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Challenges & Opportunities

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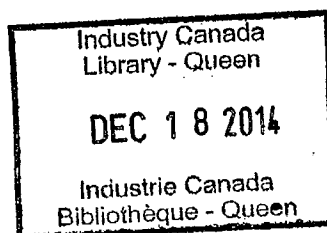
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The Northern Tourism Experience

Challenges & Opportunities

Prepared for:

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Yukon Department of Tourism

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**Research
Resolutions**

September, 1996

I. INTRODUCTION

Background

The *Northern Tourism Experience* Project is a multi-phased effort to learn more about tourism activity in Canada's North by examining tourism data from Statistics Canada's 1994 Canadian and International Travel Surveys (CTS, ITS). The project is, in part, an extension of the original examination of the country's Northern region — The Pilot Project (Phase I) — reported in *Northern Highlights: A Summary of Tourism In Canada's North* (March, 1995).¹

Components of the project include:

- Detailed computer tabulations of the 1994 Canadian and International Travel Surveys;
- *Domestic Tourism In Canada's North* — a report that compares domestic tourism in Canada's North in 1992 with comparable data in 1994 using a relatively broad definition of *The North*;
- *The Northern Tourism Experience: 1994 Domestic & Inbound Markets* — a report that examines domestic, USA and Overseas tourism using a more remote definition of the region; and
- *The Northern Tourism Experience: Challenges & Opportunities* — a summary of domestic, USA and Overseas tourism in Canada's more remote North.

Support for the *Northern Tourism Experience Project* was provided by the following partners:

Canadian Tourism Commission
Department of Canadian Heritage
Northwest Territories Economic Development & Tourism
Saskatchewan Tourism Authority
Yukon Government, Department of Tourism

Research Resolutions

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Northern Tourism Experience: 1994 Domestic & Inbound Markets

The Northern Tourism Experience: Challenges & Opportunities provides an overview of tourism in Northern Canada in 1994, including trips made by Canadians, residents of the USA and Overseas. All information used in this report has been extracted from special tabulations of Statistics Canada's Canadian and International Travel Surveys (CTS, ITS). Definitions of key terms and a map that displays the "north", as defined for this project, are appended.

The survey methodologies of the Canadian and International Travel Surveys are quite different and produce different units of analysis.² The reader is also advised that the Yukon and NWT, along with all of Canada's Indian Reserves, are systematically excluded as points of *origin* by the Canadian Travel Survey. These locations are, however, included as possible *destinations* for qualifying trips taken by Canadians, Americans and visitors from other countries.

By segmenting Canada into *new* geographical regions such as North, South, Northeast and Northwest, estimates from the CTS and ITS provided herein do not necessarily match domestic or international tourism estimates provided by Statistics Canada. The reader is advised to utilize Statistics Canada data for all *official* statistics.



II. THE NORTHERN TOURISM EXPERIENCE: CHALLENGES & OPPORTUNITIES

The main report, *The Northern Tourism Experience: 1994 Domestic & Inbound Markets*, provides a summary of findings contained in hundreds of pages of detailed computer tabulations from the Canadian and International Travel Surveys (1994). For estimates of the size and value of tourism in Canada's North and the characteristics of the market, the reader is directed to Chapters III through VI of the main report. In this summary extracted from the main report, some of the tourism challenges and opportunities offered by the vast Canadian North are described.³

The Northern tourism experience is like any other travel experience for many Canadians.

Even though Canadians represent about 8-in-10 overnight visitors to Canada's North over the year, most of these people are *not* travelling for pleasure. Instead, they are in the North to visit with their friends and relatives, to conduct business, or for other reasons. Fewer than 4-in-10 Canadian visitors in the North are there for pleasure, compared to 3-in-4 American visitors and 2-in-3 Overseas visitors to the region.

MAIN PURPOSE OF TRIPS TO CANADA'S NORTH - ALL SEASONS⁴

	Among Canadians	Among Americans	Among Overseas Visitors
Pleasure	38%	74%	68%
Business	16%	5%	7%
Visit Friends & Relatives	41%	8%	22%
Other Purposes	5%	14%	4%

Although they are less likely to be on pleasure trips, Canadians are the only year-round source of tourism for the North.

