

# Ontario Trail Tourism Statistics 2014

Tourism Research Unit  
Winter 2017

This report summarizes key characteristics of visitors and visitor spending of trips in Ontario which included one or more of the following activities:

- Visit a national, provincial or nature park
- Go hiking or backpacking
- Go wildlife viewing or bird watching
- Go camping
- Go cycling
- Go cross country skiing or snowshoeing
- Go snowmobiling
- ATV (quad, 4X4)

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

**Index**

less than 80

80-100

greater than 120

**Interpretation**

Trail trips underdeveloped versus total trips

Trail trips similar to total trips

Trail trips overdeveloped versus total trips

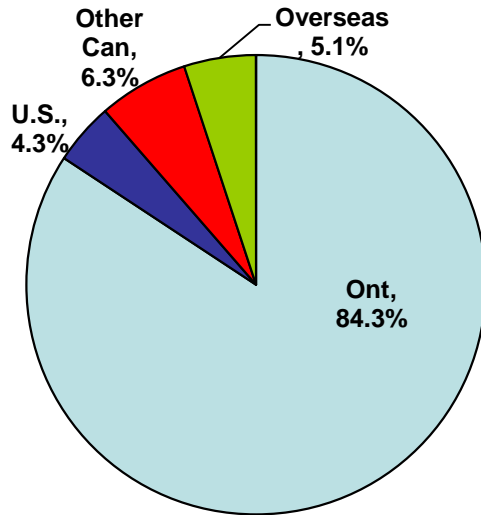
# Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
<b>Ontario Total</b>	<b>139.5</b>	<b>23.9</b>
<b>Ontario Trail</b>	<b>13.6</b>	<b>3.8</b>
<b>Ontario Trail proportion of Ontario Total</b>	<b>9.8%</b>	<b>15.8%</b>

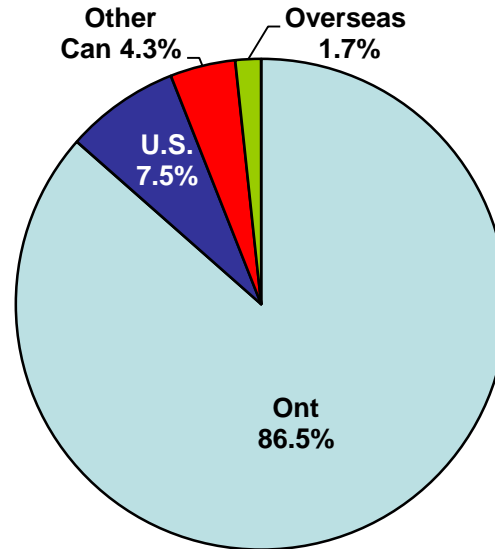
- In 2014, there were 13.6 million Trail visits in Ontario, representing 9.8% of total visits in Ontario
- Trail visitors spent \$3.8 billion, accounting for 15.8% of total visitor spending in Ontario

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

# Trail and Total Visits by Origin



Trail Visits by Origin  
13.6 million



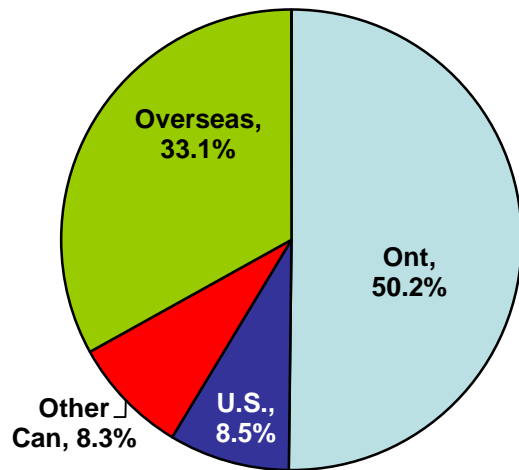
Total Visits by Origin  
139.5 million

Trail vs. Total	Visit Index
Ontario	97
U.S.	58
Other Canada	146
Overseas	299

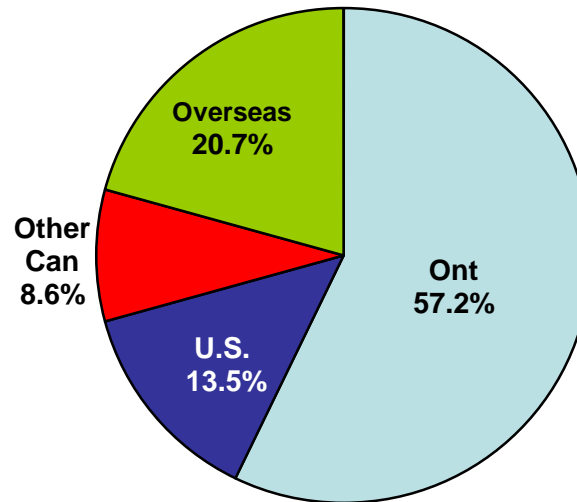
- Ontario residents accounted for the majority of Trail (84%) and total (86%) visits
- U.S. visitors accounted for 4% of Trail visits compared to 8% of total visits
- Visitors from Other Canada comprised 6% of Trail visits and 4% of total visits
- Overseas visitors accounted for 5% of Trail visits and 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

# Trail and Total Spending by Origin



Trail Visitor Spending by Origin  
\$3.8 billion



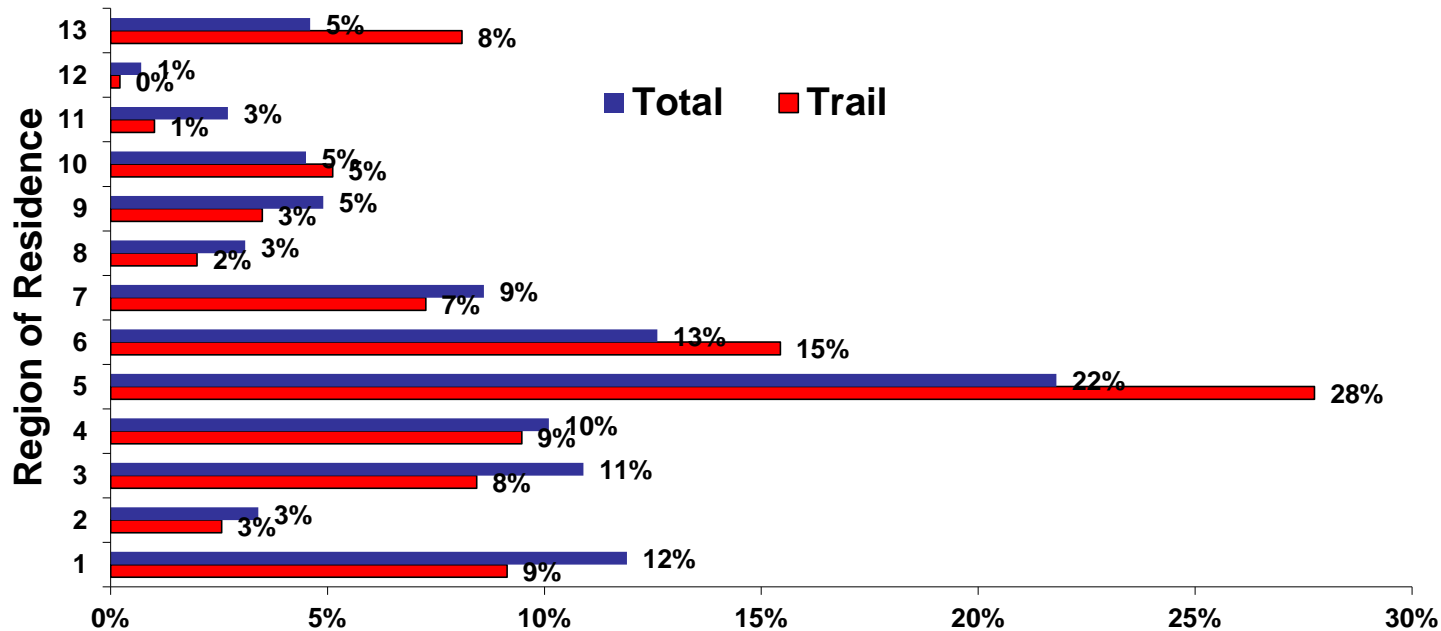
Total Visitor Spending by Origin  
\$23.9 billion

