

Ontario Theme Park Tourism Statistics 2014

Tourism Research Unit
Winter 2017

This report summarizes key characteristics of visitors and visitor spending of trips in Ontario which included visiting a theme or amusement park.

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

Index

less than 80

80-100

greater than 120

Interpretation

Theme Park trips underdeveloped versus total trips

Theme Park trips similar to total trips

Theme Park trips overdeveloped versus total trips

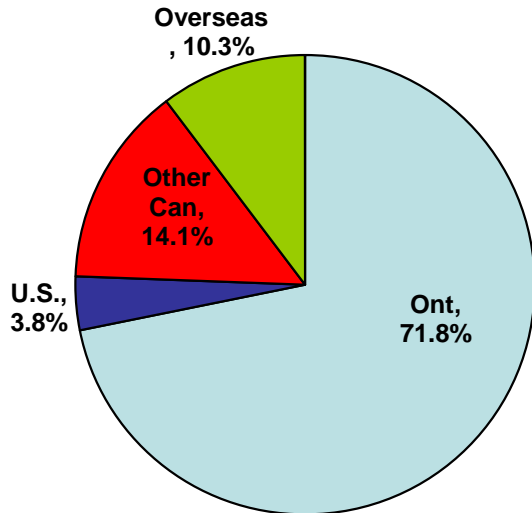
Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario Total	139.5	23.9
Ontario Theme Park	1.7	0.9
Ontario Theme Park proportion of Ontario Total	1.2%	4.0%

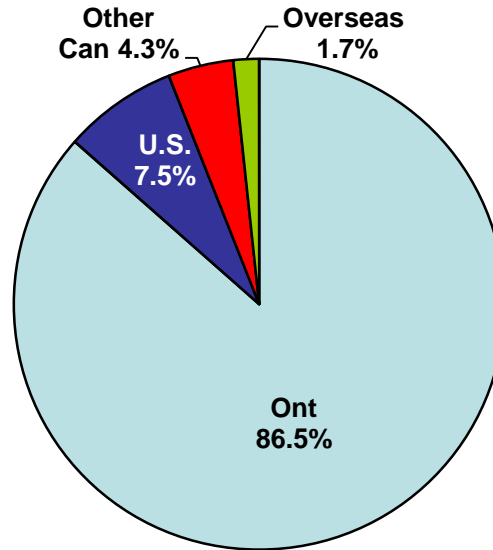
- In 2014, there were 1.7 million Theme Park visits in Ontario, representing 1.2% of total visits in Ontario
- Theme Park visitors in spent \$949 million, accounting for 4.0% of total visitor spending in Ontario

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

Theme Park and Total Visits by Origin



Theme Park Visits by Origin
1.7 million



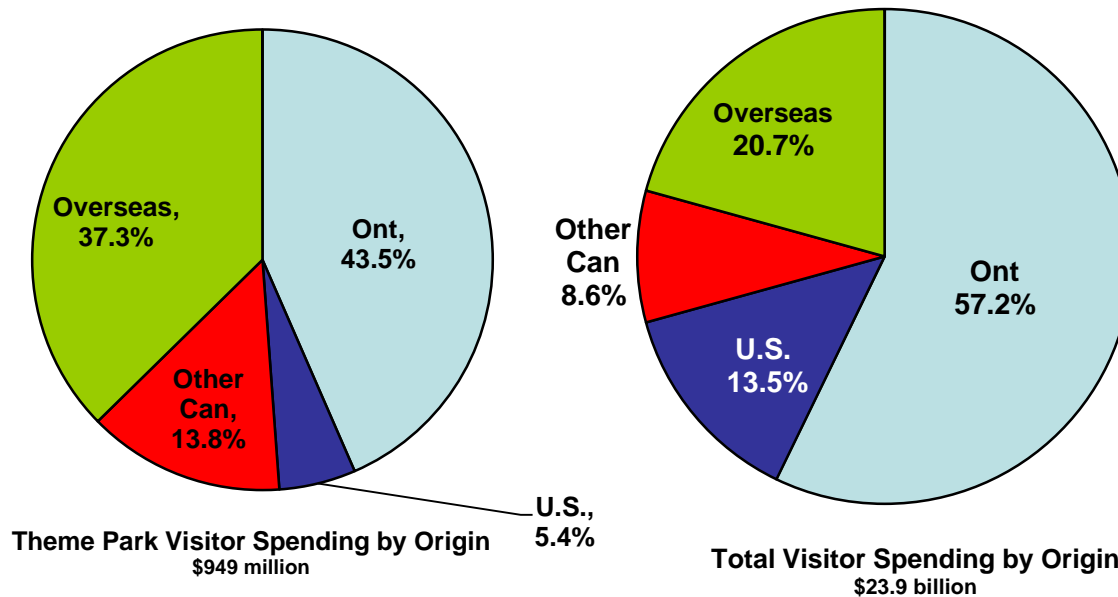
Total Visits by Origin
139.5 million

Theme Park vs. Total	Visit Index
Ontario	83
U.S.	50
Other Canada	325
Overseas	607

- Ontario residents accounted for the majority of Theme Park (72%) and total (86%) visits
- U.S. visitors accounted for 4% of Theme Park visits compared to 8% of total visits
- Visitors from Other Canada comprised 14% of Theme Park visits and 4% of total visits
- Overseas visitors accounted for 10% of Theme Park 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

Theme Park and Total Spending by Origin

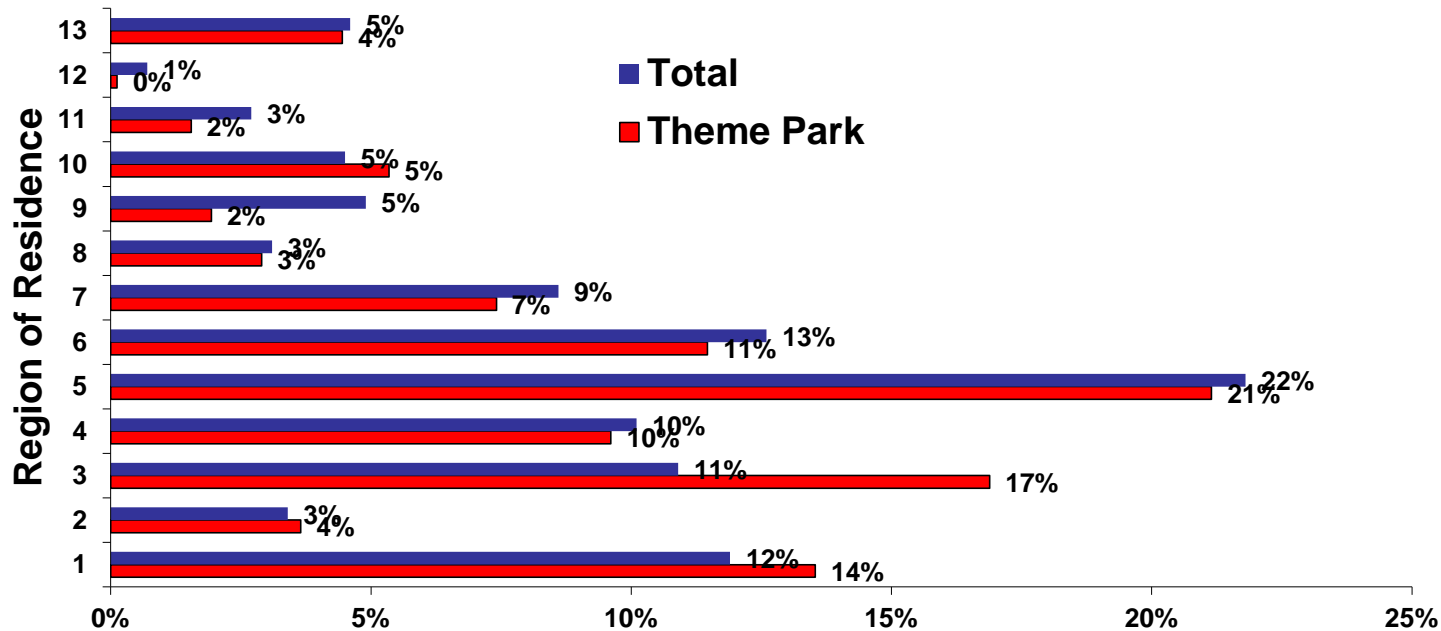


Theme Park vs. Total	Spending Index
Ontario	76
U.S.	40
Other Canada	161
Overseas	181

