



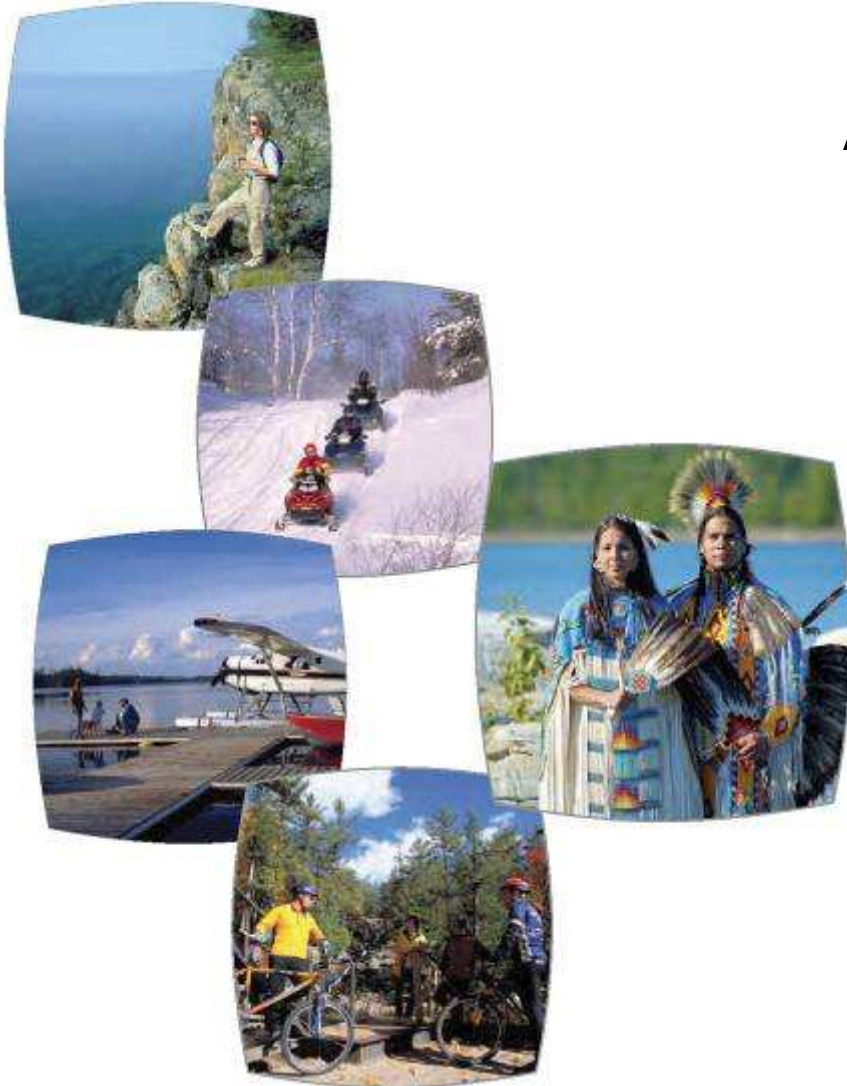
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# Tourism in Northern Ontario



## An Overview



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Prepared for FedNor by  
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Prepared in 2009 for FedNor by Research Resolutions & Consulting Ltd.

# An Overview of Tourism in Northern Ontario, 2007

## Introduction

This report summarizes tourism activity in Northern Ontario in 2007. It is designed to aid tourism operators, planners and marketers in their efforts to understand the nature of tourism within the area.

This report is based on data from 2007, the year for which the most recent estimates of tourism volume, value and characteristics are available from Statistics Canada.<sup>1</sup> For more detailed information on any section of this report or the research methodology, see ***Information Tools for Marketing and Planning: Tourism Volume, Value and Characteristics in Northern Ontario, 2007*** (FedNor, March 2009), or contact FedNor.

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. These regions are identified by the Ontario Ministry of Tourism (MTOUR) and are shown on the accompanying map; they include the census divisions (CDs) listed here.

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 Township, CSD-48-001	



Note that North-Central Region excludes the Muskoka District, Algonquin Park and South Algonquin Township.<sup>2</sup>

This document focuses on Northern Ontario data. Readers with a specific interest in Muskoka and Algonquin areas are urged to consult **Chapter VII** in FedNor's ***Information Tools for Marketing and Planning***.

