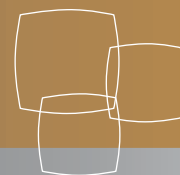




Industry  
Canada

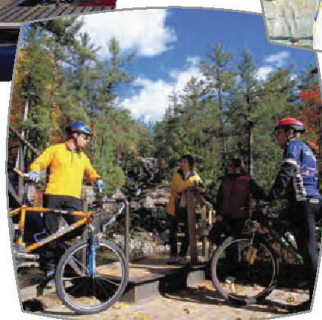
Industrie  
Canada

FedNor



# Tourism Volume, Value, and Characteristics in Northern Ontario, 2010

*Domestic and  
International Travel  
Surveys*



FedNor 

Canada 

# **Tourism Volume, Value, and Characteristics in Northern Ontario, 2010**

**Domestic and International Travel Surveys**

March 2012  
Prepared for FedNor by  
Research Resolutions & Consulting Ltd.

This publication is available in multiple formats, including print, upon request from FedNor.

Please contact:

FedNor

19 Lisgar St., Suite 307

Sudbury ON P3E 3L4

Tel.: (705) 671-0711

Toll-free: 1 877 333-6673

Fax: (705) 670-5331

E-mail: [publicationsfednor@ic.gc.ca](mailto:publicationsfednor@ic.gc.ca)

This publication is also available electronically in HTML format at <http://fednor.gc.ca/>.

### **Permission to Reproduce**

Except as otherwise specifically noted, the information in this publication may be reproduced, in part or in whole and by any means, without charge or further permission from Industry Canada, provided that due diligence is exercised in ensuring the accuracy of the information reproduced; that Industry Canada is identified as the source institution; and that the reproduction is not represented as an official version of the information reproduced, nor as having been made in affiliation with, or without the endorsement of Industry Canada.

For permission to reproduce the information in this publication for commercial redistribution, send a request by email to [droitdauteur.copyright@tpsgc-pwgsc.gc.ca](mailto:droitdauteur.copyright@tpsgc-pwgsc.gc.ca).

Cat. No.: lu91-4/5-2010E-PDF

*Aussi offert en français sous le titre, Volume, valeur et caractéristiques du tourisme dans le Nord de l'Ontario, 2010.*

TOURISM IN NORTHERN ONTARIO, 2010 .....	4
Introduction .....	4
Geographic Areas .....	4
Highlights of Tourism in Northern Ontario .....	5
Overview of Tourism in Northern Ontario .....	6
Volume of Tourists .....	6
Place of Residence .....	7
Main Purpose of Trip .....	7
Seasonality .....	8
Spending by Tourists in Northern Ontario .....	8
Average Spending by All Visitors in Northern Ontario .....	9
Economic Impact of Tourism in Northern Ontario .....	10
Regional Tourism: Volume and Spending .....	14
Regional Tourism Volumes: Place of Residence .....	15
Overnight Tourism in Northern Ontario and Regions .....	16
Detailed Place of Residence: Overnight Trips to Northern Ontario .....	17
Detailed Place of Residence: Overnight Trips to Regions .....	18
Spending on the Trip .....	19
Activities on the Trip .....	23
Length of Stay and Lodging in Northern Ontario .....	26
Season of Visit and Travel Party Characteristics .....	28
Comparisons Over Time .....	29
Appendix .....	31
MTCS Glossary: Economic Impact Terms .....	31
Notes .....	32
Northern Ontario Tourism Regions .....	33

# TOURISM IN NORTHERN ONTARIO, 2010

## Introduction

This report provides information on Northern Ontario's tourism volume, value, and characteristics for 2010. Data are based on the most recent estimates available from Statistics Canada. The report 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 2010 Canadian and International Travel Surveys<sup>1</sup> (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, Culture and Sport (MTCS)'s Tourism Regional Economic Impact Model (TREIM).<sup>2</sup>

## Geographic Areas

Early in 2010, MTCS revised the number and boundaries of its tourism regions. The new regions are referred to as Regional Tourism Organizations (RTO) in this report. They represent the same areas referred to as *Tourism Regions (TRs)* in earlier reports. Currently, Northern Ontario (RTO 13) includes three sub-regions:

- RTO13a;
- RTO13b; and
- RTO13c.

These sub-regions do not correspond to the geographical boundaries of historical northern regions (North-Central, North-East and North-West). The census divisions included in Northern Ontario as currently defined are listed and displayed below. A more detailed list of each region's geographic area is appended.

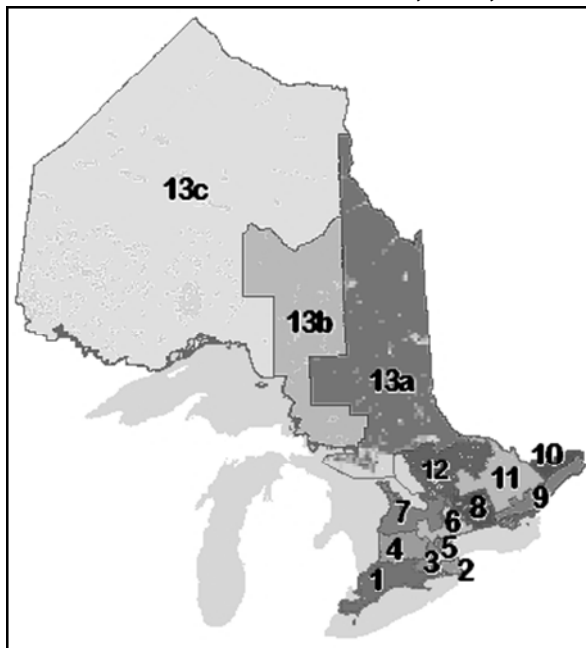
---

<sup>1</sup> This analysis is based on Statistics Canada's International Travel Survey (ITS) and Travel Survey of Residents of Canada Microdata, which contain anonymized data collected in the ITS and TSRC. All computations on these microdata were prepared by Research Resolutions & Consulting Ltd. on behalf of FedNor and the responsibility for the use and interpretation of these data is entirely that of the author. [Disclaimer required by Statistics Canada's license agreements.]

<sup>2</sup> 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 (2010)*, March 2012. Estimates provided herein are based on the 2010 TSRC pooled file as issued by Statistics Canada and may differ slightly from those produced by MTCS because of customized adjustments MTCS has made to the files subsequent to their official release by Statistics Canada.

Noteworthy by their *exclusion* from Northern Ontario are Algonquin Park, South Algonquin; Nipissing Unorganized, South Part; and Papineau-Cameron (part of Census Division 48) and Muskoka District. To address FedNor's interest in the Muskoka District Municipality (CD44) and the portions of Nipissing District (CD48) that are not included in the three Northern Ontario regions (RTO13a, RTO13b or RTO13c) a separate column in summary tables in this report is dedicated to estimates for RTO12, referred to as Muskoka/Parry Sound.

### Northern Ontario RTOs 13a, 13b, 13c



#### Census Divisions in Northern Ontario

- CD48: Nipissing District (excluding Algonquin Park)\*
- 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

\*Excludes South Algonquin; Nipissing, Unorganized, South Part; and Papineau-Cameron.

### Highlights of Tourism in Northern Ontario

- Canadians, Americans and tourists from other countries made 6.3 million same-day or overnight trips in Northern Ontario in 2010. These trips represent about 6% of all tourism in Ontario that year.
- Northern Ontario (RTO13) combined with Muskoka/Parry Sound (RTO12) attracted approximately 10 million visitors during 2010.<sup>3</sup> Close to 90% of these tourists were Canadians, primarily from Ontario. About 6.5 million were on overnight trips to locations within the broader northern area.
- Approximately 3.7 million tourists or 58% of all tourists in Northern Ontario stayed overnight, while about 2.7 million or 42% were on same-day excursions in the North.

