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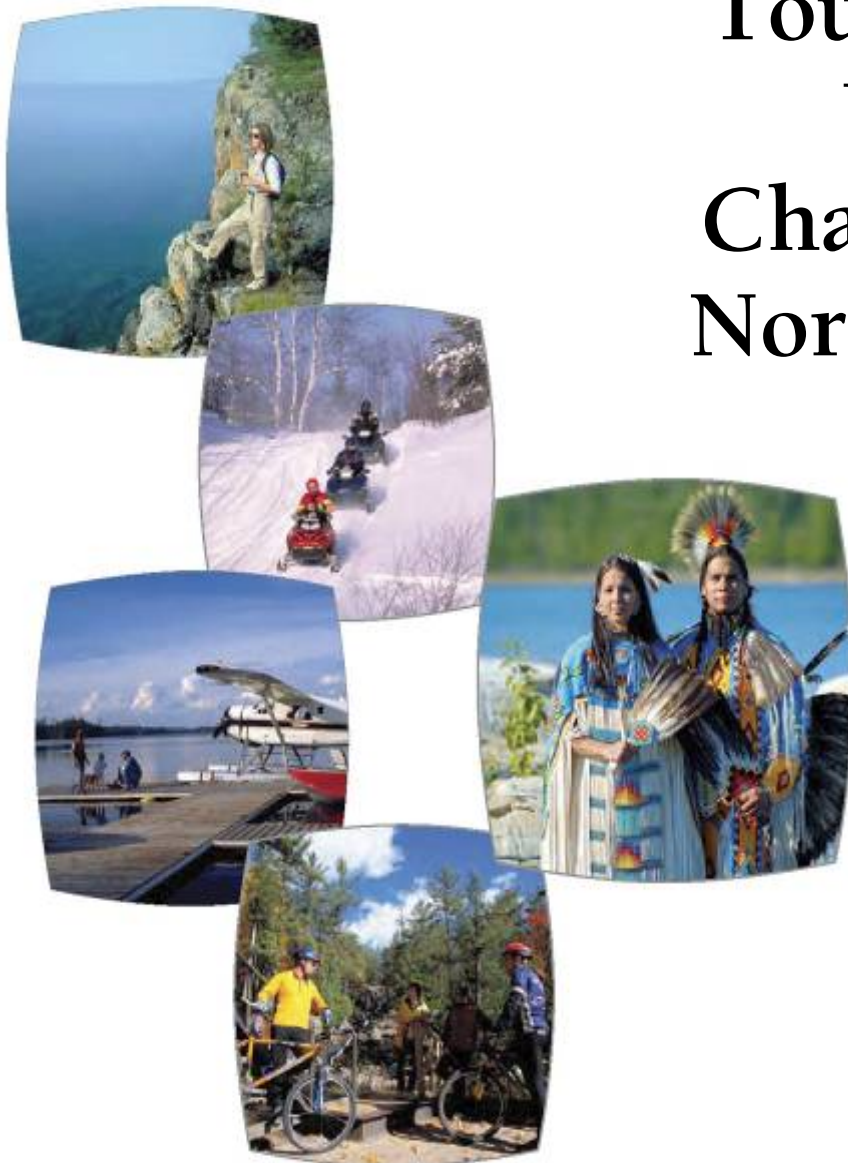
FedNor



Tourism Volume, Value, and Characteristics in Northern Ontario, 2008

*Domestic and
International
Travel Surveys*

March 2010



Canada 

FedNor 

Tourism Volume, Value, and Characteristics in Northern Ontario, 2008

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March 2010
Prepared for FedNor by
Research Resolutions & Consulting Ltd.

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TOURISM IN NORTHERN ONTARIO, 2008

Introduction

This report provides information on Northern Ontario's tourism volume, value, and characteristics for 2008. Data are based on the most recent estimates available from Statistics Canada at this time. It is a response to the Federal Economic Development Initiative for Northern Ontario (FedNor)'s continued interest in information about tourism volume, value, and characteristics in Northern Ontario. To meet these information needs, Research Resolutions & Consulting Ltd. was commissioned to undertake customized tabulations of the 2008 Canadian and International Travel Surveys (Statistics Canada) and to prepare this summary report.

Information contained in the primary source documents, the Travel Survey of Residents of Canada (TSRC) and International Travel Surveys (ITS), has been customized to reflect specific sub-provincial regions and the formats required by the Ontario Ministry of Tourism's Tourism Regional Economic Impact Model (TREIM).¹

Geographic Areas

For research purposes, Northern Ontario has been defined by the Ontario Ministry of Tourism (MTOUR) to include tourism regions 10, 11, 12 (North-Central, North-East, North-West). This area is displayed on the map (below) and includes the census districts (CDs, also listed below).



- CD48: Nipissing District (North Central portion only*)
- CD49: Parry Sound District
- CD51: Manitoulin District
- CD52: Sudbury District
- CD53: Sudbury Regional Municipality
- CD54: Timiskaming District
- CD56: Cochrane District
- CD57: Algoma District
- CD58: Thunder Bay District
- CD59: Rainy River District
- CD60: Kenora District

*CD48 excluding Nipissing Unorganized South Part UNO, CSD-48-091 and South Algonquin TP, CSD-48-001)

¹ In preparing this summary document, many decisions about how to treat information reported by survey respondents were made that may not be obvious to the reader. Readers are encouraged to familiarize themselves with the concepts and definitions provided in the footnotes and appendix, as well as in the introduction to detailed tabulations, provided to FedNor by Research Resolutions & Consulting Ltd. as *Tourism Volume, Value & Characteristics in Northern Ontario, Detailed Tabulations, Domestic & International Travel Surveys (2008)*, January 2010.

Noteworthy by their *exclusion* from Northern Ontario are Algonquin Park, South Algonquin Township (part of Census Division 48) and Muskoka District.² To address interest in the Muskoka District Municipality (CD44) and the portion of Nipissing District (CD48) that includes Algonquin Park and South Algonquin Township, a separate column in summary tables in this report is dedicated to estimates for this geographic area. It is named Algonquin/Muskoka.

Highlights of Tourism in Northern Ontario

- Canadians, Americans and tourists from other countries made 6.9 million same-day or overnight trips in Northern Ontario in 2008. These trips represent about 7% of all tourism in Ontario that year.
- Approximately 4.2 million tourists or 60% of all tourists in Northern Ontario stayed overnight, while about 2.8 million or 40% were on same-day excursions in the North.
- Northern Ontario attracted a higher proportion of overnight trips than did Canada or Ontario as a whole. Of Canada's 242.2 million person visits during the year, 43% were overnight tourists. Similarly, about 42% of Ontario's 101.0 million person visits during 2008 included at least one night spent in the province.
- Canadians represent over four fifths of overnight visits in Northern Ontario (82%). They represent virtually the same proportion of overnight tourists to Canada (83%) and to Ontario (81%).
- The United States accounted for 1-in-6 or 17% of overnight visits in Northern Ontario in 2008. All other countries ("overseas") represented 1-in-100 (1%).
- Three-in-five overnight trips to Northern Ontario were made for the primary purpose of pleasure (61%).
- The 6.9 million visitors from Canada, the United States, and other countries who took same-day or overnight trips in Northern Ontario spent almost \$1.4 billion on tourism goods and services. Most of this money was spent on overnight visits in Northern Ontario (\$1.2 billion or 83%).
- At 83%, a higher proportion of total tourism spending is devoted to overnight trips in Northern Ontario than is the case in Canada or Ontario. Of the \$48.2 billion spent by tourists in Canada during 2008, 75% was spent on overnight trips. Similarly, about \$12.2 billion or 73% of Ontario's \$16.6 billion in tourist spending was on overnight trips in the province.