<sup>1</sup> Domestic travel information between 2004 and subsequent years cannot be compared because Statistics Canada replaced the Canadian Travel Survey with the Travel Survey of Residents of Canada in 2005. Hence, this report provides year-to-year comparisons of total and domestic tourism in Northern Ontario only for 2006 and 2007.

<sup>2</sup> Tourism information from the Statistics Canada surveys for portions of Northern Ontario is available only for specific census divisions, census metropolitan areas, and each of the three tourism regions currently used by MTOUR to create the northern tourism region.

## Comparisons Over Time

### *Tourism in Northern Ontario declined between 2006 and 2007*

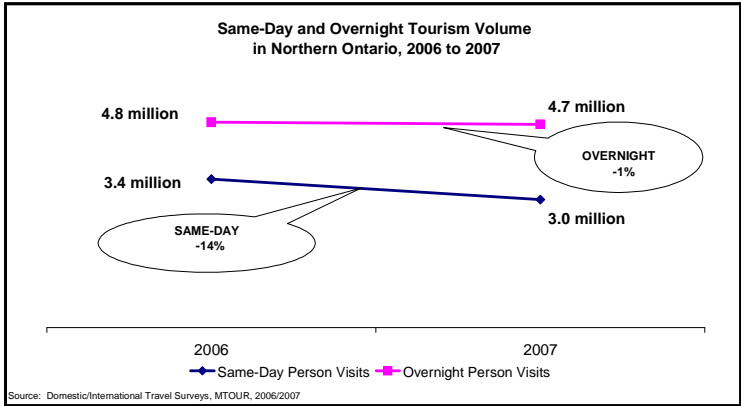
Same-day excursions and overnight visits in Northern Ontario fell 6% in 2007, from about 8.2 million person visits in 2006 to 7.7 million. Tourists from the United States represented the most substantive decline, dropping from about 1.8 million visitors in 2006 to 1.5 million in 2007. The number of tourists 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.

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.

<b>Comparison of Key Estimates: Northern Ontario, 2006 and 2007*</b>			
	<b>2006</b>	<b>2007</b>	<b>Change from 2006 to 2007</b>
<b>Total Person Visits**</b>	8 201 000	7 683 000	-6%
<b>Canada</b>	6 351 000	6 071 000	-4%
Ontario	5 859 000	5 461 000	-7%
Other Canada	492 000	610 000	24%
<b>United States</b>	1 786 000	1 540 000	-14%
<b>Overseas</b>	65 000	72 000	12%
<b>Visitor Spending</b>	\$1 584 965 000	\$1 444 236 000	-9%
<b>Person Nights</b>	16 857 000	17 330 000	3%
Sources: <i>Travel Survey of Residents of Canada (TSRC)/International Travel Survey (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: <a href="http://www.tourism.gov.on.ca/english/research">www.tourism.gov.on.ca/english/research</a> . *All estimates are rounded to the nearest thousand. **Same-day and overnight visits in Northern Ontario.			

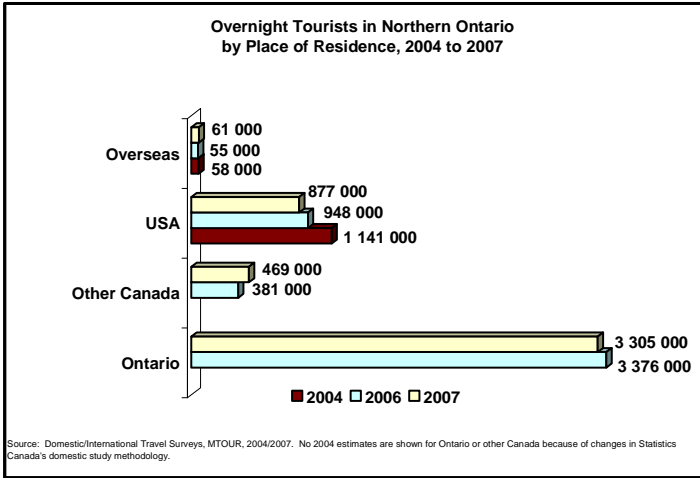
When same-day and overnight trips to Northern Ontario are separated, it is clear that the same-day market contributed most substantively to the 6% drop in total trips in Northern Ontario between 2006 and 2007. Same-day trips in Northern Ontario fell by 14% over the year, whereas overnight trips fell by only about 1%.