<sup>3</sup> The 10 million visitor estimate represents the sum of visitors to RTO13 and RTO12 so there is some duplication in the volume estimate because the same visitor could have spent time in each RTO.

- Northern Ontario attracted a higher proportion of overnight trips than did Canada or Ontario as a whole. Of Canada's 254.6 million person visits during the year, 43% were overnight tourists. Similarly, about 41% of Ontario's 103.7 million person visits during 2010 included at least one night spent in the province.
- Canadians represent 82% of overnight visits in Northern Ontario. They represent similar proportions of overnight tourists to Canada (86%) and to Ontario (83%).
- The United States accounted for 17% of overnight visits in Northern Ontario in 2010. All other countries ("overseas") represented 1%.
- One half of overnight trips to Northern Ontario were made for the primary purpose of pleasure (53%).
- The 6.3 million visitors from Canada, the United States, and other countries who took same-day or overnight trips in Northern Ontario spent almost \$1.3 billion on tourism goods and services. Most of this money was spent on overnight visits in Northern Ontario (\$1.1 billion or 84%).
- All visitors from Canada, the United States, and other countries who took same-day or overnight trips in RTO13 and/or RTO12 spent almost \$1.8 billion on tourism goods and services in 2010. Most of this spending or \$1.5 billion took place on overnight trips.<sup>4</sup>

## Overview of Tourism in Northern Ontario

### Volume of Tourists

- In 2010, people from Canada, the United States, and other countries made 6.3 million same-day or overnight trips in Northern Ontario, representing about 6% 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 6.3 million person visits, 58% of visitors or about 3.7 million stayed overnight. Same-day excursions in Northern Ontario accounted for the remaining 2.7 million person visits by tourists from Canada, the United States, and other countries.

---

<sup>4</sup> Spending estimates also represent the sum of dollars spent in the two RTOs. Unlike volume estimates, there is no duplication in spending because dollars are allocated to each location visited by the tourist and sum to total spending in the larger area.

- From a provincial perspective, Northern Ontario accounted for 9% of all overnight person visits in Ontario during 2010.

**Table 1. Overview of Tourism in Northern Ontario in 2010, by Place of Residence\***

<b>Total Person Visits**</b>	<b>6 331 000</b>	
	<b>#</b>	<b>%</b>
<b>Same-day Person Visits</b>	2 656 000	42
<b>Overnight Person Visits</b>	3 674 000	58
<b>Same-day</b>	<b>2 656 000</b>	
By place of residence	<b>#</b>	<b>%</b>
Canada	2 279 000	86
United States	376 000	14
Overseas	1 000	<0.5
<b>Overnight</b>	<b>3 674 000</b>	
By place of residence	<b>#</b>	<b>%</b>
Canada	3 015 000	82
United States	627 000	17
Overseas	33 000	1
Source: TSRC/ITS 2010 - 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 2.7 million same-day trips in the region during 2010, 86% were made by Canadian residents. Visitors from the United States accounted for 14% of these trips.
- Canadians represent about the same proportion of overnight visits (82%) and same-day excursions (86%). Of the 3.7 million overnight person visits in Northern Ontario during 2010, Northern Ontario itself accounted for 39% or 1.4 million visits.<sup>5</sup>
- The United States accounted for 17% of overnight visits in Northern Ontario in 2010. All other countries represented only 1%.

### Main Purpose of Trip

- A total of 53% of overnight trips to Northern Ontario were made for the primary purpose of pleasure whereas 37% of 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.

<sup>5</sup> See Summary Table 12 in this document.



**Table 2. Overview of Overnight Tourism in Northern Ontario in 2010: Main Reason for Trip**

<b>Overnight Person Visits (total)*</b>	<b>3 674 000</b>	
	<b>#</b>	<b>%</b>
<b>Pleasure</b>	1 934 000	53
<b>Visit friends/relatives</b>	1 348 000	37
<b>Business</b>	195 000	5
<b>All other reasons**</b>	197 000	5

Source: TSRC/ITS 2010 - 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 (56%) or other countries (44%). Canadian visitors on overnight pleasure trips are also particularly heavily concentrated in the July through September calendar quarter (53%).<sup>6</sup>

**Table 3. Season of Overnight Visits in Northern Ontario (2010)**

	<b>Total</b>	<b>Canada</b>	<b>United States</b>	<b>Overseas</b>
<b>Overnight Person Visits*</b>	<b>3 674 000</b>	<b>3 015 000</b>	<b>627 000</b>	<b>33 000</b>
January–March	14%	16%	6%	2%
April–June	23%	21%	31%	35%
July–September	44%	41%	56%	44%
October–December	19%	22%	8%	19%

Source: TSRC/ITS 2010 - 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.

### Spending by Tourists in Northern Ontario

- In 2010, the 6.3 million visitors from Canada, the United States, and other countries who took same-day or overnight trips in Northern Ontario spent almost \$1.3 billion on tourism goods and services.
- Canadians generate the largest share of visitor spending in Northern Ontario. Of the \$202 million in spending on same-day visits to the region, 90% or about \$181.2 million was spent by Canadians. Of the \$1.1 billion in visitor spending on overnight trips, Canadians spent 65% or about \$686.9 million.

<sup>6</sup> See *TSRC 2010 - Tourism in Northern Ontario (FedNor)*. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd., Table 8.

**Table 4. Overview of Visitor Spending in Northern Ontario in 2010, by Place of Residence\***

<b>Total Spending on Visit**</b>	<b>\$1 252 856 000</b>	
	\$	%
<b>Same-day</b>	\$201 962 000	<b>16</b>
<b>Overnight</b>	\$1 050 895 000	<b>84</b>
<b>Same-day</b>	<b>\$201 961 000</b>	
By place of residence	\$	%
Canada	\$181 209 000	90
United States	\$20 671 000	10
Overseas	\$82 000	<0.5
<b>Overnight</b>	<b>\$1 050 895 000</b>	
By place of residence	\$	%
Canada	\$686 922 000	65
United States	\$337 436 000	32
Overseas	\$26 537 000	3

Source: TSRC/ITS 2010 - 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 \$66 in 2010, falling to \$55 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 on a per-visitor and per-trip basis 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 2010 stay in Northern Ontario, Americans spent almost twice as much as Canadians (\$106 versus \$55 per-person per-night).
- At \$106 per-person per-night, Americans also spent more than did overseas visitors, who spent \$60 per-person per-night.

**Table 5. Average 2010 Spending by Visitors in Northern Ontario, by Place of Residence\***

	<b>Northern Ontario</b>	<b>Canada</b>	<b>United States</b>	<b>Overseas</b>
<b>Spending on same-day visits</b>	<b>\$201 961 000</b>	<b>\$181 209 000</b>	<b>\$20 671 000</b>	<b>\$82 000</b>
Average per person	\$65	\$66	\$55	N/A
<b>Spending on all overnight trips</b>	<b>\$1 050 895 000</b>	<b>\$686 922 000</b>	<b>\$337 436 000</b>	<b>\$26 537 000</b>
Average per person, per night	\$67	\$55	\$106	\$60
Average per trip**	\$420	\$308	\$1 346	\$1 330
<b>Spending on overnight pleasure trips</b>	<b>\$652 995 000</b>	<b>\$336 542 000</b>	<b>\$311 964 000</b>	<b>\$4 490 000</b>
Average per person, per night	\$77	\$58	\$111	N/A
Average per trip**	\$542	\$339	\$1 513	N/A

Source: TSRC/ITS 2010 - 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 1.6 Canadians) and the somewhat longer duration of Americans' overnight trips to the region (5.3 nights for Americans versus 3.4 nights for Canadians). Each overnight trip to Northern Ontario yielded about \$1 346 for every U.S. travel party attracted to the region, but reached only \$308 for each Canadian household travel party.

Overseas visitors spent considerably more time in Northern Ontario (11.7 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 \$1 330. Many of these overseas visitors stayed with friends and relatives. As a consequence, their \$60 per-person per-night spending level is lower than the \$106 per-person per-night spent by their U.S. counterparts.