Trail vs. Total	Spending Index
Ontario	88
U.S.	63
Other Canada	96
Overseas	160

- Ontario residents accounted for 50% of Trail and 57% of total spending
- U.S. visitors accounted for 8% of Trail spending compared to 14% of total spending
- Visitors from Other Canada comprised 8% of Trail spending and 9% of total spending
- Overseas visitors accounted for 33% of Trail 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 Trail Visitors by Region of Residence



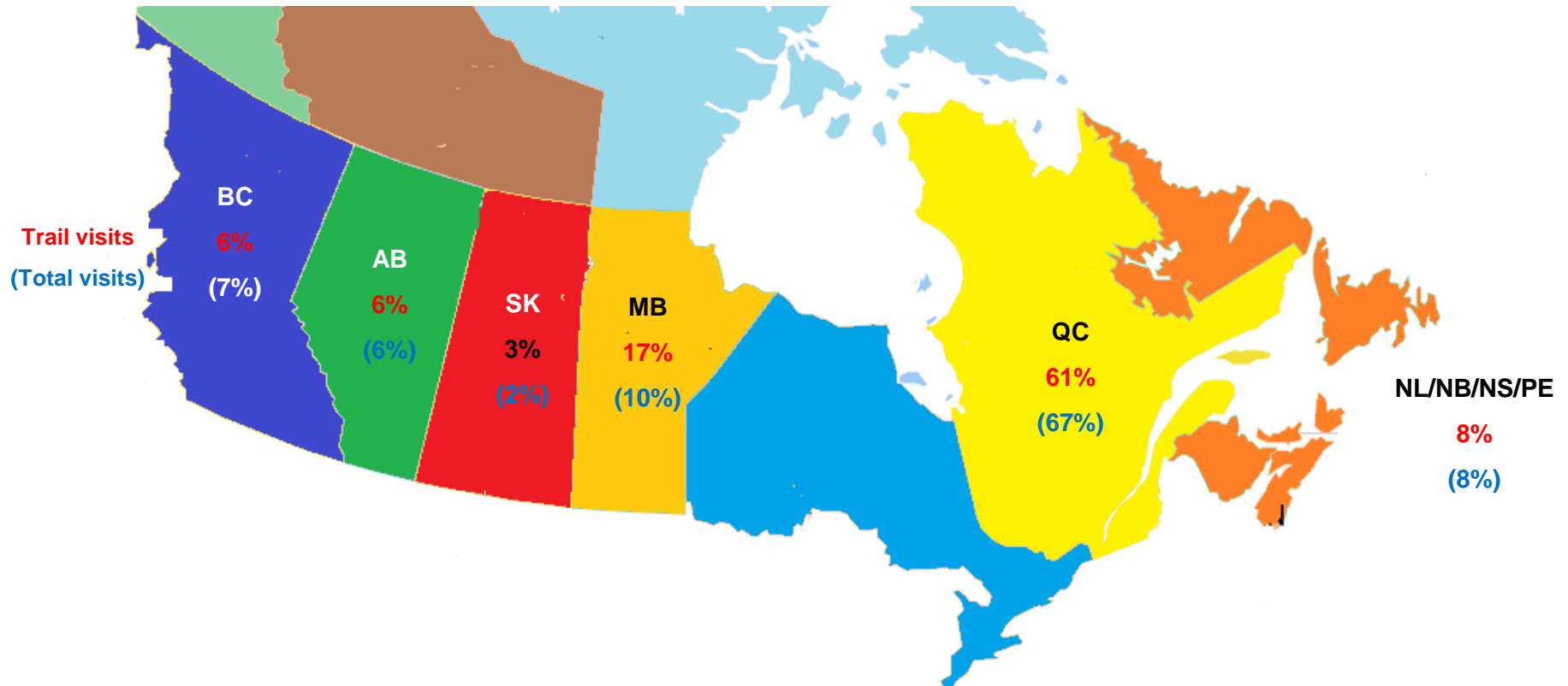
Trail vs. Total	Visits from Ontario Index
Reg 1	77
Reg 2	75
Reg 3	77
Reg 4	94
Reg 5	127
Reg 6	123
Reg 7	84
Reg 8	64
Reg 9	71
Reg 10	114
Reg 11	37
Reg 12	30
Reg 13	176

•28% Trail visitors from Ontario are from Region 5 compared to 22% of total visits, 15% from Region 6 (13% total visits) , and 9% from Region 1 (12% total visits)

Note: Ontario origin Trail visitors represented 84% (11.5 million) of visits and 50% (\$1.9 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

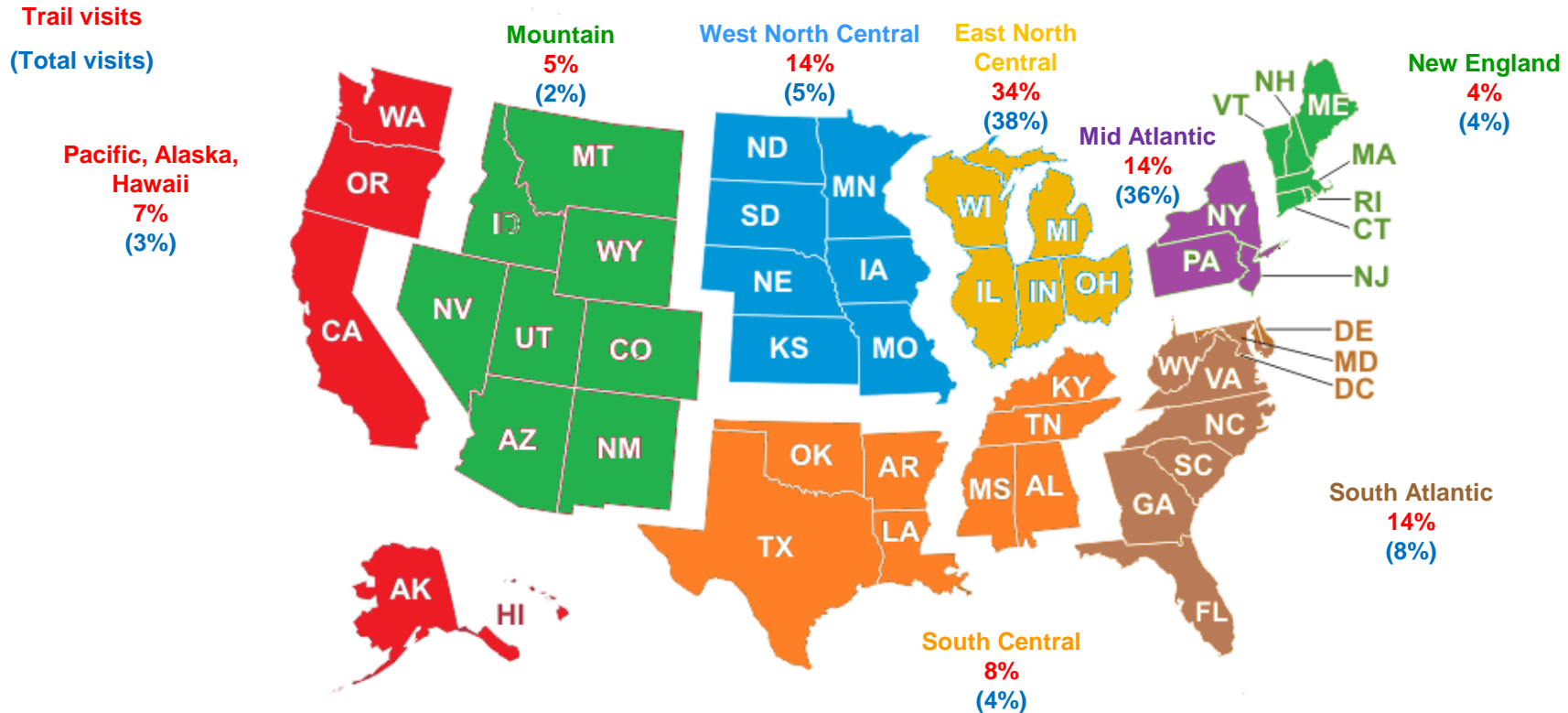
## Other Canada Trail Visitors by Province of Residence



