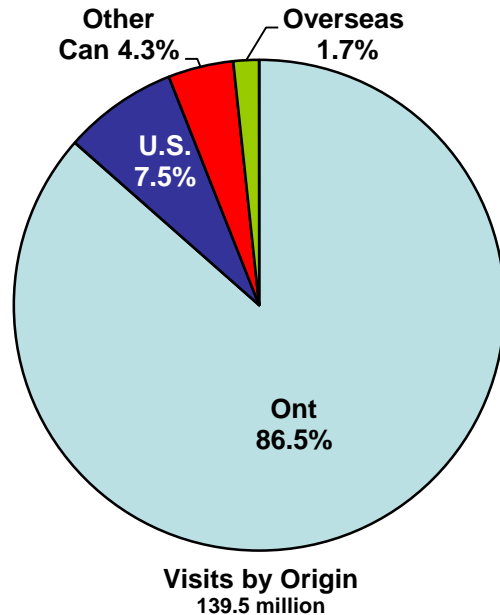
- February 7–23 – The XXII **Olympic Winter Games** are held in Sochi, Russia
- March 8 – **Malaysia Airlines Flight 370**, a Boeing 777 airliner en route to Beijing from Kuala Lumpur, disappears over the Gulf of Thailand with 239 people on board. The aircraft is presumed to have crashed into the Indian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

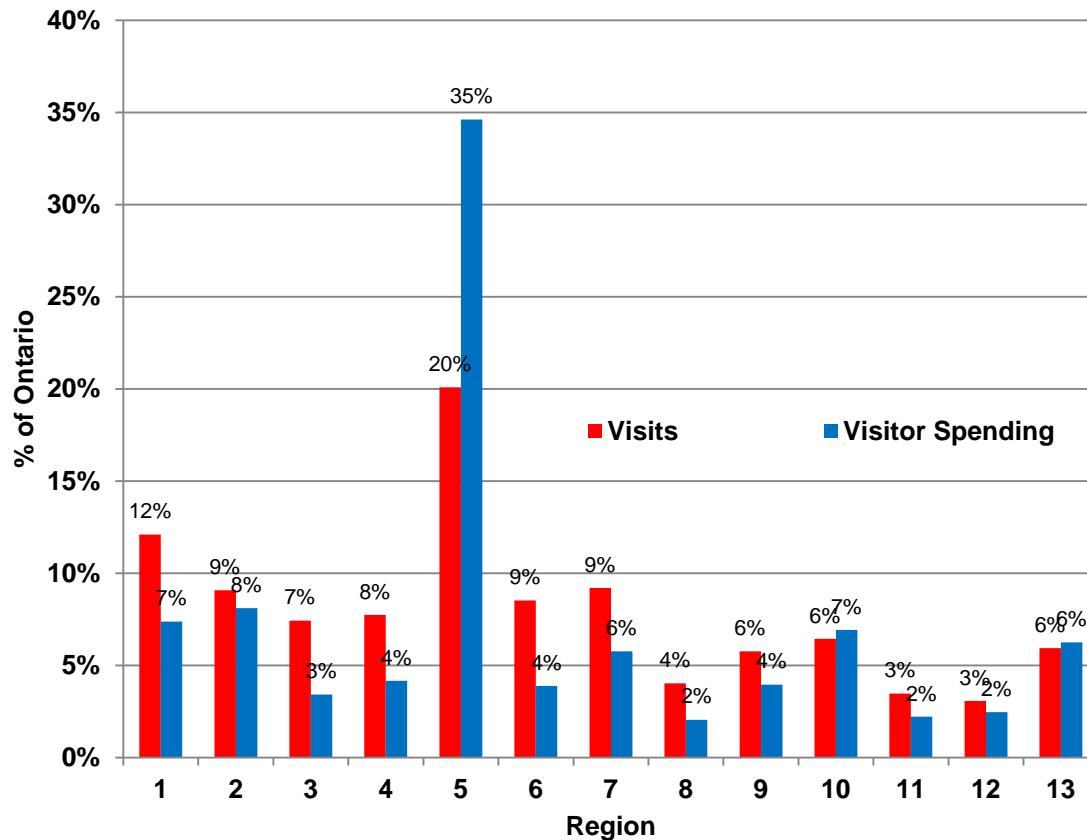


Ontario	2014	VS 2012
Visits	139.5M	-1.0%
Visitor Spending	\$23.9B	5.1%

- 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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