### **Economic Impact of Tourism in Northern Ontario**

The \$1.3 billion spent by visitors in Northern Ontario ripples throughout the local and provincial economies.<sup>7</sup> 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.<sup>8</sup>

<sup>7</sup> MTCS provides the TREIM for estimating purposes. The model was revised for the 2009 reference year and beyond. It is now provided by MTCS for the entire RTO 13 (Northern Ontario). Because of the major revision undertaken by the Ministry, results provided herein may not be directly comparable to those provided in previous reports submitted by Research Resolutions.

<sup>8</sup> 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

### **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.<sup>9</sup>

Visitors spent almost \$1.3 billion on tourism goods and services in Northern Ontario in 2010. 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 about \$518 million in direct economic activity (i.e. GDP), and an additional \$260.8 million in indirect and induced GDP for Northern Ontario's economy.

There was, therefore, about \$778.6 million in GDP retained in Northern Ontario. Other parts of Ontario benefited from about \$62.2 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 \$840.8 million in 2010.

**Table 6. Northern Ontario Tourism Contributions to GDP, and Funds Retained in Ontario, 2010**

	Amount Retained in		Total Contribution to Ontario's GDP (A + B)
	Northern Ontario (A)	Other Parts of Ontario (B)	
<b>Direct</b>	\$517 772 559	\$0	\$517 772 559
<b>Indirect</b>	\$142 076 994	\$37 135 822	\$179 212 816
<b>Induced</b>	\$118 744 895	\$25 106 701	\$143 851 596
<b>Total GDP</b>	\$778 594 448	\$62 242 522	\$840 836 970

Source: TSRC/ITS 2010 - 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 11 737 direct jobs and an additional 3 278 indirect and induced jobs in Northern Ontario were generated as a result of visitor spending in 2010. These jobs include part- and full-time positions, on both annual and seasonal

---

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. MTCS's glossary of terms to be used in conjunction with outputs from TREIM is appended and referenced throughout this chapter.

<sup>9</sup> 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.

bases.<sup>10</sup> 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 15 821 across Northern Ontario and the entire province.

Over the year, 15 821 jobs were created in Ontario because of Northern Ontario tourism. Northern Ontario retained 15 016 or 95% of these jobs.<sup>11</sup> The 15 016 jobs generated \$539.5 million in wages and salaries province-wide, with 93% of this amount (\$500.6 million direct, indirect, and induced) retained in Northern Ontario.

### **Taxes**

All levels of government benefited from tourism spending in Northern Ontario. This spending generated \$236.7 million in federal taxes, a further \$177.1 million in provincial taxes and \$5.3 million in municipal taxes based on incremental tourism revenue (direct, indirect, and induced) province-wide. Northern Ontario retained the following amounts from these taxes: \$134.3 million in direct federal taxes, \$126.3 million in direct provincial taxes, and \$784 408 in direct municipal taxes.

---

<sup>10</sup> Note that estimates for tourism economic impact in Northern Ontario published in MTCS's products may 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 and/or data than the one used internally by MTCS.

<sup>11</sup> 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, 2010**

	<b>Economic Benefits Retained in Northern Ontario</b>	<b>Total Benefits Across Ontario (Including Portion Retained in Northern Ontario)</b>	<b>Proportion of Total Ontario Benefits Retained in Northern Ontario</b>
<b>Total Visitor Spending</b>	<b>\$1 252 856 010</b>	<b>\$1 252 856 010</b>	
<b>Gross Domestic Product</b>	<b>\$778 594 448</b>	<b>\$840 836 970</b>	<b>93%</b>
Direct	\$517 772 559	\$517 772 559	<b>100%</b>
Indirect/Induced	\$260 821 889	\$323 064 412	<b>81%</b>
<b>Labour Income</b>	<b>\$500 568 859</b>	<b>\$539 485 646</b>	<b>93%</b>
Direct	\$336 715 036	\$336 715 036	<b>100%</b>
Indirect/Induced	\$163 853 823	\$202 770 611	<b>81%</b>
<b>Employment (Jobs)</b>	<b>15 016</b>	<b>15 821</b>	<b>95%</b>
Direct	11 737	11 737	<b>100%</b>
Indirect/Induced	3 278	4 083	<b>80%</b>
<b>Federal Taxes</b>	<b>\$224 646 302</b>	<b>\$236 749 916</b>	<b>95%</b>
Direct	\$134 251 533	\$134 251 533	<b>100%</b>
Indirect/Induced	\$90 394 769	\$102 498 383	<b>88%</b>
<b>Provincial Taxes</b>	<b>\$168 178 817</b>	<b>\$177 136 197</b>	<b>95%</b>
Direct	\$126 278 681	\$126 278 681	<b>100%</b>
Indirect/Induced	\$41 900 136	\$50 857 516	<b>82%</b>
<b>Municipal Taxes</b>	<b>\$2 095 115</b>	<b>\$5 278 488</b>	<b>40%</b>
Direct	\$784 408	\$784 408	<b>100%</b>
Indirect/Induced	\$1 310 707	\$4 494 080	<b>29%</b>

Source: TSRC/ITS 2010 - Tourism in Northern Ontario (FedNor). Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. and the revised TREIM model for RTO13.

## Regional Tourism: Volume and Spending

Northern Ontario's three tourism regions as defined by the Ontario Ministry of Tourism, Culture and Sport attract different levels of tourism activity. In 2010, RTO13a was the destination for 59% of all same-day trips to Northern Ontario. The remaining same-day excursions were distributed between RTO13b at 16% and RTO13c at 25%.

The distribution of overnight trips within Northern Ontario follows a pattern similar to same-day travel. Over half of the 3.7 million overnight visits in Northern Ontario were to locations in RTO13a at 2.1 million or 56%, RTO13b attracted 573 000 or 16% of overnight trips and RTO13c attracted 1.2 million or 32%.

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

	<b>Total</b>	<b>RTO13a</b>	<b>RTO13b</b>	<b>RTO13c</b>
<b>Total Person Visits**</b>	<b>6 331 000</b>	<b>3 627 000</b>	<b>1 023 000</b>	<b>1 837 000</b>
% of total person visits	100	57	16	29
<b>Same-day Person Visits</b>	<b>2 656 000</b>	<b>1 554 000</b>	<b>433 000</b>	<b>670 000</b>
% of same-day person visits	100	59	16	25
<b>Overnight Person Visits</b>	<b>3 674 000</b>	<b>2 068 000</b>	<b>573 000</b>	<b>1 162 000</b>
% of overnight person visits	100	56	16	32

Source: TSRC/ITS 2010 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.

The spending pattern across Northern Ontario's three tourism regions as defined by MTCS resembles the volume pattern. Specifically, RTO13a captures more spending associated with same-day trips than does either RTO13b or RTO13c. Same-day trip spending in RTO13a reached \$128.6 million in 2010, while the corresponding spending in RTO13b was \$23.8 million and \$46.4 million in RTO13c.

Of the \$1.1 billion spent on overnight trips in Northern Ontario during 2010, RTO 13a captured the largest share at \$493.5 million or 47%. Somewhat less money was spent in RTO13c by overnight visitors. They spent \$407.7 million or 39% of all overnight trip spending in Northern Ontario. About \$139.9 million in overnight visitor spending took place in RTO13b.

**Table 9. Regional Shares of 2010 Spending in Northern Ontario\***

	<b>Total</b>	<b>RTO13a</b>	<b>RTO13b</b>	<b>RTO13c</b>
<b>Spending on All Person Visits**</b>	<b>\$1 252 856 000</b>	<b>\$622 159 000</b>	<b>\$164 837 000</b>	<b>\$454 137 000</b>
% of spending, all person visits	100	50	13	37
<b>Spending on Same-day Person Visits</b>	<b>\$201 961 000</b>	<b>\$128 587 000</b>	<b>\$23 809 000</b>	<b>\$46 360 000</b>
% of spending, same-day visits	100	65	12	23
<b>Spending on Overnight Person Visits</b>	<b>\$1 050 895 000</b>	<b>\$493 477 000</b>	<b>\$139 944 000</b>	<b>\$407 707 000</b>
% of spending, overnight visits	100	47	13	39

Source: TSRC/ITS 2010 - 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.

