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Marketing and Planning

Tourism Volume, Value and Characteristics in Northern Ontario



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Domestic and International Travel Surveys (2007)

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Research Resolutions & Consulting Ltd.

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Table of Contents

I.	EXECUTIVE SUMMARY.....	6
II.	YEAR-TO-YEAR COMPARISONS.....	12
III.	TOURISM IN NORTHERN ONTARIO IN 2007.....	13
A.	OVERVIEW OF VISITOR VOLUME AND ORIGIN	13
B.	OVERVIEW OF VISITOR SPENDING	17
C.	SEASON OF VISIT	20
D.	MAIN PURPOSE OF TRIP, LENGTH OF STAY AND LODGING	22
E.	ACTIVITIES ON OVERNIGHT TRIPS.....	25
IV.	VISITOR SPENDING AND ECONOMIC IMPACT IN NORTHERN ONTARIO. 29	
F.	DISTRIBUTION OF VISITOR SPENDING	29
G.	AVERAGE VISITOR SPENDING IN NORTHERN ONTARIO	29
H.	ECONOMIC IMPACT OF VISITOR SPENDING	31
V.	NORTHERN ONTARIO'S THREE TOURISM REGIONS.....	34
I.	CHANGES IN NORTHERN ONTARIO'S THREE TOURISM REGIONS, 2006 TO 2007	34
J.	OVERVIEW OF VISITOR VOLUME AND SPENDING IN NORTHERN ONTARIO'S TOURISM REGIONS IN 2007	35
K.	PLACE OF RESIDENCE OF OVERNIGHT VISITORS TO NORTHERN ONTARIO'S TOURISM REGIONS	36
L.	LENGTH OF OVERNIGHT TRIP IN NORTHERN ONTARIO'S TOURISM REGIONS	37
M.	SEASON OF VISITS IN NORTHERN ONTARIO'S TOURISM REGIONS.....	38
N.	MAIN PURPOSE OF TRIP FOR VISITS IN NORTHERN ONTARIO'S TOURISM REGIONS....	38
O.	NIGHTS AND LODGING IN NORTHERN ONTARIO'S TOURISM REGIONS.....	39
P.	ACTIVITIES ON TRIPS BY OVERNIGHT VISITORS TO NORTHERN ONTARIO TOURISM REGIONS	39
VI.	TOURISM ESTABLISHMENTS IN NORTHERN ONTARIO, 2007.....	41
VII.	TOURISM IN "NORTH 2"	43
Q.	INTRODUCTION	43
R.	VOLUME OF SAME-DAY AND OVERNIGHT PERSON VISITS IN NORTH 2	43
S.	VISITOR SPENDING IN NORTH 2	44
T.	PLACE OF RESIDENCE OF OVERNIGHT VISITORS IN NORTH 2.....	45
U.	SEASON OF VISITS IN NORTH 2	46
V.	MAIN PURPOSE OF TRIP FOR VISITS IN NORTH 2	47
W.	NIGHTS AND LODGING IN NORTH 2.....	48
X.	ACTIVITIES ON OVERNIGHT TRIPS.....	50
	APPENDIXES.....	53
Y.	METHODOLOGY	53
II.	THE TABULATION SETS AND REPORTS.....	58

III.	SUMMARY TABLES.....	59
IV.	MTOUR's ECONOMIC IMPACT OF TOURISM GLOSSARY	61

I. EXECUTIVE SUMMARY

A Note on Methodology

This report is an analysis of domestic and international tourism data from the 2007 Travel Survey of Residents of Canada (TSRC) and the International Travel Survey (ITS) conducted by Statistics Canada. Research Resolutions & Consulting Ltd. customized the survey data to reflect spending and lodging in Northern Ontario and to correspond to categories required by the Ontario Ministry of Tourism's Tourism Regional Economic Impact Model (TREIM). A brief discussion of concepts, definitions and methodology used to customize the Statistics Canada survey data that form the basis of this report is provided in Appendix I. Information about the TSRC and ITS survey procedures and outputs is available on Statistics Canada's website (www.statcan.gc.ca).

For the purpose of this report, *Northern Ontario* comprises North-Central Tourism Region 10, North-East Tourism Region 11, and North-West Tourism Region 12, as identified by the Ontario Ministry of Tourism and shown on the accompanying map. Note that North-Central excludes the Muskoka District, Algonquin Park and South Algonquin Township; these areas are discussed in Chapter VII.



VOLUME AND VALUE OF TOURISM IN NORTHERN ONTARIO, 2006 AND 2007

- Same-day excursions and overnight visits in Northern Ontario fell from about 8.2 million person visits in 2006 to 7.7 million in 2007, for a decrease of about 6% over the year.
- Tourists from the United States represented the most substantive decline, dropping from about 1.8 million visitors in 2006 to 1.5 million in 2007. The number of tourists from Ontario also declined, from 5.9 million to 5.5 million. While there were gains in tourists from other Canadian provinces and countries outside North America, the increases do not compensate for the 7% loss from the very large Ontario market.
- The decline in tourism activity in Northern Ontario does not reflect tourism activity in Ontario as a whole. Same-day and overnight tourism across the province held steady over the year, going from approximately 103.4 million person visits in 2006 to 104.8 million in 2007.

- In spite of the decline in the volume of tourists, the number of nights spent by visitors in Northern Ontario increased somewhat, from about 16.9 million in 2006 to 17.3 million in 2007.
- The overall decline in tourists, however, was felt in the amount of spending in Northern Ontario over the year. Tourists spent about \$1.4 billion in the region in 2007, about 9% less than the nearly \$1.6 billion they spent during 2006.

TOURISM IN NORTHERN ONTARIO, 2007

Volume of Tourists

- In 2007, people from Canada, the United States and other countries made 7.7 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 7.7 million person visits in Northern Ontario during 2007, three-in-five visitors (61%) or about 4.7 million stayed overnight. Same-day excursions to Northern Ontario accounted for the remaining 3 million person visits by tourists from Canada, the United States, and other countries.
- From a provincial perspective, Northern Ontario accounted for 11% of all overnight person visits in Ontario during 2007.

Place of Residence

- Canadians generate most of the tourism in Northern Ontario. Of the 3 million same-day trips in the region during 2007, almost three-in-four were made by Ontario residents; one-in-five were made by visitors from the United States.
- Canadians represent about the same proportion of overnight visits (80%) and same-day excursions (77%). Of the 4.7 million overnight person visits in Northern Ontario during 2007, Northern Ontario itself accounted for 27%, or 1.3 million visits.
- The United States accounted for 1-in-5 or 19% of overnight visits in Northern Ontario in 2007. All other countries (“overseas”) represented only 1-in-100 (1%).
- The Toronto Census Metropolitan Area (CMA)¹ — that is, Toronto — is the largest urban feeder market for Northern Ontario. This CMA accounted for about 868 000 overnight visitors or close to one fifth of all overnight tourism to Northern Ontario in

¹ All Canadian cities mentioned in this report are defined by their CMA boundaries.

2007. Of Toronto's overnight visitors, about two thirds (562 000) were on pleasure trips.

- Winnipeg is the next-largest source of overnight visitors from Canadian urban markets to Northern Ontario, contributing approximately 221 000 or 5% of overnight tourists in 2007. Ottawa-Gatineau is also a key market for overnight tourists, contributing 148 000 overnight person visits to Northern Ontario in 2007.
- The province of Quebec sent about 74 000 overnight visitors to Northern Ontario, representing 2% of all overnight visitors during 2007.
- Most Americans who take overnight trips to Northern Ontario live in states located along the Canada–U.S. border. Specifically, of the 877 000 overnight visits by Americans to Northern Ontario, 602 000 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 (46 000 visitors), dominated by overnight visitors from the United Kingdom (14 000) and Germany (9 000).

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 (65%). Northern Ontario visitors on overnight pleasure trips are also particularly heavily concentrated in the July through September calendar quarter (56%).

Main Purpose of Trip

- More than half of all overnight trips to Northern Ontario were made for the primary purpose of pleasure. Approximately one third of the trips were made to visit friends and relatives, and the balance were made for business (4%) or for some other purpose (4%). These estimates clearly suggest that the North is primarily a pleasure destination for tourists.

Length of Stay and Lodging in Northern Ontario

- On average, overnight visitors to Northern Ontario spent close to four nights in the region (3.7 nights) in 2007. Canadians spent about 3.3 nights here, Americans spent 5.1 nights, and the comparatively small number of overseas visitors spent almost a full week in Northern Ontario (6.4 nights).
- Over the course of 2007, visitors from all markets spent approximately 17.3 million person nights in Northern Ontario. Canadians spent about 12.4 million, or 72% of

these nights, and Americans spent a further 4.5 million. Overseas visitors spent fewer than 500 000.

- The domestic market displays a particularly strong preference for staying with friends and relatives (38% in 2007) or in their own cottages (21%), whereas Americans tend to stay in commercial cottages and cabins in Northern Ontario (47%). More than two fifths of the nights spent by the overseas market in Northern Ontario were in private homes — either the homes of friends and relatives (37%) or much less commonly, in private cottages (7%).

Activities on the Trip

- Three fifths of the 4.7 million overnight visitors to Northern Ontario in 2007 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.
- The top 10 activities of overnight tourists in Northern Ontario are clearly associated with the outdoor experiences the region offers. Historic sites, museums, performances, spectator sporting events and festivals also figure in the top 10:

- | | |
|---|----------------------------------|
| 1. Fishing | 6. Visit a museum or art gallery |
| 2. Boating/canoeing/kayaking | 7. Golfing |
| 3. Camping/nights in campground/RV park | 8. Attend a cultural performance |
| 4. Visit a national or provincial nature park | 9. Attend a sports event |
| 5. Visit an historic site | 10. Attend a festival/fair |

Spending by Visitors in Northern Ontario

- In 2007, the 7.7 million visitors from Canada, the United States and other countries who took same-day or overnight trips in Northern Ontario spent \$1.4 billion on tourism goods and services. This spending represents about 9% of the \$16.3 billion spent on tourism in the province during 2007 and is slightly higher than the proportion of all trips in the province captured by the North (7%). Northern Ontario accounts for about the same proportion of total overnight visitor spending (10%) as it represents of total overnight visitors in Ontario in 2007 (11%).
- Of the \$12.0 billion in spending on overnight visits in Ontario as a whole, Northern Ontario accounts for 10% or about \$1.2 billion. Because of the large distances involved for many visitors travelling to and within Northern Ontario, a noticeably higher proportion of visitor spending in Northern Ontario is associated with overnight trips (83%) than is the case in Southern Ontario (73%).
- Canadians generate the largest share of visitor spending in Northern Ontario. Of the \$247.6 million in spending on same-day visits to the region, 87% or about \$215.31 was by Canadians. Of the \$1.2 billion in visitor spending on overnight trips, 62% or about \$743.3 million was spent by Canadians.

- Visitor spending in Northern Ontario benefits many sectors of the region's economy. The \$1.4 billion spent in the region in 2007 include expenditures in restaurants and bars (\$238.6 million, or 17% of the total), accommodations (\$331.4 million, or 23%), grocery stores (\$153.8 million, or 11%), and gas stations and auto repair outlets (\$291.2 million, or 20%).
- Attractions also benefit from tourism spending (\$122.1 million in 2007) as do retail establishments selling clothing (\$152 million) and other items (\$52.5 million), car rental companies (\$15 million), local bus and taxi services (\$10 million), and rail, air, intercity bus and other transportation companies (\$77.7 million).
- On a per-person per-night basis (normalized for the number of people in the travel party and the duration of the stay in Northern Ontario), Americans spent at double the rate as did Canadians: \$102 versus \$49 per-person per-night.²
- At \$102 per-person per-night, Americans also spent appreciably more than did their overseas counterparts (\$60 per-person per-night).

Economic Impact of Tourism Spending in Northern Ontario

Gross Domestic Product (GDP)

- Tourism spending in Northern Ontario in 2007 generated about \$645.6 million in direct economic activity (that is, gross domestic product or GDP)³. With an additional \$278.2 million in indirect and induced GDP, tourism spending generated a total of about \$924 million in GDP retained by Northern Ontario. Other parts of Ontario benefited from about \$74.3 million in GDP (direct, indirect, and induced) from visitor spending in the North. When combined, the province-wide GDP contribution from tourism in Northern Ontario reached almost \$1 billion in 2007.

Jobs, Wages and Salaries

- Approximately 12 400 direct jobs and an additional 3 968 indirect and induced jobs in Northern Ontario were generated as a result of visitor spending in 2007. These jobs include part- and full-time positions on both annual and seasonal bases. 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 17 100 across the province (including the jobs retained in Northern Ontario).
- Of all the jobs created because of tourism in Northern Ontario, the region retained nine out of every 10 (92%). The 17 100 jobs generated \$613.5 million in wages and

² Per-person per-night spending takes into account the number of people in the travel party and the duration of the stay in Northern Ontario.

³ For definitions of economic terms and ideas, see Appendix IV, MTOUR's Economic Impact of Tourism Glossary.

salaries province-wide, with most of this amount retained by Northern Ontario (\$565.4 million direct, indirect, and induced, or 92%).

Taxes

- All levels of government benefit from tourism spending in Northern Ontario. In 2007, tourism spending generated \$305.1 million in federal government taxes, a further \$228.2 million in provincial taxes and more than \$6.1 million in Ontario municipal taxes (direct, indirect, and induced). These estimates include taxes that were retained in Northern Ontario, specifically \$183.1 million in direct federal taxes, \$165.6 million in direct provincial taxes, and \$1.2 million in direct municipal taxes.

II. YEAR-TO-YEAR COMPARISONS

This section offers a comparison of tourism volume, visitor spending and the number of nights spent in Northern Ontario in 2006 and 2007 by visitors from Canada, the United States, and other countries.⁴

Same-day excursions and overnight visits in Northern Ontario fell about 6% over the year, from about 8.2 million person visits in 2006 to 7.7 million in 2007. The most substantive declines were evident for the U.S. market, which dropped from about 1.8 million tourists in 2006 to 1.5 million in 2007, and the Ontario market, which fell from 5.9 million to 5.5 million. While there were gains in tourists from other Canadian provinces and countries outside North America in 2007, they do not compensate for the 14% loss from U.S. visitors and 7% loss from the very large Ontario market.