- Ontario residents accounted for the 44% of Theme Park and 57% of total spending
- U.S. visitors accounted for 5% of Theme Park spending compared to 14% of total spending
- Visitors from Other Canada comprised 14% of Theme Park spending and 9% of total spending
- Overseas visitors accounted for 37% of Theme Park 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 Theme Park Visitors by Region of Residence



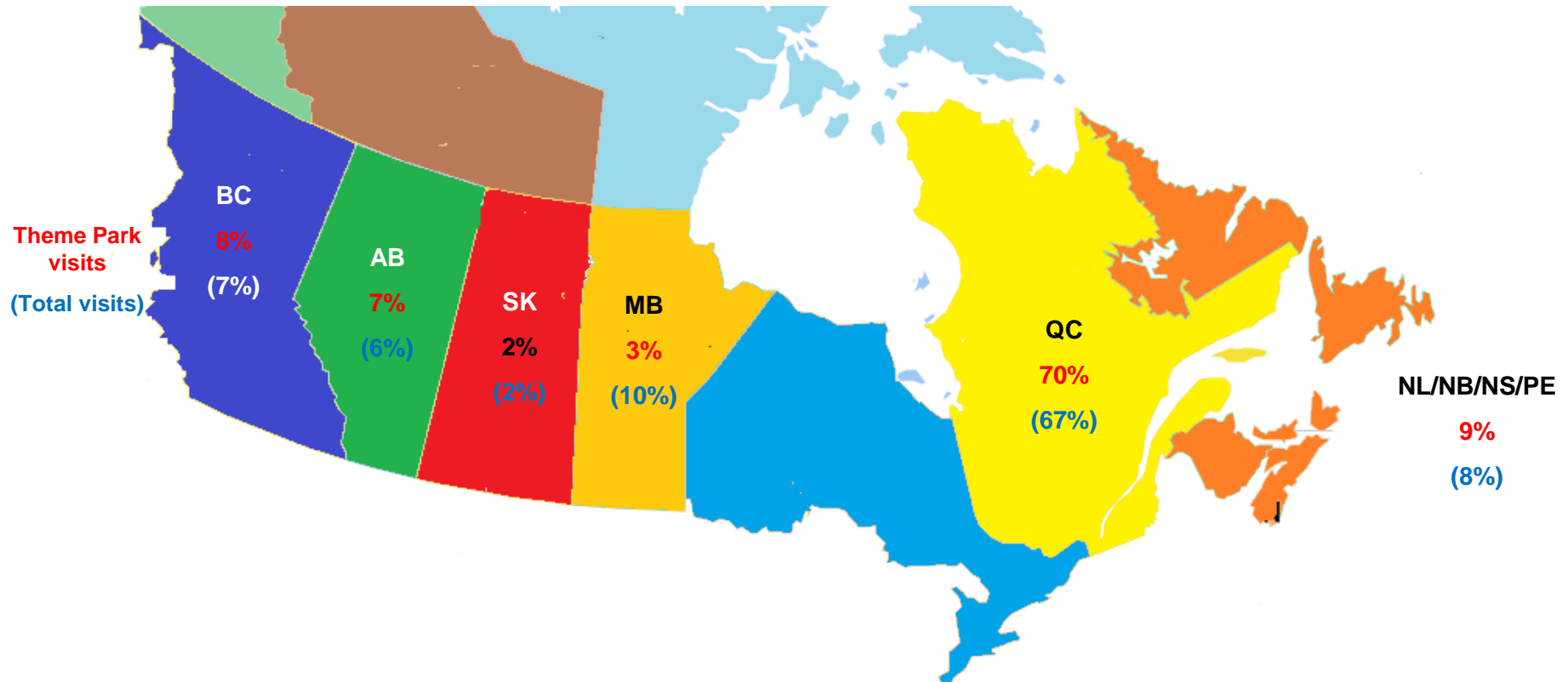
Theme Park vs. Total	Visits from Ontario Index
Reg 1	114
Reg 2	107
Reg 3	155
Reg 4	95
Reg 5	97
Reg 6	91
Reg 7	86
Reg 8	94
Reg 9	39
Reg 10	119
Reg 11	57
Reg 12	18
Reg 13	97

•21% Theme Park visitors from Ontario are from Region 5 compared to 22% of total visits, 17% from Region 3 (11% total visits), and 14% from Region 1 (12% total visits)

Note: Ontario origin Theme Park visitors represented 72% (1.2 M) of visits and 43% (\$412 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 Theme Park Visitors by Province of Residence

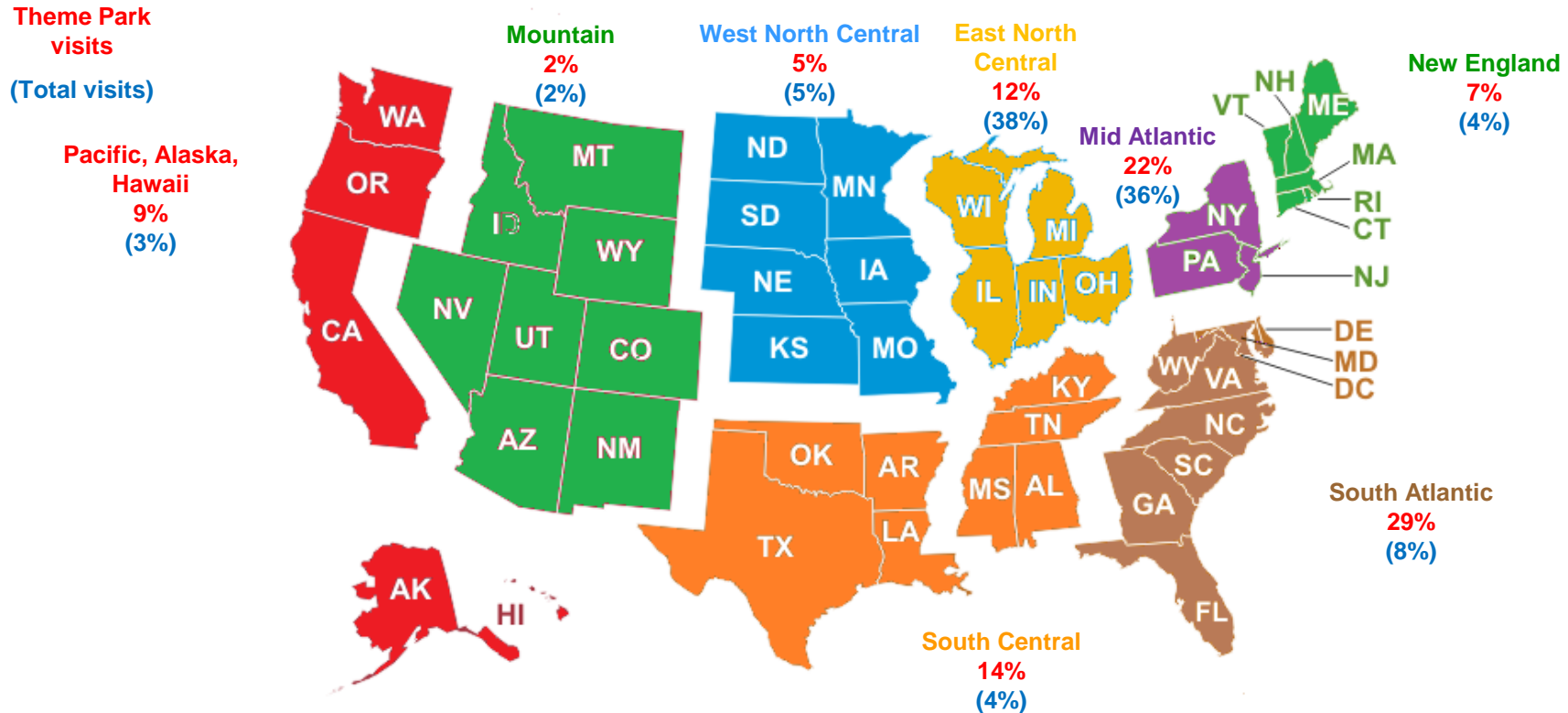


- 70% of Other Canada Theme Park visitors came from Quebec with 46% from Montreal, similar to total visits (Quebec 67%, Montreal 44%)