The overall decline in Northern Ontario compares to a slight increase in total tourism for the province as a whole. Ontario-wide tourism numbers increased from approximately 103.4 million person visits in 2006 to 104.8 million in 2007.



Even though overnight visitors declined only about 1% over the year, the spending level fell much more substantially. This is at least partly because of the sizeable loss in overnight U.S. tourists, who spend nearly twice as much per night as Canadians do. The number of overnight visits from the United States fell from 948 000 in 2006 to 877 000 in 2007 (-7%).

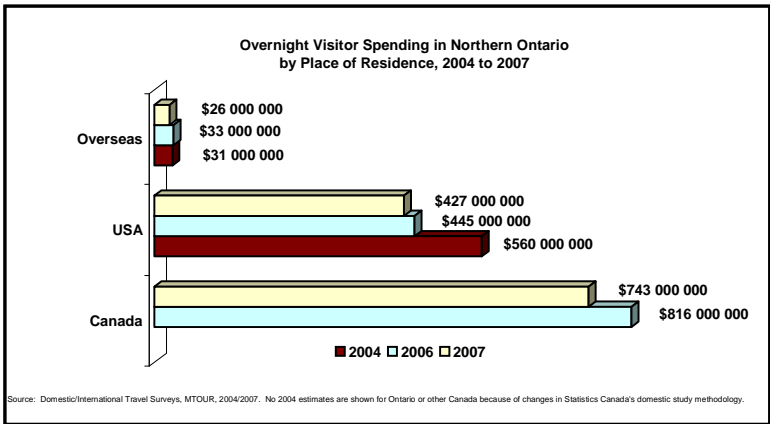
Over a longer period, the decline in U.S. tourists on overnight trips in Northern Ontario is more evident. In 2004, 1.1 million Americans visited the region. Thus, between 2004 and 2007, this important market for Northern Ontario declined by 23%. Over the same time span, the overseas market stayed relatively constant.



Over the same time span, the overseas market stayed relatively constant.

In light of the downturn in tourism volume, it is not surprising that spending by overnight visitors to Northern Ontario also suffered over the past few years. Between 2006 and 2007, spending by Canadian overnight tourists in Northern Ontario fell by about 9%, from \$816 million to \$743 million. While the 2006 to 2007 decline was not as dramatic for the U.S. overnight market (-4%),

spending by overnight U.S. tourists fell by 24% from 2004 (\$560 million) to 2007 (\$427 million). Spending by overseas visitors on overnight trips in Northern Ontario also fell over the past few years, from \$31 million in 2004 to \$26 million in 2007 (-16%).



## Tourism in Northern Ontario, 2007

### *Almost 7.7 million tourists travelled in Northern Ontario in 2007*

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

Most tourists travelling in Northern Ontario spent at least one night in the region. Of the 7.7 million person visits in 2007, 61% or about 4.7 million were on 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.

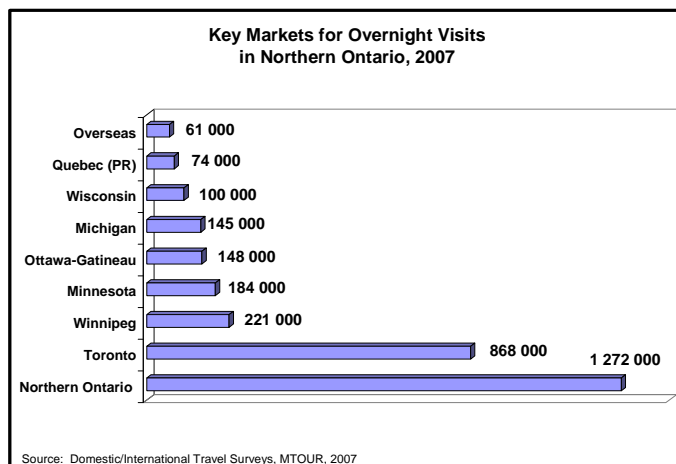
### *Most visitors to Northern Ontario are Ontario residents*

Geographical proximity has a great deal to do with where each of the Northern Ontario regions attracts its visitors. Thus, Northern Ontario residents travelling from place to place within the region (i.e. intra-regional tourism), along with domestic border regions, are the primary sources of tourists.