Comparison of Key Estimates: Northern Ontario, 2006 and 2007*			
	2006	2007	Change from 2006 to 2007
Total Person Visits**	8 201 000	7 683 000	-6%
Canada	6 351 000	6 071 000	-4%
Ontario	5 859 000	5 461 000	-7%
Other Canada	492 000	610 000	24%
United States	1 786 000	1 540 000	-14%
Overseas	65 000	72 000	12%
Visitor Spending	\$1 584 965 000	\$1 444 236 000	-9%
Person Nights	16 857 000	17 330 000	3%

Sources: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) 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. **Same-day and overnight visits in Northern Ontario.

Note that the decline in tourism activity in Northern Ontario between 2006 and 2007 does not reflect tourism activity in Ontario as a whole. Same-day and overnight tourism across the province held steady over the year, rising from approximately 103.4 million person visits in 2006 to 104.8 million in 2007.

In spite of the decline in the volume of tourists, the number of nights spent by visitors in Northern Ontario increased somewhat, from about 16.9 million in 2006 to 17.3 million in 2007. The overall decline in tourists did, however, make itself felt in the amount of spending in Northern Ontario. Tourists spent about \$1.4 billion in the region in 2007, or about 9% less than the nearly \$1.6 billion they spent during 2006.

⁴ Statistics Canada made such substantive changes in the Canadian Travel Survey (CTS) after 2004 that domestic travel information between 2004 and subsequent years cannot be compared. Hence, this report provides year-to-year comparisons only for the first complete year of tourism information based on the new domestic survey and corresponding years for the International Travel Survey (2006 to 2007).

III. TOURISM IN NORTHERN ONTARIO IN 2007

A. Overview of Visitor Volume and Origin

Same-day and Overnight Visits

Northern Ontario represents approximately 90% of Ontario's land mass. Much of the area's 90 000 hectares is remote and undeveloped, making it an attractive destination for outdoor enthusiasts including sightseers, anglers, hunters and cottagers. The area also includes a wide variety of businesses and urban-based cultural attractions and events that attract leisure and business tourists.

In 2007, approximately 7.7 million people from Canada, the United States and other countries took same-day or overnight trips⁵ in Northern Ontario, representing about 7% of all tourism in Ontario over the year. These estimates include people travelling for all purposes including pleasure, visiting friends and relatives, and business.

Most tourists travelling in Northern Ontario spent at least one night in the region. Of the 7.7 million person visits in Northern Ontario during 2007, 61% or about 4.7 million were overnight trips. The remaining 3 million person visits by tourists from Canada, the United States and other countries were same-day excursions in Northern Ontario.

From a provincial perspective, Northern Ontario accounted for 11% of all overnight person visits in Ontario during 2007.

Northern Ontario's Share of Tourism in Ontario, 2007		
	Total Person Visits	Overnight Person Visits
Total Ontario	104 790 000	42 981 000
Domestic	87 531 000	34 444 000
United States	15 063 000	6 566 000
Overseas	2 195 000	1 971 000
Northern Ontario	7 683 000	4 712 000
Domestic	6 071 000	3 774 000
United States	1 540 000	877 000
Overseas	72 000	61 000
Northern Ontario as Proportion of Total Ontario		
All Markets	7%	11%
Domestic	7%	11%
United States	10%	13%
Overseas	3%	3%
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 7.		

⁵ Same-day domestic trips are non-routine trips of at least 40 kilometres one-way from home. No distance minimum is imposed on overnight trips or on same-day trips for international travellers (from the United States or other countries).

Most visitors in Northern Ontario spend at least one night in the region (61%). In contrast, most visitors in Southern Ontario are on same-day trips (60%). The high proportion of overnight visitors in Northern Ontario is likely due to the large distances involved in moving from place to place in the North, requiring many travellers to spend at least one night away from home.

Volume of Same-day and Overnight Person Visits in Northern Ontario and Southern Ontario, 2007				
	Northern Ontario		Southern Ontario	
Total Person Visits	7 683 000		97 582 000	
Same-Day	2 971 000	39%	58 922 000	60%
Overnight	4 712 000	61%	38 660 000	40%
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 7.				

Same-day and Overnight Visits, by Major Markets

Of the 3 million same-day trips in Northern Ontario during 2007, 75% were made by Ontario residents. Visitors from the United States accounted for an additional 20% of same-day visits.

Canadians represent the highest proportion of overnight visits (80%). Of the 4.7 million overnight person visits in Northern Ontario during 2007, Northern Ontarians themselves accounted for 1.3 million or more than 27% of total overnight visits.

The United States accounted for approximately 19% of overnight visits in Northern Ontario in 2007, while the total of all other countries (overseas) represented only 1%.

Northern Ontario attracts a slightly higher proportion of U.S. overnight visitors than does Southern Ontario (19% versus 15%), but a lower proportion of overnight visitors from overseas (1% versus 5%).

Volume of Same-day and Overnight Person Visits in Northern Ontario and Southern Ontario, by Origin, 2007				
	Northern Ontario		Southern Ontario	
Person Visits	Same-Day	Overnight	Same-Day	Overnight
Total	2 971 000	4 712 000	58 922 000	38 660 000
Domestic	2 296 000	3 774 000	50 834 000	30 903 000
United States	664 000	877 000	7 872 000	5 797 000
Overseas	11 000	61 000	216 000	1 960 000
Share by Origin				
Domestic	77%	80%	86%	80%
United States	22%	19%	13%	15%
Overseas	<0.5%	1%	<0.5%	5%
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.				

Major Overnight Markets for Northern Ontario, by Origin

Northern Ontario Residents Travelling in the North

Of the 4.7 million overnight person visits in Northern Ontario during 2007, Northern Ontario itself accounted for 27%, or 1.3 million. The North-East Tourism Region provides the largest share — 15% — of overnight visitors who both live in and travel within Northern Ontario. This should come as no surprise, given that three population centres that spawn tourists for the region are located in the North-East: Sudbury, Sault Ste. Marie and Timmins. The North-West Tourism Region, including Thunder Bay, accounted for about 8% of all overnight visitors in Northern Ontario, while North-Central accounted for approximately 4%.

Other Visitors Travelling to the North

A major urban feeder market for the North, Toronto CMA, accounted for close to one fifth of all overnight tourism to Northern Ontario in 2007; that is, about 868 000 overnight visitors. Of these visitors, about two thirds (562 000) were on pleasure trips. Other overnight visitors from Toronto went to Northern Ontario to visit friends and relatives, for business, or for other purposes.

Contributing 221 000 (5%) overnight tourists in 2007, Winnipeg CMA was the second-largest contributor of overnight visitors from Canadian urban markets to Northern Ontario. Like Torontonians, most Winnipeggers on overnight trips to Northern Ontario travelled for pleasure purposes (164 000), including to visit private cottages in Northern Ontario.

Ottawa-Gatineau CMA is also a key urban market, providing 148 000 overnight person visits to Northern Ontario in 2007.

The province of Quebec represented less than 2% (about 74 000) of all overnight visitors in the region during 2007. All other Canadian markets — excluding residents of Ontario and its neighbouring provinces — represented about 3% of overnight visitors to Northern Ontario.

The U.S. market produced 877 000 visitors, representing 19% of overnight travel in Northern Ontario. Most of these Americans — 602 000 — live in traditional border markets and represent 13% of all overnight visits. While most U.S. visitors come from Michigan, Minnesota, and Wisconsin, other states that contributed at least 1% of total overnight visitors each are Illinois, Ohio, Iowa, New York, Massachusetts, and Indiana.

U.S. overnight tourists to Northern Ontario from states other than those mentioned represented 6% of overnight trips to the region. Of these remaining states, none contributed more than 25 000 visitors.

Overseas visitors to Northern Ontario are primarily from Europe. Of the 46 000 European visitors in 2007, 14 000 came from the United Kingdom, 9 000 from Germany, and 8 000 from the Netherlands.

Data for visitor volume from key markets in 2007 are summarized in the table below. Markets not shown represent a variety of origins that contribute comparatively small numbers of overnight tourists to Northern Ontario.

Overnight Person Visits in Northern Ontario, by Major Origin Market, 2007		
	Overnight Visits	
Overnight Person Visits	4 712 000*	
Place of Residence		
CANADA	3 774 000	80%
Ontario	3 305 000	70%
Quebec	74 000	2%
Manitoba	272 000	6%
Northern Ontario (Total North 1)	1 272 000	27%
North-East	712 000	15%
North-West	369 000	8%
North-Central	191 000	4%
Major Canadian Cities (Census Metropolitan Areas)		
Toronto	868 000	18%
Winnipeg	221 000	5%
Ottawa-Gatineau	148 000	3%
All Other Canada**	123 000	3%
U.S. Total	877 000	19%
Border States	602 000	13%
Minnesota	184 000	4%
Michigan	145 000	3%
Wisconsin	100 000	2%
Other Border States (Ohio, Illinois, New York, Pennsylvania)	174 000	4%
All Other States***	275 000	6%
OVERSEAS	61 000	1%
Europe (Total)	46 000	1%
United Kingdom	14 000	<0.5%
Germany	9 000	<0.5%
Netherlands	8 000	<0.5%
Asia (Total)	6 000	<0.5%
All Other Countries/Regions	9 000	<0.5%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd Table 1.

*All figures are rounded to nearest thousand. **All Other Canada is the sum of Canadian residents who live in provinces other than Ontario, Manitoba and Quebec. ***All Other States include Americans who live in states other than those listed in the table.

Note: Totals may not add to 100% due to multiple counting of provincial, regional and CMA visitors and rounding.

B. Overview of Visitor Spending

Same-day and Overnight Visit Spending

In 2007, the 7.7 million visitors from Canada, the United States and other countries who took same-day or overnight trips in Northern Ontario spent \$1.4 billion on tourism goods and services.⁶ This spending represents about 9% of the \$16.3 billion spent on tourism in the province during 2007, and is slightly higher than the proportion of all trips in the province captured by the North (7%). That year, Northern Ontario accounted for about the same proportion of total overnight visitor spending (10%) as it represented total overnight visitors in Ontario (11%).

Northern Ontario's Share of Visitor Spending in Ontario, 2007		
	Visitor Spending	Overnight Visitor Spending
Total Ontario	\$16 284 385 000	\$11 958 915 000
Domestic	\$11 161 234 000	\$7 391 943 000
United States	\$3 314 293 000	\$2 768 385 000
Overseas	\$1 808 859 000	\$1 798 586 000
Northern Ontario	\$1 444 236 000	\$1 196 675 000
Domestic	\$958 369 000	\$743 277 000
United States	\$459 320 000	\$427 232 000
Overseas	\$26 548 000	\$26 165 000
Northern Ontario as Proportion of Total Ontario		
All Markets	9%	10%
Domestic	9%	10%
United States	14%	15%
Overseas	1%	1%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 1.

Of the \$1.4 billion spent in Northern Ontario during 2007, \$248 million was spent on same-day visits in the area. The balance, \$1.2 billion, was spent on overnight stays in Northern Ontario.

Not surprisingly, visitor spending in Southern Ontario far outstrips spending in Northern Ontario because the volume of visitors in the Southern portion of the province is appreciably higher than is the case in the North. Of the \$16.3 billion spent by all visitors in Ontario during 2007, an estimated 9% or \$1.4 billion was spent in Northern Ontario and the remaining \$15.7 billion was spent in Southern Ontario.⁷

⁶ Same-day domestic trips are non-routine trips of at least 40 kilometres one-way from home. No distance minimum is imposed on overnight trips or on same-day trips for international travellers (U.S. or other countries).

⁷ Since some spending in Ontario cannot be assigned to a location in the North or South but a visit to the province as a whole is known to have occurred, figures for visitor spending in Northern and Southern Ontario will not add to total visitor spending in the province.

Same-day and Overnight Visitor Spending in Northern Ontario and Southern Ontario, 2007				
	Northern Ontario		Southern Ontario	
Total Visitor Spending	\$1 444 236 000		\$15 725 180 000	
Same-Day	\$247 562 000	17%	\$4 205 375 000	27%
Overnight	\$1 196 675 000	83%	\$11 519 805 000	73%
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.				

Of the nearly \$12.0 billion in 2007 spending on overnight visits in Ontario as a whole, Northern Ontario accounted for 10%, about \$1.2 billion. Because of the large distances involved for many visitors travelling to and within Northern Ontario, a noticeably higher proportion of visitor spending in Northern Ontario is associated with overnight trips (83%) than is the case in Southern Ontario (73%).

Same-day and Overnight Visitor Spending, by Major Markets

Canadians generate most of the visitor spending in Northern Ontario. Of the \$247.6 million in spending on same-day visits to the region, 87% was by Canadians. Of the \$1.2 billion in visitor spending on overnight trips, about 62% or \$743.3 million was a result of Canadians travelling to or within Northern Ontario.

Cross-border excursions by Americans from Michigan, Minnesota, and Wisconsin, along with other same-day visits to Northern Ontario, accounted for approximately 11% of all spending on same-day visits to the region in 2007. Americans represent an appreciably larger proportion of overnight tourism spending in Northern Ontario, reaching \$427.2 million, representing 36% of all overnight spending in Northern Ontario in 2007.

Overseas tourists, whether on same-day excursions⁸ or overnight trips to Northern Ontario, spend appreciably less money than do Canadians or Americans travelling within the region. Their comparatively low spending is a result of their smaller volume relative to Americans or Canadians. Also, many overnight overseas visitors rely on their families and friends to provide accommodation and meals.⁹ The 2007 day-excursion market from overseas contributed about \$382 000 in visitor spending to Northern Ontario, whereas the overnight overseas market contributed more than \$26 million (2% of all overnight spending).

Compared to the southern portion of the province, Northern Ontario obtains a slightly higher proportion of total spending on overnight trips from the domestic market (62% in Northern Ontario versus 57% in Southern Ontario). Northern Ontario also receives an

⁸ For the most part, same-day visits by overseas visitors are day excursions on trips with nights spent in other Canadian destinations.