Note: Other Canada Theme Park visitors represented 14% (244,000) of visits and 14% (\$131M) 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. Theme Park Visitors by Region of Residence

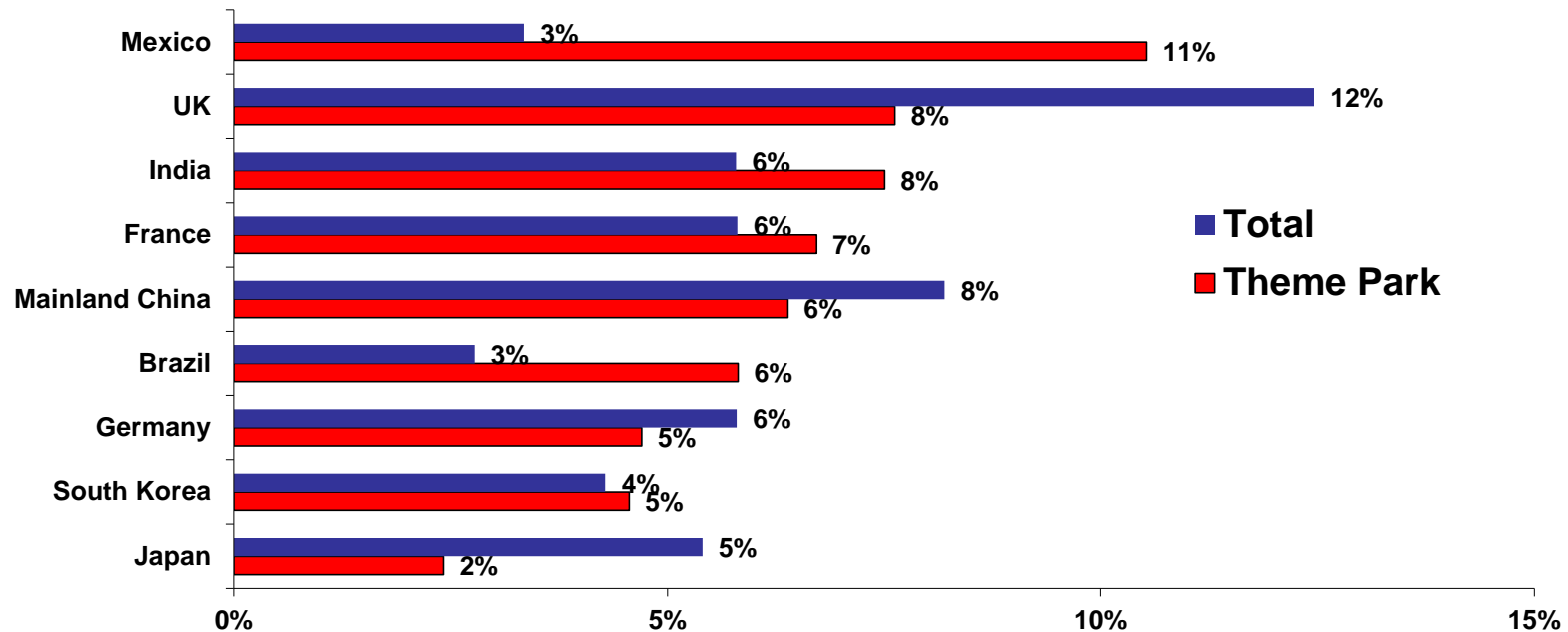


- 29% of U.S. Theme Park visitors came from South Atlantic states 22% from Mid Atlantic states

Note: U.S. Theme Park visitors represented 4% (65,000) of visits and 5% (\$51 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 Theme Park Visitors by Country of Residence

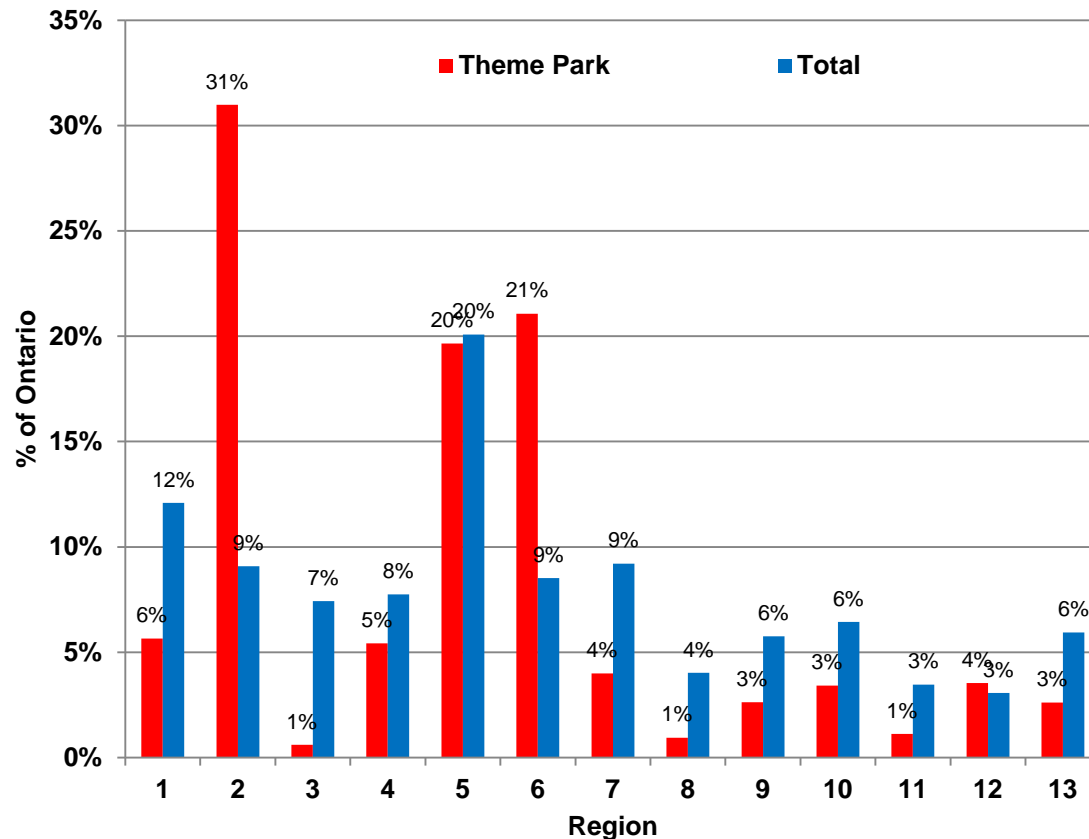


- Ontario's 9 overseas target markets represent 56% of overseas Theme Park visitors versus 54% of total overseas visits

Note: Overseas Theme Park visitors represented 10% (178,000) of visits and 37% (\$354 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 – Theme Park Visits by Region