**Same-day visits:** Ontario residents accounted for 77% of the nearly 3 million same-day trips in Northern Ontario during 2007. Another 22% came from the United States.

**Overnight visits:** Canadians also represented a high proportion of overnight visits: 80% in 2007. Of the 4.7 million overnight person visits in Northern Ontario during 2007, Northern Ontario itself accounted for 27%, or 1.3 million.

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



The Toronto Census Metropolitan Area (CMA) was the largest single urban feeder market for the North in 2007. The CMA accounted for close to one fifth of all overnight tourism to Northern Ontario over the course of the year, or about 868 000 overnight visitors. Of Toronto’s overnight visitors, about two thirds (562 000) were on pleasure trips. Other overnight visitors from Toronto were on trips to visit friends and relatives, for business, or for other purposes.

Contributing approximately 221 000 or 5% of overnight tourists in 2007, Winnipeg CMA was Canada's next-largest urban source of overnight visitors to Northern Ontario. Like Torontonians, most Winnipeggers on overnight trips to Northern Ontario were travelling for pleasure purposes (164 000 in 2007) including visiting private cottages within Northern Ontario. Ottawa-Gatineau was also a key market for overnight tourists to the North. Residents from this CMA made 148 000 overnight person visits to Northern Ontario in 2007.

***The U.S. market is especially important for overnight pleasure tourism***

Across Northern Ontario, 60% of all overnight tourists travel for pleasure purposes. On a regional basis, the proportion increases from 50% in North-East to 61% in North-Central, peaking at 71% of North-West's overnight tourists. Of Northern Ontario's overnight pleasure tourists in 2007, close to 800 000 were residents of the United States, with nearly 64% of them visiting North-West Ontario (509 000).

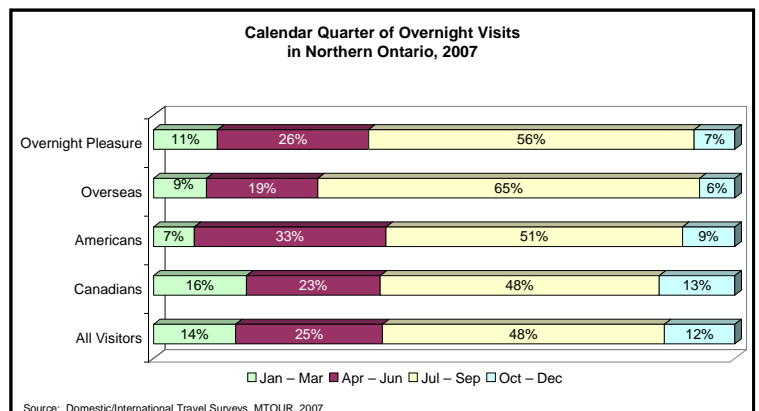
The province of Quebec represented less than 2% (about 74 000) of all overnight visitors in the region during 2007. All other Canadian markets — excluding residents of Ontario and its neighbouring provinces — represented about 3% of overnight visitors to Northern Ontario.

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. The states making the most sizeable contributions to overnight tourism in Northern Ontario — Michigan, Minnesota, and Wisconsin — were those sharing a common border with Ontario's North.

The overseas market for Northern Ontario is primarily European (46 000 visitors in 2007), dominated by overnight visitors from the United Kingdom (14 000) and Germany (9 000). For a more extensive list of feeder markets for overnight trips to Northern Ontario, see **Appendix B**.

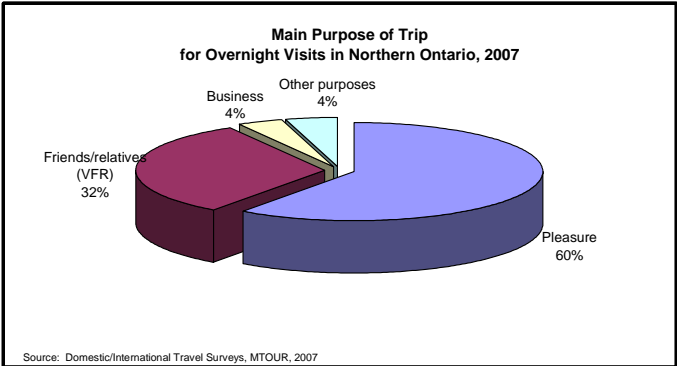
***Tourists come throughout the year but are concentrated in the summer season***

Overnight visitors come to Northern Ontario in each calendar quarter of the year but are 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 period (56%).