⁹ Of the 61 000 overnight trips by overseas visitors to Northern Ontario in 2007, 32 000 had a main purpose of visiting friends and relatives. Of the 390 000 person nights spent in the region over the year by overseas visitors, 169 000 (43%) were spent in private cottages or the homes of friends and relatives (*ITS 2007 - Overseas Residents - Tourism in Northern Ontario (FedNor)*. North 1 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd., Table 6.

appreciably higher share of overnight spending from U.S. overnight visitors (36% versus 21%). Conversely, Northern Ontario obtains a much lower proportion of overnight spending from overseas visitors (2%) than does Southern Ontario (22%).

Same-day and Overnight Visitor Spending in Northern Ontario and Southern Ontario, by Origin, 2007				
	Northern Ontario		Southern Ontario	
Visitor Spending	Same-Day	Overnight	Same-Day	Overnight
Total	\$247 562 000	\$1 196 675 000	\$4 205 375 000	\$11 519 805 000
Domestic	\$215 092 000	\$743 277 000	\$3 535 963 000	\$6 543 837 000
United States	\$32 088 000	\$427 232 000	\$573 485 000	\$2 515 421 000
Overseas	\$382 000	\$26 165 000	\$95 927 000	\$2 516 421 000
Percent by Origin				
Domestic	87%	62%	84%	57%
United States	13%	36%	14%	21%
Overseas	<0.5%	2%	2%	22%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 Note: Figures may not add to total or 100% because of rounding.

Visitor Spending in Northern Ontario, by Major Overnight Markets (Origin)

Of the \$1.2 billion spent by overnight visitors in Northern Ontario during 2007, residents of Northern Ontario spent \$212.4 million (18%). Thus, Northern Ontario residents travelling within Northern Ontario represent more than one quarter of all overnight domestic spending in the region, leaving approximately \$531 million in visitor spending coming into Northern Ontario by Canadians who do not live in the region.

Intra-regional overnight visitor spending in Northern Ontario is led by visitors from the North-East, with \$119.1 million or 10% of total overnight spending in 2007, followed by those from the North-West Tourism Region, with \$65.5 million or about 5%. The North-Central Tourism Region generates appreciably less tourism spending on overnight trips in Northern Ontario: \$27.7 million, or 2%.

The Toronto CMA accounted for about \$162 million or 14% of all overnight tourism spending in Northern Ontario in 2007.

As noted, the U.S. market represented 36% of overnight visitor spending in Northern Ontario. Most of this spending — about \$280 million — comes from Americans taking overnight trips from one of Ontario's traditional border markets, primarily Minnesota, Michigan, and Wisconsin. Visitors from Illinois and Ohio, however, also spent considerable amounts of money on overnight trips to Northern Ontario. As well, many other parts of the United States generated overnight visitors to, and spending in, Northern Ontario. These other states accounted for more than \$139 million in spending, which is 12% of all overnight spending in Northern Ontario.

Europeans accounted for more than \$18 million of the \$26 million spent by overseas overnight visitors to Northern Ontario. Visitor spending from the United Kingdom

(\$6 million), the Netherlands (\$3.6 million) and Germany (\$3.4 million) are the major levels of overnight visitor spending from countries other than the United States and Canada. Asian visitors spent nearly \$2.5 million in 2007. Countries outside Europe and Asia brought about \$5.2 million in tourism spending to Northern Ontario on their overnight trips to the area.

Overnight Visitor Spending in Northern Ontario, by Major Origin Market, 2007		
	Overnight Visitor Spending	
Total Overnight Visitor Spending	\$1 196 675 000*	
CANADA TOTAL	\$743 277 000	62%
Ontario	\$620 690 000	52%
Quebec	\$19 441 000	2%
Manitoba	\$40 591 000	3%
Northern Ontario (Total North 1)	\$212 361 000	18%
North-East	\$119 119 000	10%
North-West	\$65 537 000	5%
North-Central	\$27 705 000	2%
Major Canadian Cities (Census Metropolitan Areas)		
Toronto	\$161 677 000	14%
Winnipeg	\$30 092 000	3%
Ottawa-Gatineau	\$40 263 000	3%
All Other Canada**	\$62 255 000	5%
UNITED STATES TOTAL	\$427 232 000	36%
Border States	\$280 043 000	24%
Minnesota	\$78 534 000	7%
Michigan	\$56 914 000	5%
Wisconsin	\$51 355 000	4%
Illinois	\$46 917 000	4%
Ohio	\$37 725 000	3%
New York	\$9 786 000	1%
Pennsylvania	\$6 803 000	1%
All Other States***	\$139 189 000	12%
OVERSEAS	\$26 165 000	2%
Europe (Total)	\$18 484 000	2%
United Kingdom	\$6 041 000	1%
Germany	\$3 369 000	<0.5%
Netherlands	\$3 596 000	<0.5%
Asia (Total)	\$2 495 000	<0.5%
All Other Countries	\$5 186 000	<0.5%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*Rounded to nearest thousand. **All Other Canada includes the balance of Canadian residents who live in provinces other than Ontario, Manitoba and Quebec. *** All Other States includes Americans who live in states other than those listed in the table.

Note: Totals may not add to 100% due to multiple counting of provincial, regional and CMA visitors and rounding. The sum of each of the following macro origin groups adds up to total overnight spending in Northern Ontario: (1) Ontario, Manitoba and Quebec + Other Canada equals total domestic overnight tourism spending. (2) Border States + All Other States equals total U.S. overnight tourism spending; and (3) Europe + Asia + All Other Countries equals total overseas overnight tourism spending.

C. Season of Visit

Same-day and overnight visitors come to Northern Ontario in each calendar quarter of the year. Visitors are, however, most likely to come in warm weather periods, particularly if they are on overnight trips from the United States (51% of 2007 overnight trips took place in warmer months) or other countries (65%). Visitors on overnight pleasure trips also favour the July through September period (56% in 2007). The comparatively robust tourist volume by Canadians in the first and fourth calendar

quarters is explained in part by Canadians visiting friends and relatives in Northern Ontario during key family holiday periods (e.g. Thanksgiving, Christmas, New Year's).

Overnight Visits to Northern Ontario, by Calendar Quarter, 2007					
	All Visitors	Canadians	Americans	Overseas	Overnight Pleasure
Total	4 712 000	3 774 000	877 000	61 000	2 823 000
January–March	14%	16%	7%	9%	11%
April–June	25%	23%	33%	19%	26%
July–September	48%	48%	51%	65%	56%
October–December	12%	13%	9%	6%	7%

Sources: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 8.
 Note: Figures may not add to total or 100% because of rounding.

Among the 2.9 million overnight visitors to Northern Ontario who engaged in at least one outdoor or sporting activity while on their trip, 60% travelled in the third calendar quarter (July through September). Another 25% travelled in the spring shoulder season (April through June).

Regardless of their origin, 60% of outdoor activity overnight visitors concentrate their travel to Northern Ontario in the warmest calendar quarter. Only about 12% of U.S. overnight visitors who engage in outdoor activities come to Northern Ontario during the coldest months of the year (October through March). Canadians, too, prefer the warmer months, with only 17% travelling to or within Northern Ontario during the six colder months. Cold-weather visitors from Canada were divided evenly between the first (9%) and fourth (8%) calendar quarters.

Overnight Visits with Any Outdoor Activity in Northern Ontario, by Calendar Quarter, 2007				
	All Visitors	Canadians	Americans	Overseas
Total	2 901 000	2 124 000	725 000	51 000
January–March	8%	9%	4%	6%
April–June	25%	22%	34%	20%
July–September	60%	61%	54%	71%
October–December	8%	8%	8%	4%

Sources: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 8.
 Note: Figures may not add to total or 100% because of rounding.

D. Main Purpose of Trip, Length of Stay and Lodging

Main Purpose of Trip

More than half (55%) of all trips to Northern Ontario were made for the primary purpose of pleasure, 32% were made to visit friends and relatives, and the balance were made for business (4%) or for some other purpose (9%). These proportions clearly suggest that Northern Ontario is primarily a pleasure destination for tourists. In contrast, Southern Ontario attracts about the same proportions of same-day and overnight tourists for pleasure as for visiting with friends and relatives. The southern portion of the province also captures business travellers at about twice the rate (7% in 2007) as does Northern Ontario (4%).

Main Purpose of Trip: Same-day and Overnight, 2007				
	Northern Ontario		Southern Ontario	
Total Visitors (Same-day and Overnight)	7 683 000		97 582 000	
Pleasure	4 250 000	55%	41 874 000	43%
Visit friends/relatives	2 430 000	32%	41 091 000	42%
Business	313 000	4%	6 919 000	7%
All other purposes*	689 000	9%	7 698 000	8%
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 5.				
*Includes those not stating a response.				

The positioning of Northern Ontario as a pleasure destination is further supported by data for overnight trips. Sixty percent of overnight trips in Northern Ontario were taken for pleasure in 2007, compared to 45% of overnight trips to destinations in Southern Ontario.

Main Purpose of Trip: Overnight, 2007				
	Northern Ontario		Southern Ontario	
Total Overnight Visitors	4 712 000		38 660 000	
Pleasure	2 823 000	60%	17 255 000	45%
Visit friends/relatives	1 500 000	32%	16 355 000	42%
Business	180 000	4%	3 343 000	9%
All other purposes*	209 000	4%	1 708 000	4%
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 5.				
*Includes those not stating a response.				

Pleasure is the primary trip motivation for 87% of Americans who spent nights in Northern Ontario during 2007. More than half of Canadian tourists (54%) and about two fifths of overseas tourists (42%) on overnight trips in Northern Ontario were travelling for pleasure. Interestingly, visiting family and friends sparked the trip for 37% of Northern Ontario's domestic market and for 52% of overnight overseas visitors.

Main Purpose of Trip: Overnight Trips in Northern Ontario, by Origin, 2007				
	All Visitors	Canadians	Americans	Overseas
Overnight Visitors	4 712 000	3 774 000	877 000	61 000
Pleasure	60%	54%	87%	42%
Visit friends/relatives	32%	37%	7%	52%
Business	4%	4%	2%	4%
All other purposes*	4%	4%	5%	2%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 5.
*Includes those not stating a response.

As will be made clear in the following sections, trip motivation is commonly associated with where visitors spend their nights. Those who travel for pleasure tend to pay for lodging, whereas those who travel to visit friends and relatives tend to stay with these friends or relatives. These accommodation choices have a sizeable impact on average spending in Northern Ontario: visitors who pay for commercial lodging spend more per capita because they also pay for restaurant meals and other services to a much greater extent than do those who rely on the hospitality of friends and relatives.

Length of Stay in Northern Ontario (Overnight Trips)

On average, overnight visitors to Northern Ontario spent close to four nights (3.7 nights) in the region in 2007. Canadians spent about 3.3 nights, Americans spent 5.1 nights and the comparatively small number of visitors from overseas stayed almost a full week (6.4 nights) in the North.

Over the course of 2007, visitors from all markets spent approximately 17.3 million person nights in Northern Ontario. Canadians spent 12.4 million or 72% of these nights, and Americans spent a further 4.5 million. Visitors from other countries spent 390 000 person nights in Northern Ontario.

Length of Stay: Overnight Trips in Northern Ontario, by Origin, 2007				
	All Visitors	Canadians	Americans	Overseas
Overnight Visitors	4 712 000	3 774 000	877 000	61 000
One night	18%	19%	12%	14%
Two nights	33%	38%	12%	22%
Three nights	17%	17%	15%	11%
Four–five nights	14%	13%	20%	21%
Six–nine nights	14%	9%	36%	18%
Ten nights or more	5%	4%	5%	15%
Average number of nights	3.7	3.3	5.1	6.4
Total Person Nights	17 330 000	12 430 000	4 510 000	390 000

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Tables 5, 6, 7.
*Includes those not stating a response.
Note: Percentages may not add to 100% due to rounding.

Overnight visitors from Canada spend about one more night in Northern Ontario, on average, than they do on trips to Southern Ontario. Visitors from the United States spend almost two more nights in the northern area, on average. In contrast, tourists

from overseas countries spend almost four more nights, on average, in Southern Ontario (10.1) than they do in the North (6.4).

Average Number of Nights: Overnight Trips in Northern and Southern Ontario, by Origin, 2007			
	Canadians	Americans	Overseas
Average Number of Nights			
Northern Ontario	3.3	5.1	6.4
Southern Ontario	2.5	3.3	10.1

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 6.

Lodging in Northern Ontario (Overnight Trips)

Of the 17.3 million person nights spent in Northern Ontario in 2007, 37% or about 6.4 million nights were spent in commercial roofed lodging (hotels, motels, resorts, bed and breakfast establishments [B&Bs], and commercial cottages/cabins). A further 10% or 1.6 million person nights were spent in the region's campgrounds. Private accommodation — that is, private homes and cottages — represented 51% or about 8.8 million of all person nights spent in Northern Ontario.

Visitors from each of the major markets for Northern Ontario have different lodging preferences. For example, the domestic market displays a particularly strong preference for staying with friends and relatives (38%) or in their own cottage (21%), whereas Americans tend to overnight in commercial cottages and cabins in Northern Ontario (47%). More than two fifths of the nights spent by the overseas market in Northern Ontario are in private homes — either the homes of friends and relatives (37%) or, much less commonly, in private cottages (7%).

Lodging in Northern Ontario: Person Nights, by Origin, 2007				
	All Visitors	Canadians	Americans	Overseas
Total Person Nights	17 330 000	12 430 000	4 510 000	390 000
Hotels	7%	7%	6%	8%
Motels	4%	3%	6%	6%
Commercial cottages/cabins*	26%	19%	47%	15%
Campgrounds/trailer facilities	10%	9%	11%	12%
Private homes/cottages	51%	62%	20%	43%
Private cottages	18%	21%	13%	7%
Homes of friends/relatives	30%	38%	7%	37%
Other	3%	<0.5%	10%	17%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 6.

*For Canadian tourists, includes B&Bs, resorts, hunting/fishing lodges; for U.S./Overseas visitors, includes other roofed commercial lodging.