Canadians utilize their North as a tourism destination at more than twice the rate Americans and Overseas visitors do during the *winter*. About two-fifths of all overnight trips taken by Canadians to the North occur in the six month period between October and March.

The North is a fair weather destination for the non-domestic market.

The concentration of American and Overseas trips to the North in the six month period from April through September, and particularly in July, August and September is consistent with these markets' utilization of the North as a *pleasure trip destination*.

TIMING OF TRIPS TO CANADA'S NORTH⁵

	Among Canadians	Among Americans	Among Overseas Visitors
Quarter I	18%	8%	4%
Quarter II	26%	27%	30%
Quarter III	37%	58%	57%
Quarter IV	20%	7%	8%

On a year-round basis, most Canadians do not utilize the outdoors in the North.

Because Canadian trips tend to be more evenly spread throughout the year and have a wider variety of purposes, they utilize traditional "tourism" infrastructure such as commercial accommodation and restaurants at a lower rate than is evident within the non-domestic market. In fact, about 6-in-10 Canadian trips to the North over a full year include *no* outdoor activities and rely on non-commercial accommodation such as private cottages and the homes of friends and relatives.

USE OF INFRASTRUCTURE IN CANADA'S NORTH -- ALL SEASONS⁶

	Participate In No Outdoor Activity In Canada's North	Use Non-Commercial Accommodation
Canadians	63%	58%
Americans	24%	14%
Overseas Visitors	14%	26%

Canada's dominance as the source of tourism in the North diminishes quite dramatically within the peak season *pleasure* market.

Although they continue to represent the majority of holiday visitors with a Northern experience during the six months between April and September, Canadians make only 6-in-10 of the 1.8 million overnight pleasure trips to the region in peak season. Residents of the USA contribute more than 1-in-3 of these trips and Overseas residents contribute 1-in-20.

OVERNIGHT TRIPS TO CANADA'S NORTH⁷

	All Purposes - All Seasons	Pleasure - Peak Season
Total Person Trips (1994)	5,109,000	1,834,000
By Canadians (Total)	78%	59%
By Northern Residents	24%	17%
By Southern Residents	54%	42%
By Americans	19%	36%
By Overseas Visitors	3%	5%

Residents of Canada's South constitute a pleasure travel market that is somewhat larger (42%) than the American market (36%). Because so many of these Canadians are *cottagers* or stay with friends and relatives, however, they do not make the same contribution to public and commercial activities or to the economy of Northern communities as do American visitors.

While technically a part of the "pleasure" market, the 6-in-10 overnight trips by Canadians who do not use commercial accommodation, including more than 3-in-10 who are staying in private cottages, suggest a relatively intractable domestic tourism base. This market is unlikely to respond to traditional marketing approaches for increased *touristic* utilization of the region. At the same time, cottagers make a different type of contribution to the North: they pay property taxes, rely on local utilities and, to some extent, on the services and retailers in local communities.⁸

Canadians make the most substantial contribution to economic activity in the North over the full year, but Americans are the key source of consumer spending in the peak season pleasure market.

The prominence of Canadians as a source of tourism spending in Canada's North over the year is a function of their year-round use and their correspondingly high volume of trips to the region. It also reflects the high-cost, year-around business trips they make to the region. Canadians account for almost two-thirds (\$738 million) of the \$1.2 billion in consumer spending that *remains* in Canada's North over twelve months. In contrast, American visitors leave about \$354 million in the North, and their Overseas counterparts spend \$62 million in the region during the full year.

Within the *peak season pleasure market*, however, it is the Americans rather than the comparatively high-volume, low-spending Canadians that make the greatest contribution to the tourism economy of the region. They spend \$321 million during the six month peak season, compared to Overseas visitors' \$54 million.

SPENDING THAT STAYS IN CANADA'S NORTH⁹

	All Purposes - All Seasons	Pleasure - Peak Season
Total Spending That Stays In Canada's North (1994)	\$1,154,000,000	\$493,000,000
By Canadians	64%	24%
By Americans	31%	65%
By Overseas Visitors	5%	11%

Once the many family visits and business trips with their particular reliance on the commercial accommodation and restaurant sectors are removed, Canadians account for only \$118 million in spending that remains in the North (24% of total peak season pleasure spending).