### Regional Tourism Volumes: Place of Residence

Almost all same-day and overnight tourists to Northern Ontario's RTO13a and to the adjacent Muskoka/Parry Sound area (RTO12) live in Canada.<sup>12</sup> Because they are on the Canada–United States border, comparatively high proportions of RTO13b's and RTO13c's tourists are Americans.

- Of the 3.6 million tourists who went to **RTO13a** on a same-day or overnight trip in 2010, 3.5 million or 95% were Canadians. About 152 000 of these visitors were from the United States. Approximately 2.1 million or over half of all visits to the region were overnight trips.
- **RTO13b** attracted fewer visitors during 2010 than did other regions. Canada is a major source of tourism in the region but more than one third of RTO13b's visitors live in the United States. At 648 000, residents of Canada represented 63% of all same-day excursionists and overnight visitors. Americans represented 36% of all tourists in the region during 2010. At about 573 000, more of the 1 million visitors to RTO13b were on overnight trips than on same-day excursions at about 433 000.
- **RTO13c** attracted both Canadian and American visitors during 2010. Of the 1.8 million tourists who went to the region on a same-day or overnight trip in 2010, 1.3 million or 70% were Canadians and 549 000 or 30% were Americans. Most of these tourists, about 1.2 million, spent at least one night in RTO13c.
- While not considered in MTCS's definition of Northern Ontario, the **Muskoka/Parry Sound** region attracted 3.8 million tourists over the course of 2010. As with RTO13a, almost all of these tourists were Canadian residents and most spent at least one night in Muskoka/Parry Sound. Of the 3.8 million trips to the

<sup>12</sup> 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.



area, residents of Canada made 3.6 million trips, of which 2.8 million were overnight trips.

**Table 10. Overview of 2010 All Visits in Northern Ontario and Regions\***

	Northern Ontario		RTO13a		RTO13b		RTO13c		RTO12 Muskoka/ Parry Sound	
<b>Total Person Visits**</b>	<b>6 331 000</b>		<b>3 627 000</b>		<b>1 023 000</b>		<b>1 837 000</b>		<b>3 827 000</b>	
<b>Place of Residence</b>										
Canada	5 294 000	84%	3 452 000	95%	648 000	63%	1 277 000	70%	3 627 000	95%
United States	1 002 000	16%	152 000	4%	368 000	36%	549 000	30%	131 000	3%
Overseas	34 000	1%	23 000	1%	6 000	1%	12 000	1%	69 000	2%
<b>Duration of Stay</b>										
Same-day	2 656 000	42%	1 554 000	43%	433 000	42%	670 000	36%	1 012 000	26%
Overnight	3 674 000	58%	2 068 000	57%	573 000	58%	1 162 000	64%	2 814 000	74%

Source: TSRC/ITS 2010 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

### 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, 94% of overnight tourists to RTO13a and Muskoka/Parry Sound are residents of Canada. Canadians represented 66% of overnight tourists in RTO13c and 33% came from the United States. Similarly, while 74% of all overnight tourists to RTO13b were Canadians, almost all (25%) remaining visitors were residents of the United States.

Many overnight trips to each region are for pleasure purposes. Nonetheless, large numbers of overnight tourists are travelling in order to visit with friends and relatives and some are travelling for business or other reasons.

- The main purpose of overnight trips to **RTO13a** is as likely to be pleasure (45%) as it is to be visiting friends and relatives (42%). Business and other reasons represented 7% and 6% of overnight trips, respectively.
- **RTO13b's** overnight tourism in 2010 was divided between people travelling for pleasure reasons and those travelling for other reasons. A total of 53% of all overnight trips to the region were pleasure trips while 38% of trips were made to visit friends and relatives. Comparatively few overnight tourists are on business trips at 3% or trips taken for other reasons at 6%.
- A total of 68% of overnight trips to **RTO13c** were made for pleasure, while 25% were made to see friends and relatives.

- A total of 77% of **Muskoka/Parry Sound's** overnight tourists in 2010 were on pleasure trips and about 20% took a trip to see friends and relatives.

**Table 11. Place of Residence and Main Reason: 2010 Overnight Visits in Northern Ontario and Regions\***

	Northern Ontario		RTO13a		RTO13b		RTO13c		RTO12 Muskoka/ Parry Sound	
<b>Total Overnight Person Visits</b>	<b>3 674 000</b>		<b>2 068 000</b>		<b>573 000</b>		<b>1 162 000</b>		<b>2 814 000</b>	
<b>Place of Residence</b>										
Canada	3 015 000	82%	1 905 000	92%	424 000	74%	767 000	66%	2 647 000	94%
United States	627 000	17%	141 000	7%	144 000	25%	385 000	33%	110 000	4%
Overseas	33 000	1%	22 000	1%	4 000	1%	11 000	1%	57 000	2%
<b>Main Reason for Trip</b>										
Pleasure	1 934 000	53%	932 000	45%	303 000	53%	786 000	68%	2 175 000	77%
Visit friends/relatives	1 348 000	37%	874 000	42%	219 000	38%	288 000	25%	549 000	20%
Business	195 000	5%	138 000	7%	18 000	3%	46 000	4%	18 000	1%
All other reasons**	197 000	5%	124 000	6%	33 000	6%	43 000	4%	73 000	3%

Source: TSRC/ITS 2010 - 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.

### 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 sub-regions and Muskoka/Parry Sound. In the North as a whole, Ontario residents represent 70% of all overnight tourists. More than half of these Ontarians 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)<sup>13</sup> is the largest urban feeder market for Northern Ontario. This CMA accounted for about 320 000 overnight visitors or 9% of all overnight tourism to Northern Ontario in 2010. Of Toronto's overnight visitors, about 134 000 were on pleasure trips.
- Winnipeg is the next-largest source of overnight visitors from Canadian urban markets outside Northern Ontario, contributing approximately 224 000 or 6% of overnight tourists to the North in 2010.
- The province of Quebec sent about 49 000 overnight visitors to Northern Ontario, representing 1% of all overnight visitors during 2010.

<sup>13</sup> All Canadian cities mentioned in this report are defined by their CMA boundaries.

- Most Americans who take overnight trips to Northern Ontario live in states located along the Canada–U.S. border. Specifically, of the 627 000 overnight visits by Americans to Northern Ontario, 456 000 originated in border states. Minnesota, Michigan, and Wisconsin make the most sizeable contributions of U.S. overnight tourists to Northern Ontario.
- The overseas market for Northern Ontario is primarily European (24 000 visitors), dominated by overnight visitors from Germany (8 000) and the United Kingdom (6 000).

#### **Detailed Place of Residence: Overnight Trips to Regions**

- **RTO13a** draws 40% of its overnight tourists from within its own boundaries and other parts of Northern Ontario. Many of these northerners are, in fact, residents of RTO13a who were travelling within their own region. Toronto contributes about 12% of overnight tourists in RTO13a. About 7% of the region's overnight visitors are from the United States.
- About 36% of **RTO13b's** overnight tourism or 207 000 visitors are residents of Northern Ontario travelling within the larger region. The United States contributes about 144 000 overnight tourists to the region, with more of these Americans coming from Michigan (63 000) than any other state.
- **RTO13c** has the most diversified market of the three Northern regions. It is least reliant on the Ontario resident market drawing 35% of its overnight visitors from the province. It also attracts 25% of its overnight tourists or 294 000 from Manitoba and 33% or 385 000 from the United States. More of these Americans come from Minnesota (139 000) than any other state.
- At 1.4 million, Toronto is the single-largest contributor to the 2.8 million overnight visitors to **Muskoka/Parry Sound**.