Not surprisingly, of the 3.2 million nights in private cottages in Northern Ontario, 2.6 million or 80% were spent by Canadians. In contrast, the share by Canadians dropped

to just more than half of the 4.5 million nights in commercial cottages and cabins,¹⁰ with Americans spending about 47% or 2.1 million nights.

Of the 17.3 million person nights in Northern Ontario, about 11.4 million or 66% were spent on pleasure trips. In turn, of the 11.4 million nights spent in the region on pleasure trips, more than half or 6.5 million were spent in commercial roofed accommodation or in campgrounds. Thus, of the nights spent in Northern Ontario during 2007, more than one third (37%) were spent on pleasure trips that directly benefited tourism businesses in the accommodation sector (including campgrounds).

Person Nights on Overnight Pleasure Trips in Northern Ontario, 2007	
Total Person Nights	17 330 000
On Pleasure Trips	11 382 000
On Pleasure Trips—Paid Lodging/Campgrounds	6 469 000
Type of Lodging on Pleasure Trips with Any Paid Lodging/Campgrounds	
Hotels	582 000
Motels	397 000
Commercial cottages/cabins*	4 032 000
Campgrounds/trailer facilities	1 458 000
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 6.	
*For Canadian tourists, includes B&Bs, resorts, hunting/fishing lodges; for U.S./Overseas visitors, includes other roofed commercial lodging.	

E. Activities on Overnight Trips

Activity Patterns on Overnight Trips by Origin

When travellers reported activities in the Statistics Canada travel surveys used for this report, they were asked to identify what they did on their entire Canadian trip (without reference to where in Canada the activity took place). Thus, for visitors who travelled exclusively in Northern Ontario, the activity can be assumed to have taken place in the region. Those on touring trips that included stops in Southern Ontario or other parts of Canada may have engaged in an activity at any location they visited.

Furthermore, information on activities is presented for overnight trips only, because no activity information is collected from same-day U.S. tourists who come to Canada by car and because in the new domestic travel survey, very limited activity information is asked of Canadians on same-day trips.

Each of the three major markets for overnight visitors in Northern Ontario has a distinctive activity pattern, in part because of differences among the tourists and, more importantly, because of differences between which activities are included in the domestic and international questionnaires as of 2007. For example, three of the most prevalent activities that used to be measured in both the domestic and international surveys are no longer included in the domestic survey. Thus, there is no information on

¹⁰ For Canadian tourists, includes B&Bs, resorts, hunting/fishing lodges.

how many Canadians visited with friends or relatives, went sightseeing, or went shopping on their overnight trip. Participation rates in these activities are available for international tourists.

In spite of changes in how activities are measured, it is clear that Northern Ontario is an outdoor-oriented destination for all overnight tourists. At least half of Canadian overnight tourists and more than four fifths of those from the United States and other countries engaged in at least one outdoor activity while on the overnight trip that brought them to Northern Ontario.

Canadian Overnight Visitors

The most popular outdoor activities¹¹ for Canadian overnight visitors are boating (31% of 2007 total), followed by fishing (24%), naturalist activities such as hiking or backpacking (16%), camping (15%), and bird or wildlife viewing (15%).

The pleasure travel segment is strongly drawn to outdoor activities. Of the 2 million overnight pleasure travellers from Canada, 1.6 million (78%) participated in an outdoor activity on a trip with nights in Northern Ontario. The most popular outdoor activities within this pleasure market include boating¹² (48%), fishing (34%), camping (24%), going to a beach (23%), hiking or backpacking (22%), and wildlife viewing or bird watching (21%).

Cultural and entertainment activities are not widely utilized by overnight domestic tourists in Northern Ontario.

U.S. Overnight Visitors

The U.S. overnight market for Northern Ontario seems to be drawn by the region's fishing (60%), shopping (40%), and sightseeing opportunities (33%). To a greater extent than their Canadian counterparts, U.S. visitors go to historic sites (19%) and to national or provincial nature parks (22%) on their trips.

Because the vast majority of U.S. overnight travellers to Northern Ontario are on pleasure trips, the activity profile of all members of this market closely resembles the sub-set of those travelling for pleasure.

Overseas Overnight Visitors

Since more than half of overseas overnight visitors to Northern Ontario in 2007 were travelling with the primary purpose of visiting friends and relatives, it comes as no surprise that many spent time visiting with their hosts (81%). At the same time, these visitors seem to have engaged in a much wider variety of cultural activities and

¹¹ Note that respondents could select more than one activity, so the sum of percentages will exceed 100%.

¹² Forty percent of this market segment said they were boating and 19% said they went canoeing or kayaking on the trip.

attractions than U.S. visitors. For example, about half went to an historic site and slightly fewer went to a museum or art gallery on their trip (see table below).

Overseas visitors participate in more activities than do their Canadian and U.S. counterparts. Their higher participation rates are likely explained by their longer trips and/or by a propensity to visit different locations in Canada. Only 18% of overseas overnight visitors spent all of their trip nights in Northern Ontario, compared to 85% of U.S. overnight tourists and 93% of Canadians.

Activities on Trip: Overnight Visitors to Northern Ontario, by Origin, 2007				
	Total	Canada	U.S.	Overseas
Overnight Person Visits (Weighted*)	4 712 000	3 774 000	877 000	61 000
General/Entertainment Activities				
Visit friends or relatives***	N/A**	N/A	22%	81%
Go shopping***	N/A	N/A	40%	88%
Go sightseeing***	N/A	N/A	33%	84%
Go to a bar or night club***	N/A	N/A	11%	21%
Attend a sports event	3%	3%	1%	12%
Go to a casino	2%	1%	6%	9%
Visit a zoo, aquarium (ITS only: botanical garden)	1%	1%	1%	34%
Visit a theme or amusement	2%	2%	1%	12%
Team sports***g	N/A	3%	N/A	N/A
Cultural Activities				
Visit an historic site	9%	6%	19%	51%
Visit a museum or art gallery	6%	5%	11%	43%
Attend a festival/fair	3%	3%	2%	15%
Attend a cultural performance	4%	4%	3%	16%
Attend an Aboriginal cultural event***	N/A	1%	N/A	N/A
Outdoor Activities/Parks				
Visit a national or provincial nature park	12%	9%	22%	70%
Participate in a sport or outdoor activity	62%	56%	83%	84%
Fishing	31%	24%	60%	20%
Boating/canoeing/kayaking	31%	31%	28%	36%
Camping/nights in campground/RV park	15%	15%	11%	16%
Golfing	4%	4%	1%	1%
Hunting	2%	2%	4%	1%
Downhill skiing/snowboarding	1%	1%	1%	<0.5%
Hiking/backpacking****	N/A	16%	N/A	N/A
Bird/wildlife viewing****	N/A	15%	N/A	N/A
Cycling****	N/A	2%	N/A	N/A
Snowmobiling****	N/A	3%	N/A	N/A
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 4.				
"Weighted" refers to adjusting data to correct for potentially disproportionate representation of the data, such as unintentional disproportionalities caused by design effects, biases in data capture or reporting, and other anomalies. Various levels of "weights" have been applied to the data to correct for population, trip reporting and other factors. **N/A: Not available. *Included on ITS (U.S., Overseas) questionnaires only. ****Included on Canadian questionnaire only.				
Note: The sum of visits/proportions may not add to the total or to 100% because of multiple activities on trips.				

An Activity Participation Index

With Canadians accounting for eight in every 10 overnight visitors to Northern Ontario, the domestic market segment dominates each activity group. In other words, no matter which activity is the subject of interest, there will be more Canadian than U.S. or overseas participants simply because so much of tourism in Northern Ontario is driven by the Canadian market. To determine whether one or another activity has a particularly strong following among Canadians or Americans, an index to compare the total volume of visitors from these markets¹³ with the ratio of participation in a specific activity was generated. This index can be used to identify the propensity of Canadians and Americans to participate in specific activities.¹⁴ The higher an index score is over one (1), the more it suggests a special interest in an activity.

Index of Participation in Specific Activities on Trip in 2007									
		Propensity to Participate in a Named Activity on an Overnight Trip							
	% of Overnight Visitors to Northern Ontario	Hunting	Fishing	Golfing	Camping	Nature Parks	Festivals/Fairs	Cultural Performances	Historic Site
Canadians	80%	0.89	0.78	1.17	1.05	0.75	1.00	1.00	0.65
Americans	19%	1.56	1.97	0.35	0.77	1.75	0.68	0.76	2.19

Clearly, U.S. visitors on overnight trips to Northern Ontario are drawn to fishing experiences (1.97) to a much greater extent than are Canadians (0.78). Even though there are more Canadian anglers on overnight trips in Northern Ontario (898 000) than Americans (528 000), Americans are heavily over-represented among anglers relative to their total contribution to overnight tourism in the region.

Similarly, Americans are particularly likely to visit historic sites while on a trip that includes nights spent in Northern Ontario (2.19). Conversely, Canadians are under-represented among overnight tourists who go to historic sites (0.65). The comparatively low level of visits to such attractions among Canadians is likely a function of the high level of intra-regional overnight domestic tourists in Northern Ontario. Many of these visitors live in Northern Ontario and would have had multiple opportunities to go to the region's historic sites over the years.

U.S. tourists in Northern Ontario are also especially attracted to nature parks (1.75) and hunting (1.56) relative to their Canadian counterparts. By way of contrast, overnight U.S. tourists are particularly unlikely to be drawn to festivals/fairs (0.68), cultural performances (0.76), camping (0.77) or golfing (0.35). Of the 168 000 overnight visitors to the region who golf, almost all are Canadians (157 000).

¹³ The index was not applied to the overseas market because of that market's small base size.

¹⁴ The propensity to participate is calculated by dividing the proportion of activity participants who are Canadian on overnight trips to Northern Ontario by the proportion of all overnight visitors to Northern Ontario who are Canadian. The calculation is repeated for U.S. overnight tourists.

IV. VISITOR SPENDING AND ECONOMIC IMPACT IN NORTHERN ONTARIO

F. Distribution of Visitor Spending

Visitor spending in Northern Ontario benefits many sectors of the regional economy. The \$1.4 billion spent in the region in 2007 contributes to restaurants and bars (\$238.6 million or 17% of total spending), the accommodation sector (\$331.4 million or 23%), grocery and liquor stores (\$153.8 million or 11%), and gas stations and auto repair outlets (\$291.2 million or 20%).

Attractions also benefited from tourism spending (\$122.1 million), as did retail establishments selling clothing (\$152 million) and other items (\$52.5 million), car rental companies (\$15 million), local bus and taxi services (\$10 million), and rail, air, intercity bus and other transportation companies (\$77.7 million).

Visitor Spending in Northern Ontario, by Sector, 2007		
Total Visitor Spending	\$1 444 236 000*	
Vehicle Rental	\$14 992 000	1%
Gas Stations/Auto Repairs	\$291 244 000	20%
Transport Fares**	\$77 683 000	5%
Local Transport	\$9 962 000	1%
Restaurants and Bars	\$238 563 000	17%
Grocery/Liquor Stores	\$153 803 000	11%
Lodging	\$331 371 000	23%
Attractions/Events	\$122 090 000	9%
Clothing Retail	\$152 046 000	11%
Other Retail/Other	\$52 518 000	4%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 10.
*All figures 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.

G. Average Visitor Spending in Northern Ontario

Average Spending by All Visitors in Northern Ontario

The average spending among same-day visitors to Northern Ontario is \$77 for Canadians and falls to \$48 per person for Americans. Average spending on overnight trips in the region also varies substantively from market to market.

- U.S. overnight visitors spend more money in Northern Ontario than do Canadians or overseas visitors.
- On a per-person per-night basis, and normalized or adjusted to account for the number of people in the travel party and the duration of the 2007 stay in Northern

Ontario, Americans spent twice as much as Canadians (\$102 versus \$49 per-person per-night).

- At \$102 per-person per-night, Americans also spent appreciably more than did their overseas counterparts, who spent \$60 per-person per-night.

The gap between Canadian and U.S. spending widens to a factor of three on a per-trip basis. The bigger gap reflects the larger travel party size of Americans (2.6 Americans on overnight trips versus 1.8 Canadians) and the somewhat longer duration of Americans' overnight trips to the region (5.1 nights for Americans versus 3.3 nights for Canadians). Each overnight trip to Northern Ontario yielded almost \$1300 for every U.S. travel party attracted to the region, but reached only \$280 for each Canadian household travel party.

Overseas visitors spent considerably more time in Northern Ontario (6.4 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 \$834. 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 their U.S. counterparts' \$102 level.

Average Visitor Spending in Northern Ontario, By Origin, 2007				
	Total	Canada	United States	Overseas
Same-day Trips				
Per Person	\$72*	\$77	\$48	N/A***
Overnight Trips: All Purposes				
Per Person Per Night	\$61	\$49	\$102	\$60
Per Trip**	\$396	\$280	\$1282	\$834
Overnight Trips: Pleasure				
Per Person Per Night	\$66	\$48	\$103	\$61
Per Trip**	\$496	\$302	\$1441	\$990

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 11.
 *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. ***There is no estimate for same-day overseas average spending because of the market's small base size.

Average Spending for Overnight Activity Participants in Northern Ontario

Overnight visitors to Northern Ontario who participate in any sport or outdoor activity while on their trip spent about \$484 per trip or \$62 per person per night. If they went fishing while on the trip, their spending increased by more than 32%, from \$484 to \$639 on a per-trip basis.

Overnight visitors who participated in a sport or outdoor activity but did not go fishing or hunting in 2007 spent \$332 per trip. This is about 30% less than spending by outdoor activity participants as a whole and about half as much (-48%) as those who fished while on their trip. These findings highlight the importance of the U.S. fishing market in the region. Americans comprised more than one third or 528 000 of the 1.4 million visitors who fished during overnight trips in Northern Ontario in 2007.