- 61% of Other Canada Trail visitors came from Quebec, compared to 67% of total visits
- Note: Other Canada Trail visitors represented 6% (861,000) of visits and 8% (\$313 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. Trail Visitors by Region of Residence



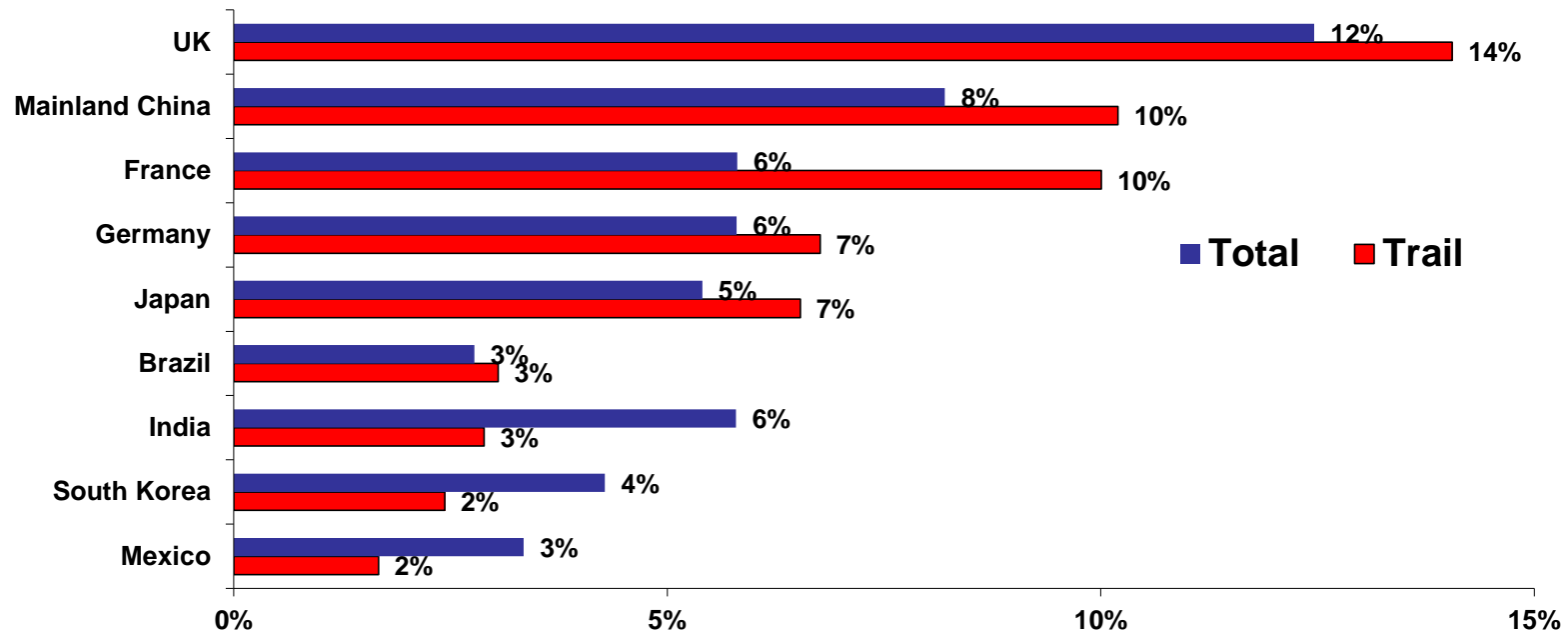
- 34% of U.S. Trail visitors came from East North Central states (Michigan, Ohio, Illinois, Indiana, and Wisconsin)

Note: U.S. Trail visitors represented 4% (591,000) of visits and 8% (\$321 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 Trail Visitors by Country of Residence

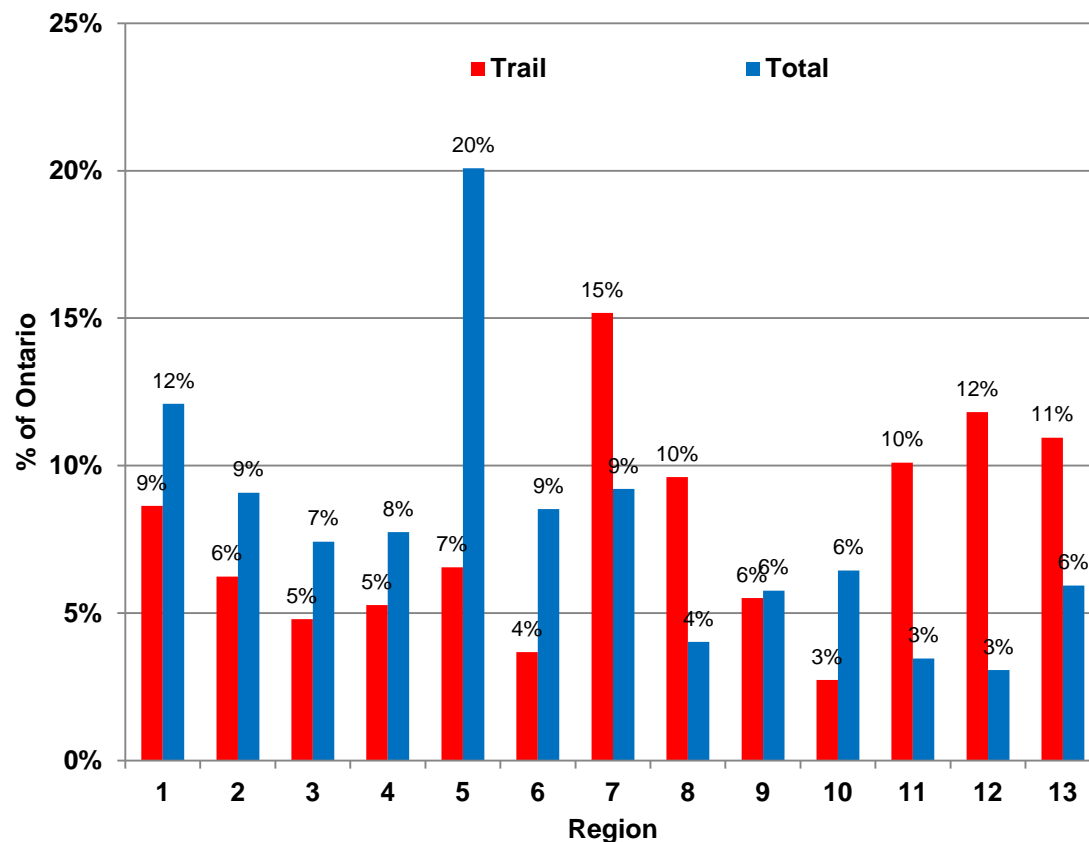


- Ontario's 9 overseas target markets represent 58% of overseas Trail visitors versus 54% of total overseas visits