**Three fifths of overnight visitors to Northern Ontario are travelling for pleasure**

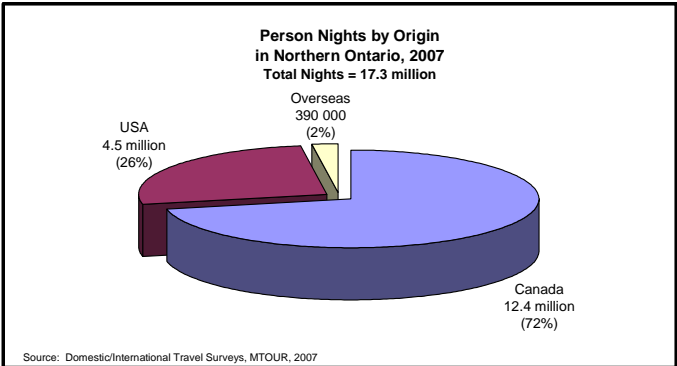


Sixty percent of all overnight trips to Northern Ontario in 2007 were made for the primary purpose of pleasure, approximately one third were made to visit friends and relatives, and the balance were made for business (4%) or some other purpose (4%). These proportions clearly suggest that the North is primarily a pleasure destination for tourists.

**Americans stay in commercial cottages; Canadians prefer private cottages**

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

During 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, Americans spent 4.5 million, and visitors from other countries spent 390 000.



Of the 17.3 million person nights spent in Northern Ontario in 2007, one third or about 6.4 million nights were spent in commercial roofed lodging (hotels, motels, resorts, bed and breakfasts [B&Bs], commercial cottages and cabins). Another 1.6 million were spent in campgrounds in the region. Private accommodation (i.e. private homes and cottages) represented

about 8.8 million person nights — more than half of all nights spent in Northern Ontario.

Visitors from each of the major markets for Northern Ontario have different lodging preferences. For example, Canadians have a particularly strong preference for staying with friends and relatives (38%) or in their own cottages (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 were in private homes, either the homes of friends and relatives (37%) or, much less commonly, in private cottages (7%).

## **Northern Ontario is an outdoor destination**

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 included 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       |

## **Americans come to Northern Ontario to fish**

An index was developed to determine whether one or another activity has a particularly strong following among Americans or Canadians. It can be used to identify the propensity of Americans and Canadians to participate in specific activities. The higher an index score is over one (1), the more it suggests a special interest in an activity.

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

Clearly, the U.S. market for overnight trips to Northern Ontario was drawn to fishing experiences (1.97) to a much greater extent in 2007 than were Canadians (0.78). Even though there were more Canadian anglers on overnight trips in Northern Ontario (898 000) than Americans (528 000), Americans were heavily over-represented among anglers relative to their total contribution to overnight tourism in the region.

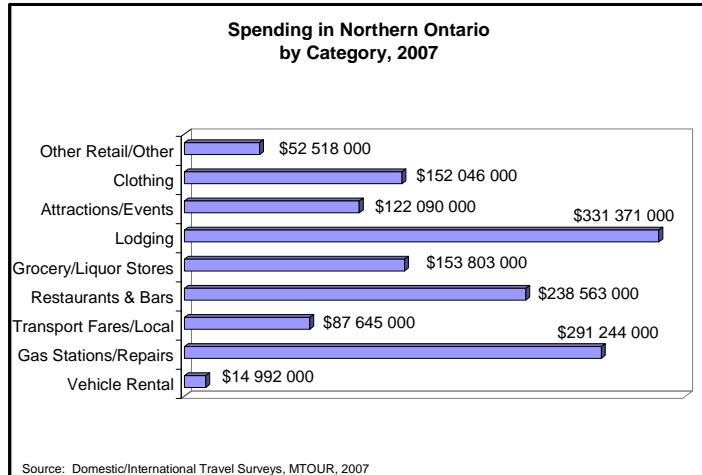
Similarly, Americans were particularly likely to visit historic sites while on a trip that included nights spent in Northern Ontario (2.19). Conversely, Canadians are under-represented among overnight tourists who go to historic sites (0.65). The comparatively low level of visits to such attractions 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.