Average Visitor Spending in Northern Ontario, by Outdoor Activity on Trip, 2007	
	All Markets
Overnight Trips: Any Outdoor Activity	
Per Person Per Night	\$62*
Per Trip**	\$484
Overnight Trips: Any Fishing***	
Per Person Per Night	\$71
Per Trip**	\$639
Overnight Trips: Any Other Outdoor Activity***	
Per Person Per Night	\$48
Per Trip**	\$332
Source: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 11.	
*Figures are rounded to nearest dollar. Averages exclude inbound Canadian carrier fares to enter Canada (for U.S./overseas travellers). **All members of household/travel party for all nights spent in Northern Ontario. ***Included in Any Outdoor Activity.	

H. Economic Impact of Visitor Spending

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 destinations¹⁵). 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.

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

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.

¹⁵ Also excluded are Canadian carrier fares to enter or leave Canada that might be assigned to Northern Ontario for U.S. or overseas visitors with no visits in Northern Ontario.

The Ontario Ministry of Tourism's glossary of terms to be used in conjunction with outputs from its Tourism Regional Economic Impact Model is appended and referenced throughout this chapter.¹⁶

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 by 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.

Visitors spent approximately \$1.4 billion on tourism goods and services in Northern Ontario in 2007. Once 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 \$645.6 million in direct economic activity (GDP), and an additional \$278.2 million in indirect and induced GDP.

There was, therefore, a total of nearly \$924 million in GDP retained by Northern Ontario. Other parts of Ontario benefited from about \$74.3 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 exceeded \$999 million in 2007.

Northern Ontario Tourism Contributions to GDP, and Funds Retained in Ontario, 2007			
	Retained in Northern Ontario (A)	Retained in Other Parts of Ontario (B)	Total Contribution to Ontario's GDP (A + B)
Direct	\$645 590 000	\$22 159 000	\$667 748 000
Indirect	\$135 312 000	\$22 646 000	\$157 958 000
Induced	\$142 934 000	\$29 457 000	\$172 392 000
Total GDP	\$923 836 000	\$74 262 000	\$998 098 000

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

Jobs, Wages and Salaries

Approximately 12 400 direct jobs and an additional 3 968 indirect and induced jobs in Northern Ontario were generated as a result of visitor spending in 2007. These jobs include part- and full-time positions, on both annual and seasonal bases.¹⁷ Additional employment in the province was generated because of tourism in Northern Ontario,

¹⁶ The MTOUR provides the Tourism Regional Economic Impact Model (TREIM) for estimating purposes. There is, however, no calibration for macro regions in the province such as Northern or Southern 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 (Muskoka, and the Algonquin Park area) 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.

¹⁷ 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.

bringing the total number of direct, indirect and induced jobs to about 17 100 across Northern Ontario and the entire province.

Of all the jobs created in Ontario because of Northern Ontario tourism, the region retained 16 368 or 92%.¹⁸ The 17 100 jobs generated \$613.5 million in wages and salaries province-wide, with 92% of this amount (\$565.4 million direct, indirect, and induced) retained by Northern Ontario.

Taxes

All levels of government benefited from tourism spending in Northern Ontario. This spending generated \$305.1 million in federal government taxes, a further \$228.2 million in provincial taxes and more than \$6.1 million in municipal taxes (direct, indirect, and induced) province-wide. Northern Ontario retained the following amounts from these taxes: \$183.1 million in direct federal taxes, \$165.6 million in direct provincial taxes, and \$1.2 million in direct municipal taxes.

Economic Impact of Visitor Spending in Northern Ontario, 2007			
	Economic Benefits Retained in Northern Ontario	Total Benefits Across Ontario (Including Portion Retained by Northern Ontario)	Proportion of Total Ontario Benefits Retained in Northern Ontario
Total Visitor Spending	\$1 444 236 000	\$1 444 236 000	
Gross Domestic Product (GDP)	\$923 836 000	\$998 098 000	93%
Direct	\$645 590 000	\$667 748 000	97%
Indirect/induced	\$278 246 000	\$323 051 000	86%
Labour Income	\$565 381 000	\$613 545 000	92%
Direct	\$384 307 000	\$399 268 000	96%
Indirect/induced	\$181 075 000	\$211 335 000	86%
Employment (Jobs)	16 000	17 000	94%
Direct	12 000	13 000	97%
Indirect/induced	4 000	4 000	85%
Federal Taxes	\$274 084 000	\$305 103 000	90%
Direct	\$183 100 000	\$188 082 000	97%
Indirect/induced	\$90 984 000	\$117 021 000	78%
Provincial Taxes	\$216 253 000	\$228 225 000	95%
Direct	\$165 601 000	\$169 232 000	98%
Indirect/induced	\$50 652 000	\$58 993 000	86%
Municipal Taxes	\$3 186 000	\$6 136 000	52%
Direct	\$1 192 000	\$1 234 000	97%
Indirect/induced	\$1 995 000	\$4 901 000	41%

Sources: Visitor spending estimates from *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) 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.

¹⁸ 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.

V. NORTHERN ONTARIO'S THREE TOURISM REGIONS

I. Changes in Northern Ontario's Three Tourism Regions, 2006 to 2007

This chapter provides key volume and value information for each of the Northern Ontario tourism regions — North-West, North-East, and North-Central — beginning with a year-to-year comparison.

At 3.4 million, the North-East Region continued to attract the largest number of same-day and overnight visitors in 2007, followed by North-Central at 2.3 million visitors and North-West at 2.1 million. These estimates represent declines from 2006 levels, ranging from a 15% drop in North-West to smaller declines in North-Central (-4%) and North-East (-1%).

In North-East and North-Central, the bulk of the drop in total visits between 2006 and 2007 was associated with declines in same-day excursions rather than overnight visitors. In these regions, overnight tourism remained relatively stable between the two years. The situation is slightly different for North-West, where overnight tourism dropped 5%, from 1.4 million person visitors in 2006 to 1.3 million in 2007.

Changes in Tourism Volume and Spending in Ontario's Three Northern Tourism Regions, 2006–2007			
	North-West	North-East	North-Central
All Person Visits			
2007	2 105 000	3 398 000	2 330 000
2006	2 490 000	3 443 000	2 419 000
% Change 2006 to 2007	-15%	-1%	-4%
Overnight Person Visits			
2007	1 290 000	1 847 000	1 684 000
2006	1 362 000	1 844 000	1 673 000
% Change 2006 to 2007	-5%	<0.5%	1%
Visitor Spending			
2007	\$490 627 000	\$604 814 000	\$333 218 000
2006	\$565 598 000	\$606 151 000	\$387 795 000
% Change 2006 to 2007	-13%	<-0.5%	-14%
Person Nights			
2007	5 255 000	6 221 000	5 854 000
2006	5 828 000	5 906 000	5 122 000
% Change 2006 to 2007	-10%	5%	14%

Sources: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) 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.

Consistent with reductions in the numbers of visitors between 2006 and 2007, spending on tourism-related goods and services decreased, in North-West by 13% and North-

Central, by 14%. Just as the decline in tourism volume was minor in North-East, so too was the less than 0.5% decrease in tourism spending between 2006 and 2007.¹⁹

J. Overview of Visitor Volume and Spending in Northern Ontario's Tourism Regions in 2007

In 2007, visitor volume and spending were distributed throughout the three tourism regions, led by North-East. The North-East region attracted 1.5 million same-day excursionists compared to about 791 000 same-day visitors in North-West and even fewer in North-Central (636 000).

The North-East region also attracted the largest number of overnight tourists. In 2007, 1.8 million tourists spent at least one night in North-East Ontario, compared to nearly 1.7 million overnight tourists in North-Central and 1.3 million in North-West.

Visitor Volume in Northern Ontario, by Region Visited in 2007				
	Same-day Visits		Overnight Visits	
North-West	791 000	33%	1 290 000	27%
North-East	1 545 000	65%	1 847 000	38%
North-Central	636 000	27%	1 684 000	35%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Tables 3 and 7.
 Note: the sum of proportions may not add to 100% because of visits by the same traveller to different sub-regional destinations. Percentages are based on the sum of individual regional visits.

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 \$138 million, or 57% of same-day spending across the three regions, with \$48.8 million in North-West and \$55.4 million in North-Central.

North-East also attracted more spending on overnight trips (\$466.6 million, or 39%) than North-West at \$441.2 million, and North-Central at \$277.6 million.

Visitor Spending in Northern Ontario, by Region Visited in 2007				
	Same-day Visits		Overnight Visits	
North-West	\$48 773 000	20%	\$441 225 000	37%
North-East	\$137 982 000	57%	\$466 573 000	39%
North-Central	\$55 431 000	23%	\$277 597 000	23%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 13.
 Note: the sum of proportions may not add to 100% because of visits by the same traveller to different sub-regional destinations. Percentages are based on the sum of individual regional spending.

The average per-person spending for same-day trips is comparable between North-Central (\$87) and North-East (\$89); the North-West average is \$62. When it comes to

¹⁹ See Appendix III for additional summary tables that describe shifts over time by flow from domestic, U.S., and overseas markets.

overnight trips, however, per-person per-night spending in North-West, at about \$83, is appreciably higher than in North-East (\$64) and North-Central (\$40).

The larger share of U.S. tourists visiting the North-West Tourism Region is likely driving the average spending on an overnight trip (\$613) and per-person per-night spending (\$83) well above levels for the other two regions.

Average Visitor Spending in Northern Ontario's Tourism Regions, 2007

	Same-day Visits	Overnight Visits	
	Average Per Person	Average Per Person Per Night	Average Per Trip
North-West	\$62	\$83	\$613
North-East	\$89	\$64	\$378
North-Central	\$87	\$40	\$244

Sources: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 11; special calculations.
 Note: Average spending is calculated independently for each tourism region. These figures cannot be combined to obtain averages for Northern Ontario as a single geographic entity. Averages for same-day trips are calculated from person trip and visitor spending data.

K. Place of Residence of Overnight Visitors to Northern Ontario's Tourism Regions

Geography has a great deal to do with the origin of overnight visitors to each of Northern Ontario's tourism regions. For example, North-West attracted 40% of its 2007 overnight visitors from the United States. In contrast, North-Central attracted only 6% and North-East attracted 16% of their overnight tourists from American states.

North-West and North-East are particularly likely to attract overnight visitors from the urban centres contained within their respective region, or from locations contiguous to it. Toronto is a key feeder market for the North-Central and North-East Tourism Regions.

Key markets from which overnight visitors come to the North-West region (and the number of visitors in 2007) are:

- Thunder Bay CMA (145 000);
- Manitoba (259 000), primarily from Winnipeg CMA (210 000);
- Minnesota (173 000); and
- Wisconsin (83 000).

Key markets from which overnight visitors come to North-East (and the number of visitors in 2007) are:

- Toronto CMA (294 000);
- Sudbury CMA (220 000); and
- Michigan (110 000).

Key markets from which overnight visitors come to North-Central (and the number of visitors in 2007) are:

- Toronto CMA (556 000);
- Sudbury CMA (73 000); and
- Ottawa-Gatineau CMA (45 000).

Because it borders Manitoba and several American states, the North-West Tourism Region has the greatest propensity to attract overnight visitors from locations outside Ontario. In this region, two-in-three overnight visitors come from outside Ontario (66%), compared to only 11% in North-Central and 23% in North-East.

Overnight Visitor Volumes in Northern Ontario Tourism Regions, by Origin, 2007						
	North-West		North-East		North-Central	
Overnight Person Visits	1 290 000		1 847 000		1 684 000	
	#	%*	#	%*	#	%*
Ontario	438 000	34	1 415 000	77	1 502 000	89
Toronto CMA	28 000	2	294 000	16	556 000	33
Sudbury	4 000	<0.5	220 000	12	73 000	4
Thunder Bay	145 000	11	22 000	1	2 000	<0.5
Other Canada	329 000	26	104 000	6	54 000	3
Manitoba	259 000	20	10 000	1	8 000	1
Quebec	5 000	<0.5	62 000	3	9 000	1
United States	509 000	40	300 000	16	103 000	6
Total Border States	366 000	28	207 000	11	54 000	3
Illinois	57 000	4	5 000	<0.5	3 000	<0.5
Michigan	29 000	2	110 000	6	15 000	1
Minnesota	173 000	13	15 000	1	5 000	<0.5
New York	10 000	1	13 000	1	8 000	1
Ohio	13 000	1	37 000	2	13 000	1
Wisconsin	83 000	6	14 000	1	3 000	<0.5
Pennsylvania	<0.5%	<0.5	12 000	1	6 000	<0.5
Overseas	14 000	1	28 000	2	25 000	2

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 1.

* Percentage of regional total.

Note: the sum of various origins may not add to total Northern Ontario because of visits by the same traveller to different sub-regional destinations.

L. Length of Overnight Trip in Northern Ontario's Tourism Regions

More than half of the overnight tourists in North-Central and North-East spent one or two nights in the region. Longer stays are more common in North-West, with 22% of overnight visitors spending at least six nights in the region. These longer stays in North-West make the average length of stay in this region — 4.1 nights — almost one full night longer than in North-Central (3.5 nights) or North-East (3.4).

Length of Overnight Trip in Northern Ontario, by Region, 2007			
	North-West	North-East	North-Central
Overnight Visitors	1 290 000	1 847 000	1 684 000
One night	17%	23%	17%
Two nights	25%	33%	38%
Three nights	17%	15%	17%
Four–five nights	15%	14%	13%
Six–nine nights	22%	11%	11%
10 nights or more	4%	4%	4%
Average Number of Nights	4.1	3.4	3.5
Total Person Nights	5 255 000	6 221 000	5 854 000

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
 *Percentage of region's total.

M. Season of Visits in Northern Ontario's Tourism Regions

Close to half of the overnight tourists in each of Northern Ontario's tourism regions come between July and September and about one quarter come in the spring shoulder season (April through June). The travel pattern for overnight tourism in each of the regions is quite similar, although North-East is a little more successful in attracting overnight visitors between October and December.

Overnight Visitors to Northern Ontario Regions, by Season of Visit, 2007			
	North-West	North-East	North-Central
Overnight Person Visits	1 290 000	1 847 000	1 684 000
January–March	13%	17%	13%
April–June	28%	25%	22%
July–September	48%	45%	54%
October–December	11%	14%	12%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 8.