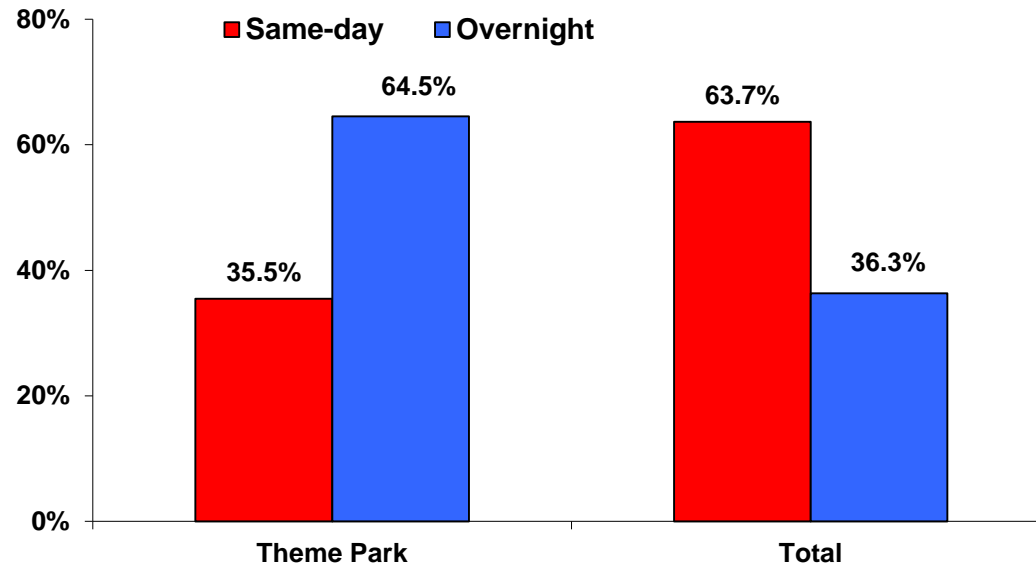


Theme Park vs. Total	Destination Index
Reg 1	47
Reg 2	341
Reg 3	8
Reg 4	70
Reg 5	98
Reg 6	247
Reg 7	43
Reg 8	23
Reg 9	46
Reg 10	53
Reg 11	33
Reg 12	115
Reg 13	44

- 31% of Theme Park visits took place in Region 2 compared to 9% of total visits, 21% in Region 6 (8% total), and 20% in Region 5 (20% total)

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

Theme Park Visits by Length of Stay

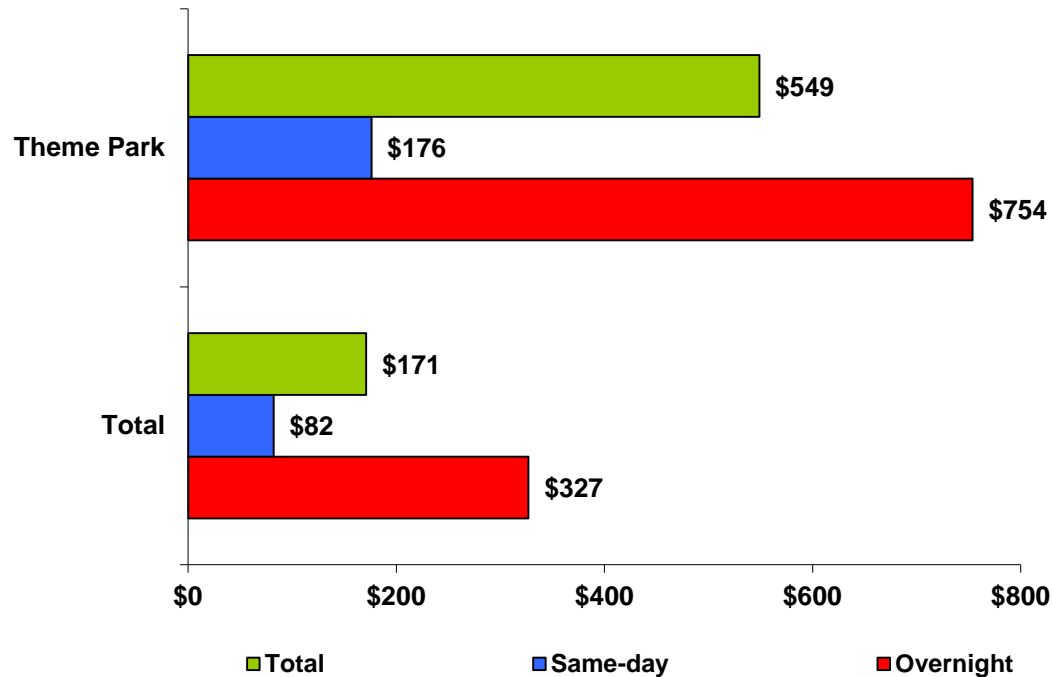


Theme Park vs. Total	Length of Stay Index
Same-day	56
Overnight	178
Avg # nights	176

- The majority (64%) of Theme Park visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits
- The average number of nights spent on Theme Park visits was 5.4, 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

Theme Park \$/Trip by Length of Stay



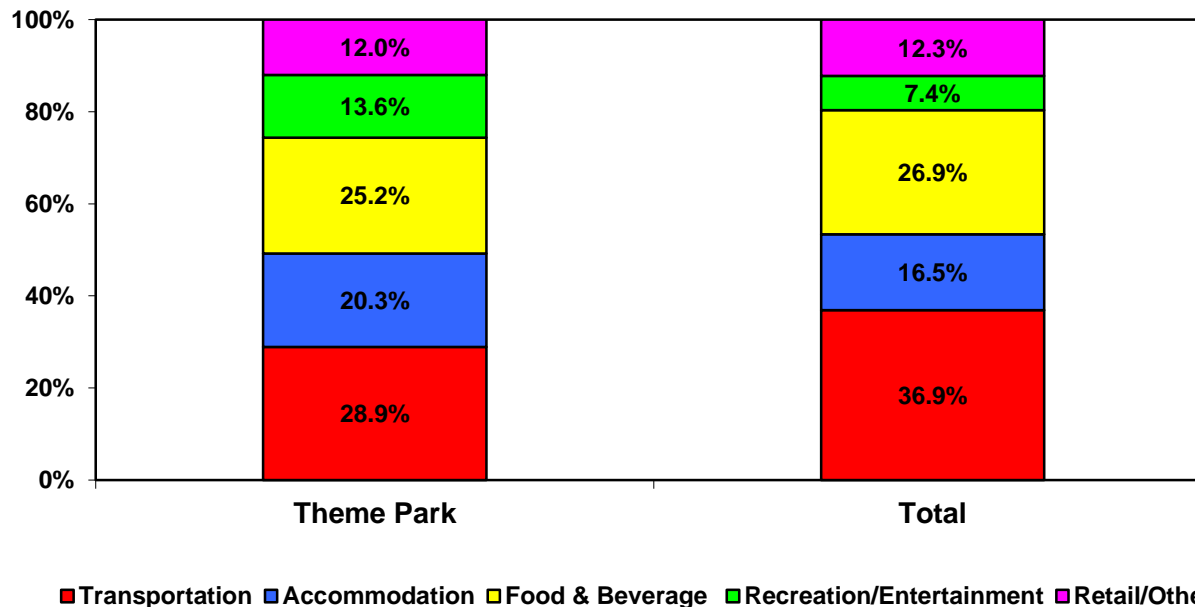
Theme Park vs. Total	\$/Trip Index
Total	320
Same-day	213
Overnight	230

- Theme Park visitors spent an average of \$549/trip (\$171/trip for total trips)
- On average, overnight visitors spent over 4 times as much per trip as same-day visitors

Total trip spending, not just spending on Theme Park

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

Theme Park Spending by Category



Theme Park vs. Ontario	Spending Index
Transportation	78
Accommodation	123
Food & Beverage	93
Rec./Entertain.	183
Retail/Other	98