**Table 12. 2010 Overnight Visits in Northern Ontario and Regions,\* by Place of Residence**

	Northern Ontario	RTO13a	RTO13b	RTO13c	RTO12 Muskoka/Parry Sound
<b>Total Overnight Person Visits</b>	<b>3 674 000</b>	<b>2 068 000</b>	<b>573 000</b>	<b>1 162 000</b>	<b>2 814,000</b>
<b>Place of Residence</b>					
<b>Canada</b>	82%	92%	74%	66%	94%
Ontario	70%	88%	70%	35%	93%
Northern Ontario	39%	45%	36%	27%	2%
RTO13a	25%	40%	14%	2%	2%
RTO13b	5%	4%	20%	<0.5%	<0.5%
RTO13c	9%	2%	2%	24%	<0.5%
Muskoka/Parry Sound	1%	2%	1%	<0.5%	1%
Toronto CMA	9%	12%	6%	3%	51%
Manitoba	8%	<0.5	1%	25%	<0.5%
Winnipeg	6%	<0.5	1%	19%	<0.5%
Quebec	1%	2%	1%	<0.5%	<0.5%
<b>United States</b>	17%	7%	25%	33%	4%
Minnesota	4%	1%	1%	12%	<0.5%
Michigan	3%	1%	11%	2%	<0.5%
Wisconsin	2%	<0.5%	1%	5%	<0.5%
<b>Overseas</b>	1%	1%	1%	1%	2%

Source: TSRC/ITS 2010 - 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.

### Spending on the Trip

As noted previously, of the \$1.3 billion visitors spent in Northern Ontario, \$622.2 million or 50% was spent in RTO13a, \$164.8 million or 13% in RTO13b, and about \$454.1 million or 37% in RTO13c.<sup>14</sup>

Because it attracts more same-day visitors than other tourism regions in Northern Ontario, it is not surprising that RTO13a attracted the highest proportion of visitor spending from all same-day excursionists in Northern Ontario. RTO13a same-day visitor spending reached nearly \$129 million, or 65% of same-day spending across the three regions. Such spending totaled \$23.8 million in RTO13b, and \$46.4 million in RTO13c.

RTO13a attracted slightly more spending on overnight trips (\$493.5 million or 47%) than did RTO13c at \$407.7 million and appreciably more than RTO13b at \$139.9 million.

<sup>14</sup> See Table 9.

Over the course of 2010, Muskoka/Parry Sound attracted more than \$513.0 million in visitor spending. Most of this spending occurred on overnight visits to the region (\$469.5 million, or 92% of all spending).

**Table 13. Regional Shares of 2010 Spending in Northern Ontario and Muskoka/Parry Sound \***

	<b>Northern Ontario</b>	<b>RTO13a</b>	<b>RTO13b</b>	<b>RTO13c</b>	<b>RTO12 Muskoka/Parry Sound</b>
<b>Spending on all person visits**</b>	<b>\$1 252 856 000</b>	<b>\$622 159 000</b>	<b>\$164 837 000</b>	<b>\$454 137 000</b>	<b>\$513 048 000</b>
% of spending, all person visits	100	50	13	37	N/A
<b>Spending on same-day person visits</b>	<b>\$201 961 000</b>	<b>\$128 587 000</b>	<b>\$23 809 000</b>	<b>\$46 360 000</b>	<b>\$43 556 000</b>
% of spending, same-day person visits	100	65	12	23	N/A
<b>Spending on overnight person visits</b>	<b>\$1 050 895 000</b>	<b>\$493 477 000</b>	<b>\$139 944 000</b>	<b>\$407 707 000</b>	<b>\$469 493 000</b>
% of spending, overnight person visits	100	47	13	39	N/A

Source: TSRC/ITS 2010 - 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. Spending estimates exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas).

N/A: not applicable, because Muskoka/Parry Sound is not included in the Northern Ontario totals.

Per-person, per-night spending in RTO13c, at about \$81, is appreciably higher than in RTO13a (\$59) and RTO13b (\$57). The larger share of U.S. tourists visiting RTO13c is likely driving the average spending on an overnight trip (\$577) and per-person per-night spending (\$81) well above levels for the other two regions.

Average overnight spending of \$44 per-person per-night in Muskoka/Parry Sound falls far short of per-person per-night spending in RTO13a, RTO 13b and RTO13c likely because Muskoka/Parry Sound's overnight visitors tend to use private cottages or campgrounds for their accommodation rather than hotels, motels and other forms of paid roofed lodging. At \$252, trip spending for overnight tourists in Muskoka/Parry Sound is also lower than the levels achieved in any of Northern Ontario's tourism regions.

**Table 14. Average Spending by Overnight Visitors in Northern Ontario and Regions (2010)\***

	Northern Ontario	RTO13a	RTO13b	RTO13c	RTO12 Muskoka/ Parry Sound
<b>Overnight Trips: All Purposes</b>					
Per person per night	\$67	\$59	\$57	\$81	\$44
Per trip**	\$420	\$330	\$375	\$577	\$252

Source: TSRC/ITS 2010 - 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). \*\* 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 RTO13c comes from American tourists. In contrast, RTO13a and Muskoka/Parry Sound derive 84% of their overnight spending from Canadian tourists. At 39%, RTO13b attracts a higher proportion of overnight spending from Americans than does RTO13a but a lower proportion than RTO13c at 55%. Only 12% of RTO13a's overnight spending is generated by American tourists.

Pleasure trips account for 62% of all overnight spending in Northern Ontario. In **RTO13a**, spending on overnight pleasure trips accounts for about \$248.9 million or 50% of all overnight spending in the region. Although at \$93.6 million the amount spent on overnight pleasure trips in RTO13b is smaller than in other Northern Ontario regions, this spending accounts for 67% of all overnight spending in the region. Spending on overnight pleasure trips is especially widespread in **RTO13c**, at \$308.2 million or 76% of all overnight spending. A total of 79% of all overnight spending in **Muskoka/Parry Sound** or \$372.3 million was on pleasure trips.

**Table 15. Overview of 2010 Overnight Visitor Spending in Northern Ontario and Regions\***

	Northern Ontario		RTO13a		RTO13b		RTO13c		RTO12 Muskoka/ Parry Sound	
<b>Total</b>	<b>\$1 050 895 000</b>		<b>\$493 477 000</b>		<b>\$139 944 000</b>		<b>\$407 707 000</b>		<b>\$469 493 000</b>	
<b>Place of Residence</b>										
Canada	\$686 922 000	65%	\$415 566 000	84%	\$82 744 000	59%	\$180 068 000	44%	\$400 321 000	85%
United States	\$337 436 000	32%	\$58 705 000	12%	\$54 224 000	39%	\$223 355 000	55%	\$48 164 000	10%
Overseas	\$26 537 000	3%	\$19 206 000	4%	\$2 976 000	2%	\$4 283 000	1%	\$21 008 000	4%
<b>Pleasure Trips</b>	<b>\$652 995 000</b>	<b>62%</b>	<b>\$248 868 000</b>	<b>50%</b>	<b>\$93 611 000</b>	<b>67%</b>	<b>\$308 154 000</b>	<b>76%</b>	<b>\$372 318 000</b>	<b>79%</b>

Source: TSRC/ITS 2010 - 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.

- Visitor spending in Northern Ontario benefits many sectors of the region's economy. The \$1.3 billion spent in the region in 2010 includes expenditures in restaurants and bars (\$232.8 million, or 19% of the total), accommodations (\$287.6 million, or 23%), grocery stores (\$119.3 million, or 10%), and gas stations and auto repair outlets (\$255.9 million, or 20%).
- Attractions also benefit from tourism spending (\$112.6 million), as do retail establishments selling clothing (\$120.0 million) and other items (\$42.3 million), car rental companies (\$15.6 million), local bus and taxi services (\$8.9 million), and rail, air, intercity bus and other transportation companies (\$58.1 million).