² These areas are tabulated and reported separately, as Algonquin/Muskoka.

Overview of Tourism in Northern Ontario

Volume of Tourists

- In 2008, people from Canada, the United States, and other countries made 6.9 million same-day or overnight trips in Northern Ontario, representing about 7% of all tourism in Ontario over the year. These estimates include people travelling for pleasure, visiting friends and relatives, business, and other purposes.
- Most of the person visits in Northern Ontario included an overnight stay in the region. Of the 6.9 million person visits, three-in-five visitors (60%) or about 4.2 million stayed overnight. Same-day excursions to Northern Ontario accounted for the remaining 2.8 million person visits by tourists from Canada, the United States, and other countries.
- From a provincial perspective, Northern Ontario accounted for 10% of all overnight person visits in Ontario during 2008.

Table 1. Overview of Tourism in Northern Ontario in 2008, by Place of Residence*

Total Person Visits**	6 935 000	
	#	%
Same-day Person Visits	2 753 000	40
Overnight Person Visits	4 182 000	60
Same-day	2 753 000	
By place of residence	#	%
Canada	2 339 000	85
United States	400 000	15
Overseas	14 000	1
Overnight	4 182 000	
By place of residence	#	%
Canada	3 407 000	82
United States	729 000	17
Overseas	47 000	1

Source: *TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor)*. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *All estimates are rounded to the nearest thousand. **Same-day and overnight visits in region. Percentages may not add to 100% due to rounding.

Place of Residence

- Canadians generate most of the tourism in Northern Ontario. Of the 2.8 million same-day trips in the region during 2008, more than four-in-five were made by Ontario residents. One-in-seven (15%) trips were made by visitors from the United States.
- Canadians represent about the same proportion of overnight visits (82%) and same-day excursions (85%). Of the 4.2 million overnight person visits in

Northern Ontario during 2008, Northern Ontario itself accounted for 34% or 1.4 million visits.³

- The United States accounted for 1-in-6 or 17% of overnight visits in Northern Ontario in 2008. All other countries represented only 1-in-100 (1%).

Main Purpose of Trip

- Three-in-five overnight trips to Northern Ontario were made for the primary purpose of pleasure (61%). About half this proportion or 29% of the trips were made to visit friends and relatives, and the balance was made for business (5%) or for some other purpose (5%). These estimates clearly suggest that the North is primarily a pleasure destination for tourists.

Table 2. Overview of Overnight Tourism in Northern Ontario in 2008: Main Reason for Trip

Overnight Person Visits (total)*	4 182 000	
	#	%
Pleasure	2 546 000	61
Visit friends/relatives	1 231 000	29
Business	187 000	5
All other reasons**	218 000	5

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Tables 5-2, 7.
*All estimates are rounded to the nearest thousand. **Includes those not stating a response. Percentages may not add to 100% due to rounding.

Seasonality

- Same-day and overnight visitors come to Northern Ontario in all seasons. They are, however, most likely to come in warm weather periods, particularly if they are on overnight trips from the United States (51%) or other countries (67%). Northern Ontario visitors on overnight pleasure trips are also particularly heavily concentrated in the July through September calendar quarter (54%).⁴

Table 3. Season of Overnight Visits in Northern Ontario (2008)

	Total	Canada	United States	Overseas
Overnight Person Visits*	4 182 000	3 407 000	729 000	47 000
January–March	11%	12%	8%	2%
April–June	25%	24%	33%	25%
July–September	47%	46%	51%	67%
October–December	17%	19%	7%	7%

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
*All estimates are rounded to the nearest thousand. Note: Percentages may not add to 100% due to rounding.

³ See Summary Table 12 in this document.

⁴ See TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd., Table 8.

Spending by Tourists in Northern Ontario

- In 2008, the 6.9 million visitors from Canada, the United States, and other countries who took same-day or overnight trips in Northern Ontario spent almost \$1.4 billion on tourism goods and services.
- Canadians generate the largest share of visitor spending in Northern Ontario. Of the \$232.3 million in spending on same-day visits to the region, 90% or about \$210.1 million was spent by Canadians. Of the \$1.2 billion in visitor spending on overnight trips, Canadians spent 67% or about \$772.4 million.

Table 4. Overview of Visitor Spending in Northern Ontario in 2008, by Place of Residence*

Total Spending on Visit**	\$1 393 424 000	
	#	%
Same-day	\$232 349 000	17
Overnight	\$1 161 076 000	83
Same-day	\$232 349 000	
By place of residence	#	%
Canada	\$210 101 000	90
United States	\$21 757 000	9
Overseas	\$491 000	<0.5
Overnight	\$1 161 076 000	
By place of residence	#	%
Canada	\$772 437 000	67
United States	\$366 622 000	32
Overseas	\$22 017 000	2

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*All estimates are rounded to the nearest thousand. Estimates exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas). **Same-day and overnight visits in region. Percentages may not add to 100% due to rounding.

Average Spending by All Visitors in Northern Ontario

The average spending among same-day Canadian visitors to Northern Ontario was \$74 in 2008, falling to \$54 per person for Americans. Average spending on overnight trips in the region also varies substantively depending on the origin of the visitor.

- U.S. overnight visitors spend more money in Northern Ontario than do Canadians or overseas visitors.
- On a per-person per-night basis, and adjusted to account for the number of people in the travel party and the duration of the 2008 stay in Northern Ontario, Americans spent almost twice as much as Canadians (\$99 versus \$53 per-person per-night).
- At \$99 per-person per-night, Americans also spent appreciably more than did their overseas counterparts, who spent \$60 per-person per-night.

Table 5. Average 2008 Spending by Visitors in Northern Ontario, by Place of Residence*

	Northern Ontario	Canada	United States	Overseas
Spending on same-day visits	\$232 349 000	\$210 101 000	\$21 757 000	\$491 000
Average per person	\$116	\$74	\$54	N/A
Spending on all overnight trips	\$1 161 076 000	\$772 437 000	\$366 622 000	\$22 017 000
Average per person, per night	\$63	\$53	\$99	\$60
Average per trip**	\$429	\$322	\$1 277	\$765
Spending on overnight pleasure trips	\$761 654 000	\$415 385 000	\$333 250 000	\$13 018 000
Average per person, per night	\$66	\$50	\$101	N/A
Average per trip**	\$510	\$332	\$1 493	N/A

Source: *TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor)*. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*Total spending estimates are rounded to the nearest thousand dollars. Averages are rounded to nearest dollar. Averages exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas). **All members of household/travel party for all nights spent in Northern Ontario.

N/A: Not available

Note: There are no estimates for same-day or overnight pleasure overseas average spending because of the market's small base sizes.

The gap between Canadian and U.S. spending widens to a factor of four on a per-trip basis. The bigger gap reflects the larger travel party size of Americans (2.5 Americans on overnight trips versus 1.8 Canadians) and the somewhat longer duration of Americans' overnight trips to the region (5.4 nights for Americans versus 3.5 nights for Canadians). Each overnight trip to Northern Ontario yielded almost \$1277 for every U.S. travel party attracted to the region, but reached only \$322 for each Canadian household travel party.