Spending patterns between American and Overseas visitors are similar, with the exception of accommodation, recreation and retail.

Average per person per night spending that is retained by the North from American and Overseas visitors in the peak season are about the same for transportation in Canada¹⁰, and food/beverages, but Americans spend somewhat more money on accommodation, and on recreation and entertainment than do Overseas visitors. Conversely,

PER PERSON PER NIGHT AVERAGE SPENDING THAT STAYS IN CANADA'S NORTH -- PEAK SEASON, PLEASURE¹¹

	Americans	Overseas Visitors
Per Person Per Night Average (Total)	\$117	\$122
Accommodation	\$46	\$37
Transportation In Canada	\$20	\$25
Food & Beverages	\$22	\$26
Recreation	\$18	\$11
Other/Retail	\$11	\$23

Overseas visitors seem to spend more money shopping — and are more apt to “go shopping” as an activity — than are Americans. Their lower shelter costs likely reflect Overseas visitors' propensity to stay with friends and relatives in the North rather than in commercial forms of accommodation.

The North American market for Canada's North is "close by", creating very different feeder markets for the Northeast and Northwest.

For the most part, *eastern* Canadians and Americans go to destinations in Canada's *North-east* and *western* Canadians and Americans go to locations in Canada's *Northwest* on their pleasure trips. Proximity and available automobile access routes between Ontario and the East North Central and West North Central States such as Michigan, Wisconsin and Minnesota make these the key North American feeder markets for the Northeast.

In contrast, Pacific states, and the more densely populated western Canadian provinces -- Alberta and British Columbia -- are the primary feeder markets for the Northwest. The Americans who spend a night in the Northwest, and particularly Alaskans with any nights in the Yukon include those "in transit", likely travelling on the Alaska Highway.

KEY SOURCES OF PEAK SEASON PLEASURE TRIPS¹²

	To Canada's Northeast	To Canada's Northwest
Canada	56%	63%
USA	42%	28%
East North Central States	24%	4%
West North Central States	10%	3%
Mountain States	1%	4%
Pacific States	*	8%
Alaska	-	3%
Overseas	2%	9%
German-Speaking Europe	1%	5%
All Other Europe	1%	3%
All Other	*	1%

*Less than 0.5%.



visitors' activities are the most likely to be split between the North and South since these visitors spend five to six nights in the South on their Northern trip.

Canadians who go to the North are *not* "typical tourists".

Their primary activities include seeing friends and relatives (45%), going to cottages (32%), and fishing (37%). They do not shop, sightsee, go to parks or historic sites, or engage in cultural experiences at anywhere near the rate that Americans and Overseas visitors in the North do.

Of the three visitor groups, those from Overseas are most inclined to follow the "typical tourist" pattern.

Almost all sightsee (90%), shop (86%) and go to parks or historic sites (85%). They also go to zoos, museums, or natural displays (64%); dine out or go to clubs (45%); camp

ACTIVITIES ON OVERNIGHT PEAK SEASON PLEASURE TRIPS TO CANADA'S NORTH

	Canadians	Americans	Overseas Visitors
	%	%	%
Visit Friends & Relatives	45	15	36
Shopping	19	58	86
Sightseeing	29	66	90
Festival/Fair	5	14	14
Sports Event	6	3	9
Museum/Art Gallery	6	N/A	N/A
Zoo/Museum/Natural Display	N/A	28	64
Zoo/Natural Exhibit	4	N/A	N/A
Cultural Performance/Events ¹	2	6	14
Swim/Other Water Sports	23	11	25
Hunting/Fishing	37	33	15
Dining/Nightlife ²	19	37	45
National/Provincial Park/Historic Site ³	16	58	85
Any Cottage Nights	32	6	1
Any Camping Nights	30	27	40
At Least One Outdoor Activity	69	85	94
No Outdoor Activities	31	15	7

¹ITS attending cultural events; CTS attend cultural performance;²Includes Dining in high quality restaurant, night-life/entertainment..³In ITS, category includes "regional parks".