**Table 16A. 2010 Spending in Northern Ontario and Regions,\* by Category**

	Northern Ontario	RTO13a	RTO13b	RTO13c	RTO12 Muskoka/Parry Sound
<b>Total</b>	<b>\$1 252 856 000</b>	<b>\$622 159 000</b>	<b>\$164 837 000</b>	<b>\$454 137 000</b>	<b>\$513 048 000</b>
<b>Transportation (all)</b>	\$362 882 000	\$186 068 000	\$43 555 000	\$120 743 000	\$125 255 000
Vehicle Rental	\$15 551 000	\$3 921 000	\$1 016 000	\$9 909 000	\$6 155 000
Gas Stations/ Auto Repairs	\$255 807 000	\$148 371 000	\$33 185 000	\$67 546 000	\$104 288 000
Transport Fares**	\$58 079 000	\$16 811 000	\$7 243 000	\$29 798 000	\$5 694 000
Local Transport	\$8 947 000	\$6 522 000	\$547 000	\$1 791 000	\$1 481 000
<b>Restaurants and Bars</b>	\$232 779 000	\$137 508 000	\$28 951 000	\$66 320 000	\$89 927 000
<b>Grocery/Liquor Stores</b>	\$119 301 000	\$66 152 000	\$15 650 000	\$37 500 000	\$109 023 000
<b>Lodging</b>	\$287 583 000	\$122 837 000	\$37 287 000	\$127 459 000	\$107 060 000
<b>Attractions/Events</b>	\$112 555 000	\$40 093 000	\$21 168 000	\$51 294 000	\$41 088 000
<b>Clothing Retail</b>	\$120 002 000	\$66 216 000	\$15 284 000	\$38 502 000	\$26 683 000
<b>Other Spending</b>	\$42 252 000	\$13 728 000	\$4 504 000	\$24 019 000	\$21 649 000

Source: TSRC/ITS 2010 - 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 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 28% of all money spent by overnight tourists within RTO13c. This is a slightly higher proportion of all money spent by overnight tourists within each of the other regions (RTO13a, 20%; RTO13b, 23%; Muskoka/Parry Sound, 21%).
- Spending on **food and beverages in restaurants and bars** and **auto operation and repairs** represents the lowest proportion by overnight tourists in RTO13c and the highest proportion in RTO 13a.
- In contrast, the highest proportion of spending on **food and beverages in stores** is found in Muskoka/Parry Sound, likely reflecting purchases of provisions for stays in private cottages by tourists in the area.

**Table 16B: 2010 Spending in Northern Ontario and Regions,\* by Category**

	Northern Ontario	RTO13a	RTO13b	RTO13c	RTO12 Muskoka/Parry Sound
<b>Total</b>	<b>\$1 252 856 000</b>	<b>\$622 159 000</b>	<b>\$164 837 000</b>	<b>\$454 137 000</b>	<b>\$513 048 000</b>
<b>Transportation (all)</b>	29%	30%	26%	27%	24%
Vehicle Rental	1%	1%	1%	2%	1%
Gas Stations/ Auto Repairs	20%	24%	20%	15%	20%
Transport Fares**	5%	3%	4%	7%	1%
Local Transport	1%	1%	<0.5%	<0.5%	<0.5%
<b>Restaurants and Bars</b>	19%	22%	18%	15%	18%
<b>Grocery/Liquor Stores</b>	10%	11%	9%	8%	21%
<b>Lodging</b>	23%	20%	23%	28%	21%
<b>Attractions/Events</b>	9%	6%	13%	11%	8%
<b>Clothing Retail</b>	10%	11%	9%	8%	5%
<b>Other Spending</b>	3%	2%	3%	5%	4%

Source: TSRC/ITS 2019 - 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 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

- Over half of the 3.7 million overnight visitors to **Northern Ontario** in 2010 took part in outdoor activities while on their trip. The most popular outdoor activities among overnight tourists include fishing, boating, 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.<sup>15</sup> Historic sites, museums, spectator sporting events, performances and casinos also figure in the top 10:

- |                              |   |
|------------------------------|---|
| 1. Fishing                   | 6. Visit a museum or art gallery        |
| 2. Boating/canoeing/kayaking | 7. Attend a cultural performance        |
| 3. Camping                   | 8. Attend a sports event as a spectator |
| 4. Go to a nature park       | 9. Attend a fair or festival            |
| 5. Visit an historic site    | 10. Go to a casino                      |

Overnight visitors to **RTO13a** are also outdoor oriented.

**Top 5 Activities on Overnight Trips: RTO13a**

- |                                  |     |
|----------------------------------|-----|
| 1. Boating/canoeing/kayaking     | 22% |
| 2. Fishing                       | 22% |
| 3. Camping                       | 16% |
| 4. Go to a nature park           | 12% |
| 5. Visit a museum or art gallery | 8%  |

Like other parts of Northern Ontario, **RTO13b** attracts overnight tourists who engage in outdoor activities while travelling. These tourists are almost as likely to be going to nature parks as they are to be fishing.

**Top 5 Activities on Overnight Trips: RTO13b**

- |                              |     |
|------------------------------|-----|
| 1. Fishing                   | 25% |
| 2. Go to a nature park       | 20% |
| 3. Boating/canoeing/kayaking | 17% |
| 4. Camping                   | 17% |
| 5. Visit an historic site    | 14% |

Of the three Northern Ontario regions, **RTO13c** is most apt to attract overnight tourists who want to fish and go boating.

**Top 5 Activities on Overnight Trips: RTO13c**

- |                              |     |
|------------------------------|-----|
| 1. Fishing                   | 45% |
| 2. Boating/canoeing/kayaking | 34% |
| 3. Camping                   | 19% |
| 4. Go to a nature park       | 16% |
| 5. Visit an historic site    | 10% |

<sup>15</sup> 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.

Among **Muskoka/Parry Sound's** overnight tourists, boating is the most popular activity. At 49%, the participation rate in boating is almost twice that achieved by fishing and three times that for going to a nature park or camping.

#### Top 5 Activities on Overnight Trips: Muskoka/Parry Sound

1. Boating/canoeing/kayaking	49%
2. Fishing	27%
3. Go to a nature park	17%
4. Camping	16%
5. Visit an historic site	9%

**Table 17. 2010 Overnight Visits in Northern Ontario and Regions,\* by Activities on Trip**

	Northern Ontario	RTO13a	RTO13b	RTO13c	RTO12 Muskoka/Parry Sound
<b>Total Overnight Person Visits</b>	<b>3 674 000</b>	<b>2 068 000</b>	<b>573 000</b>	<b>1 162 000</b>	<b>2 814 000</b>
<b>Participate in a sport or outdoor activity (unduplicated counts)</b>	54%	45%	56%	73%	78%
Fishing	29%	22%	25%	45%	27%
Boating/canoeing/kayaking	25%	22%	17%	34%	49%
Camping	16%	16%	17%	19%	16%
Go to a nature park	13%	12%	20%	16%	17%
Golfing	3%	2%	4%	3%	7%
Hunting	2%	2%	1%	3%	1%
Downhill skiing/snowboarding	1%	<0.5%	3%	<0.5%	1%
<b>Go to attractions or cultural events (unduplicated counts)</b>	22%	23%	36%	18%	18%
Visit an historic site	9%	8%	14%	10%	9%
Visit a museum or art gallery	7%	8%	11%	6%	6%
Attend a cultural performance	5%	6%	7%	4%	2%
Attend a sports event as a spectator	4%	4%	8%	4%	2%
Attend a festival or fair	4%	4%	5%	4%	5%
Go to a casino	3%	2%	10%	2%	1%
Visit a theme or amusement park	1%	2%	1%	1%	1%
Visit a zoo, aquarium**	1%	2%	1%	1%	1%

Source: TSRC/ITS 2010 - 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. \*\* 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 (3.8 nights) in 2010. Canadians spent about 3.4 nights here, Americans spent 5.3 nights, and the comparatively small number of overseas visitors spent close to two weeks in Northern Ontario (11.7 nights).
- Over the course of 2010, visitors from all markets spent approximately 13.8 million person nights in Northern Ontario. Canadians accounted for about 10.1 million, or 73% of these nights, and Americans for a further 3.3 million. Overseas visitors spent 383 000 nights.
- The domestic market displays a particularly strong preference for staying with friends and relatives (45%) or in their own cottages (23%).<sup>16</sup> In contrast, Americans tend to stay in commercial cottages and cabins (41%) or private cottages (13%) in Northern Ontario.<sup>17</sup> Over one half of the nights spent by the overseas market in Northern Ontario were in the homes of friends and relatives (55%).