Overseas visitors spent considerably more time in Northern Ontario (6.2 nights on average for overnight visitors) than did their U.S. or Canadian counterparts, and their per-trip spending reached an average value of about \$765. Many of these overseas visitors stayed with friends and relatives. As a consequence, their \$60 per-person per-night spending level is appreciably lower than the \$99 per-person per-night spent by their U.S. counterparts.

Economic Impact of Tourism in Northern Ontario

The \$1.4 billion spent by visitors in Northern Ontario ripples throughout the local and provincial economies.⁵ These expenditures generate economic activity including contributions to gross domestic product (GDP); jobs in tourism-related sectors such as accommodation, transportation and food services; jobs in other sectors such as manufacturing and agriculture; and taxes.⁶

Gross Domestic Product

Gross domestic product is the value of goods and services produced by labour and capital located within a region. This definition suggests why GDP retained in Northern Ontario is smaller than the total amount of spending done by visitors to the area: many of the goods and services produced to serve tourists in Northern Ontario are produced outside the region.⁷

Visitors spent approximately \$1.4 billion on tourism goods and services in Northern Ontario in 2008. Once the imports from other locations in Ontario, other parts of Canada, and other countries are taken into account, tourism spending in Northern Ontario generated only about \$633.1 million in direct economic activity (i.e. GDP), and an additional \$302.4 million in indirect and induced GDP.

There was, therefore, about \$872 million in GDP retained in Northern Ontario. Other parts of Ontario benefited from about \$70.3 million in GDP (direct, indirect, and induced) from visitor spending in the region. When combined, the province-wide GDP contribution of tourism in Northern Ontario reached almost \$942 million in 2008.

⁵ MTOUR provides the TREIM for estimating purposes. There is, however, no calibration for macro regions in the province such as Northern Ontario. Consequently, to obtain estimates of the economic impact of tourism in Northern Ontario, estimates for each of the three tourism regions that constitute this area (North-West, North-Central, North-East) were run independently, three times. In each iteration, the Rest of Ontario, and each of the other two northern tourism regions were used as the basis for the residual spending. The residual spending for each other northern region was summed and included in estimates of tourism economic impact in the North. The summed residual spending in individual tourism regions was also subtracted from the Rest of Ontario total (summed from the three tourism regions), thereby eliminating double counting.

⁶ The economic impact estimates provided in this section reflect visitor spending only, that is, spending by visitors who took a same-day trip to, or spent nights in Northern Ontario. As such, the estimates do not include spending by residents of Northern Ontario who leave the area for other destinations (e.g. they exclude Canadian carrier fares purchased by residents of Northern Ontario to travel to other destinations). The estimates provided here are the most appropriate ones to use when assessing the results of marketing and promotional efforts, and the appeal of tourism products and experiences in Northern Ontario. MTOUR's glossary of terms to be used in conjunction with outputs from TREIM is appended and referenced throughout this chapter.

⁷ In some geographical areas, the amount of economic activity is on par with, or less than visitor spending. Northern Ontario is one of these regions. This situation occurs when a sizeable proportion of the economic activity required to create the goods and services consumed by tourists occurs outside the community. For example, a high proportion of the food prepared in restaurants in Northern Ontario is grown outside the region. Consequently, much of the economic activity associated with restaurant meals purchased by tourists takes place outside Northern Ontario. Similarly, materials required for building hotels, motels and other lodging establishments are created outside Northern Ontario and generate economic activity in communities where the materials are produced.

Table 6. Northern Ontario Tourism Contributions to GDP, and Funds Retained in Ontario, 2008

	Amount Retained in		Total Contribution to Ontario's GDP (A + B)
	Northern Ontario (A)	Other Parts of Ontario (B)	
Direct	\$611 859 850	\$21 277 355	\$633 137 205
Indirect	\$126 512 782	\$21 404 017	\$147 916 799
Induced	\$133 229 240	\$27 659 764	\$160 889 004
Total GDP	\$871 601 872	\$70 341 136	\$941 943 008

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. and special calculations of TREIM for each of the three Northern Ontario tourism regions.

Jobs, Wages, and Salaries

Approximately 11 300 direct jobs and an additional 3 365 indirect and induced jobs in Northern Ontario were generated as a result of visitor spending in 2008. These jobs include part- and full-time positions, on both annual and seasonal bases.⁸ Additional employment in the province was generated because of tourism in Northern Ontario, bringing the total number of direct, indirect and induced jobs to about 15 600 across Northern Ontario and the entire province.

Of all the jobs created in Ontario because of Northern Ontario tourism, the region retained 14 695 or 94%.⁹ The 15 600 jobs generated \$577.6 million in wages and salaries province-wide, with 92% of this amount (\$531.7 million direct, indirect, and induced) retained in Northern Ontario.

Taxes

All levels of government benefited from tourism spending in Northern Ontario. This spending generated \$286.6 million in federal government taxes, a further \$216.9 million in provincial taxes and more than \$4.1 million in municipal taxes (direct, indirect, and induced) province-wide. Northern Ontario retained the following amounts from these taxes: \$174.5 million in direct federal taxes, \$158.2 million in direct provincial taxes, and \$1.1 million in direct municipal taxes.

⁸ Note that estimates for tourism economic impact in Northern Ontario published in MTOUR's tourism profiles differ from those provided herein because the inputs used for the TREIM model are somewhat different and the online TREIM model is based on different assumptions than the one used internally by MTOUR to generate profiles.

⁹ Estimates of jobs produced by the economic impact model use the same definition as is used in Statistics Canada's Labour Force Survey. Thus, jobs generated by the model include part-time, full-time and seasonal jobs. They also include paid employees and unpaid family employees.

Table 7. Economic Impact of Visitor Spending in Northern Ontario, 2008

	Economic Benefits Retained in Northern Ontario	Total Benefits Across Ontario (Including Portion Retained in Northern Ontario)	Proportion of Total Ontario Benefits Retained in Northern Ontario
Total Visitor Spending	\$1 393 424 000	\$1 393 424 000	
Gross Domestic Product	\$871 601 872	\$941 943 008	93
Direct	\$611 859 850	\$633 137 205	97
Indirect/Induced	\$259 742 022	\$302 423 394	86
Labour Income	\$531 741 935	\$577 562 281	92
Direct	\$361 764 106	\$376 159 297	96
Indirect/Induced	\$169 977 829	\$198 925 469	85
Employment (Jobs)	14 695	15 607	94
Direct	11 330	11 630	97
Indirect/Induced	3 365	3 940	85
Federal Taxes	\$258 972 043	\$286 601 084	90
Direct	\$174 548 628	\$179 459 113	97
Indirect/Induced	\$84 423 415	\$107 141 971	79
Provincial Taxes	\$205 536 978	\$216 888 613	95
Direct	\$158 157 122	\$161 640 550	98
Indirect/Induced	\$47 379 856	\$55 248 063	86
Municipal Taxes	\$3 009 537	\$4 136 488	73
Direct	\$1 140 103	\$1 181 589	96
Indirect/Induced	\$1 869 434	\$2 954 899	63

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. and special calculations of TREIM for each of the three Northern Ontario tourism regions.

Regional Tourism: Volume and Spending

Northern Ontario's three tourism regions attract different levels of tourism activity. In 2008, North-East Region was the destination for over half of all same-day trips to Northern Ontario (54%). The remaining same-day excursions were distributed fairly evenly between North-West at 26% and North-Central at 20%.