Note: Overseas Trail visitors represented 5% (689,000) of visits and 33% (\$1.2 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 – Trail Visits by Region

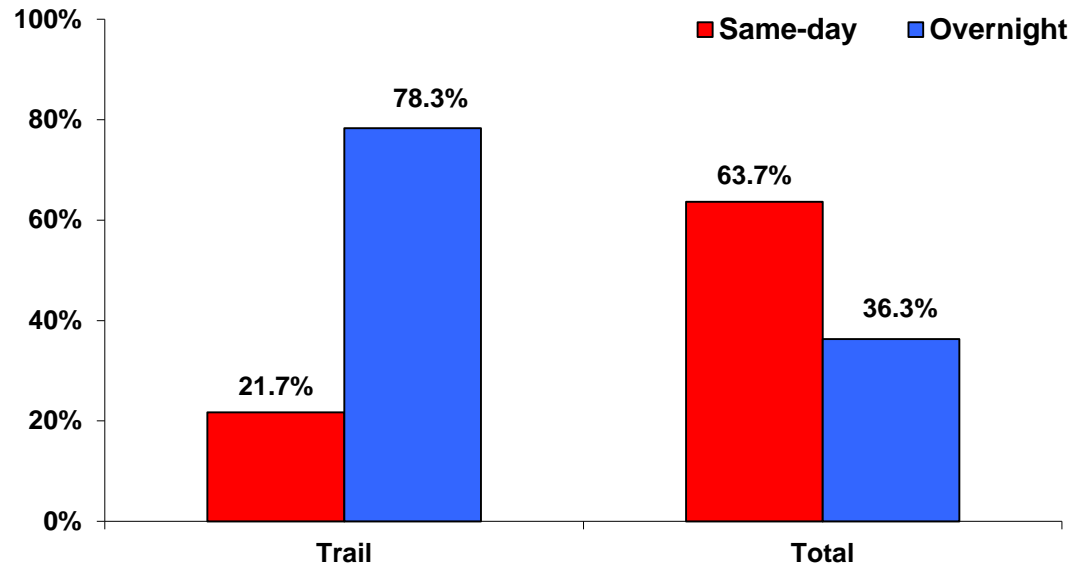


Trail vs. Total	Destination Index
Reg 1	71
Reg 2	69
Reg 3	65
Reg 4	68
Reg 5	33
Reg 6	43
Reg 7	165
Reg 8	239
Reg 9	96
Reg 10	42
Reg 11	292
Reg 12	385
Reg 13	184

- 15% of Trail visits took place in Region 7 compared to 9% of total visits, 12% in Region 12 (3% total), and 11% in Region 13 (6% total)

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

# Trail Visits by Length of Stay

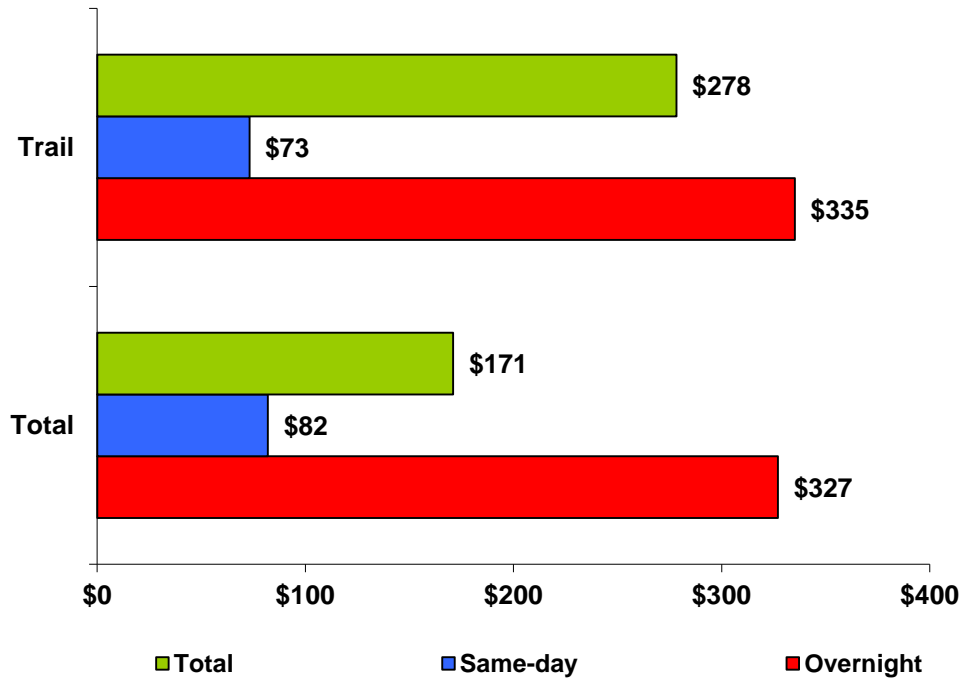


Trail vs. Total	Length of Stay Index
Same-day	34
Overnight	215
Avg # nights	116

- The majority (78%) of Trail visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits
- The average number of nights spent on Trail 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

# Trail \$/Trip by Length of Stay



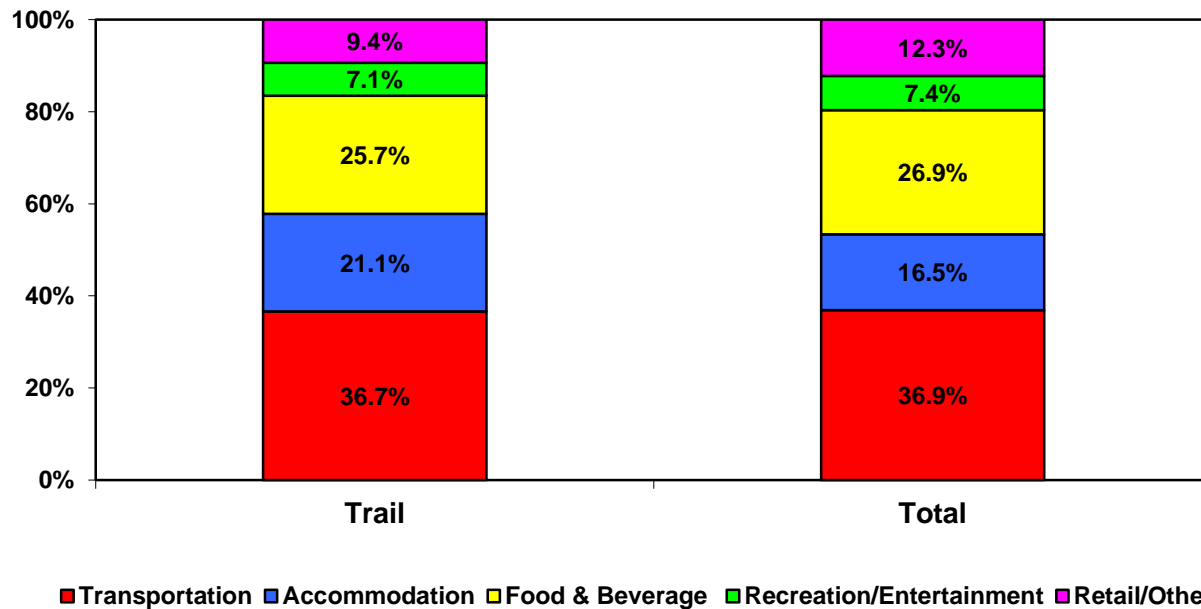
Trail vs. Total	\$/Trip Index
Total	162
Same-day	89
Overnight	102

- Trail visitors spent an average of \$278/trip (\$171/trip for total trips)

Total trip spending, not just spending on Trail

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

# Trail Spending by Category



Trail vs. Ontario	Spending Index
Transportation	99
Accommodation	128
Food & Beverage	95
Rec./Entertain.	96
Retail/Other	77