- The largest proportions of expenditures were spent on Transportation (29% Theme Park, 37% total) and Food & Beverage (25% Theme Park, 27% total)
- Theme Park 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 Theme Park Visitors

Activity	Theme Park Visit Participation	Index vs Total
Theme Parks	100%	8072
Any Outdoor/Sports Activity	23%	136
National/Provincial Nature Parks	21%	711
Historic Sites	20%	627
Museums/Art Galleries	19%	618
Sightseeing	18%	333
Shopping	16%	183
Restaurant or bar	15%	272
Zoos/Aquariums/Botanical Gardens	14%	944
Casinos	11%	416

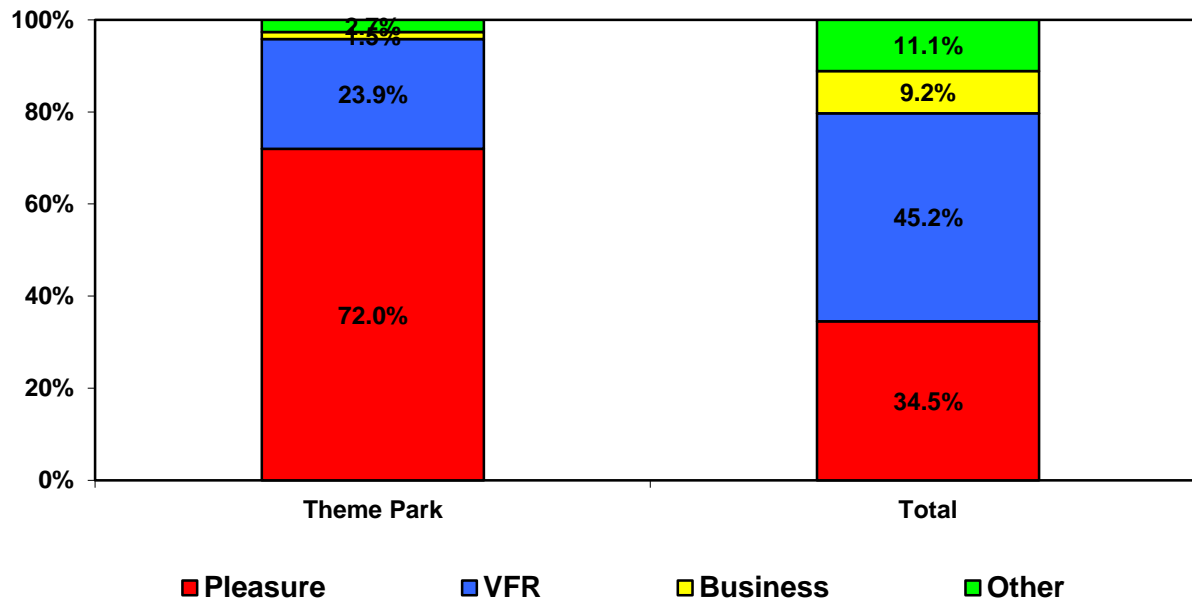
Activity	Theme Park Visit Participation	Index vs Total
Visit Friends or Relatives	10%	32
Performance such as a play or concert	9%	219
Visit a beach	8%	178
Hiking	8%	200
Boating	8%	173
Wildlife/Bird watching	6%	290
Festivals/Fairs	6%	210
Sports Events	5%	117
Movies	4%	455
Camping	4%	107

Activity	Theme Park Visit Participation	Index vs Total
Play a sport	4%	189
Golfing	2%	162
Cycling	2%	182
Fishing	2%	54
Aboriginal	1%	837
Skiing/Snowboarding	1%	75
Business Meeting/Conference/Seminar	1%	13
Medical/Dental appointment	0%	24
Hunting	0%	38
Snowmobiling	0%	0

- 21% of Theme Park visitors went to a national/provincial park, 20% went to a historic site, and 19% went to a museum/art gallery

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 Theme Park Visit

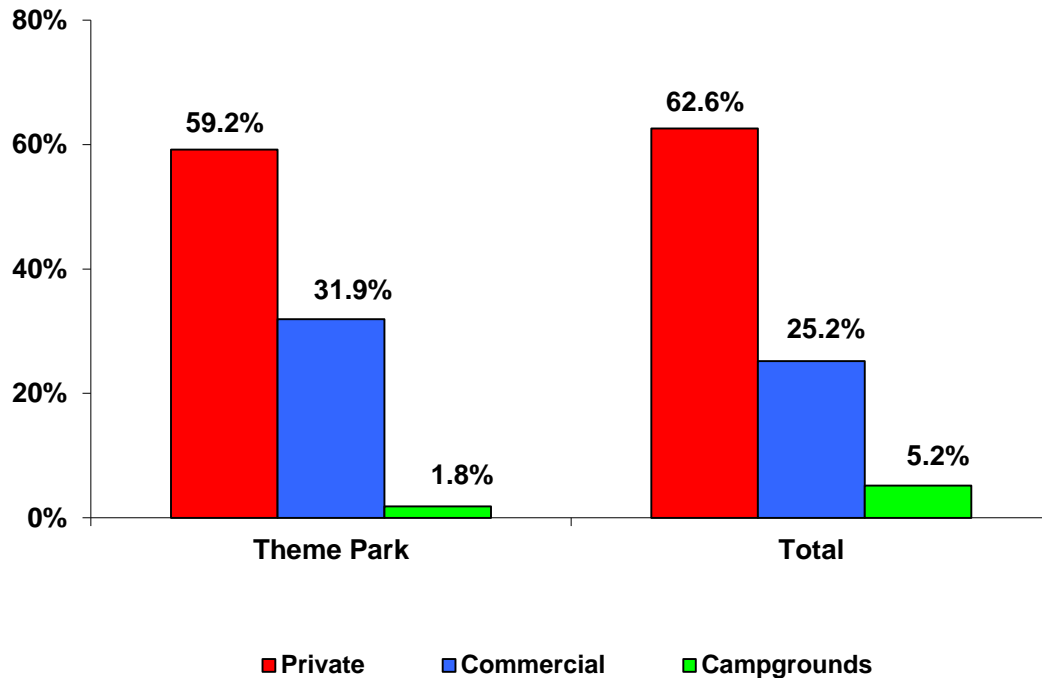


Theme Park vs. Total	Purpose Index
Pleasure	208
VFR	53
Business	16
Other	24
VFR: Visiting Friends and / or Relatives	