The 4.2 million overnight visits in Northern Ontario were spread among North-West at 1.3 million or 31%, North-East at 1.7 million or 40%, and North-Central at 1.4 million or 32%.

Table 8. Regional Shares of Same-day and Overnight Visits in Northern Ontario*

	Total	North-West	North-East	North-Central**
Total Person Visits***	6 935 000	2 009 000	3 151 000	1 910 000
% of total person visits	100	29	45	28
Same-day Person Visits	2 753 000	717 000	1 487 000	549 000
% of same-day person visits	100	26	54	20
Overnight Person Visits	4 182 000	1 280 000	1 657 000	1 352 000
% of overnight person visits	100	31	40	32

Source: *TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor)*. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township. ***Same-day and overnight visits in region.

The spending pattern across Northern Ontario's three tourism regions closely resembles the volume pattern. Specifically, North-East Region captures more spending associated with same-day trips than do either North-West or North-Central. Same-day trip spending in North-East reached \$140.8 million in 2008, while the corresponding spending in North-Central was \$47.6 million and \$44.0 million in North-West.

Of the \$1.2 billion spent on overnight trips in Northern Ontario during 2008, North-West Region captured the largest share at \$446.0 million. About one third of all overnight spending or \$393.4 million took place in North-East and more than one quarter or \$308.0 million was in North-Central.

Table 9. Regional Shares of 2008 Spending in Northern Ontario*

	Total	North-West	North-East	North-Central**
Spending on All Person Visits***	\$1 393 424 000	\$490 267 000	\$533 623 000	\$352 343 000
% of spending, all person visits	100	35	38	25
Spending on Same-day Person Visits	\$232 349 000	\$44 044 000	\$140 796 000	\$47 585 000
% of spending, same-day visits	100	19	61	20
Spending on Overnight Person Visits	\$1 161 076 000	\$446 005 000	\$393 425 000	\$308 001 000
% of spending, overnight visits	100	38	34	27

Source: *TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor)*. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township. ***Same-day and overnight visits in region.

Regional Tourism Volumes: Place of Residence

Almost all same-day and overnight tourists to Northern Ontario's North-West and North-Central regions and to the adjacent Algonquin/Muskoka area live in Canada.¹⁰ Because it is on the Canada–United States border, a relatively high proportion of North-West's tourists are Americans.

¹⁰ Visits to the three Northern Ontario tourism regions do not add to the net number of visits to Northern Ontario as a whole because tourists who visit more than one tourism region are counted in each region visited but only once for Northern Ontario.

- Of the 2.0 million tourists who went to **North-West Region** on a same-day or overnight trip in 2008, 1.4 million or 68% were Canadians. About 631 000 of these visitors were from the United States. Approximately 1.3 million or two thirds of all visits to the region were overnight trips.
- Canadians dominated **North-East Region's** tourism in 2008. At 2.7 million, residents of Canada represented 85% of all same-day excursionists and overnight visitors. Unlike other parts of Northern Ontario, the 3.2 million visitors to North-East were about evenly divided, between those on same-day excursions at about 1.5 million and overnight trips at about 1.7 million.
- **North-Central** attracted fewer visitors during 2008 than did other regions. About 1.8 million or 94% of the region's 1.9 million visitors were residents of Canada. Most of these tourists, about 1.4 million, spent at least one night in North-Central.
- While not considered in MTOUR's definition of Northern Ontario, the **Algonquin/Muskoka** region attracted 2.6 million tourists over the course of 2008. As with North-Central region, almost all of these tourists were Canadian residents and most spent at least one night in Algonquin/Muskoka. Of the 2.6 million trips to the area, residents of Canada made 2.4 million trips, of which 1.8 million were overnight trips.

Table 10. Overview of 2008 Visits in Northern Ontario and Regions*

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Total Person Visits***	6 935 000	2 009 000	3 151 000	1 910 000	2 600 000
Place of Residence					
Canada	5 746 000	1 365 000	2 669 000	1 786 000	2 449 000
United States	1 129 000	631 000	459 000	89 000	91 000
Overseas	61 000	12 000	23 000	34 000	61 000
Duration of Stay					
Same-day	2 753 000	717 000	1 487 000	549 000	817 000
Overnight	4 182 000	1 280 000	1 657 000	1 352 000	1 783 000
Place of Residence					
Canada	83%	68%	85%	94%	94%
United States	16%	31%	15%	5%	4%
Overseas	1%	1%	1%	2%	2%
Duration of Stay					
Same-day	40%	36%	47%	29%	31%
Overnight	60%	64%	53%	71%	69%

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township. ***Same-day and overnight visits in region

Overnight Tourism in Northern Ontario and Regions

The country of origin of overnight tourists in each region parallels the pattern evident for all tourism. Specifically, more than eight-in-ten of overnight tourists to North-East and more than nine-in-ten of those to North-Central and Algonquin/Muskoka are residents of Canada. Two thirds of North-West's overnight tourists live in Canada and almost all of the remaining one third came from the United States.

Most overnight trips to each region are driven by pleasure purposes. Nonetheless, many overnight tourists are travelling in order to visit with friends and relatives, and some are travelling for business or other reasons.

- Almost two thirds of the 1.3 million overnight tourists in **North-West Region** took their trip for pleasure purposes. About one quarter were motivated to travel in order to see friends and relatives.
- **North-East Region's** overnight tourism in 2008 was divided between people travelling for pleasure reasons and those travelling for other reasons. About half of all overnight trips to the region were pleasure trips and over one third were made to visit friends and relatives. Business and other reasons each represented about 6% of overnight trips.

- Most of the overnight trips to **North-Central** were made for pleasure (71%). Another one quarter were made to see friends and relatives.
- As with North-Central, 72% of **Algonquin/Muskoka's** overnight tourists in 2008 were on pleasure trips, and about one quarter took a trip to see friends and relatives.

Table 11. Place of Residence and Main Reason: 2008 Overnight Visits in Northern Ontario and Regions*

	Northern Ontario	North-West	North-East	North-Central ¹	Algonquin/Muskoka
Total Overnight Person Visits	4 182 000	1 280 000	1 657 000	1 352 000	1 783 000
Place of Residence					
Canada	3 407 000	840 000	1 388 000	1 248 000	1 654 000
United States	729 000	429 000	250 000	79 000	75 000
Overseas	47 000	10 000	19 000	25 000	55 000
Main Reason for Trip					
Pleasure	2 546 000	820 000	838 000	953 000	1 290 000
Visit friends/relatives	1 231 000	339 000	614 000	306 000	404 000
Business	187 000	40 000	101 000	53 000	50 000
All other reasons***	218 000	80 000	104 000	40 000	41 000
Place of Residence					
Canada	82%	66%	84%	92%	93%
United States	17%	34%	15%	6%	4%
Overseas	1%	1%	1%	2%	3%
Main Reason for Trip					
Pleasure	61%	64%	51%	71%	72%
Visit friends/relatives	29%	27%	37%	23%	23%
Business	5%	3%	6%	4%	3%
All other reasons***	5%	6%	6%	3%	2%

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township. ***Includes those not stating a response.

Detailed Place of Residence: Overnight Trips to Northern Ontario

Ontario is the primary source of overnight tourism for Northern Ontario in total, as well as for each of the three regions and Algonquin/Muskoka. In the region as a whole, Ontario residents represent close to three quarters of all overnight tourists. About half of these Ontarians, or 34% of all overnight tourists, are residents of Northern Ontario travelling from home to other locations in the North.