N. Main Purpose of Trip for Visits in Northern Ontario's Tourism Regions

Each of Northern Ontario's tourism regions attracts more visitors on pleasure trips than those travelling to visit friends and relatives, for business or for other purposes. Among overnight tourists to the North-West Tourism Region, 71% claimed to be on a trip motivated by pleasure and 21% were on a trip to visit friends and relatives. The proportion of pleasure tourists is somewhat lower in North-Central (62%) and declines to 51% of overnight visitors in North-East. Visits with friends and family accounted for 33% of overnight visitors in North-Central and slightly more in North-East (39%).

Overnight Visitors to Northern Ontario Regions, by Main Purpose of Visit, 2007			
	North-West	North-East	North-Central
Overnight Person Visits	1 290 000	1 847 000	1 684 000
Pleasure	71%	51%	62%
Visit friends/relatives	21%	39%	33%
Business	3%	5%	3%
All other purposes	5%	6%	2%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 5.

O. Nights and Lodging in Northern Ontario's Tourism Regions

Of the 17.3 million person nights spent in Northern Ontario in 2007, 5.3 million nights or close to 30% of total visits were spent in North-West, 5.9 million or 34% were in North-Central, and the greatest amount, 6.2 million or 36%, were in the North-East Tourism Region. Relative to the other tourism regions, North-Central attracted the highest proportion of nights spent in private homes or private cottages, 59% in 2007.

North-Central and North-East each had about 2 million person nights over the year in commercial (i.e. paid) roofed lodgings. Nearly 2.4 million of North-West's person nights were spent in paid, roofed accommodations.

From market share and volume perspectives, campgrounds and trailer facilities seem to be slightly more popular among visitors in North-East (697 000 or 11%) than they are among tourists in North-West (515 000 or 10%) or North-Central (431 000 or 7%).

Person Nights in Northern Ontario, by Lodging Type, 2007				
	Total Northern Ontario	North-West	North-East	North-Central
Total Person Nights	17 330 000	5 255 000	6 221 000	5 854 000
Roofed Commercial Lodging	6 364 000	2 371 000	2 034 000	1 958 000
Campgrounds/Trailers	1 643 000	515 000	697 000	431 000
Private (Cottages/Homes)	8 806 000	2 023 000	3 356 000	3 427 000
Other/Unknown	518 000	346 000	135 000	37 000

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 6.

P. Activities on Trips by Overnight Visitors to Northern Ontario Tourism Regions

By and large, overnight visitors to each of Ontario's three northern tourism regions have similar activity profiles, although there are some noteworthy differences. These differences likely reflect the relative importance of the U.S. overnight market compared with Ontario residents travelling within the region. For example, U.S. overnight visitors to Northern Ontario are especially likely to go fishing on their trip and the North-West attracts an especially high proportion of U.S. visitors. Consequently, it is not surprising that a higher proportion of North-West's overnight visitors go fishing on their trip (47%) than is the case in North-Central (28%) or North-East (21%).

Overnight Visitors to Northern Ontario Regions, by Activity, 2007			
	North-West	North-East	North-Central
Total Overnight Person Visits	1 290 000	1 847 000	1 684 000
General/Entertainment Activity*			
Go to a casino	1%	6%	<0.5%
Attend a sports event	3%	4%	2%
Visit a zoo, aquarium (ITS only: botanical garden)	1%	1%	2%
Visit a theme or amusement	1%	2%	2%
Cultural Activity*			
Visit an historic site	8%	12%	8%
Visit a museum or art gallery	5%	9%	6%
Attend a festival/fair	2%	3%	3%
Attend a cultural performance	2%	5%	4%
Outdoor Activity/Parks			
Visit a national or provincial nature park	13%	15%	11%
Participate in a sport or outdoor activity	61%	34%	50%
Fishing	47%	21%	28%
Boating	33%	22%	38%
Golfing	4%	5%	2%
Hunting	3%	3%	1%
Downhill skiing/snowboarding	1%	1%	1%
Camping/nights in campgrounds/RV parks	15%	15%	15%

Source: *TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 4.

*Small numbers/percentages may reflect a lack of infrastructure.

Note: Activities could have taken place at any location visited on the trip. They did not necessarily take place in Northern Ontario.

VI. TOURISM ESTABLISHMENTS IN NORTHERN ONTARIO, 2007

According to Statistics Canada's Business Register Division estimates, Northern Ontario supports more than 8000 businesses associated with tourism. These establishments represent about 5% of approximately 151 800 tourism-related businesses in the province (see table, below).

Within Northern Ontario, there are more than 900 accommodation establishments including 135 hotels, about 80 resorts, 220 motels/motor hotels, almost 190 hunting and fishing camps, 127 housekeeping cottage/cabin businesses, and 110 RV parks and campgrounds.

Northern Ontario's 567 arts, entertainment and recreation establishments include 76 golf courses and country clubs, 54 marinas, 39 museums and/or heritage institutions or sites, 18 performance venues (e.g. theatre, dance), and 16 skiing facilities.

The 1472 establishments that serve food and beverages to tourists represent 18% of all tourism businesses in Northern Ontario. Retail businesses represent more than twice the number of food/beverage establishments. With 3376 establishments, the retail segment is the largest business segment serving tourists in Northern Ontario. Of course, these food and beverage establishments and stores also provide their goods and services to the local population. Similarly, only a portion of the business done by marinas, golf courses, theatres, museums and other business sectors is devoted to meeting the needs of tourists in Northern Ontario.

A wide array of transportation businesses operates in Northern Ontario, including 109 taxi businesses, about 31 car rental companies and more than 52 non-scheduled chartered airline companies. Travel services are provided by 81 companies, including 54 travel agencies and 17 tour operators.

Tourism Establishments in Northern Ontario in 2007			
	# of Tourism Establishments in Northern Ontario	% of Tourism Establishments in Northern Ontario	Northern Ontario's Share of All Tourism Establishments in Ontario
Total Establishments	8 053		151 849
ACCOMMODATION	962	12	20%
Hotels	135	2	15%
Motels/Motor Hotels	220	3	19%
Resorts	80	1	27%
Bed and Breakfast	26	<0.5	7%
Housekeeping Cottages and Cabins	127	2	27%
All Other Traveller Accommodation	16	<0.5	14%
RV Parks and Campgrounds	110	1	16%
Hunting and Fishing Camps	187	2	39%
Recreational and Vacation Camps (Other)	61	1	19%
ARTS, ENTERTAINMENT and RECREATION	567	7	6%
Commercial Art Dealers	19	<0.5	4%
Motion Picture and Video Exhibition	15	<0.5	6%
Theatre Companies and Dinner Theatres	12	<0.5	2%

Tourism Establishments in Northern Ontario in 2007

	# of Tourism Establishments in Northern Ontario	% of Tourism Establishments in Northern Ontario	Northern Ontario's Share of All Tourism Establishments in Ontario
Total Establishments	8 053		151 849
Dance Companies	1	<0.5	1%
Other Performing Arts Companies	1	<0.5	3%
Sports Teams and Clubs	17	<0.5	7%
Horse Race Tracks	15	<0.5	2%
Other Spectator Sports	10	<0.5	4%
Live Theatre and Other Performing Arts Presenters with Facilities	4	<0.5	3%
Sports Stadiums and Other Presenters with Facilities	3	<0.5	2%
Museums	24	<0.5	10%
Historic and Heritage Sites	3	<0.5	7%
Zoos and Botanical Gardens	3	<0.5	8%
Other Heritage Institutions	12	<0.5	18%
Amusement and Theme Parks	5	<0.5	5%
Amusement Arcades	3	<0.5	2%
Casinos (except Casino Hotels)	2	<0.5	14%
All Other Gambling Industries	13	<0.5	7%
Golf Courses and Country Clubs	76	1	9%
Skiing Facilities	16	<0.5	24%
Marinas	54	1	11%
Fitness and Recreational Sports Centres	80	1	4%
Bowling Centres	31	<0.5	12%
All Other Amusement and Recreation Industries	148	2	8%
FOOD and BEVERAGE	1 472	18	5%
Full-Service Restaurants	666	8	5%
Limited-Service Eating Places	601	7	4%
Caterers	43	1	3%
Mobile Food Services	20	<0.5	6%
Drinking Places (Alcoholic Beverages)	142	2	9%
TRANSPORTATION	289	4	4%
Scheduled Air Transportation	14	<0.5	10%
Non-Scheduled Chartered Air Transportation	52	1	22%
Passenger Rail Transportation	0	<0.5	0%
Deep Sea, Coastal and Great Lakes Water Transportation	9	<0.5	13%
Inland Water Transportation	1	<0.5	4%
Urban Transit Systems	9	<0.5	14%
Interurban and Rural Bus Transportation	4	<0.5	14%
Taxi Service	109	1	2%
Limousine Service	5	<0.5	1%
Charter Bus Industry	4	<0.5	5%
Other Transit and Ground Passenger Transportation	7	<0.5	3%
Scenic and Sightseeing Transportation	17	<0.5	10%
Passenger Car Rental	31	<0.5	4%
Truck, Utility Trailer and RV Rental and Leasing	27	<0.5	5%
TRAVEL SERVICES	81	1	3%
Travel Agencies	54	1	2%
Tour Operators	17	<0.5	4%
Other Travel Arrangement and Reservation Services	10	<0.5	3%
RETAIL	3 376	42	5%
OTHER SERVICES	1 306	16	4%

Source: MTOUR, 2007 Regional Tourism Profiles, Combined North, Table 4 (Statistics Canada, Business Register Division):
www.tourism.gov.on.ca/english/research/rtp/index.html

VII. TOURISM IN “NORTH 2”

Q. Introduction

This chapter will be of interest to readers who require a broader definition of Northern Ontario. The “North 2” area includes the three tourism regions previously identified as Northern Ontario (and also known as North 1), plus Muskoka District Municipality (Census Division [CD] 44) and the portion of Nipissing District (CD48) that includes Algonquin Park and South Algonquin Township.

Throughout this chapter, the terms *Algonquin Park* and *Algonquin Park area* are used interchangeably. The terms refer to both the park itself and South Algonquin Township as one geographic entity.

The reader is cautioned that this chapter introduces new estimates of visitor data that encompass the larger Northern Ontario region known as North 2.

R. Volume of Same-day and Overnight Person Visits in North 2

By increasing the geographic boundaries of Northern Ontario (North 1) to include Muskoka and Algonquin Park, the volume of same-day visitors from all markets grows by 16% to reach almost 3.5 million.²⁰ Overnight visitors increase at an appreciably higher rate, from 4.7 million in North 1 to 6.4 million in North 2 (+37%).

Volume of Person Visits in Northern Ontario (North 1) and North 2: Same-day and Overnight, 2007

	Northern Ontario (North 1)		North 2	
Total Person Visits	7 683 000		9 900 000	
Same-Day	2 971 000	39%	3 459 000	35%
Overnight	4 712 000	61%	6 441 000	65%

Sources: TSRC/ITS 2007 Harmonized - *Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; TSRC 2007 - *Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *Overseas Residents - Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *U.S. Residents - Tourism in Northern Ontario (FedNor)*. North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

When the boundaries of Northern Ontario are expanded, Muskoka District added about 2 million overnight person visits in 2007 to the region and the Algonquin Park area attracted approximately 242 000 overnight visitors. The additional destination areas included in North 2 represent 31% of all overnight tourism in North 2, putting this area somewhat ahead of North-Central (24%) and North-East (26%). In this new configuration, Algonquin/Muskoka was visited by an appreciably larger share of overnight visitors than was the North-West (18%).

²⁰ The addition of Algonquin Park and South Algonquin Township has a minimal impact on total same-day visits to North 2 relative to North 1 (that is, it increased the number by 31 000 in 2007). In contrast, the addition of Muskoka District to North 2 increased same-day visits by 461 000.

Overnight Person Visits in Northern Ontario (North 1) and North 2, by Region, 2007

	Northern Ontario (North 1)		North 2	
Overnight Person Visits	4 712 000		6 441 000	
North-West	1 290 000	27%**	1 290 000	18%
North-East	1 847 000	39%	1 847 000	26%
North-Central*	1 684 000	36%	1 684 000	24%
Algonquin Park/South Algonquin Township	N/A	N/A	242 000	3%
Muskoka District	N/A	N/A	1 982 000	28%

Sources: TSRC/ITS 2007 Harmonized - *Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; TSRC 2007 - *Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *Overseas Residents - Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *U.S. Residents - Tourism in Northern Ontario (FedNor)*. North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*Excluding Algonquin Park/South Algonquin Township.

**Percentages are based on the sum of the regional components.

Note: the sum of proportions may not add to 100% because of visits by the same traveller to different sub-regional destinations.

S. Visitor Spending in North 2

By increasing the geographic boundaries of Northern Ontario (North 1) to include Muskoka and the Algonquin Park area, the volume of same-day visitor spending from all markets in 2007 grew 13%, from about \$247.6 million to \$280.4 million. Overnight visitor spending increased at more than double this rate, from \$1.2 billion in North 1 to \$1.6 billion in North 2 (for an increase of 31%).

The 31% increase in overnight visitor spending falls somewhat short of the 37% increase in overnight visitors. This is because much of the additional overnight tourism activity in the broader Northern Ontario area (North 2) is based on private cottage stays. Since private cottagers do not tend to pay for accommodation nor do they purchase as many restaurant meals as do overnight visitors who stay in paid accommodation, they do not contribute spending to the region at a rate commensurate with their numbers.

Visitor Spending in Northern Ontario (North 1) and North 2: Same-day and Overnight, 2007

	Northern Ontario (North 1)		North 2	
Total Visitor Spending	\$1 444 236 000		\$1 852 443 000	
Same-Day	\$247 562 000	17%	\$280 410 000	15%
Overnight	\$1 196 675 000	83%	\$1 572 033 000	85%

Sources: TSRC/ITS 2007 Harmonized - *Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; TSRC 2007 - *Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *Overseas Residents - Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *U.S. Residents - Tourism in Northern Ontario (FedNor)*. North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

Muskoka District added about \$316.6 million in 2007 overnight visitor spending to the region. The Algonquin Park area attracts about \$56.6 million in overnight visitor spending over the year. These additional destination areas represent approximately 24% of all overnight tourism spending in North 2. See the table below for comparisons with the three North 1 regions.

