

Tourism

A **PROVEN** GROWTH ENGINE.
A **SMART** INVESTMENT.
AN **IMMEDIATE** RETURN.



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NORTHERN ONTARIO'S ECONOMIC ANTIDOTE

THE OPPORTUNITY AT HAND

\$3.1 billion visitor spending in 2025 (60% growth over 2019)

\$2.8 billion in visitor spending (2024) with **+9.6% year-over-year growth**

More than \$900 million in annual municipal, provincial and federal **tax revenues**

Northern Ontario border crossings continue to experience the **smallest decline in U.S. visitation** compared to other Ontario regions

91% of tourism spending **remains in Northern Ontario**, supporting local businesses and communities

Canadian tourism projected to hit a whopping **\$183 billion in 2025**

A CRITICAL ECONOMIC DRIVER

TOURISM IS NOT A SIDE ECONOMY, IT IS FOUNDATIONAL



1 in 4 businesses is **tourism-related**



Up to 40% of regional jobs are **tied directly or indirectly to tourism**



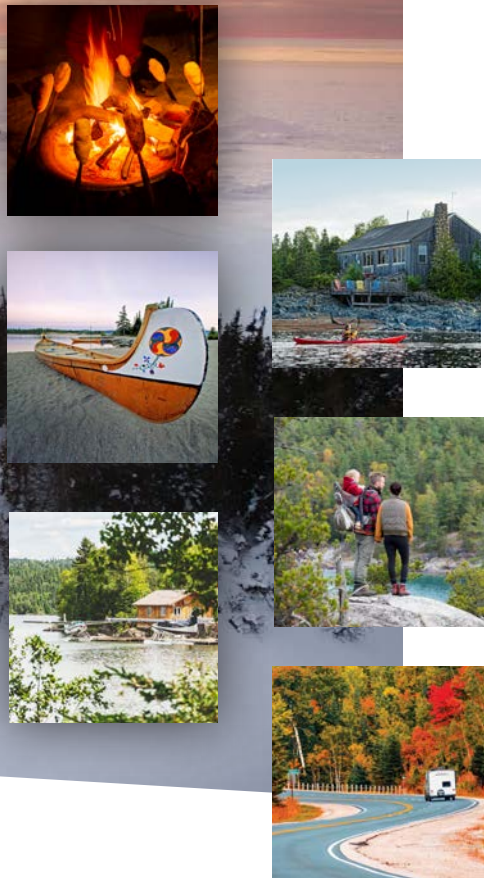
Largest employer of **young workers** in Northern Ontario – a major employer of **women, youth, and newcomers**



More than 1,300 of the region's 1,400 accommodation providers are **independently owned small businesses**



Who We Are



DESTINATION NORTHERN ONTARIO

Destination Northern Ontario (DNO) is the largest of Ontario's 13 Regional Tourism Organizations, funded by the Ontario Ministry of Tourism, Culture and Gaming. DNO works with industry partners, communities, and stakeholders to strengthen Northern Ontario's visitor economy by coordinating regional initiatives, investing in tourism development, and supporting sustainable growth across the region.

DNO'S PRIORITIES ALIGN WITH FIVE KEY PILLARS ESTABLISHED BY THE MINISTRY OF TOURISM, CULTURE AND GAMING:

- Product Development** – Bringing high-quality tourism products and experiences to market.
- Investment Attraction** – Securing funding and support for sustainable tourism initiatives.
- Workforce Development & Industry Training** – Strengthening the sector through training, education, and capacity building.
- Marketing & Communications** – Promoting Northern Ontario as a premier tourism destination.
- Partnerships** – Fostering collaboration to leverage resources and enhance industry effectiveness.

NATURE & OUTDOOR TOURISM ONTARIO

Nature & Outdoor Tourism Ontario (NOTO) represents lodges, camps, outfitters, municipalities, and tourism partners across Northern Ontario. Since 1929, NOTO has advocated on behalf of the outdoor tourism sector, bringing operator concerns to government and keeping members informed on issues that affect their businesses.

NOTO PROVIDES THE FOLLOWING KEY SERVICES TO INDUSTRY AND GOVERNMENT:

- Supports tourism operators** with regulatory guidance, business advice, and practical problem-solving.
- Serves as a trusted voice** between government decision-makers and Northern Ontario's outdoor tourism sector.
- Provides data and sector insights** to support informed policy decisions.
- Communicates** government programs, initiatives, and regulatory updates to industry members.
- Participates in key advisory committees** and working groups to ensure operators' perspectives are considered.
- Builds collaboration across the tourism sector** by connecting operators, partners, and industry organizations.

GROWING DOMESTIC & INTERNATIONAL DEMAND

DOMESTIC MARKET

71% of tourism revenue comes from Ontario residents, keeping tourism dollars in the province

Strong and growing visitation from the **rest of Canada**

INTERNATIONAL MARKET

International visitation continues to **rebound rapidly**.



2018
International tourism revenues grew from **\$7 million** in 2018

2024
to **\$81 million** in 2024

2023
to **\$48 million** in 2023

RESEARCH & INSIGHTS

Destination Northern Ontario provides trusted tourism research and market intelligence that drives strategic investment, measures economic impact, identifies growth opportunities, and supports the long-term sustainability and competitiveness of Northern Ontario's visitor economy.

- **Economic impact reporting**
- **Visitor and market research**
- **Travel trend analysis**
- **Industry and consumer insights**
- **Evidence-based planning**
- **Research for policy and investment decisions**



KEY PRIORITIES TO UNLOCK GROWTH

TO MAXIMIZE TOURISM'S ECONOMIC IMPACT, STRATEGIC INVESTMENTS ARE NEEDED IN:

- **Transportation infrastructure** (highways, airports, rail and visitor amenities)
- **Cruise infrastructure** and legislative support
- **Resource stewardship** and shared land-use planning
- **Immigration pathways** to address tourism labour shortages
- **Tourism and hospitality programs** at Northern Ontario post-secondary institutions
- **Resolution of U.S. angling guide access** in Canadian waters
- **Improved access** to capital for tourism businesses
- **Destination marketing**
- **Sustainable tourism funding**, including self-generated funding opportunities on Crown land and within unorganized townships
- **Improved access to tourism data** and research to support evidence-based decision-making



THE ROI IS CLEAR

EVERY ADDITIONAL \$1 BILLION IN TOURISM RECEIPTS DELIVERS:



Immediate return
on investment



\$300 million in
new tax revenues



14,000 new jobs
in local economies



Long-term regional
resilience & diversification



Few sectors deliver this level of economic impact **this quickly.**

Investing IN NORTHERN ONTARIO TOURISM

Tourism is one of Northern Ontario's strongest economic development opportunities. Continued investment in destination marketing, workforce development, infrastructure, and industry growth will generate new visitor spending, stronger communities, more jobs, and increased tax revenues across the region.



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