- The largest proportions of expenditures were spent on Transportation (37% Trail, 37% total), Food & Beverage (26% Trail, 27% total) and Accommodations (21% Trail, 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 Trail Visitors

Activity	Trail Visit Participation	Index vs Total
Any Outdoor/Sports Activity	100%	518
Hiking	41%	1025
Camping	31%	891
National/Provincial Nature Parks	31%	1025
Visit a beach	27%	577
Boating	25%	530
Wildlife/Bird watching	23%	1025
Fishing	15%	432
Cycling	12%	1025
Historic Sites	12%	385

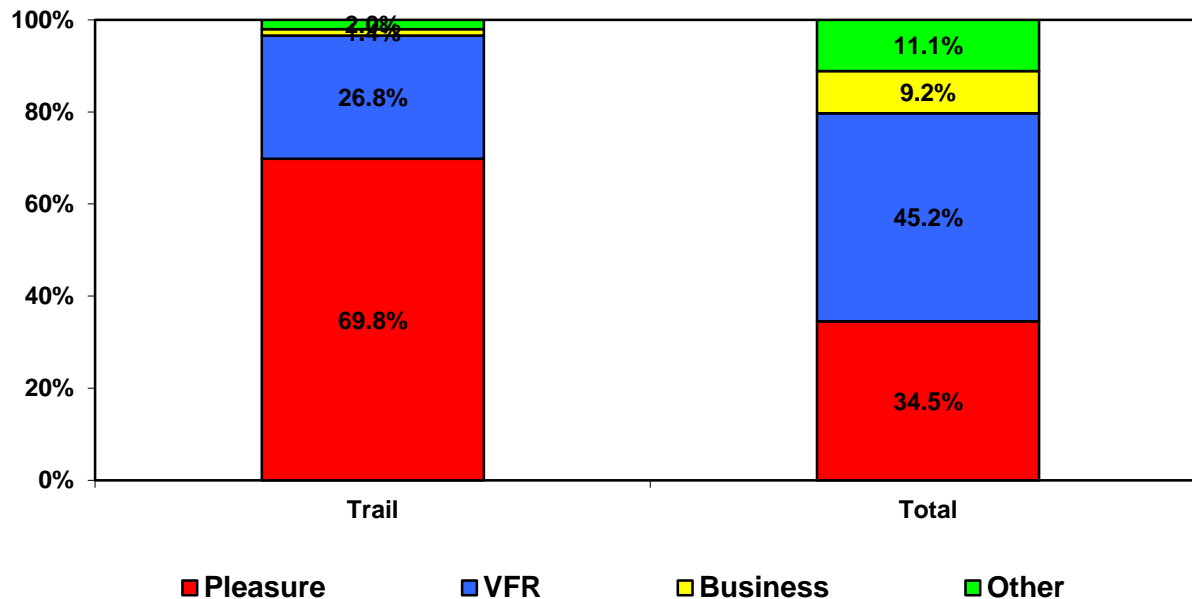
Activity	Trail Visit Participation	Index vs Total
Museums/Art Galleries	11%	354
Sightseeing	9%	172
Restaurant or bar	9%	164
Shopping	9%	98
Visit Friends or Relatives	9%	26
Play a sport	5%	259
Festivals/Fairs	5%	174
Performance such as a play or concert	5%	125
Skiing/Snowboarding	4%	372
Zoos/Aquariums/Botanical Gardens	4%	239

Activity	Trail Visit Participation	Index vs Total
Theme Parks	3%	273
Snowmobiling	3%	1025
Golfing	3%	229
Sports Events	3%	75
Casinos	3%	114
ATV	1%	1025
Movies	1%	134
Hunting	1%	299
Business Meeting/Conference/Seminar	1%	12
Aboriginal	1%	445
Medical/Dental appointment	0%	11

- 41% of Trail visitors went hiking, 31% went camping, 31% visited a national/provincial/nature park and 27% visited a beach

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 Trail Visit

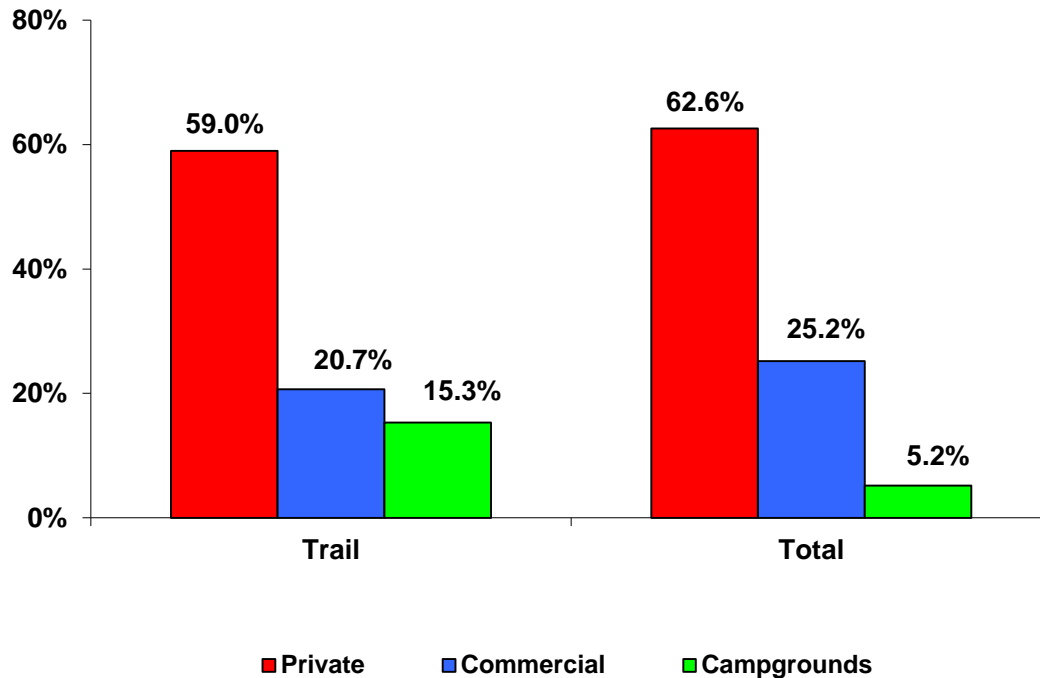


Trail vs. Total	Purpose Index
Pleasure	202
VFR	59
Business	15
Other	18
VFR: Visiting Friends and / or Relatives	

- Most trips were pleasure trips (70% Trail 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