(40%); and visit friends and relatives (36%), although these activities may occur in Canada's North or South. Unlike Americans and Canadians on trips to Canada's North, Overseas visitors are not particularly interested in fishing. Americans fall between the Canadian and Overseas visitors to the North in their shopping, sightseeing, and park/historic site visitation patterns, but they closely resemble Canadians in their interest in fishing and camping.

Camping is particularly popular among West Coast Americans and visitors from German-speaking Europe whereas non-European Overseas visitors are likely to stay with friends or relations.

Almost one half of the visitors from the three Pacific states — Washington, Oregon and California — spend nights camping in Canada's Northwest. From the national perspective, one-third of all American visitors who camp in the North live in Pacific or Mountain states, or Alaska. German-speaking Europe yields about one-half of all the Overseas campers in the North, and countries outside of Europe generate the highest proportion of Overseas house guests in the region (41%).¹⁵

American Anglers are very single-minded — they come to fish and that's about all they do!

Almost one-half of the Americans who fish on a peak season pleasure trip in Canada's North engage in no *other* outdoor activity. Only one-third go to parks or historic sites, shop or sightsee while on their trip. Anglers are concentrated in Canada's Northeast. In fact, of all American "fishing trips" to the North in the peak season, more than 8-in-10 include nights in the Northeast. These Anglers, like the Northeastern USA visitor base as a whole, tend to come from three states: Minnesota, Wisconsin and Michigan.

The heavy concentration of American Anglers in Canada's Northeast creates a relatively homogenous visitor base for the region.

Americans who come to the Northeast in the peak season seem to come for the fishing, whereas those who go to the Northwest are more likely to engage in a variety of nature-based activities including camping, and visiting parks or historic sites. British Columbians, Albertans and Californians are the primary sources of broad-based nature-oriented tourism in Canada's Northwest.

Canada's national and provincial parks and historic sites are equally popular in the Northeast and Northwest.

Even though Anglers may be concentrated in the Northeast and campers may be focused on Canada's Northwest, visits to national, provincial parks and historic sites are equally common in each northern region.

Fishing and national/provincial parks and historic sites are the single largest activity-based economic drivers in Canada's North during the peak season.

Of the \$771 million that *stay* in the North in the peak season, one-third are linked to fishing trips (\$256 million). About the same amount is associated with visits to the country's parks and historic sites (\$252 million). Camping trips account for about \$137 million, and those with *no* outdoor activities represent more than one-third of the peak season total (\$275). (Note: The same spending may appear in more than one activity group since the activity groups are not mutually exclusive.)

SPENDING ASSIGNED TO THE NORTH BY ACTIVITY GROUPS -- PEAK SEASON

Total Spending Assigned To The North In Peak Season	\$771 Million	
	\$	%
Any Parks/Historic Sites	\$252 million	33%
Anglers/Hunters	\$256 million	33%
Any Camping	\$134 million	17%
No Outdoor Activity	\$275 million	37%
1 - 2 Outdoor Activities	\$389 million	50%
3+ Outdoor Activities	\$102 million	13%

Access corridors and product diversity are impediments to getting the large American visitor base in the Northeastern and Midwestern USA to Canada's North on more than a "fishing trip in Northern Ontario".

Throughout the findings, Canada's Northeast emerges as a *cottaging* and/or *fishing* peak season destination for Ontarians and for residents of midwestern and eastern border states such as Minnesota, Michigan and Wisconsin. Almost no domestic tourism for the North emerges from Canada's second largest province - Quebec - to either the Northeast or the Northwest. In fact, whether from the Canadian or American perspective, there is minimal



tourism activity in Canada's North that crosses a "continental divide" at the Manitoba/Ontario border.

Undoubtedly, the focus on the Northeast by Ontarians, and by East and West North Central USA residents is related to the highway network since most American Northern visitors enter Canada by car (63%) or bus (18%), and almost all Canadians in the North are in their cars. But access routes are not a sufficient explanation for the relatively undiversified visitor base in Northeastern Canada, particularly in light of the Northwest's ability to attract greater activity diversity and greater regional (origin) diversity. Either the Northwest has a more developed and diversified product base to offer potential visitors than does the Northeast, or it has been more successful at communicating its product offerings to the North American and Overseas markets than have Northern Ontario, Quebec and Newfoundland/Labrador.