- Apart from the North itself, the Toronto Census Metropolitan Area (CMA)¹¹ — that is, Toronto — is the largest urban feeder market for Northern Ontario. This CMA accounted for about 585 000 overnight visitors or one seventh of all overnight tourism to Northern Ontario in 2008. Of Toronto's overnight visitors, about two thirds (382 000) were on pleasure trips.
- Winnipeg is the next-largest source of overnight visitors from Canadian urban markets outside Northern Ontario, contributing approximately 262 000 or 6% of overnight tourists to the North in 2008.
- The province of Quebec sent about 43 000 overnight visitors to Northern Ontario, representing 1% of all overnight visitors during 2008.
- Most Americans who take overnight trips to Northern Ontario live in states located along the Canada–U.S. border. Specifically, of the 729 000 overnight visits by Americans to Northern Ontario, 522 000 originated in border states. Minnesota, Michigan, and Wisconsin make the most sizeable contributions of overnight tourists to Northern Ontario.
- The overseas market for Northern Ontario is primarily European (40 000 visitors), dominated by overnight visitors from the United Kingdom (13 000) and Germany (8 000).

Detailed Place of Residence: Overnight Trips to Regions

- **North-West Region** draws about one quarter of its overnight tourists from within its own boundaries and other parts of Northern Ontario. Manitoba and its capital, Winnipeg, are also major contributors to touristic activity in the region. Of 2008's 314 000 overnight visitors from Manitoba, 258 000 were residents of Winnipeg.
- The United States is also a major source of overnight tourism for North-West. One third of all overnight tourists or 429 000 are residents of the United States. Most of these Americans live in a state bordering Ontario. Minnesota is the most prominent source of U.S. tourism, with 158 000 overnight person visits to North-West in 2008.
- Almost half of **North-East Region's** overnight tourism or 790 000 visitors are residents of Northern Ontario travelling within the larger region. Most of these northerners are, in fact, residents of North-East who were travelling within their own region (698 000). The United States contributes about 250 000 overnight tourists to the region, with more of these Americans coming from Michigan (95 000) than any other state.

¹¹ All Canadian cities mentioned in this report are defined by their CMA boundaries.

- Even though Ontario residents dominate overnight tourism in **North-Central**, this region is not as dependent on travel by residents of Northern Ontario as are North-East and North-West. In fact, only 21% of overnight tourists to North-Central live in Northern Ontario, whereas 29% live in Toronto.
- At 975 000, Toronto is the single-largest contributor to the 1.8 million overnight visitors to **Algonquin/Muskoka**.

Table 12. 2008 Overnight Visits in Northern Ontario and Regions,* by Place of Residence

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Total Overnight Person Visits	4 182 000	1 280 000	1 657 000	1 352 000	1 783 000
Place of Residence					
Canada	82%	66%	84%	92%	93%
Ontario	71%	39%	80%	90%	92%
Northern Ontario	34%	27%	48%	21%	1%
North-West	9%	26%	3%	<0.5%	<0.5%
North-East	21%	1%	42%	14%	1%
North-Central**	3%	<0.5%	3%	7%	<0.5%
Algonquin/Muskoka	<0.5%	<0.5%	1%	<0.5%	1%
Toronto CMA	14%	6%	8%	29%	55%
Manitoba	8%	25%	1%	<0.5%	<0.5%
Winnipeg	6%	20%	<0.5%	<0.5%	<0.5%
Quebec	1%	<0.5%	1%	2%	1%
United States	17%	34%	15%	6%	4%
Minnesota	4%	12%	1%	<0.5%	<0.5%
Michigan	3%	1%	6%	1%	<0.5%
Wisconsin	2%	6%	1%	<0.5%	<0.5%
Overseas	1%	1%	1%	2%	3%

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township.

Spending on the Trip

Of the \$1.4 billion visitors spent in Northern Ontario, \$533.6 million or 38% was spent in North-East, \$490.3 million or 35% in North-West, and about \$352.3 million or 25% in North-Central.

Because it attracts more same-day visitors than other tourism regions in Northern Ontario, it is not surprising that North-East attracted the highest proportion of visitor spending from all same-day excursionists in Northern Ontario. North-East same-day visitor spending reached nearly \$141 million, or 61% of same-day spending across the three regions. Such spending totalled \$44 million in North-West, and \$47.6 million in North-Central.

North-West attracted slightly more spending on overnight trips (\$446 million or 38%) than did North-East at \$393.4 million and North-Central at \$308 million.

Over the course of 2008, Algonquin/Muskoka attracted more than \$513 million in visitor spending. Most of this spending occurred on overnight visits to the region (\$426.2 million, or 83% of all spending in Algonquin/Muskoka).

Table 13. Regional Shares of 2008 Spending in Northern Ontario and Algonquin/Muskoka*

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Spending on all person visits***	\$1 393 424 000	\$490 267 000	\$533 623 000	\$352 343 000	\$513 164 000
% of spending, all person visits	100	35	38	25	N/A
Spending on same-day person visits	\$232 349 000	\$44 044 000	\$140 796 000	\$47 585 000	\$86 941 000
% of spending, same-day person visits	100	19	61	21	N/A
Spending on overnight person visits	\$1 161 076 000	\$446 005 000	\$393 425 000	\$308 001 000	\$426 223 000
% of spending, overnight person visits	100	38	34	27	N/A

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township. ***Same-day and overnight visits in region. Spending estimates exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas). N/A: not applicable, because Algonquin/Muskoka is not included in the Northern Ontario totals.

Per-person, per-night spending in North-West, at about \$80, is appreciably higher than in North-East (\$57) and North-Central (\$53).

The larger share of U.S. tourists visiting North-West is likely driving the average spending on an overnight trip (\$581) and per-person per-night spending (\$80) well above levels for the other two regions.

Average overnight spending of \$57 per-person per-night in Algonquin/Muskoka is on par with North-East and North-Central. At \$354, trip spending for overnight tourists in Algonquin/Muskoka is also on par with the levels achieved in North-East and North-Central.

Table 14. Average Spending by Overnight Visitors in Northern Ontario and Regions (2008)*

					Algonquin/ Muskoka
Overnight Trips: All Purposes	Northern Ontario	North-West	North-East	North-Central**	
Per person per night	\$63	\$80	\$57	\$53	\$57
Per trip***	\$428	\$581	\$359	\$336	\$354

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*Figures are rounded to nearest dollar. Averages exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas).

Excludes Algonquin Park/South Algonquin Township. *All members of household/travel party for all nights spent in Northern Ontario.

Unlike other regions, more than half of all spending on overnight trips to North-West Ontario comes from American tourists. In contrast, North-East, North-Central, and Algonquin/Muskoka derive at least three quarters of their overnight spending from Canadian tourists. Only 25% of North-East's overnight spending and 12% of overnight spending in North-Central is generated by American tourists.

Pleasure trips account for two thirds of all overnight spending in Northern Ontario. In **North-West Region**, spending on overnight pleasure trips accounts for about \$324.3 million or 73% of all overnight spending in the region. The \$229.3 million spent on overnight pleasure trips represents a smaller share in **North-East**, at 58%, than is the case in North-West. Two thirds of overnight spending in **North-Central** or \$204.4 million took place on pleasure trips. Over four fifths of all overnight spending in **Algonquin/Muskoka** or \$355 million was on pleasure trips.