- 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

Theme Park Visits by Accommodation Type

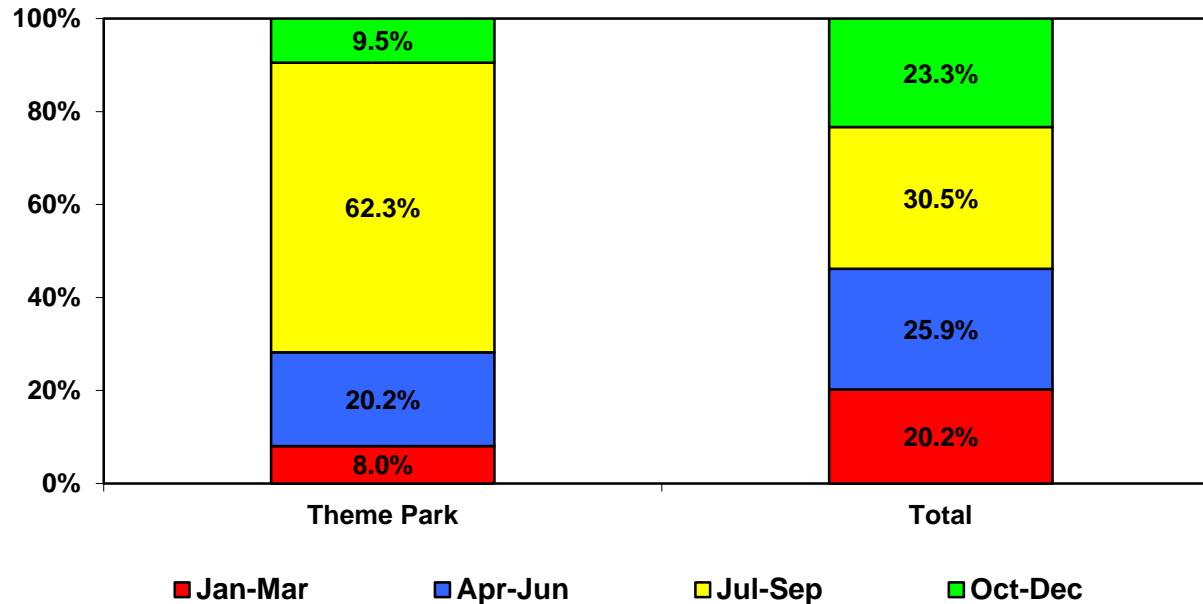


Theme Park vs. Total	Type Index
Private	94
Commercial	127
Campground	36

- The majority (59%) of overnight Theme Park visits were spent at unpaid accommodations such as private homes and cottages, compared to 63% of total visits
- 32% of overnight Theme Park visits were spent in commercial accommodations versus 25% 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

Theme Park Visits by Time of Year

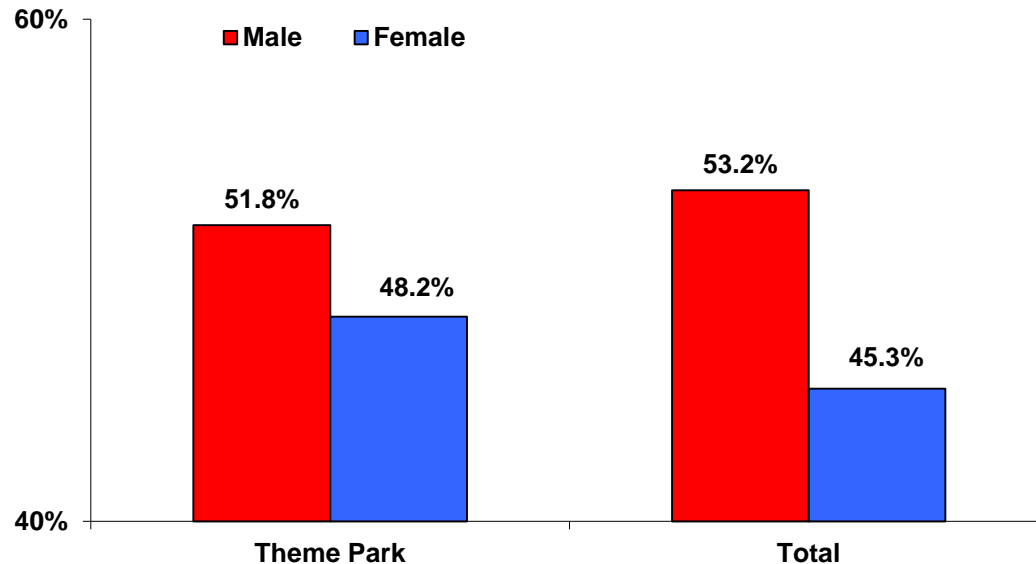


Theme Park vs. Total	Quarter Index
Jan-Mar	40
Apr-Jun	78
Jul-Sept	204
Oct-Dec	41

- The largest proportion of trips occur in the summer months with 62% of Theme Park 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

Theme Park Visits by Gender

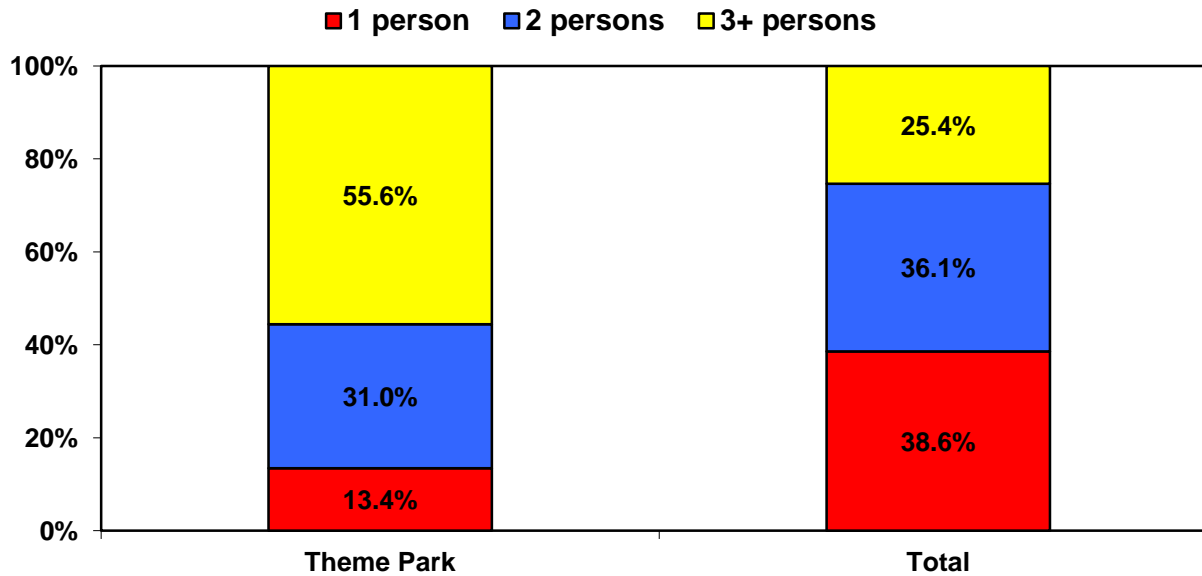


Theme Park vs. Total	Gender Index
Male	97
Female	106

- Males made the majority (52%) of Theme Park 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

Theme Park Visits by Party Size



Theme Park vs. Total	Party Size Index
1 person	35
2 persons	86
3+ persons	219
Avg party size	144
With children	312

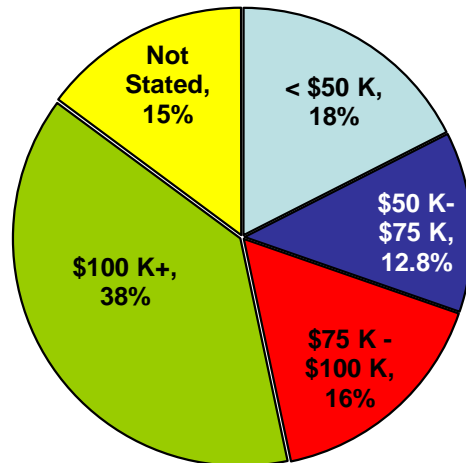
Avg Party Size	3.5	2.4
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With children	40%	13%
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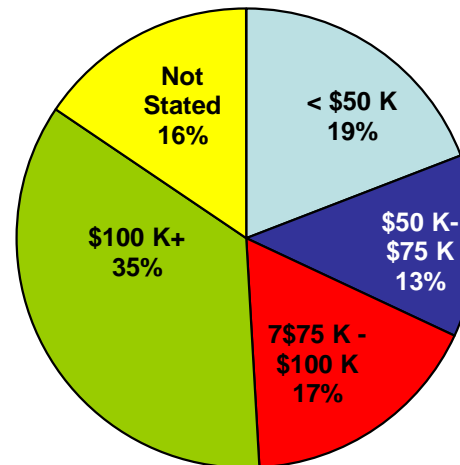
- 56% of Theme Park visits were among groups of 3 or more people compared to 25% of total visits
- 40% of Theme Park visits included children versus 13% of total visits