# Trail Visits by Accommodation Type



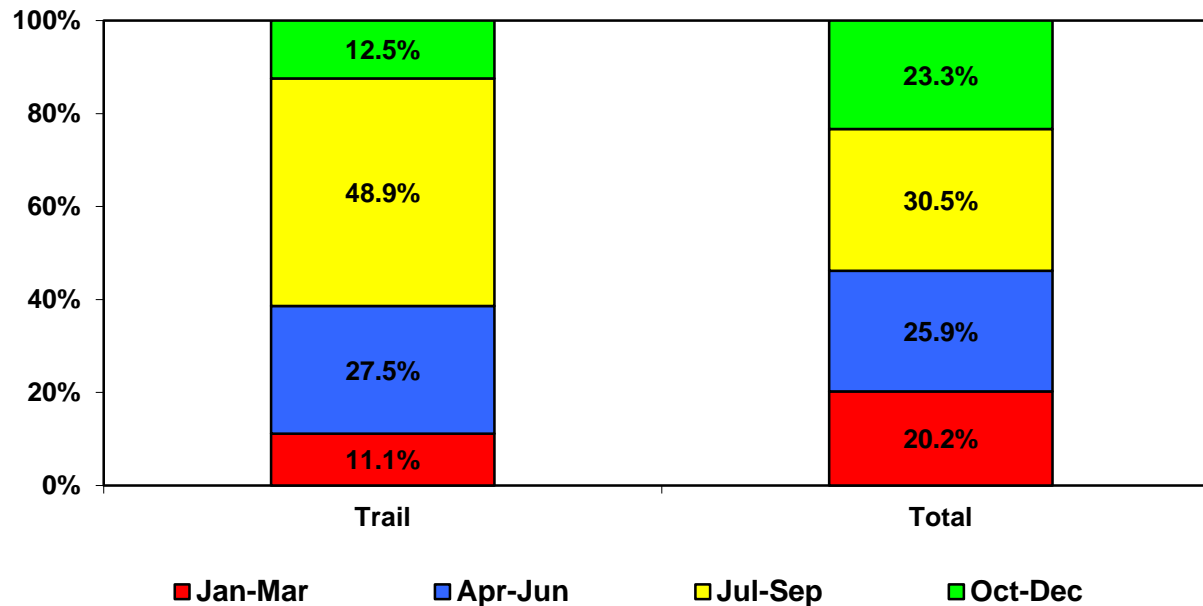
Trail vs. Total	Type Index
Private	94
Commercial	82
Campground	295

- 15% of overnight Trail 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



# Trail Visits by Time of Year

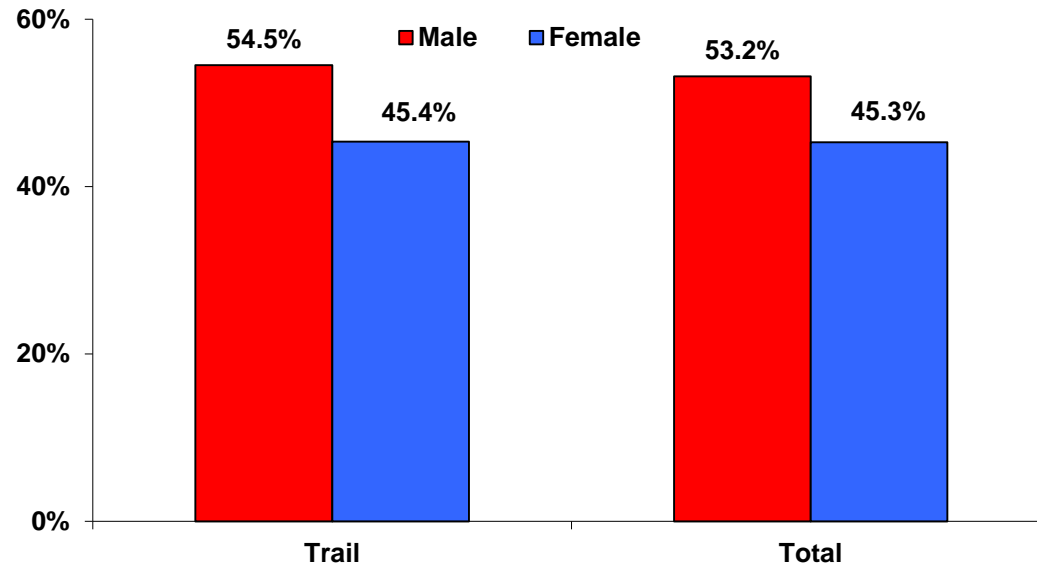


Trail vs. Total	Quarter Index
Jan-Mar	55
Apr-Jun	106
Jul-Sept	160
Oct-Dec	53

- The largest proportions of trips occur in Jul-Sep (49% Trail vs 30% total) and Apr-Jun (28% Trail, 26% total)

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

## Trail Visits by Gender

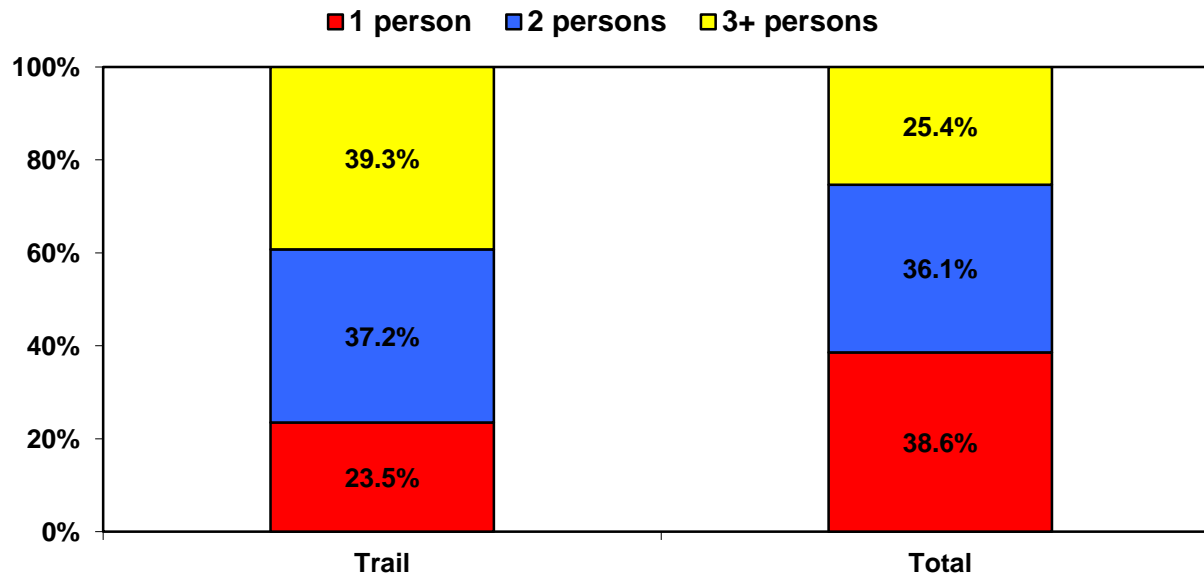


Trail vs. Total	Gender Index
Male	103
Female	100

- Males made the majority (54%) of Trail 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

# Trail Visits by Party Size



Trail vs. Total	Party Size Index
1 person	61
2 persons	103
3+ persons	155
Avg party size	130
With children	151

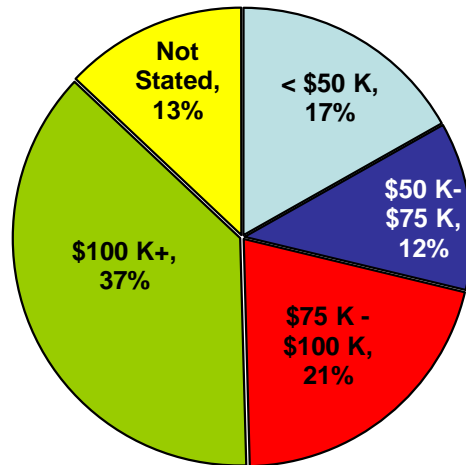
<b>Avg Party Size</b>	<b>3.2</b>	<b>2.4</b>
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<b>With children</b>	<b>19%</b>	<b>13%</b>
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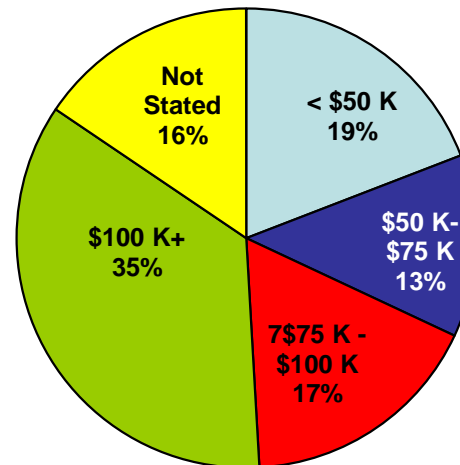
- 39% of Trail visits were among groups of 3 or more people compared to 25% of total visits
- 19% of Trail visits included children versus 13% of total visits