Table 15. Overview of 2008 Overnight Visitor Spending in Northern Ontario and Regions*

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Total	\$1 161 076 000	\$446 005 000	\$393 425 000	\$308 001 000	\$426 223 000
Place of Residence					
Canada	\$772 437 000	\$206 269 000	\$289 816 000	\$264 096 000	\$363 886 000
United States	\$366 622 000	\$232 491 000	\$96 933 000	\$35 913 000	\$38 651 000
Overseas	\$22 017 000	\$7 245 000	\$6 676 000	\$7 992 000	\$23 685 000
Pleasure Trips	\$761 654 000	\$324 319 000	\$229 286 000	\$204 369 000	\$354 956 000
Percentages					
Canada	67	46	74	86	85
United States	32	52	25	12	9
Overseas	2	2	2	3	6
Pleasure Trips	66	73	58	66	83

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *All estimates are rounded to the nearest thousand. Includes those not stating a response. **Excludes Algonquin Park/South Algonquin Township.

- Visitor spending in Northern Ontario benefits many sectors of the region's economy. The \$1.4 billion spent in the region in 2008 includes expenditures in restaurants and bars (\$224.7 million, or 16% of the total), accommodations (\$312.8 million, or 22%), grocery stores (\$143.1 million, or 10%), and gas stations and auto repair outlets (\$325.2 million, or 23%).
- Attractions also benefit from tourism spending (\$103.2 million in 2008), as do retail establishments selling clothing (\$135.5 million) and other items (\$53.6 million), car rental companies (\$15.7 million), local bus and taxi services (\$7.3 million), and rail, air, intercity bus and other transportation companies (\$72.3 million).

Table 16A. 2008 Spending in Northern Ontario and Regions,* by Category

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Total	\$1 393 424 000	\$490 267 000	\$533 623 000	\$352 343 000	\$513 164 000
Transportation (all)	\$420 633 000	\$133 290 000	\$175 345 000	\$94 806 000	\$90 199 000
Vehicle Rental	\$15 749 000	\$4 345 000	\$6 706 000	\$4 024 000	\$8 650 000
Gas Stations/ Auto Repairs	\$325 249 000	\$92 708 000	\$135 794 000	\$86 526 000	\$77 059 000
Transport Fares***	\$72 320 000	\$33 627 000	\$29 652 000	\$2 755 000	\$2 617 000
Local Transport	\$7 315 000	\$2 610 000	\$3 193 000	\$1 501 000	\$1 873 000
Restaurants and Bars	\$224 703 000	\$71 761 000	\$91 031 000	\$61 911 000	\$116 565 000
Grocery/Liquor Stores	\$143 067 000	\$33 309 000	\$51 247 000	\$58 510 000	\$90 624 000
Lodging	\$312 779 000	\$152 350 000	\$90 474 000	\$69 955 000	\$146 256 000
Attractions/Events	\$103 175 000	\$41 568 000	\$39 054 000	\$22 553 000	\$38 951 000
Clothing Retail	\$135 508 000	\$39 682 000	\$66 281 000	\$29 545 000	\$20 130 000
Other Spending	\$53 560 000	\$18 305 000	\$20 191 000	\$15 064 000	\$10 437 000

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township. ***Excludes fares for residents to leave the area and domestic carrier fares for U.S. and overseas visitors to enter/leave Canada.

For the most part, spending patterns in each region are similar to one another. There are, however, some noteworthy variations:

- **Lodging** represents a higher proportion of overnight tourists' spending in North-West and Algonquin/Muskoka than in North-East and North-Central.
- Conversely, spending on **food and beverages** in restaurants, bars and grocery stores represents the lowest proportion by overnight tourists in North-West.
- **Vehicle operation** expenses represent a smaller share of spending for overnight tourists in Algonquin/Muskoka than in any of the Northern Ontario regions. This is likely because these tourists are concentrated in Toronto and drive fewer kilometers to reach their destination than do their counterparts in North-West, North-East or North-Central.

Table 16B: 2008 Spending in Northern Ontario and Regions,* by Category

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka ²
Total	\$1 393 424 000	\$490 267 000	\$533 623 000	\$352 343 000	\$513 164 000
Transportation (all)	30%	27%	33%	27%	18%
Vehicle Rental	1%	1%	1%	1%	2%
Gas Stations/ Auto Repairs	23%	19%	25%	25%	15%
Transport Fares***	5%	7%	6%	1%	1%
Local Transport	1%	1%	1%	<0.5%	<0.5%
Restaurants and Bars	16%	15%	17%	18%	23%
Grocery/Liquor Stores	10%	7%	10%	17%	18%
Lodging	22%	31%	17%	20%	29%
Attractions/Events	7%	9%	7%	6%	8%
Clothing Retail	10%	8%	12%	8%	4%
Other Spending	4%	4%	4%	4%	2%

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township. ***Excludes fares for residents to leave the area and domestic carrier fares for U.S. and overseas visitors to enter/leave Canada.

Activities on the Trip

- Three fifths of the 4.2 million overnight visitors to **Northern Ontario** in 2008 took part in outdoor activities while on their trip. The most popular outdoor activities among overnight tourists include boating, fishing, camping, and going to nature parks.
- Of those measured in the surveys, the top 10 activities of overnight tourists in Northern Ontario are clearly associated with the outdoor experiences the region offers.¹² Historic sites, museums, spectator sporting events, and performances also figure in the top 10:
 1. Boating/canoeing/kayaking
 2. Fishing
 3. Camping
 4. Go to a nature park
 5. Visit an historic site
 6. Visit a museum or art gallery
 7. Attend a sports event as a spectator
 8. Golfing
 9. Hunting
 10. Attend a cultural performance, fair or festival, and/or casino¹³

Overnight visitors to **North-West Region** are also outdoor oriented. Two fifths of them go fishing and one third go boating on overnight trips. About one seventh of these tourists also go to nature parks and/or camp while on their trip.

¹² Note that some major activities such as *shopping* and *visiting friends and relatives* are not included in the domestic travel survey. As a consequence, participation in these activities is not provided in this report.

¹³ Tied at 3% of overnight trips to the region.

Top 5 Activities on Overnight Trips: North-West Region

1. Fishing	40%
2. Boating/canoeing/kayaking	33%
3. Go to a nature park	15%
4. Camping	14%
5. Visit an historic site	9%

Like other parts of Northern Ontario, **North-East** attracts overnight tourists who engage in outdoor activities while travelling. While as likely to be camping or going to nature parks as those who visit North-West or North-Central, tourists to this region are not as likely to go boating or fishing. About one quarter of North-East's overnight tourists include boating and/or fishing among their activities.

Top 5 Activities on Overnight Trips: North-East Region

1. Boating/canoeing/kayaking	25%
2. Fishing	23%
3. Camping	16%
4. Go to a nature park	15%
5. Visit an historic site	10%

North-Central Region also attracts overnight tourists who engage in outdoor activities while travelling. Boating and fishing followed by camping are especially popular among tourists to this region.

Top 5 Activities on Overnight Trips: North-Central Region

1. Boating/canoeing/kayaking	41%
2. Fishing	32%
3. Camping	21%
4. Go to a nature park	13%
5. Visit a museum or art gallery, and/or Attend a sports event as a spectator	6%

Among **Algonquin/Muskoka's** overnight tourists, boating is the most popular activity. At two fifths, the participation rate in boating is twice that achieved by fishing, going to a nature park or camping. Among Algonquin/Muskoka's overnight tourists, about one-tenth say they go to historic sites and/or play golf while on their trip.