American tourists in Northern Ontario were also especially attracted to nature parks (1.75) and to hunting (1.56) relative to their Canadian counterparts. By way of contrast, overnight U.S. tourists were particularly unlikely to be drawn to festivals/fairs (0.68),

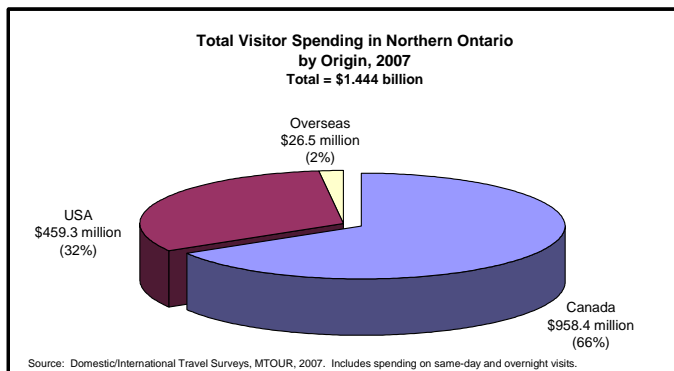
cultural performances (0.76), camping (.77), or golfing (.35). Of the 168 000 overnight visitors to the region who golfed, almost all were Canadians (157 000).

**Visitors spent \$1.4 billion in Northern Ontario during 2007**

In 2007, the 7.7 million visitors from Canada, the United States and other countries who took overnight or same-day 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%). In terms of overnight tourism activity, Northern Ontario accounted for \$1.2 billion, or about 10% of total overnight visitor spending in Ontario (\$12 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 most of the visitor spending in Northern Ontario. Of the \$247.6 million in 2007 spent during same-day visits to the region, 87% was by Canadians. Of the \$1.2 billion in visitor spending on overnight trips, three fifths or about \$743.3 million was a result of Canadians travelling to or within Northern Ontario.

Visitor spending in Northern Ontario benefits many sectors of the regional economy. The \$1.4 billion spent in the region in 2007 contributed to restaurants and bars (\$238.6 million, or 17%), the accommodation sector (\$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 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).

## American overnight tourists offer the highest yield for Northern Ontario

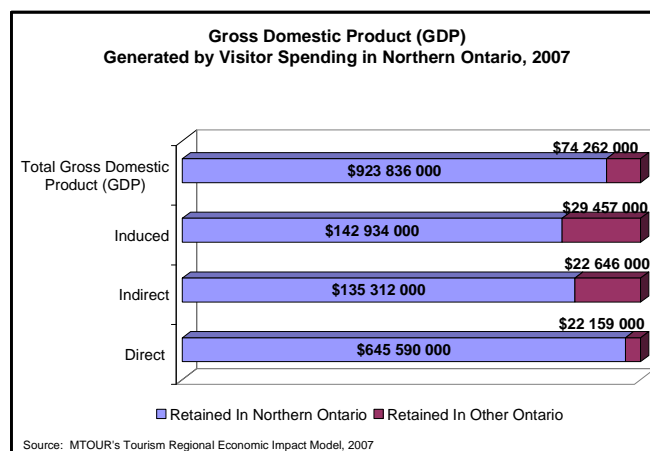
On a per-person per-night basis, Americans spent more than double what Canadians did — \$102 versus \$49 per-person per-night in 2007.<sup>3</sup> At \$102, Americans also spent appreciably more than did their overseas counterparts (\$60 per-person per-night).

Average Visitor Spending in Northern Ontario, By Origin, 2007				
	Total	Canada	United States	Overseas
<b>Same-day Trips</b>				
Per Person	\$72*	\$77	\$48	Not available***
<b>Overnight Trips: All Purposes</b>				
Per Person Per Night	\$61	\$49	\$102	\$60
Per Trip**	\$396	\$280	\$1282	\$834
<b>Overnight Trips: Pleasure</b>				
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.

## Tourism spending in Northern Ontario generated \$924 million in economic activity and 16 000 jobs for the region

Tourism spending in Northern Ontario generated about \$645.6 million in direct economic activity (GDP)<sup>4</sup> and an additional \$278.2 million in indirect and induced GDP, for 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 of tourism in Northern Ontario reached \$998 million in 2007.