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

# Domestic Trail Visitor's Income



Trail Visits



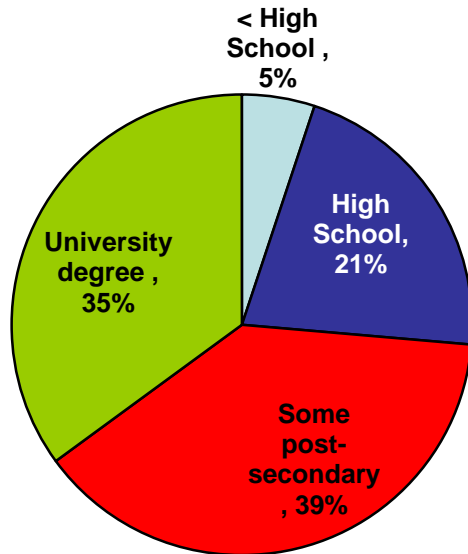
Total Visits

Trail vs. Total	Income Index
< \$50 K	88
\$50 K - \$75 K	93
\$75 K - \$100 K	122
\$100 K+	106

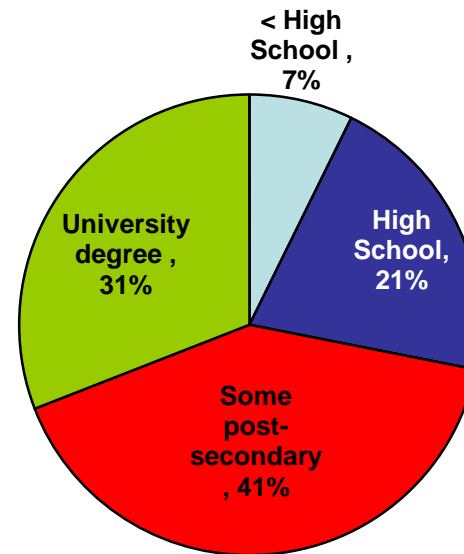
- 37% of Canadian Trail visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors

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

# Domestic Trail Visitor's Education



Trail Visits



Total Visits

Trail vs. Ontario	Education Index
< High School	70
High School	102
Some post-secondary	94
University degree	113

- 35% of Canadian Trail 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

## Trail Summary

- In 2014, there were 13.6 million Trail visits in Ontario, representing 9.8% of total visits to Ontario. Trail visitors spent \$3.8 billion, or 15.8% of total visitor spending in Ontario.
- Ontario residents accounted for 84% of visits and 50% of spending, residents of Other Canada accounted for 6% of visits and 8% of spending, U.S. visitors represented 4% of visits and 8% of expenditures, and overseas visitors accounted for 5% of visits and 33% of spending
- 28% Trail visitors from Ontario are from Region 5 compared to 22% of total visits, 15% from Region 6 (13% total visits) , and 9% from Region 1 (12% total visits)
- 15% of Trail visits took place in Region 7 compared to 9% of total visits, 12% in Region 12 (3% total), and 11% in Region 13 (6% total)

## Trail Summary

- The majority (78%) of Trail visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits. The average number of nights spent on Trail visits was 3.6, above Ontario's average of 3.1 nights
- Trail visitors spent an average of \$278/trip (\$171/trip for total trips)
- The largest proportions of expenditures were spent on Transportation (37% Trail, 37% total), Food & Beverage (26% Trail, 27% total) and Accommodations (21% Trail, 16% total)
- 41% of Trail visitors went hiking, 31% went camping, 31% visited a national/provincial/nature park and 27% visited a beach
- Most trips were pleasure trips (70% compared to 34% of total trips)

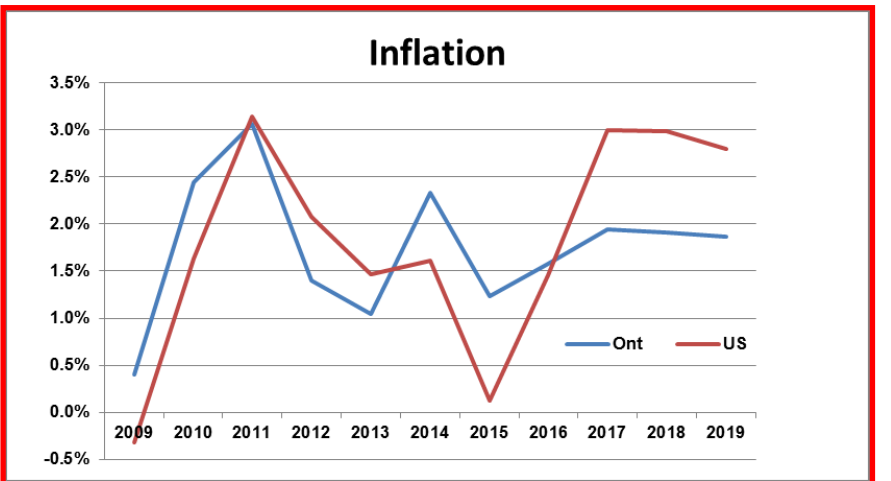
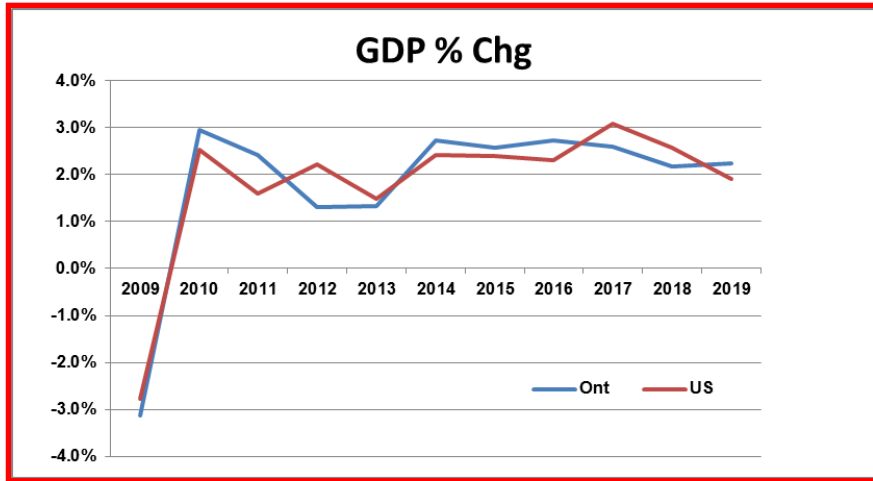
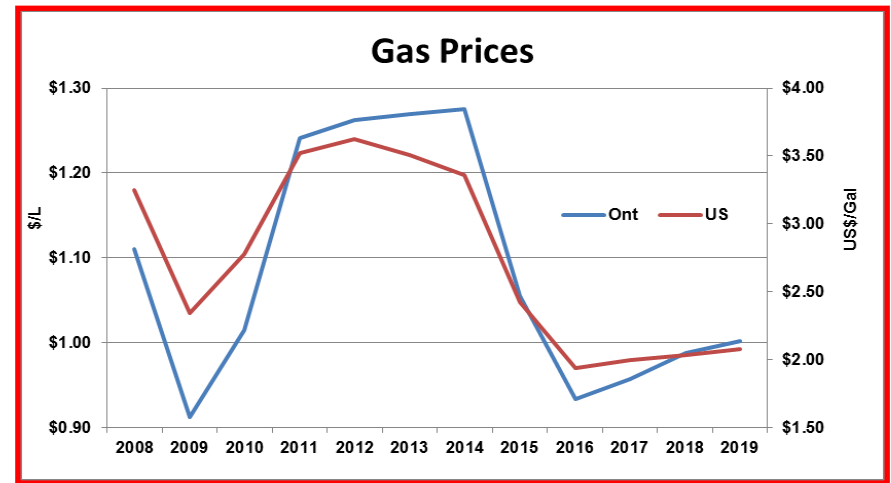
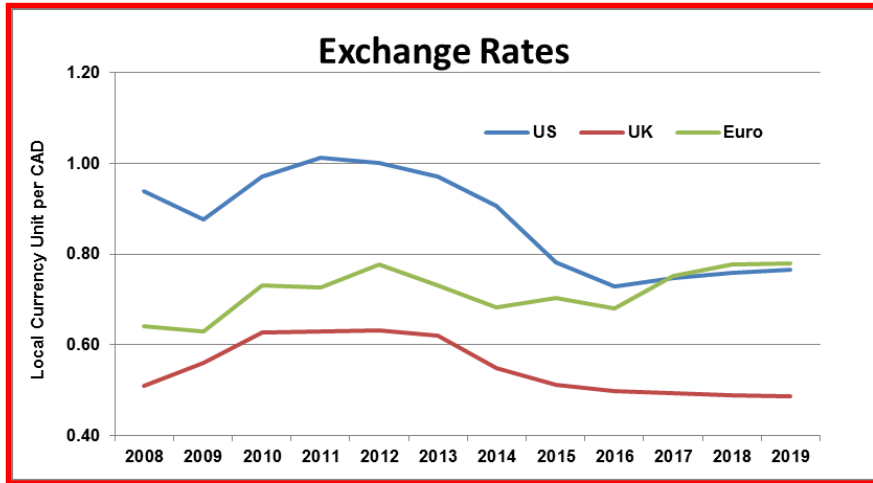
## Trail Summary