Top 5 Activities on Overnight Trips: Algonquin/Muskoka

1. Boating/canoeing/kayaking	41%
2. Fishing	20%
3. Go to a nature park	19%
4. Camping	18%
5. Visit an historic site, and/or Golfing	9%

Table 17. 2008 Overnight Visits in Northern Ontario and Regions,* by Activities on Trip

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Total Overnight Person Visits	4 182 000	1 280 000	1 657 000	1 352 000	1 783 000
Participate in a sport or outdoor activity (unduplicated counts)	63%	71%	52%	71%	71%
Boating/canoeing/kayaking	33%	33%	25%	41%	41%
Fishing	31%	40%	23%	32%	20%
Camping	16%	14%	16%	21%	18%
Go to a nature park	13%	15%	15%	13%	19%
Golfing	4%	5%	3%	4%	9%
Hunting	3%	3%	3%	3%	1%
Downhill skiing/snowboarding	1%	1%	1%	<0.5%	3%
Go to attractions or cultural events (unduplicated counts)	21%	18%	27%	18%	17%
Visit an historic site	7%	9%	10%	4%	9%
Visit a museum or art gallery	6%	5%	8%	6%	8%
Attend a sports event as a spectator	5%	3%	7%	6%	1%
Attend a cultural performance	3%	2%	4%	2%	6%
Attend a festival or fair	3%	3%	3%	4%	4%
Go to a casino	3%	3%	5%	<0.5%	1%
Visit a theme or amusement park	1%	2%	2%	1%	4%
Visit a zoo, aquarium***	1%	3%	2%	1%	2%

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township. *** In the ITS, this category also includes "botanical garden". Note: Activities could have taken place at any location visited on the trip. They did not necessarily take place in Northern Ontario or a specific region. Comparatively small participation rates for cultural activities may reflect a lack of cultural infrastructure.

Length of Stay and Lodging in Northern Ontario

- On average, overnight visitors to **Northern Ontario** spent close to four nights in the region (3.9 nights) in 2008. Canadians spent about 3.5 nights here, Americans spent 5.4 nights, and the comparatively small number of overseas visitors spent almost a full week in Northern Ontario (6.2 nights).
- Over the course of 2008, visitors from all markets spent approximately 16.2 million person nights in Northern Ontario. Canadians spent about 12.0 million, or 74% of these nights, and Americans spent a further 3.9 million. Overseas visitors spent fewer than 300 000 nights.
- The domestic market displays a particularly strong preference for staying with friends and relatives (33% in 2008) or in their own cottages (34%), whereas Americans tend to stay in commercial cottages and cabins (39%) or private

cottages (18%) in Northern Ontario.¹⁴ Almost half of the nights spent by the overseas market in Northern Ontario were in private homes — either the homes of friends and relatives (43%) or much less commonly, in private cottages (4%).

- At 6.1 million, more nights in Northern Ontario were spent in North-East Region than in North-West at 5.3 million or North-Central at 4.8 million.

Table 18. Nights Spent in Northern Ontario,* 2008

Total Person Nights	16 179 000	
Canada	11 975 000	74%
United States	3 915 000	24%
Overseas	290 000	2%
North-West	5 278 000	33%
North-East	6 105 000	38%
North-Central**	4 796 000	30%
Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.		
*All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township.		
Note: Percentages may not add to 100% due to rounding.		

Of the three Northern Ontario regions, **North-West** attracts the highest number and proportion of nights spent in hotels, motels, bed and breakfast establishments, and other forms of roofed commercial lodging. One third or 1.7 million of the region's 5.3 million person nights in 2008 were spent in these forms of accommodation. Over half the nights were spent in private homes or cottages, and one tenth in the region's campgrounds and trailer facilities.

More person nights are spent in **North-East Region** than in the other Northern Ontario regions. Of the 6.1 million nights spent in North-East in 2008, about one fifth or 1.4 million were spent in paid roofed lodging such as a hotel, resort, motel, or commercial cottage. Over 4 million nights, however, were spent in private homes or private cottages. One tenth of nights spent in the region were in campgrounds and trailer facilities.

As in North-East Region, **North-Central's** overnight tourists tend to stay with friends and relatives or in their own cottages. Of the 4.8 million nights spent in the region during 2008, 3.1 million were spent in these types of non-commercial lodging. At the same time, close to one million person nights were spent in North-Central's hotels, motels, bed and breakfast establishments, and other forms of roofed commercial lodging. Campgrounds attracted about one seventh of the nights spent in the region during 2008.

¹⁴ Percentages are based on nights spent by tourists from each market. Source: TSRC/ITS 2008 - Tourism in Northern Ontario Tabulations (FedNor). Individual market tables, Table 6. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

Overnight tourists spent almost six million person nights in **Algonquin/Muskoka** during 2008, with an average length of stay of about three nights. At 3.3 million, over half the nights spent in Algonquin/Muskoka were in private homes or cottages. The area's hotels, resorts, motels, commercial cottages, and other forms of paid roofed lodging attracted about 1.5 million person nights or one quarter of all nights spent in Algonquin/Muskoka over the year. The presence of Algonquin Park within the area likely explains the popularity of campgrounds in Algonquin/Muskoka. Close to one million nights were spent in the area's camping facilities during 2008.

Table 19. 2008 Overnight Visits in Northern Ontario and Regions,* by Lodging Type

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Total person nights (000s)	16 179 000	5 278 000	6 105 000	4 796 000	5 957 000
Average nights per person	3.9 nights	4.1 nights	3.7 nights	3.6 nights	3.3 nights
Roofed commercial lodging	3 987 000	1 679 000	1 351 000	958 000	1 540 000
Campgrounds/trailers	1 738 000	513 000	561 000	664 000	951 000
Private (cottages/homes)	9 940 000	2 732 000	4 090 000	3 118 000	3 316 000
Other/unknown	514 000	355 000	104 000	56 000	151 000
Roofed commercial lodging	25%	32%	22%	20%	26%
Campgrounds/trailers	11%	10%	9%	14%	16%
Private (cottages/homes)	61%	52%	67%	65%	56%
Other/unknown	3%	7%	2%	1%	3%

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township.

Season of Visit and Travel Party Characteristics

Consistent with the outdoor activities popular among overnight visitors to the North, it is not surprising that overnight tourism in Northern Ontario and Algonquin/Muskoka is concentrated in the third calendar quarter. About half of all overnight visits to North-West and North-Central occur between July and September. Over two fifths of North-East Region's overnight tourists come to the area during this three-month period. At 59%, overnight tourism activity is most heavily concentrated in July through September in Algonquin/Muskoka.

Table 20. 2008 Overnight Visits in Northern Ontario and Regions,* by Calendar Quarter

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Total Overnight Person Visits	4 182 000	1 280 000	1 657 000	1 352 000	1 783 000
January–March	11%	10%	14%	9%	9%
April–June	25%	27%	26%	23%	23%
July–September	47%	49%	43%	51%	59%
October–December	17%	14%	18%	17%	9%

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township.