Canada's North has a special appeal to men and to young people in the peak season.

More American and Canadian peak season visitors to the North are men than are women, reflecting the special enthusiasm men seem to have for fishing and camping. Perhaps because fewer of them are Anglers, Overseas visitors to the North are as likely to be men as women. Almost all groups who travel in the North are made up of people over fifteen years of age, although higher proportions of Canadian and Overseas trips are composed of people in the teenage and young to middle-aged adult segments (15 to 24 years; 25 to 44 years) than is the case among Americans.

The USA market for the North, and particularly for Canada's Northwest is somewhat older. About 3-in-10 American travel parties to the North are composed entirely of adults who are 55 years of age or over (25% for the Northeast and 33% for the Northwest).

The North, like all destinations, attracts fewer Canadians over 65 years than would be expected in light of this age group's share of the total adult population. Again, like all other destinations for overnight pleasure trips, the North attracts somewhat more affluent Canadians — about one-third have household incomes of at least \$60,000.

Each regional sponsor has a somewhat different market profile.

The Yukon's non-resident travel market is highly dependent on overnight visitors from the USA (79%), although a significant minority of the trips originating in Alaska are "pass through" trips for the Yukon. In addition to Alaska, the Yukon draws much of its USA tourism from the three Pacific states.

The NWT is more dependent on Canadian tourism than is the Yukon, and correspondingly less dependent on tourism from the USA or Overseas.

Within the Overseas market, the Yukon and Northwest Territories (combined) are particularly attractive to Germans: 4-in-10 overseas trips over the year to the Territories are made by residents of Germany. Switzerland and Austria contribute a further 1-in-8, making German-speaking Europe a key source of overseas visitation to the region (53%). Australia and New Zealand also contribute to tourism in the Territories (10%).¹⁶

Because information on Northern Saskatchewan includes both resident and non-resident, it is not surprising that this region relies heavily on its own and neighbouring provinces for its tourism. More than 9-in-10 trips to Northern Saskatchewan are made by Canadians.

Some conclusions and next steps . . .

- Canada's North emerges as a multi-faceted tourism region that offers many different tourism experiences and attracts very different types of visitors from around the world. From an economic perspective, however, the North relies very heavily on nature-based tourism, and particularly, on fishing.
- The Northwest is particularly attractive to Western Canadians and Americans and to German-speaking Europeans who enjoy camping and other non-consumptive outdoor experiences. The Northeast, on the other hand, draws a very high proportion of Anglers, primarily from Ontario and nearby states such as Michigan, Wisconsin and Minnesota.

- Markets for the Northwest, and to an even greater extent, the Northeast are primarily “regional”. They reflect road access routes and proximity. There are, therefore, opportunities to break down regional barriers by creating or packaging tourism activities that entice potential visitors to go further afield than they currently go.
- Very little non-domestic pleasure travel occurs in the North in non-peak periods, leaving the region reliant on Canadians who visit friends and relatives and conduct business there to support hotels, restaurants, and the tourism sector in general between October and March. Even though most American and Overseas visitors to Canada’s North are travelling without school-aged children, and are not hindered by the realities of “school breaks”, their activities suggest that they are “fair weather” visitors. Almost all participate in at least one outdoor activity, while on their Northern trip — activities such as camping and fishing that may not be readily shifted to other seasons.
- There are strong economic arguments to be made to encourage American and Overseas travel to Canada’s North since these trips provide *extra* benefits to tourism in Canada as a whole. More nights are spent *in Canada* on a trip that includes an overnight stay in the North than on those that do not include the North as part of the itinerary. Thus, by enticing a visitor to the North, the tourism industry in both the North and South benefits.
- On balance, the American market is more beneficial for Canada’s North than is the Overseas market. Not only do *more* Americans take trips in the North than do Overseas visitors, but they make a considerably greater economic contribution to the North than do those coming from other countries. The North *retains* about three-quarters of American visitors’ total trip spending on key items such as accommodation, food, entertainment and shopping, but retains only one-quarter to one-third of this spending from Overseas visitors.
- Activity and origin profiles reveal numerous visitor segments that should be amenable to targeted marketing efforts. For example, Anglers spend more nights away from home on their trips than do other activity segments. If they are Americans, they are also heavily reliant on commercial cottages and lodges for accommodation. They use boats and private planes to a considerably greater extent than do other Northern visitors . . . and many *only* fish while in the North. Parks Visitors, on the other hand, are closer to “all round tourists” — they sightsee, shop, go to festivals and fairs, camp out, eat in

restaurants or go to clubs. About one-fifth of the American Parks/Sites Visitors to the North seem to be on bus tours whereas none of the American Anglers is.