- 15% of overnight Trail visits were spent in camping/RV facilities versus 5% of total visits
- The largest proportions of trips occur in Jul-Sep (49% Trail vs 30% total) and Apr-Jun (28% Trail, 26% total)
- 39% of Trail visits were among groups of 3 or more people compared to 25% of total visits. 19% of Trail visits included children versus 13% of total visits
- 37% of Canadian Trail visitors in Ontario had an household income greater than \$100,000 compared to 35% of total visitors
- 35% of Canadian Trail 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

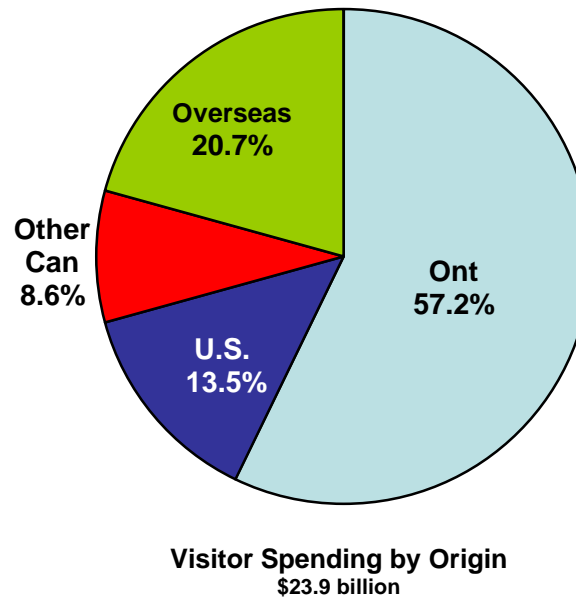
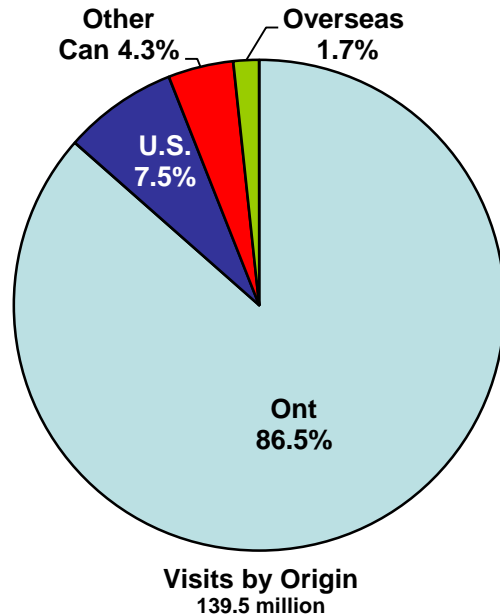
- February 7–23 – The XXII **Olympic Winter Games** are held in Sochi, Russia
- March 8 – **Malaysia Airlines Flight 370**, a Boeing 777 airliner en route to Beijing from Kuala Lumpur, disappears over the Gulf of Thailand with 239 people on board. The aircraft is presumed to have crashed into the Indian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

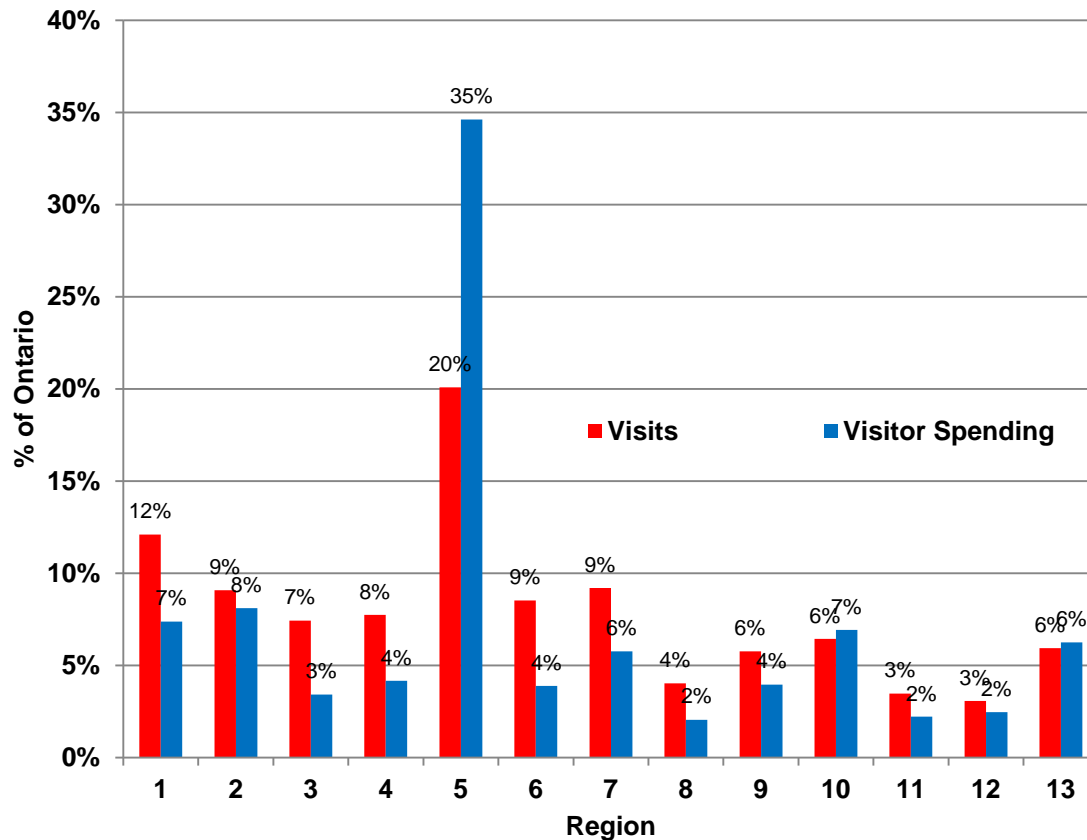


Ontario	2014	VS 2012
Visits	139.5M	-1.0%
Visitor Spending	\$23.9B	5.1%

- 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 TranTrailation (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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