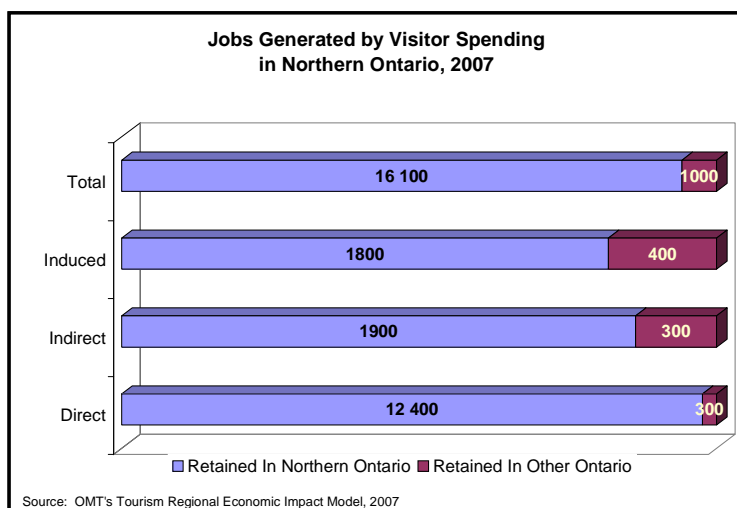
Approximately 12 400 direct jobs and an additional 3 968 indirect and induced jobs in Northern Ontario were generated as a result of visitor spending. These jobs include part and full-time positions on both annual and seasonal bases.<sup>5</sup> Additional employment in

<sup>3</sup> 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.

<sup>4</sup> See **MTOUR's Economic Impact of Tourism Glossary**, appended, for terms and concepts discussed here.

<sup>5</sup> See MTOUR's glossary, appended. Also 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

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).



Thus, of all the jobs created because of tourism in Northern Ontario, the region retained 92%.<sup>6</sup> In turn, 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.

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. These taxes included \$183.1 million in direct federal taxes retained in the region, \$165.6 million in direct provincial taxes, and \$1.2 million in direct municipal taxes retained in Northern Ontario.

### ***More than 8000 businesses are associated with tourism in Northern Ontario***

The 8058 businesses associated with tourism in Northern Ontario represent about 5% of the 152 000 tourism-related establishments in the province.<sup>7</sup>

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. Of the 567 arts, entertainment and recreation establishments in Northern Ontario, there are 76 golf courses and country clubs, 54 marinas, 39 museums and/or heritage institutions or sites, 18 performance venues (theatre, dance, etc.), and 16 skiing facilities.

for the model are somewhat different and the online Tourism Regional Economic Impact Model (TREIM) is based on different assumptions than the one used internally by MTOUR to generate profiles.

<sup>6</sup> Estimates of jobs produced by the economic impact model use the same definition as is used in Statistics Canada's Labour Force Survey. Thus, jobs generated by the model include part-time, full-time and seasonal jobs. They also include paid employees and unpaid family employees.

<sup>7</sup> MTOUR provided estimates based on Statistics Canada's Business Register Division estimates, 2007.

## Regional Differences Within Northern Ontario

In 2007, visitor volume and spending were distributed throughout the North-West, North-East, and North-Central regions:

- 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).
- Of the three regions, North-East also attracted the largest number of overnight tourists. During 2007, 1.8 million tourists spent at least one night in North-East. This compares to fewer than 1.7 million overnight tourists in North-Central and 1.3 million in North-West.

	Same-day Visits		Overnight Visits	
<b>North-West</b>	791 000	33%	1 290 000	27%
<b>North-East</b>	1 545 000	65%	1 847 000	38%
<b>North-Central</b>	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 historically 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 in 2007, or 57% of same-day spending across the three regions, with \$48.8 million in North-West and \$55.4 million in North-Central.

	Same-day Visits		Overnight Visits	
<b>North-West</b>	\$48 773 000	20%	\$441 225 000	37%
<b>North-East</b>	\$137 982 000	57%	\$466 573 000	39%
<b>North-Central</b>	\$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.

North-East also attracted more spending on overnight trips in 2007 (\$466.6 million, or 39%), than North-West at \$441.2 million, and North-Central at \$277.6 million.