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

Domestic Theme Park Visitor's Income



Theme Park Visits



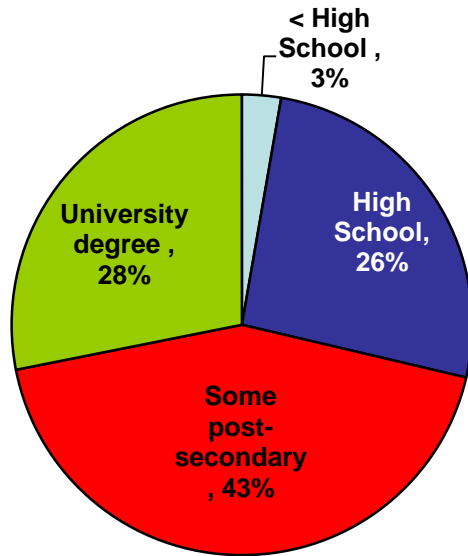
Total Visits

Theme Park vs. Total	Income Index
< \$50 K	92
\$50 K - \$75 K	100
\$75 K - \$100 K	96
\$100 K+	109

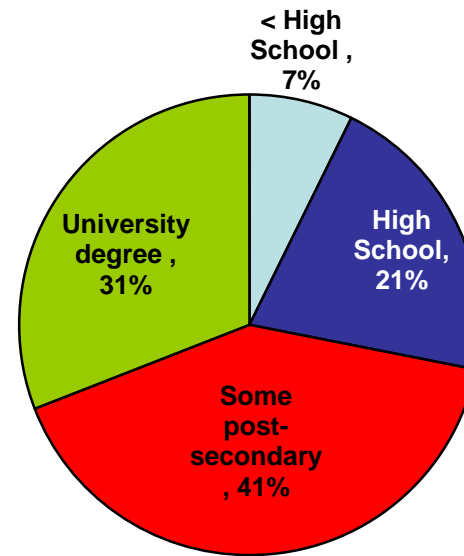
- 38% of Canadian Theme Park visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors

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

Domestic Theme Park Visitor's Education



Theme Park Visits



Total Visits

Theme Park vs. Ontario	Education Index
< High School	38
High School	125
Some post-secondary	105
University degree	91

- 28% of Canadian Theme Park 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

Theme Park Summary

- In 2014, there were 1.7 million Theme Park visits, accounting for 1.2% of total visits to Ontario. Theme Park visitors spent \$949 million, or 4.0% of total visitor spending in Ontario.
- Ontario residents accounted for 72% of visits and 44% of spending, residents of Other Canada accounted for 14% of visits and 14% of spending, U.S. visitors represented 4% of visits and 5% of expenditures, and overseas visitors accounted for 10% of visits and 37% of spending
- 21% Theme Park visitors from Ontario are from Region 5 compared to 22% of total visits, 17% from Region 3 (11% total visits), and 14% from Region 1 (12% total visits)
- 31% of Theme Park visits took place in Region 2 compared to 9% of total visits, 21% in Region 6 (8% total), and 20% in Region 5 (20% total)

Theme Park Summary

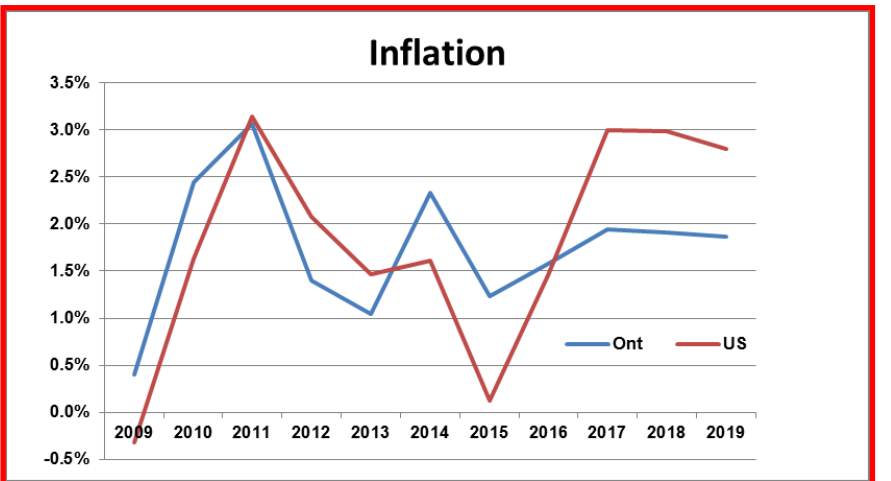
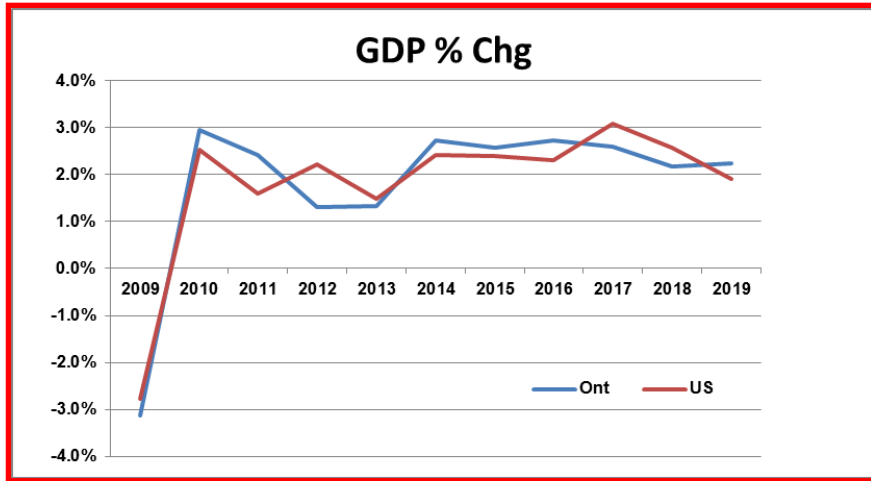
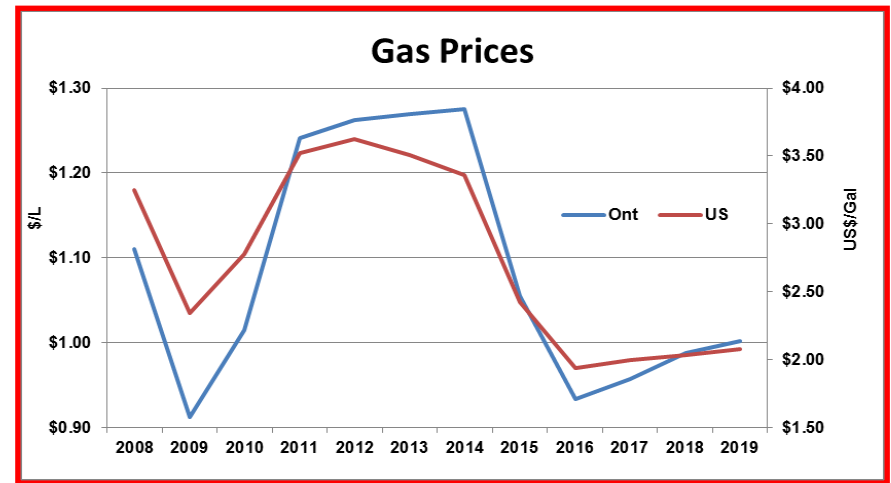
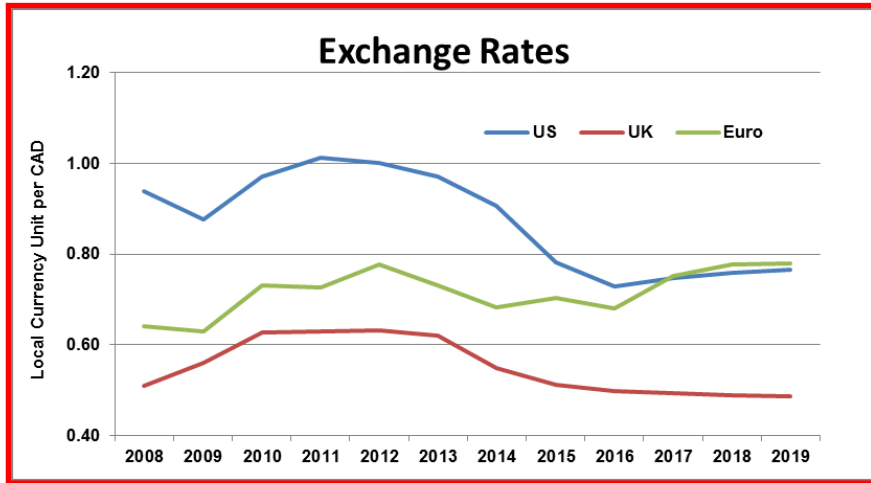
- The majority (64%) of Theme Park visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits. The average number of nights spent on Theme Park visits was 5.4, above Ontario's average of 3.1 nights
- Theme Park visitors spent an average of \$549/trip (\$171/trip for total trips). On average, overnight visitors spent over four times as much per trip as same-day visitors
- The largest proportions of expenditures were spent on Transportation (29% Theme Park, 37% total) and Food & Beverage (25% Theme Park, 27% total). Theme Park visitors spent a larger proportion on accommodations, 20%, than total visitors, 16%
- 21% of Theme Park visitors went to a national/provincial park, 20% went to a historic site, and 19% went to a museum/art gallery
- Most trips were pleasure trips (72% compared to 34% of total trips)