- Tourism planners and marketers are encouraged to explore the report and detailed tabulations in pursuit of market segments of key interest, while recognizing that differences in question structure between the ITS and CTS create difficulties in combining the sizeable domestic market for Canada's North with the USA and Overseas markets to build a profile of specific activity groups such as "all anglers", "all hunters" or "all park visitors". Such profiles would be extremely useful, but cannot be created until the activity list in the ITS is made identical to the one used in the CTS.¹⁷
- To maximize the utility of *The Northern Tourism Experience Project*, more analysis should be undertaken. Based on the information examined to date, fruitful *next steps* might include the following:
 - Activity-based reports, focusing on the characteristics of specific activity segments in the entire North or in a particular region;
 - Origin-based reports, looking at the differences between visitors from the Western United States and those from the Mid-West and North Central states or specific provinces or states, as base sizes permit; and
 - Comparisons between activity segments in Canada's South and their counterparts in the North to determine the possibilities for attracting Southern visitors to the North and to identify the unique features of the North that do not seem available in the South.

• **Key Concepts & Terms**

CANADA'S NORTH A geographic region defined in consultation with sponsors to reflect the northern portion of Canada. See Appendix C for the geographical definitions of this region.

NORTHEAST

A sub-set of Canada's North, eastward from the Manitoba/Ontario border. See Appendix C for further details.¹⁸

NORTHWEST

A sub-set of Canada's North, westward from the Manitoba/Ontario border. See Appendix C for further details.

**EXPERIENCE
(NORTHERN/
SOUTHERN)**

Within the CTS (domestic market) records were assigned to Canada's North on the basis of the *destination* of the trip. Within the ITS (USA and other countries), the assignment was made on the basis of *any nights spent* in Canada's North. The same USA or Overseas trip can, and most often does, also include nights spent in Canada's South, but so long as the trip has *any* nights in the North, it is assigned only to the North. Hence, the terms "Any Northern Experience" and "No Northern Experience" are used within all international data.

**GERMAN-
SPEAKING
COUNTRIES**

Germany, Austria, Switzerland

**OUTDOOR
ACTIVITIES**

An unduplicated count of trips in which participation in one or more of the outdoor activities provided in the CTS and ITS questionnaires is noted by the respondent, along with "any camping nights" (accommodation) and/or a visit to a national/provincial park. See Notes for the itemized activity list from each survey.¹⁹

**OVERSEAS/
OTHER
COUNTRIES**

Visitors from *Overseas* are those who reside outside Canada and the USA. They are also referred to as visitors from *other countries*.

PEAK SEASON

April, May, June, July, August, September

**TRIP - Canadian
Travel Survey**

All CTS data derive from a telephone survey of Canadian households conducted with independent samples for each calendar month. Approximately 117,000 households were surveyed in 1994 to obtain the incidence and details of travel by Canadians, reported for a one-month period and aggregated over the year.

The unit of measurement within the CTS is a qualifying trip made by individuals 15 years of age or over. A qualifying trip is made for any purpose other than commuting to work or school, moving to a new residence, or as a member of a crew. All trips included in this analysis require that the individual travel a minimum of 80 kilometres one way from home.

A household trip in the CTS is the trip taken by the designated respondent, regardless of the number of people from the household that went on the trip. The household trip is, therefore, a measure of the occurrence of a trip rather than a reflection of the number of people in the household who took the trip.

A person trip in the CTS is the total number of household members who accompanied the designated respondent on a trip he/she made.

**TRIP - International
Travel Survey**

The unit of measurement within the ITS is a trip to Canada by residents of countries other than Canada. Self-completion questionnaires are distributed to a sample of non-residents as they enter Canada, for completion and return once the trip is over. Although response rates for USA and Overseas visitors are low, the returned questionnaires are projected to actual border crossing counts.