Generally, overnight travel parties in Northern Ontario include two adults, on average, and no children or teenagers. Adult-only two person parties predominate in all regions but North-Central is somewhat more likely than other parts of the North to attract travel parties with teenagers and/or children. Algonquin/Muskoka is also apt to appeal to travel parties that include adults and teenagers or children.

Table 21. 2008 Overnight Visits in Northern Ontario and Regions,* by Travel Party Composition and Size

	Northern Ontario	North-West	North-East	North-Central**	Algonquin/Muskoka
Total Overnight Person Visits	4 182 000	1 280 000	1 657 000	1 352 000	1 783 000
Party Composition					
Adult only	83%	87%	84%	78%	77%
Any teens/children	17%	13%	16%	22%	33%
Average Party Size	1.8 people	1.9 people	1.8 people	1.9 people	1.9 people

Source: TSRC/ITS 2008 Harmonized - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *All estimates are rounded to the nearest thousand. **Excludes Algonquin Park/South Algonquin Township.

Comparisons Over Time

This section offers a comparison of tourism volume, visitor spending, and the number of nights spent in Northern Ontario in 2006, 2007 and 2008 by visitors from Canada, the United States, and other countries.¹⁵ Because Canadians represent the largest share of tourism volume and value in Northern Ontario, changes over time in this market will have the greatest impact on the well-being of tourism businesses throughout the area.¹⁶

¹⁵ Statistics Canada made a major methodological change to the ITS U.S. survey in 2008, rendering direct comparisons between this and previous years unreliable. For this reason, change over time percentages are not shown and readers are urged to use caution in interpreting differences from 2006/2007 and 2008 for U.S. tourism in Northern Ontario. In addition, for September 2007 through December 2007 (inclusive), there was a software error in processing ITS Overseas records. When the error was discovered, Statistics Canada corrected and reissued the ITS OVS file for 2007. By the time the revised file was issued, however, FedNor had used the 2007 files to produce estimates for Northern Ontario. Since the impact of the error was expected to be negligible for Northern Ontario, FedNor elected not to revise the 2007 data. Caution is, however, required when making direct comparisons between 2007 and 2008 ITS Overseas estimates.

¹⁶ Methodological differences in the estimates for 2008 and previous years for the ITS make it inadvisable to make direct comparisons for "total" or international visitors and associated spending and nights in Northern Ontario.

The relatively poor economic conditions in Ontario over the course of 2008 likely explain the drop in tourism activity for Northern Ontario.

- Same-day excursions and overnight visits in Northern Ontario seem to have fallen about 10% between 2007 and 2008, from approximately 7.7 million person visits in 2007 to 6.9 million in 2008. Because of methodological changes, this change over time should be interpreted with considerable caution.
- The U.S. market would appear to have dropped sharply, from 1.5 million person visits in 2007 to 1.1 million in 2008. Some of this apparent decline could be a function of the methodological change that Statistics Canada implemented between 2007 and 2008.
- Tourist visits from parts of Canada other than Ontario have also fallen substantively. They are down by 16%, from 610 000 in 2007 to 512 000 in 2008.
- Although the Ontario market did not drop as much in percentage terms as did other markets, its very large size means that a 4% decline results in a loss of about 227 000 same-day excursionists and overnight visitors to Northern Ontario.
- Even though the number of Canadian tourists in Northern Ontario declined between 2007 and 2008, spending increased slightly, about 3%, from approximately \$958.4 million in 2007 to \$982.5 million in 2008. On the other hand, nights spent in Northern Ontario by Canadians fell by about 4% between 2007 and 2008.

Tourism activity in Ontario as a whole also declined between 2007 and 2008, although not to the same extent as in Northern Ontario. While Northern Ontario's person visits fell by about 10% over the year, Ontario's person visits declined by about 4% over this period, from approximately 104.8 million person visits in 2007 to about 101 million in 2008. Note that some of the shifts seen for Ontario as a whole may be a function of methodological changes in the ITS made by Statistics Canada.

As in previous years, Northern Ontario contributed about 10% of all tourism activity to the province.

Table 22. Volume and Value of Tourism in Northern Ontario from 2006 to 2008*

	2006	2007	2008	Change from 2007	Change from 2006
Total Person Visits**	8 201 000	7 683 000	6 935 000	-10%	-15%
Canada	6 351 000	6 071 000	5 746 000	-5%	-18%
Ontario	5 859 000	5 461 000	5 234 000	-4%	-11%
Other Canada	492 000	610 000	512 000	-16%	4%
United States	1 786 000	1 540 000	1 129 000	N/A	N/A
Overseas	65 000	72 000	61 000	N/A	-6%
Visitor Spending	\$1 584 965 000	\$1 444 236 000	\$1 393 424 000	-4%	-12%
By Canadians	\$1 058 586 000	\$958 369 000	\$982 538 000	3%	-7%
Person Nights	16 857 000	17 330 000	16 179 000	-7%	-4%
By Canadians	11 900 000	12 430 000	11 975 000	-4%	1%
Sources: <i>TSRC/ITS 2007 and 2008 Harmonized - Tourism in Northern (FedNor)</i> . Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; Ontario Ministry of Tourism, Regional Tourism Profiles (online) 2006: www.tourism.gov.on.ca/english/research .					
*All estimates are rounded to the nearest thousand. Note that caution is required in comparing "total", United States and/or Overseas volumes and values between 2008 and previous years because of methodological differences. See the appendix for more details. **Same-day and overnight visits in Northern Ontario.					
N/A: not available					

APPENDIX

MTOUR Glossary: Economic Impact Terms

The following is a partial copy of MTOUR's glossary, taken February 2010 from <http://www.tourism.gov.on.ca/english/research/rtp/index.html>.

The economic impact of visits in Ontario regions: since no Ontario region is economically self-sustaining, in order to produce the goods and services demanded by its visitors, it will need to import some goods and services from other regions. As such, some of the economic benefits of the visitors' spending in a region will spill over to other Ontario regions.

Gross domestic product (GDP): value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership. This GDP is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travellers.

Direct impact: refers to the impact generated in businesses or sectors that produce or provide goods and services directly to travellers, e.g. accommodations, restaurants, recreation providers, travel agents, transportation, and retail enterprises. Direct impact on GDP, employment, and tax revenues is also called tourism GDP, tourism employment, and tourism tax revenues.

Indirect impact: refers to the impact resulting from the expansion of demand from businesses or sectors that directly produce or provide goods and services to travellers, to other businesses or sectors.

Induced impact: refers to the impact associated with the re-spending of labour income and/or profits earned in the industries that serve travellers directly and indirectly.

Employment: refers to number of jobs, including full-time, part-time, and seasonal employment, as well as both employed and self-employed.

Federal tax revenues: include personal income tax, corporate income tax, commodity tax (Goods and Services Tax [GST], gas tax, excise tax, excise duty, air tax, and trading profits) and payroll deduction collected by the federal government.

Provincial tax revenues: include personal income tax, corporate income tax, commodity tax (Provincial Sales Tax [PST], gas tax, liquor gallonage tax, amusement tax, and trading profits) and employer health tax collected by the Ontario provincial government.

Municipal tax revenues: include business and personal property taxes that are collected by the municipalities. Collection, however, does not follow immediately the consumption or production of goods and services in a municipality by visitors (as is the case with GST or personal income taxes). Rather, these taxes show the percentage of the total property taxes collected by a municipality that can be attributed to tourism

because of tourism's contribution to the economic activity of the municipality and hence its tax base.

Industry: The industry follows Statistics Canada's 1997 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.