Theme Park Summary

- The majority (59%) of overnight Theme Park visits were spent at unpaid accommodations such as private homes and cottages, compared to 63% of total visits. 32% of overnight Theme Park visits were spent in commercial accommodations versus 25% of total visits
- The largest proportion of trips occur in the summer months with 62% of Theme Park trips taking place in Jul-Sep versus 30% of total trips
- 56% of Theme Park visits were among groups of 3 or more people compared to 25% of total visits. 40% of Theme Park visits included children versus 13% of total visits
- 38% of Canadian Theme Park visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors
- 28% of Canadian Theme Park 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

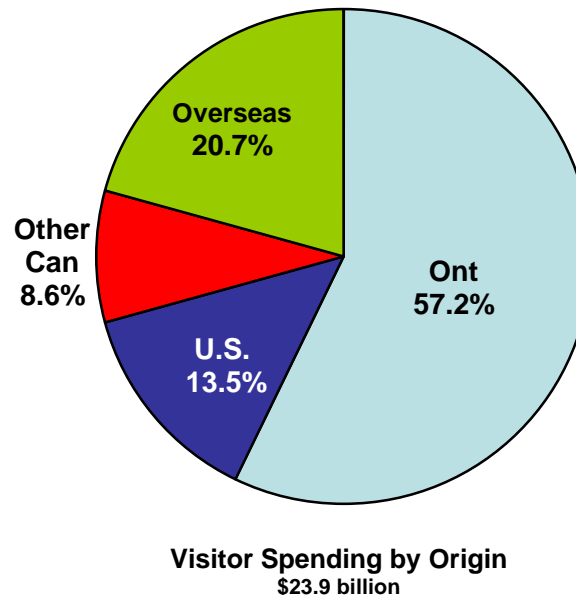
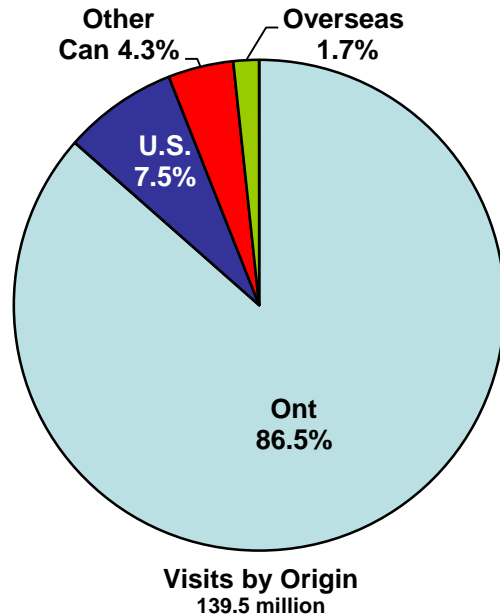
- February 7–23 – The XXII **Olympic Winter Games** are held in Sochi, Russia
- March 8 – **Malaysia Airlines Flight 370**, a Boeing 777 airliner en route to Beijing from Kuala Lumpur, disappears over the Gulf of Thailand with 239 people on board. The aircraft is presumed to have crashed into the Indian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

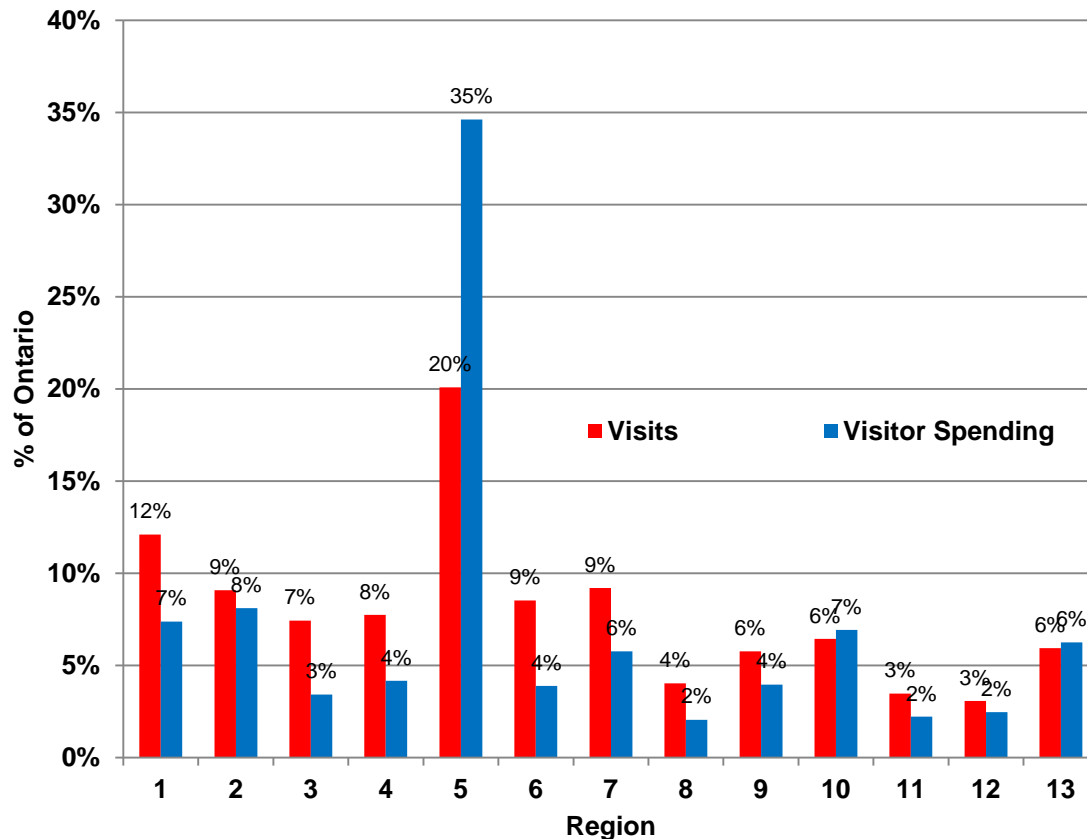


Ontario	2014	VS 2012
Visits	139.5M	-1.0%
Visitor Spending	\$23.9B	5.1%

- 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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