Overnight Visitor Spending in Northern Ontario (North 1) and North 2, by Region, 2007

	Northern Ontario (North 1)		North 2	
Overnight Visitor Spending	\$1 196 675 000		\$1 572 033 000	
North-West	\$441 225 000	37%	\$441 225 000	28%
North-East	\$466 573 000	39%	\$466 573 000	30%
North-Central*	\$277 597 000	23%	\$277 597 000	18%
Algonquin Park/South Algonquin Township	N/A	N/A	\$56 618 000	4%
Muskoka District	N/A	N/A	\$319 565 000	20%

Source: TSRC/ITS Tabulations 2007.

*Excluding Algonquin Park/South Algonquin Township.

Note: The distribution of spending among North-West, North-Central and North-East changes somewhat when the "net" region is expanded to include Algonquin Park, South Algonquin Township and Muskoka District.

T. Place of Residence of Overnight Visitors in North 2

By increasing the geographic boundaries of Northern Ontario (North 1) to include Muskoka and the Algonquin Park area, the proportions of same-day and overnight visitors from domestic markets increases marginally at the expense of the U.S. market:

- The same-day excursion market shifts from 77% domestic for Northern Ontario to 80% for North 2.
- The proportion of U.S. same-day excursions declines from 22% in Northern Ontario to 19% in North 2.
- Similarly, 19% of all overnight visitors in Northern Ontario are Americans, but this proportion declines to 15% once Muskoka and the Algonquin Park area are included in the region. This shift is explained, at least in part, by the fact that the Muskoka and Algonquin Park areas attract high volumes of domestic cottagers.

Same-day and Overnight Visitors, by Origin, 2007

	Northern Ontario (North 1)		North 2	
	Same-Day	Overnight	Same-Day	Overnight
Total Person Visits	2 971 000	4 712 000	3 459 000	6 441 000
Domestic	2 296 000	3 774 000	2 768 000	5 371 000
United States	664 000	877 000	673 000	959 000
Overseas	11 000	61 000	18 000	111 000
Percent by Origin				
Domestic	77%	80%	80%	83%
United States	22%	19%	19%	15%
Overseas	<0.5%	1%	1%	2%

Source: TSRC/ITS Tabulations 2007.

Note: Figures may not add to total or 100% because of rounding.

A key reason for changes in major origin markets for overnight visitors to North 2 relative to Northern Ontario is the proximity of each portion of the larger region to the Canada/U.S. border. Like the North-Central Tourism Region, the additional area captured in North 2 is not contiguous with the U.S. border. In each of these areas —

North-Central, the Algonquin Park area and Muskoka — less than 1-in-20 overnight visitors come from the United States. In contrast, the North-West Tourism Region shares a common border with Minnesota and Wisconsin. Likely as a consequence of this proximity, Americans represent 39% of overnight tourism in North-West. Similarly, the North-East Tourism Region shares a common border with Michigan and enjoys a higher share of overnight tourists from the United States (16%) than does North-Central (6%) or Algonquin Park and Muskoka (5%).

Overnight Visitor Volumes in Northern Ontario Tourism Regions, by Origin, 2007								
Overnight Person Visits	North-West		North-East		North-Central		Algonquin Park/South Algonquin Township/Muskoka District	
Canada	1 290 000		1 847 000		1 684 000		1 749 000	
Ontario	438 000	34%	1 415 000	77%	1 502 000	89%	1 584 000	91%
Toronto CMA	28 000	2%	294 000	16%	556 000	33%	891 000	51%
Quebec	5 000	<0.5%	62 000	3%	9 000	1%	10 000	<0.5%
Manitoba	259 000	20%	10 000	1%	8 000	1%	1 000	<0.5%
Other Canada	65 000	5%	33 000	2%	36 000	2%	13 000	<0.5%
United States	509 000	40%	300 000	16%	103 000	6%	86 000	5%
Total Border States	366 000	28%	207 000	11%	54 000	3%	41 000	2%
Illinois	57 000	4%	5 000	<0.5%	3 000	<0.5%		<0.5%
Michigan	29 000	2%	110 000	6%	15 000	1%	8 000	<0.5%
Minnesota	173 000	13%	15 000	1%	5 000	<0.5%		<0.5%
New York	10 000	1%	13 000	1%	8 000	1%	21 000	1%
Ohio	13 000	1%	37 000	2%	13 000	1%		<0.5%
Wisconsin	83 000	6%	14 000	1%	3 000	<0.5%		<0.5%
Other United States	143 000	11%	93 000	5%	49 000	3%	45 000	3%
Overseas	14 000	1%	28 000	2%	25 000	2%	56 000	3%

Source: TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor) North 1 Tabulations; TSRC 2007 - Tourism in Northern Ontario (FedNor) North 2; ITS 2007 - Overseas Residents - Tourism in Northern Ontario (FedNor) North 2; ITS 2007 - U.S. Residents - Tourism in Northern Ontario (FedNor) North 2 derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 1.
Note: the sum of various origins may not add to total Northern Ontario because of visits by the same traveller to different sub-regional destinations.

U. Season of Visits in North 2

Expanding the size of the northern region by adding Muskoka District and the Algonquin Park area has a minimal impact on which season same-day or overnight visits occur. The proportions of same-day visitors travelling in North 2 over each of the four calendar quarters are very similar to the seasonal patterns evident for Northern Ontario.

There is, however, a somewhat greater concentration of overnight visitors between July and September in the Muskoka/Algonquin region (58%) than there are in other regions.

The proportions of overnight person visits in each North 2 region, from July to September, are:

- North-West, 48% of the year's total;
- North-East, 45%;
- North-Central, 54%; and
- Muskoka/Algonquin, 58%.

Season of Person Visits in Northern Ontario (North 1) and North 2: Same-day and Overnight, 2007

	Northern Ontario (North 1)	North 2
Same-day Person Visits	2 971 000	3 459 000
January–March	21%	19%
April–June	27%	27%
July–September	30%	33%
October–December	22%	21%
Overnight Person Visits	4 712 000	6 441 000
January–March	14%	14%
April–June	25%	23%
July–September	48%	51%
October–December	12%	12%

Sources: TSRC/ITS 2007 Harmonized - *Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; *TSRC 2007 - Tourism in Northern Ontario (FedNor) North 2*; *ITS 2007 - Overseas Residents - Tourism in Northern Ontario (FedNor) North 2*; *ITS 2007 - U.S. Residents - Tourism in Northern Ontario (FedNor)*. North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

V. Main Purpose of Trip for Visits in North 2

Adding Muskoka District and the Algonquin Park area also has a minimal impact on the main purpose of same-day excursions. In North 2:

- half of the same-day person visits were made for pleasure purposes;
- almost one third were made to visit friends and relatives; and
- about one seventh were made to conduct personal business or for some other non-business reason.

These proportions are essentially the same as those found in Northern Ontario (North 1).

Similarly, there is little difference in overnight trip motivation between Northern Ontario (North 1) and the expanded region. In both areas, three fifths of all overnight trips in 2007 were motivated by pleasure. Visiting friends and relatives prompted 32% of overnight travel in Northern Ontario (North 1) and slightly less (29%) in the expanded area.

Main Purpose of Visits in Northern Ontario (North 1) and North 2: Same-day and Overnight, 2007

	Northern Ontario (North 1)	North 2
Same-day Person Visits	2 971 000	3 459 000
Pleasure	48%	51%
Visit friends/relatives	31%	30%
Business	5%	4%
All other purposes	16%	14%
Overnight Person Visits	4 712 000	6 441 000
Pleasure	60%	64%
Visit friends/relatives	32%	29%
Business	4%	3%
All other purposes	4%	3%

Sources: TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor). Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; TSRC 2007 - Tourism in Northern Ontario (FedNor) North 2; ITS 2007 - Overseas Residents - Tourism in Northern Ontario (FedNor) North 2; ITS 2007 - U.S. Residents - Tourism in Northern Ontario (FedNor). North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

Of the four areas that comprise North 2, Muskoka/Algonquin (76%) and the North-West Tourism Region (71%) are most apt to attract overnight tourists for pleasure. In North-Central, 62% of visitors stated "pleasure" as the purpose for their trip, as did 51% in North-East.

W. Nights and Lodging in North 2

By adding the traditional cottage country of Muskoka and the Algonquin Park area to Northern Ontario, the number of nights spent in North 2 increases by 32%, from 17.3 million to 22.9 million. The bulk of this growth is, not surprisingly, in the private cottage and private home segments.

The number of person nights spent in private homes or cottages during 2007 increased by about 29% in Northern Ontario with the inclusion of Muskoka and the Algonquin Park area (from 8.8 million in Northern Ontario to 11.4 million in North 2).

Lodging in Northern Ontario (North 1) and North 2: Person Nights, 2007

	Northern Ontario (North 1)		North 2	
Total Person Nights	17 330 000		22 909 000	
Roofed Commercial Lodging	6 364 000	37%	8 808 000	38%
Campgrounds/Trailers	1 643 000	10%	2 139 000	9%
Private (Cottages/Homes)	8 806 000	51%	11 356 000	50%
Other/Unknown	518 000	3%	608 000	3%

Sources: TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor). Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; TSRC 2007 - Tourism in Northern Ontario (FedNor) North 2; ITS 2007 - Overseas Residents - Tourism in Northern Ontario (FedNor) North 2; ITS 2007 - U.S. Residents - Tourism in Northern Ontario (FedNor). North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

Muskoka District and Algonquin Park represent 27% of all person nights spent in commercial roofed lodging in this expanded region. Not surprisingly, Muskoka District tourists accounted for the majority of these commercial nights (25%).

Roofed Commercial Lodging in Northern Ontario (North 1) and North 2, by Region, 2007				
	Northern Ontario (North 1)		North 2	
Roofed Commercial Person Nights	6 364 000		8 808 000	
North-West	2 371 000	37%	2 371 000	27%
North-East	2 034 000	32%	2 034 000	23%
North-Central*	1 958 000	31%	1 958 000	22%
Algonquin Park/ South Algonquin Township	N/A	N/A	206 000	2%
Muskoka District	N/A	N/A	2 238 000	25%

Source: TSRC/ITS Tabulations 2007.
*Excluding Algonquin Park/South Algonquin Township.

Private Cottage/Home Person Nights in Northern Ontario (North 1) and North 2, by Region, 2007				
	Northern Ontario (North 1)		North 2	
Private Cottage/Home Person Nights	8 806 000		11 356 000	
North-West	2 023 000	23%	2 023 000	18%
North-East	3 356 000	38%	3 356 000	30%
North-Central*	3 427 000	39%	3 427 000	30%
Algonquin Park/ South Algonquin Township	N/A**	N/A	170 000	1%
Muskoka District	N/A	N/A	2 379 000	21%

Sources: TSRC/ITS 2007 Harmonized - *Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; *TSRC 2007 - Tourism in Northern Ontario (FedNor) North 2*; *ITS 2007 - Overseas Residents - Tourism in Northern Ontario (FedNor) North 2*; *ITS 2007 - U.S. Residents - Tourism in Northern Ontario (FedNor)*. North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
*Excluding Algonquin Park/South Algonquin Township.

As a major camping destination in Ontario, it is not surprising that when Algonquin Park area numbers are included in Northern Ontario, the number of camping nights spent in the expanded area increases. The Park and adjacent township contribute about 249 000 person nights in campgrounds or trailer facilities to North 2. Camping in Muskoka District also adds about 246 000 camping nights to North 2. Thus, camping nights increase by about 31%, from 1.6 million in Northern Ontario to 2.1 million in North 2.

Camping Person Nights in Northern Ontario (North 1) and North 2, by Region, 2007

	Northern Ontario (North 1)		North 2	
Camping Person Nights	1 634 000		2 139 000	
North-West	515 000	32%	515 000	24%
North-East	697 000	43%	697 000	33%
North-Central*	431 000	26%	431 000	20%
Algonquin Park/ South Algonquin Township	N/A**	N/A	249 000	12%
Muskoka District	N/A	N/A	246 000	12%

Sources: TSRC/ITS 2007 Harmonized - *Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; *TSRC 2007 - Tourism in Northern Ontario (FedNor) North 2*; *ITS 2007 - Overseas Residents - Tourism in Northern Ontario (FedNor) North 2*; *ITS 2007 - U.S. Residents - Tourism in Northern Ontario (FedNor)*. North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.
*Excluding Algonquin Park/South Algonquin Township.

X. Activities on Overnight Trips

Activity information is provided here for overnight trips only. There is only one substantive difference in the activity profiles of overnight trips when this information is examined within Northern Ontario (North 1) or in the expanded North 2 area. Specifically, boating emerges as a more pervasive activity among overnight visitors to North 2 (38%) than it does in North 1 (20%). In both areas, however, outdoor activities — led by boating, fishing and camping — remain predominant.

By and large, overnight visitors to each of the four areas that contribute to tourism in North 2 have similar activity profiles. There is one noteworthy difference between activities of visitors to Algonquin Park/South Algonquin Township/Muskoka District and those who go to the three tourism regions that constitute Northern Ontario (North 1). There is a greater tendency to go boating among overnight visitors to Muskoka District or the Algonquin Park area (combined) relative to visitors in North-East, North-Central and North-West. The increased tendency toward boating is likely a function of many Muskoka/Algonquin overnight visitors' use of lakeside cottages for recreational boating.