More person nights are spent in **RTO13a** than in the other Northern Ontario regions. Of the 6.9 million nights spent in RTO13a in 2010, 24% or 1.6 million were spent in paid roofed lodging such as a hotel, resort, motel, or commercial cottage. About 63% or 4.4 million nights, however, were spent in private homes or private cottages. About 11% of nights spent in the region were in campgrounds and trailer facilities.

**Table 18. Nights Spent in Northern Ontario,\* 2010**

Total Person Nights	13 794 000	
Canada	10 094 000	73%
United States	3 317 000	24%
Overseas	383 000	3%
RTO13a	6 944 000	50%
RTO13b	2 104 000	15%
RTO13c	4 746 000	34%
Source: TSRC/ITS 2010 - 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.		

As in RTO13a, **RTO13b's** overnight tourists tend to stay with friends and relatives or in their own cottages. Of the 2.1 million nights spent in the region

<sup>16</sup> Percentages are based on nights spent by tourists from each market. Source: *TSRC/ITS 2010 - Tourism in Northern Ontario Tabulations (FedNor)*. Individual market tables, Table 6. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

<sup>17</sup> Percentages are based on nights spent by tourists from each market. Source: *TSRC/ITS 2010 - Tourism in Northern Ontario Tabulations (FedNor)*. Individual market tables, Table 6. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

during 2010, 1.3 million were spent in these types of non-commercial lodging. At the same time, one half million person nights were spent in RTO13b's hotels, motels, bed and breakfast establishments, and other forms of roofed commercial lodging. Campgrounds attracted about 8% of the nights spent in the region during 2010.

Of the three Northern Ontario regions, **RTO13c** attracts the highest number of nights spent in hotels, motels, bed and breakfast establishments, and other forms of roofed commercial lodging. About 31% or 1.5 million of the region's 4.7 million person nights in 2010 were spent in these forms of accommodation. Half the nights (51%) were spent in private homes or cottages, and 10% in the region's campgrounds and trailer facilities.

Overnight tourists spent 8.8 million person nights in **Muskoka/Parry Sound** during 2010, with an average length of stay of about three nights. At 6.1 million, 69% of the nights spent in Muskoka/Parry Sound were in private homes or cottages. The area's hotels, resorts, motels, commercial cottages, and other forms of paid roofed lodging attracted about 1.6 million person nights or 19% of all nights spent in Muskoka/Parry Sound over the year. The presence of Algonquin Park within the area likely explains the popularity of campgrounds in Muskoka/Parry Sound. Over one million nights were spent in the area's camping facilities during 2010.

**Table 19. 2010 Overnight Visits in Northern Ontario and Regions,\* by Lodging Type**

	Northern Ontario		RTO13a		RTO13b		RTO13c		RTO12 Muskoka/ Parry Sound	
<b>Total person nights</b>	<b>13 794 000</b>		<b>6 944 000</b>		<b>2 104 000</b>		<b>4 746 000</b>		<b>8 789 000</b>	
<b>Average nights per person</b>	<b>3.8 nights</b>		<b>3.4 nights</b>		<b>3.7 nights</b>		<b>4.1 nights</b>		<b>3.1 nights</b>	
Roofed commercial lodging	3 616 000	26%	1 634 000	24%	505 000	24%	1 476 000	31%	1 642 000	19%
Campgrounds/trailers	1 402 000	10%	737 000	11%	175 000	8%	490 000	10%	1 003 000	11%
Private (cottages/homes)	8 128 000	59%	4 366 000	63%	1 333 000	63%	2 428 000	51%	6 087 000	69%
Other/unknown	649 000	5%	206 000	3%	91 000	4%	351 000	7%	58 000	1%
Source: TSRC/ITS 2010 - 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.										

### 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 Muskoka/Parry Sound is concentrated in the third calendar quarter. About two fifths of all overnight visits to RTO13a and RTO13b occur between July and September. Over one half of RTO13c and Muskoka/Parry Sound's overnight tourists come to the respective area during this three-month period.

**Table 20. 2010 Overnight Visits in Northern Ontario and Regions,\* by Calendar Quarter**

	Northern Ontario	RTO13a	RTO13b	RTO13c	RTO12 Muskoka/Parry Sound
<b>Total Overnight Person Visits</b>	<b>3 674 000</b>	<b>2 068 000</b>	<b>573 000</b>	<b>1 162 000</b>	<b>2 814 000</b>
<b>January–March</b>	14%	16%	18%	7%	8%
<b>April–June</b>	23%	21%	19%	28%	26%
<b>July–September</b>	44%	40%	43%	53%	54%
<b>October–December</b>	19%	23%	20%	12%	12%

Source: TSRC/ITS 2010 - 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.

As has been the case historically across most jurisdictions including Northern Ontario, overnight travel parties tend to include two adults, on average, and no children or teenagers. Adult-only two person parties predominate across the North. Muskoka/Parry Sound is, however, slightly more apt than the RTOs in Northern Ontario to appeal to travel parties that include adults and teenagers or children.

**Table 21. 2010 Overnight Visits in Northern Ontario and Regions,\* by Travel Party Composition and Size**

	Northern Ontario	RTO13a	RTO13b	RTO13c	RTO12 Muskoka/Parry Sound
<b>Total Overnight Person Visits</b>	<b>3 674 000</b>	<b>2 068 000</b>	<b>573 000</b>	<b>1 162 000</b>	<b>2 814 000</b>
<b>Party Composition</b>					
Adult only	83%	82%	84%	85%	80%
Any teens/children	17%	17%	16%	15%	20%
<b>Average Party Size</b>	<b>1.7 people</b>	<b>1.7 people</b>	<b>1.8 people</b>	<b>1.8 people</b>	<b>1.9 people</b>

Source: TSRC/ITS 2010 - 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.

## Comparisons Over Time

This section offers a comparison of tourism volume, visitor spending, and the number of nights spent in Northern Ontario from 2008 through 2010 by visitors from Canada, the United States, and other countries.<sup>18</sup> 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.

There has been relatively little change in tourism activity for Northern Ontario between 2009 and 2010. The slow emergence from the economic recession may explain why there has been a slight increase in the number of tourists from Ontario who are travelling close to home, a stable situation for those coming from the United States and a slight decline in visitors from overseas countries.

- At 6.3 million person visits, same-day excursions and overnight visits in Northern Ontario during 2010 increased slightly from 6.1 million in 2009.
- Visits to the region by Americans held steady over the year at about 1 million in both 2009 and 2010.
- Consistent with the slight increase in person visits, total tourism spending in Northern Ontario remains almost unchanged at about \$1.253 billion in 2010 from \$1.237 billion in 2009.
- While a small contributor to tourism in Northern Ontario, the overseas market experienced a slight decline over the year, down by 8%, from 37 000 in 2009 to 34 000 in 2010.
- The number of nights spent by Canadians in Northern Ontario increased slightly over the year, from 9.5 million to 10.1 million.

Tourism activity in Ontario as a whole also remained relatively stable between 2009 and 2010. At the provincial level, person visits increased by about two percent. Northern Ontario contributed about 6% of all tourism activity in the province in 2009 and 2010.