The average per-person spending for same-day trips is comparable between North-Central (\$87) and North-East (\$89); the North-West average was \$62. When it came to overnight trips, however, per-person per-night spending in North-West, at about \$83, was appreciably higher than in North-East (\$64) and North-Central (\$40). The especially low per-diem spending for overnight visitors in North-Central was likely a function of the

comparatively low proportion of foreign tourists in this region. Foreign tourists tend to utilize more of a destination's tourism infrastructure than do domestic tourists. Consequently, when they represent only 8% of all overnight tourists in North-Central, it is not surprising that average spending is lower in North-Central than in regions where foreign tourists represent a larger market share, such as 18% in North-East or 35% in North-West.

<b>Average Visitor Spending in Northern Ontario's Tourism Regions, 2007</b>			
	<b>Same-day Visits</b>	<b>Overnight Visits</b>	
	Average Per Person	Average Per Person Per Night	Average Per Trip
<b>North-West</b>	\$62	\$83	\$613
<b>North-East</b>	\$89	\$64	\$378
<b>North-Central</b>	\$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.

The larger share of American tourists attracted to North-West likely drives average spending on an overnight trip (\$613) and per-person-per-night spending (\$83) well above those evident for the other regions in Northern Ontario.

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

The North-West and North-East tourism regions were especially likely to attract overnight visitors from urban centres contained within the respective region or from locations contiguous to it.

Key markets from which overnight visitors came 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 came 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 came 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 U.S. states, the North-West Tourism Region is most likely to attract overnight visitors from locations outside Ontario. In this region, 66% of overnight visitors came from outside Ontario, compared to 11% in North-Central, and 23% in North-East.



## APPENDIX A

### Overnight Person Visits in Northern Ontario, by Major Origin Market, 2007

	Overnight Visits	
Overnight Person Visits	4 712 000*	
Place of Residence		
<b>CANADA</b>	<b>3 774 000</b>	<b>80%</b>
Ontario	3 305 000	70%
Quebec	74 000	2%
Manitoba	272 000	6%
<b>Northern Ontario (Total North 1)</b>	<b>1 272 000</b>	<b>27%</b>
North-East	712 000	15%
North-West	369 000	8%
North-Central	191 000	4%
<b>Major Canadian Cities (Census Metropolitan Areas)</b>		
Toronto	868 000	18%
Winnipeg	221 000	5%
Ottawa-Gatineau	148 000	3%
<b>All Other Canada**</b>	<b>123 000</b>	<b>3%</b>
<b>U.S. Total</b>	<b>877 000</b>	<b>19%</b>
<b>Border States</b>	<b>602 000</b>	<b>13%</b>
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%
<b>OVERSEAS</b>	<b>61 000</b>	<b>1%</b>
<b>Europe (Total)</b>	<b>46 000</b>	<b>1%</b>
United Kingdom	14 000	<0.5%
Germany	9 000	<0.5%
Netherlands	8 000	<0.5%
<b>Asia (Total)</b>	<b>6 000</b>	<b>&lt;0.5%</b>
<b>All Other Countries/Regions</b>	<b>9 000</b>	<b>&lt;0.5%</b>

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.

## APPENDIX B

<b>Overnight Visitor Volumes in Northern Ontario Tourism Regions, by Origin, 2007</b>						
	<b>North-West</b>		<b>North-East</b>		<b>North-Central</b>	
<b>Overnight Person Visits</b>	<b>1 290 000</b>		<b>1 847 000</b>		<b>1 684 000</b>	
	<b>#</b>	<b>%*</b>	<b>#</b>	<b>%*</b>	<b>#</b>	<b>%*</b>
<b>Ontario</b>	<b>438 000</b>	<b>34</b>	<b>1 415 000</b>	<b>77</b>	<b>1 502 000</b>	<b>89</b>
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
<b>United States</b>	<b>509 000</b>	<b>40</b>	<b>300 000</b>	<b>16</b>	<b>103 000</b>	<b>6</b>
<b>Total Border States</b>	<b>366 000</b>	<b>28</b>	<b>207 000</b>	<b>11</b>	<b>54 000</b>	<b>3</b>
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
<b>Overseas</b>	<b>14 000</b>	<b>1</b>	<b>28 000</b>	<b>2</b>	<b>25 000</b>	<b>2</b>

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.

## APPENDIX C

### 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.