Travel party is the reporting unit within the ITS. A travel party might include more than one household.

A *person trip* in the ITS is the total number of individuals on the trip to Canada. A *party trip* in the ITS is the occurrence of the trip, regardless of the number of people in the travel party.

**"TRIPS" &
"VISITORS"**

Throughout this report, *trips* and *visitors* are occasionally used to denote all trip measures, including *person trips* and *household* or *party trips*. Summary tables are always based on analogous units: *person trips* for both the ITS and CTS or *household trips* for the CTS and *party trips* for the ITS. The unit — person or household/party — used in the summary table is identified in the notes at the base of each table.

¹The Pilot Project (Phase I) was designed under the auspices of the Tourism Research Working Group (TRWG) to provide new analysis of the 1992 Canadian Travel Survey (CTS) to sponsoring organizations and to Canada's tourism industry at large. The project, Undertaken by Judy Rogers, Principal of Research Resolutions, was structured to encourage co-operation among various organizations via sponsorships and support.

²The boundaries used to define Canada's North, South, Northeast and Northwest are described in Appendix C. Unlike the "extended" definition, used in 1992 CTS analysis and the report, *Domestic Tourism In Canada's North*, which compares 1992 and 1994 travel patterns for the domestic market, the definition used herein excludes some major population centres in Ontario, including Thunder Bay. It also excludes "cottage country" in relatively close proximity to the Toronto CMA.

³ All estimates in this summary reflect *overnight* trips or visits to Canada's North.

⁴ See Table 9 in the main report.

⁵ See Table 9 in the main report.

⁶ See Detailed Tables, Volume II, Special Tabulations, page 75-2; Volume III, page 99-1; Volume IV, page 86-1.

⁷ See Tables 3, 4 in the main report.

⁸ See Detailed Tables, Special Tabulations, page 181-3.

⁹ See Tables 38, 39 in the main report.

¹⁰ Excludes transportation costs to Canada.

¹¹ See Table 40 in the main report.

¹² See Tables 15, 4 in the main report.

¹³ See Table 10 in the main report.

¹⁴ See Section 7-d in the main report.

¹⁵ See Section 5-b in the main report.

¹⁶ See Tables 6, 7 in the main report.

¹⁷ For example, the ITS captures hunting and fishing as a single, combined activity whereas the CTS allows anglers and hunters to identify *which* of the two activities they engaged in on the trip. Similarly, in the ITS, all parks and historic sites are listed as a single activity, whereas in the CTS, visits to national/provincial parks are separated from visits to historic sites.

¹⁸ Within the CTS, all trips are assigned to either Canada's Northeast or Northwest with no duplication because the assignment is based on the *destination* of the trip. Within the ITS, trips may be assigned to multiple geographic regions, based on *where nights were spent* on the trip. Thus, a trip assigned to Canada's North, based on *any nights spent in Canada's North* might be included in both the Northeast and Northwest if nights were spent in each of these regions. There is, however, no duplication in the ITS data between Canada's North and Canada's South since a trip is assigned to the South only if *no nights are spent in Canada's North*, and to the North only if *any nights are spent in Canada's*

North.

¹⁹ Outdoor activity lists differ between the CTS and ITS, as described below:

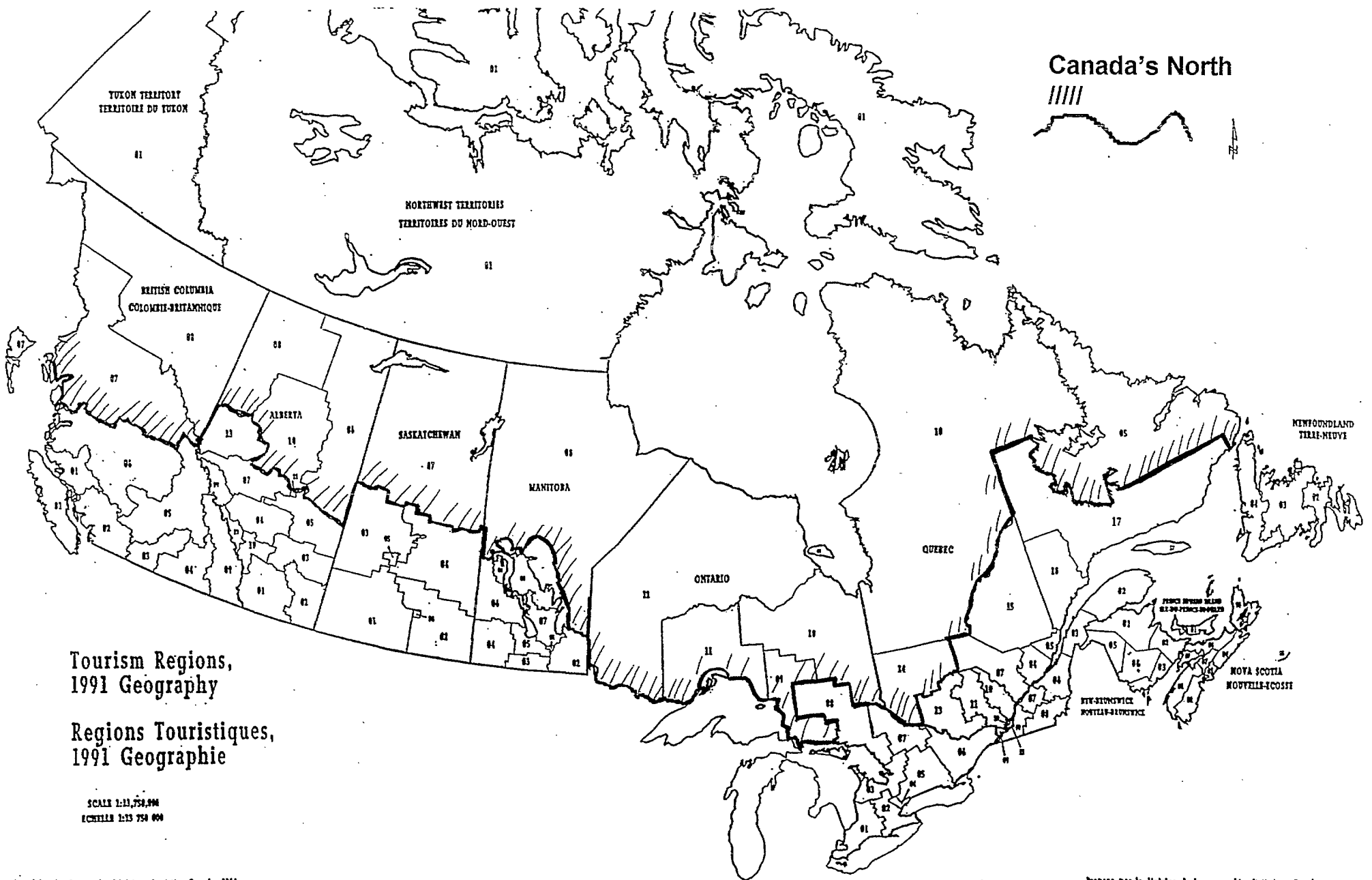
CTS Outdoor Activities

Visit A National/Provincial Park
Any Camping Nights (Accommodation)
Swimming
Other Water-Based Activities
Golfing
Hunting
Fishing
Bird/Wildlife Viewing
Cross-Country Skiing
Downhill Skiing
Snowmobiling
Walking Or Hiking
Cycling
Other Sport/Outdoor Activity

ITS Outdoor Activities

Visit A National/ Provincial/Regional Park Or Historic Site
Any Camping Nights (Accommodation)
Swimming
Other Water Sports
Hunting Or Fishing
Cross-Country Skiing
Downhill Skiing
Other Sport





CANADIAN TOURISM COMMISSION

**The Northern Tourism Experience:
Challenges and Opportunities**

Evaluation Questionnaire

The Canadian Tourism Commission welcomes your comments on this publication. We hope that you will take the time to complete this short evaluation questionnaire. Your feedback will help the Canadian Tourism Commission in assessing the value of this publication and will also help us determine other business services that may be developed in the future.

Please complete the questionnaire below and mail it back to us at:

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