Activities on Trip by Overnight Visitors to Northern Ontario (North 1) and North 2, by Origin, 2007

	Northern Ontario (North 1)	North 2
Overnight Person Visits (Weighted)	4 712 000	6 441 000
General/Entertainment Activities*		
Attend a sports event	3%	2%
Go to a casino	2%	2%
Visit a zoo, aquarium (for ITS, also includes botanical garden)	1%	1%
Visit a theme or amusement	2%	2%
Cultural Activities*		
Visit an historic site	9%	9%
Visit a museum or art gallery	6%	7%
Attend a festival/fair	3%	3%
Attend a cultural performance	4%	4%
Outdoor Activities/Parks*		
Visit a national or provincial nature park	12%	14%
Participate in a sport or outdoor activity	62%	66%
Camping/nights in campground/RV park	15%	15%
Fishing	31%	30%
Boating/canoeing/kayaking	20%	38%
Golfing	4%	4%
Hunting	2%	2%
Downhill skiing/snowboarding	1%	1%

Sources: TSRC/ITS 2007 Harmonized - *Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; TSRC 2007 - *Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *Overseas Residents - Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *U.S. Residents - Tourism in Northern Ontario (FedNor)*. North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd. Table 4.

* Small numbers/percentages may reflect a lack of infrastructure.

Note: Activities could have taken place at any location visited on the trip; they did not necessarily take place in Northern Ontario regions. Also, the sum of visits/proportions may not add to the total or to 100% because of multiple activities on trips.

Activities on Trip: Overnight Visits in Northern Ontario (North 1) and North 2, by Region, 2007

	North-West	North-East	North-Central	Algonquin Park/South Algonquin Township/Muskoka District
Total Overnight Person Visits	1 290 000	1 847 000	1 684 000	1 749 000
General/Entertainment Activities*				
Go to a casino	1%	6%	<0.5%	2%
Attend a sports event	3%	4%	2%	1%
Visit a zoo, aquarium (for ITS, also includes botanical garden)	1%	1%	2%	2%
Visit a theme or amusement	1%	2%	2%	3%
Cultural Activities*				
Visit an historic site	8%	12%	8%	9%
Visit a museum or art gallery	5%	9%	6%	9%
Attend a festival/fair	2%	3%	3%	5%
Attend a cultural performance	2%	5%	4%	5%
Outdoor Activities/Parks*				
Visit a national or provincial nature park	13%	15%	11%	20%
Participate in a sport or outdoor activity	61%	34%	50%	83%
Fishing	47%	21%	28%	30%
Boating/canoeing/kayaking	33%	22%	38%	58%
Golfing	4%	5%	2%	5%
Hunting	3%	3%	1%	<0.5%
Downhill skiing/snowboarding	1%	1%	1%	1%
Camping/nights in campgrounds/RV parks	15%	15%	15%	15%

Sources: TSRC/ITS 2007 Harmonized - *Tourism in Northern/Southern Ontario (FedNor)*. Northern Ontario (North 1) tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.; TSRC 2007 - *Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *Overseas Residents - Tourism in Northern Ontario (FedNor) North 2*; ITS 2007 - *U.S. Residents - Tourism in Northern Ontario (FedNor)*. North 2 tabulations derived from Statistics Canada files by Research Resolutions & Consulting Ltd.

*Small numbers/percentages may reflect a lack of infrastructure.

Note: Activities could have taken place at any location visited on the trip. They did not necessarily take place in Northern Ontario regions.

APPENDIXES

Y. METHODOLOGY

Background

Representatives of FedNor continue their 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 Statistics Canada's 2007 Travel Survey of Residents of Canada (TSRC) and International Travel Surveys (ITS) and to prepare accompanying reports. This report updates *Tourism Volume, Value and Characteristics in Northern Ontario, 2004* and is based on the most recent estimates of tourism volume, value and characteristics available from Statistics Canada at this time. Domestic travel information between 2004 and subsequent years cannot be compared because Statistics Canada replaced the Canadian Travel Survey (CTS) with the Travel Survey of Residents of Canada (TSRC) in 2005. Hence, this report provides year-to-year comparisons only for the first complete year of tourism information based on the new domestic survey and corresponding years for the International Travel Survey (2006 and 2007).

Information contained in the domestic and international travel surveys 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). As a result, many decisions about how to treat information reported by survey respondents have been made and are not necessarily obvious.

Geographic Areas

Northern and Southern Ontario (North 1, South 1)

For research purposes, *Northern Ontario* has been defined by the Ontario Ministry of Tourism (MTOUR) to include Tourism Region 10 North-Central, 11 North-East, and 12 North-West. This area is displayed on the map below and includes the census divisions (CDs) listed alongside the map.²¹ Note that Algonquin Park, South Algonquin Township (Part of CD48) and Muskoka District are excluded from Northern Ontario (North 1).²² To retain consistency with past tabulations, *Northern Ontario* coincides with *North 1* throughout this report.

²¹ Tourism information from the Statistics Canada surveys for portions of Northern Ontario is available only for specific census divisions (as listed), CMAs and MTOUR tourism regions 10, 11 and 12.

²² These areas are included in South 1 and in North 2.

For comparative purposes, a geographical unit referred to as *South 1* or *Southern Ontario* was constructed. South 1 represents residual travel in the province, that is, travel volume, travel value and nights spent by people who did not visit Northern Ontario on their same-day or overnight trip. Because some travellers visit both Northern and Southern Ontario on the same trip and/or because some records in Statistics Canada data files do not include information on the location of sub-provincial visits, the sum of North 1 and South 1 will not necessarily match total tourism volume or value for Ontario as a whole.



- 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

North 2

For marketing and product development purposes, some stakeholders require a broader definition of Northern Ontario — one that includes all the census divisions included in North 1 as well as Muskoka District Municipality (CD44) and the portion of Nipissing District (CD48) that includes Algonquin Park and South Algonquin Township (these latter areas are not included in North-Central Ontario Tourism Region and are, therefore, excluded from North 1). This larger area is referred to as *North 2* (see CD list below).



CD44:	Muskoka District Municipality
CD48:	Nipissing District (entire CD, including Algonquin Park and South Algonquin Township)
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

Additional Information on Interpreting Estimates

Smaller Geographic Units of Analysis are Not Necessarily Additive

The reader is reminded that visitor volumes are not cumulative across sub-regions. In other words, the sum of visits across the three tourism regions that constitute Northern Ontario (North-West, North-East, North-Central) will not be identical to the estimate of visits in Northern Ontario as a whole because the latter is a net (unduplicated) count of visits to the larger geographic region (e.g. North 1, South 1).

For example, assume a traveller spends five nights on the trip. During this trip, he/she spends three nights in North-Central Tourism Region and two nights in North-East. This person will be counted as an overnight visitor in North-Central and will also be counted as an overnight visitor in North-East, when each of these tourism regions is examined independently. If volume estimates for these two regions were added together, the same traveller would be counted two times. When a larger geographic unit such as Northern Ontario is the unit of analysis, this traveller would be counted only once, that is, as one visitor to the broader region, staying five nights in Northern Ontario.

The same principle of *net counts* applies to census divisions. The sum of visits in census divisions within a larger geographic region will not match the net of visits to the larger region. In fact, the sum will be equal to or larger than the net count because the same visitor may be counted more than once when the smaller units are added together.

Domestic Visitor Spending

Visitor spending includes all spending on goods and services by visitors in their destination(s). Residents of that community may spend additional spending on tourism goods and services in a community. When a resident visits a destination or site within the same geographic area as the place of residence, transportation spending (primarily, domestic commercial carrier fares such as those for commercial airlines, trains, buses) is included in the visitor-spending estimate for the geographic area. If no visit by the area resident takes place in the geographic region, transportation spending to leave the region or to come and go from Canada is excluded from visitor spending.

The sum of visitor spending and spending by area residents to leave the place of residence is referred to as *tourism receipts*. Economic impact estimates are generally based on visitor spending rather than tourism receipts because visitor spending reflects what people, who came to a destination, spend on their visit in the location.

For example: Assume a resident of Rainy River District spends \$500 on a trip, of which \$100 is on bus fare to travel to the destination. If the traveller only has a same-day destination outside Rainy River District (on a same-day trip) or all nights on the trip were spent outside Rainy River District (on an overnight trip), the \$100 in bus fare would be assigned to Rainy River District as a tourism receipt but would not be included in visitor spending in the district (because no visit to the region took place on this trip). If, on the other hand, this same traveller had a same-day destination or spent at least one night in Rainy River District, the \$100 in bus fare would be considered visitor spending (because there was a visit in the region) and assigned to Rainy River.

Why visitor spending cannot be added together from smaller units of geography: The assignment of dollars to visitor spending rather than tourism receipts will change as the unit of geography changes. Using the example cited above, visitor spending in Rainy River will not include the Rainy River resident's \$100 in bus fare if this resident did not have a destination or any night spent in Rainy River District.²³ If, however, this same person has a destination or nights spent in Thunder Bay District, which is another Census Division within North 1, the \$100 in bus fare would be considered visitor spending for Northern Ontario. In other words, *origin spending* (to leave the place of residence) can be converted to visitor spending as the unit of geography increases in size.

²³ This bus fare would, however, be assigned to tourism receipts in Rainy River District.

The same principle applies to Canadian carrier fares to enter and leave Canada by U.S. and overseas visitors. If there is a visit in the region, spending assigned for domestic commercial carrier fares is assigned as visitor spending but if there is no visit, these transportation costs are included only in tourism receipts for the area.

In summary, tourism receipts are commonly used to describe the importance of the entire tourism industry to an area (inbound and outbound travel). They are not commonly used to estimate the impact of marketing, product development and infrastructure in an area because they include spending to leave the area as well as spending by visitors to an area. Therefore, this report uses visitor spending — not tourism receipts — as the basis for estimating the economic impact of tourism to Northern Ontario.

II. THE TABULATION SETS AND REPORTS

Ten sets of tabulations from the 2007 Canadian and international travel surveys (TSRC/ITS) were produced by Research Resolutions & Consulting Ltd. and were provided to FedNor in electronic format. The sets are identified in the following table.

	Canadians	Americans	Other Countries (Overseas)	All Markets
North 1	X	X	X	X
South 1	X	X	X	N/A
North 2	X	X	X	N/A
N/A: not applicable				

Key measures of tourism volume and value for individual tourism regions and census divisions in Northern Ontario (North 1; North 2) are included in the tabulations. For regional boundaries used in these tabulations, see Appendix I, Geographic Areas.

The Reports

Research Resolutions & Consulting Ltd prepared two analytical products for FedNor in this project:

1. A detailed summary of tourism volume, value and characteristics in Northern Ontario (this report).
2. An industry-oriented highlights report for stakeholders on tourism volume, value and characteristics in Northern Ontario (see *An Overview of Tourism in Northern Ontario, 2007*, FedNor 2009).

III. SUMMARY TABLES

The following tables illustrate key data changes from 2006 to 2007 in Northern Ontario's three tourism regions.

NORTH-WEST	TOTAL	CANADA	U.S.	OVERSEAS
All Person Visits				
2007	2 105 000	1 176 000	914 000	15 000
2006	2 490 000	1 384 000	1 097 000	9 000
% Change 2006 to 2007	-15%	-15%	-17%	69%
Overnight Person Visits				
2007	1 290 000	767 000	509 000	14 000
2006	1 362 000	790 000	565 000	7 000
% Change 2006 to 2007	-5%	-3%	-10%	114%
Visitor Spending				
2007	\$490 627 000	\$184 695 000	\$300 211 000	\$5 722 000
2006	\$566 612 000	\$233 709 000	\$329 648 000	\$3 255 000
% Change 2006 to 2007	-10%	-21%	-9%	76%
Person Nights				
2007	5 255 000	2 323 000	2 818 000	144 000
2006	5 828 000	2 911 000	2 869 000	48 000
% Change 2006 to 2007	-10%	-20%	-2%	137%
Sources: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) 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 .				

NORTH-EAST	TOTAL	CANADA	U.S.	OVERSEAS
All Person Visits				
2007	3 398 000	2 798 000	566 000	34 000
2006	3 443 000	2 770 000	638 000	35 000
% Change 2006 to 2007	-1%	1%	-11%	-3%
Overnight Person Visits				
2007	1 847 000	1 519 000	300 000	28 000
2006	1 844 000	1 484 000	327 000	33 000
% Change 2006 to 2007	<0.5%	2%	-8%	-15%
Visitor Spending				
2007	\$604 814 000	\$470 422 000	\$122 082 000	\$12 310 000
2006	\$609 279 000	\$452 665 000	\$135 518 000	\$21 096 000
% Change 2006 to 2007	-1%	4%	-10%	-42%
Person Nights				
2007	6 221 000	4 908 000	1 160 000	154 000
2006	5 906 000	4 352 000	1 193 000	362 000
% Change 2006 to 2007	5%	13%	-3%	-57%
Sources: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) 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 .				

NORTH-CENTRAL	TOTAL	CANADA	U.S.	OVERSEAS
All Person Visits				
2007	2 330 000	2 184 000	116 000	31 000
2006	2 419 000	2 286 000	102 000	31 000
% Change 2006 to 2007	-4%	4%	14%	-2%
Overnight Person Visits				
2007	1 684 000	1 556 000	103 000	25 000
2006	1 673 000	1 556 000	91 000	25 000
% Change 2006 to 2007	1%	<0.5%	13%	1%
Visitor Spending				
2007	\$333 218 000	\$287 676 000	\$37 027 000	\$8 515 000
2006	\$387 831 000	\$350 970 000	\$27 740 000	\$9 122 000
% Change 2006 to 2007	-14%	-18%	33%	-7%
Person Nights				
2007	5 854 000	5 199 000	533 000	122 000
2006	5 122 000	4 638 000	368 000	116 000
% Change 2006 to 2007	14%	12%	45%	5%
Sources: <i>TSRC/ITS 2007 Harmonized - Tourism in Northern/Southern Ontario (FedNor)</i> . Northern Ontario (North 1) 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 .				

IV. MTOUR's ECONOMIC IMPACT OF TOURISM GLOSSARY

The following is a partial copy of MTOUR's glossary, taken January 2009 from <http://www.tourism.gov.on.ca/english/research/rtp/index.html>.

The economic impact of visits in Northern Ontario and other 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 visitor spending in Northern Ontario 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, 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, seasonal employment, as well as both employed and self-employed.

Federal tax revenue: includes personal income tax, corporate income tax, commodity tax (i.e. 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 revenue: includes personal income tax, corporate income tax, commodity tax (i.e. 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 revenue: includes business and personal property taxes that are collected by a municipality. Collection, however, does not immediately follow 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.