---

<sup>18</sup> FedNor commissioned the re-tabulation of the TSRC and ITS using Ontario's new tourism regions for reference year 2008. Thus, comparisons are provided only for 2008 onward. It should be noted that MTCS has adopted a policy of assigning Census Divisions, RTOs and Census Metropolitan Areas to records in the TSRC file that Statistics Canada had labelled as *unknown*. Figures in this report for 2008 and 2009 do *not* include these re-assigned records whereas figures for 2010 do include them. A review of the impacts of the Ministry's policy on 2009 domestic tourism estimates suggests that overnight tourism volume is approximately one per cent higher and tourism spending is less than one per cent higher as a result of assigning *unknown* locations to locations in Northern Ontario. Hence, increases between 2009 and 2010 in the one per cent range are likely *methodological artefacts* rather than indications of behavioural changes in domestic tourism volume and/or spending.

**Table 22. Volume and Value of Tourism in Northern Ontario in 2008, 2009 and 2010\***

	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>Changes 2009 to 2010</b>
<b>Total Person Visits**</b>	<b>6 108 000</b>	<b>6 104 000</b>	<b>6 331 000</b>	<b>4%</b>
Canada	4 960 000	5 049 000	5 294 000	5%
Ontario	4 455 000	4 560 000	4 741 000	4%
Other Canada	505 000	489 000	553 000	13%
United States	1 100 000	1 018 000	1 002 000	-2%
Overseas	47 000	37 000	34 000	-8%
Overnight Person Visits	3 480 000	3 457 000	3 674 000	6%
Visitor Spending	\$1 245 921 000	\$1 236 862 000	\$1 252 856 000	1%
By Canadians	\$858 102 000	\$856 620 000	\$868 131 000	1%
Person Nights	13 555 000	13 171 000	13 794 000	5%
By Canadians	9 691 000	9 536 000	10 094 000	6%

Sources: *TSRC/ITS 2008, 2009 and 2010 Harmonized - Tourism in Northern (FedNor)*. Northern Ontario tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. See footnote 17 for information on methodology changes. \*All estimates are rounded to the nearest thousand. \*\*Same-day and overnight visits in Northern Ontario.

N/A: not available

## APPENDIX

### ***MTCS Glossary: Economic Impact Terms***

The following is a partial copy of MTCS'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 2007 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.

## **Notes**

The Ontario Ministry of Tourism, Culture and Sport made census division assignments to a few records in the 2009 TSRC Pooled File. These records had visits in Northern Ontario but Statistics Canada could not identify the census division associated with the visit in a northern tourism region. Hence, the records appear with an assigned tourism region but the census division is "unknown". The changes made by the MTCS are expected to have minimal impact on estimates of volume and value since they represent approximately one third of one percent of all visits in the three northern tourism regions (about 28 out of 8,296 visit records). These adjustments were made subsequent to the release of the data file by Statistics Canada and were not performed in tabulations associated with this project.

## Northern Ontario Tourism Regions

Northern Ontario			
13a	13b	13c	12 (Muskoka/Parry Sound)
<b>Cochrane District</b> City of Timmins Town of Cochrane Town of Iroquois Falls  Town of Kapuskasing  Town of Moosonee Town of Smooth Rock Falls Township of Black River Matheson Township of Fauquier-Strickland Township of Moonbeam  <b>Greater Sudbury</b> <b>Manitoulin District:</b> Town of Gore Bay Town of NorthEastern Manitoulin and The Islands Township of Assiginack  Municipality of Billings  Township of Burpee & Mills Township of Central Manitoulin Township of Cockburn Island Municipality of Gordon/Barrie Island Township of Tehkummah <b>Nipissing District:</b> City of North Bay Municipality of Temagami  Municipality of West Nipissing  Town of Mattawa  Township of Bonfield Township of Calvin Township of Chisholm Township of East Ferris Township of Mattawan  Township of Papineau-Cameron <b>Parry Sound District:</b> Municipality of Callander (formerly the Twp. of North Himsworth) Municipality of Powassan Township of Nipissing <b>Sudbury District:</b>  Municipality of French River Municipality of Killarney Municipality of Markstay-Warren	<b>Algoma District:</b> City of Elliot Lake City of Sault Ste Marie  Municipality of Huron Shores  Municipality of Wawa Town of Blind River Town of Bruce Mines  Town of Thessalon  Township of Dubreuilville  Township of Hilton Township of Hornepayne Township of Jocelyn Township of Johnson  Township of Laird Township of Macdonald, Meredith & Aberdeen Additional Township of Plummer Additional Township of Prince  Township of Spanish Township of St. Joseph Island Township of Tarbutt & Tarbutt Additional Township of The North Shore Township of White River Village of Hilton Beach <b>Cochrane District:</b>  Town of Hearst  Township of Mattice-Val Cote  Township of Opasatika Township of Val Rita-Harty	<b>Kenora District:</b> City of Dryden City of Kenora Municipality of Red Lake Municipality of Sioux Lookout Township of Ear Falls Township of Ignace  Township of Machin Township of Pickle Lake Township of Sioux Narrows - Nestor Falls <b>Rainy River District:</b> Town of Fort Frances Town of Rainy River  Township of Alberton  Township of Atikokan  Township of Chapple Township of Dawson  Township of Emo Township of La Vallee Township of Lake of the Woods Township of Morley <b>Thunder Bay District:</b> City of Thunder Bay Municipality of Greenstone  Municipality of Neebing Municipality of Oliver Paipoonge Town of Marathon Township of Conmee Township of Dorion Township of Gillies Township of Manitouwadge  Township of Nipigon Township of O'Connor  Township of Red Rock Township of Schreiber Municipality of Shuniah Township of Terrace Bay	<b>Muskoka District:</b> Town of Bracebridge Town of Gravenhurst Town of Huntsville  Township of Georgian Bay  Township of Lake of Bays Township of Muskoka Lakes <b>Nipissing District:</b>  Township of South Algonquin  <b>Parry Sound District:</b>  Municipality of Magnetawan Municipality of Whitestone Town of Kearney Town of Parry Sound  Township of Armour  Township of Carling  Township of Joly Township of Machar  Township of McDougall Township of McKellar  Township of McMurrich/Monteith Township of Perry Township of Ryerson Township of Seguin  Township of Strong  Township of The Archipelago  Village of Burk's Falls Village of South River Village of Sundridge Town of Arnprior Town of Deep River  Town of Laurentian Hills  Town of Petawawa Town of Renfrew  Township of Admaston-Bromley Township of Bonnechere Valley Township of Brudenell, Lyndoch and Raglan Township of Greater Madawaska Township of Killaloe, Hagarty & Richards Township of Head, Clara & Maria

**Northern Ontario****13a**

Municipality of St. Charles  
 Town of Espanola  
 Township of Baldwin  
 Township of Chapleau  
 Township of Nairn & Hyman  
 Township of Sables Spanish  
 Rivers

**Temiskaming District:**

City of Temiskaming Shores  
 Municipality of Charlton and  
 Dack  
 Town of Cobalt  
 Town of Englehart  
 Town of Kirkland Lake  
 Town of Latchford  
 Township of Armstrong  
 Township of Brethour  
 Township of Casey  
 Township of Chamberlain  
 Township of Coleman  
 Township of Ewanturel  
 Township of Gauthier  
 Township of Harley  
 Township of Harris  
 Township of Hilliard  
 Township of Hudson  
 Township of James  
 Township of Kerns  
 Township of Larder Lake  
 Township of Matachewan  
 Township of McGarry  
 Village of Thornloe

**13b****13c****12 (Muskoka/Parry Sound)**

Township of Horton  
 Township of Laurentian Valley  
 Township of Madawaska Valley  
 Township of McNab-Braeside  
 Township of North Algona-Wilberforce  
 Township of Whitewater Region