ATTRACTION TOURISTS IN NORTHERN ONTARIO (RTO13)

A SITUATION ANALYSIS

PREPARED FOR

TOURISM NORTHERN ONTARIO

BY

Research Resolutions & Consulting Ltd.

Ontario

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Northern Ontario Heritage Fund Corporation

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OVERVIEW OF ATTRACTION TRIPS IN NORTHERN ONTARIO

Over 19 million overnight tourists across Canada go to attractions on their trips.

Of the 124.7 million overnight tourists in Canada from all markets, 19.4 million or 16% claim to have gone to an attraction on their trip in 2012.[1]

> ***Without attractions, there would be no tourism.***
>
> C. Gunn, Professor Emeritus, Texas A & M University, 1972

Similar to *all* overnight tourism, Canadians dominate the Attraction sector. They account for almost two thirds of overnight tourists in the market segment (65%). Americans represent about one-tenth of Canada's overnight tourists (9%) but a considerably higher proportion of the country's Attraction Tourists (24%). The overseas market, while much smaller, is also over-represented among Attraction Tourists (11%) relative to its share of *all* overnight tourists in Canada (3%).

Ontario attracts more Attraction Tourists than does any other province.

During 2012, 8.0 million overnight tourists in Ontario went to an attraction on their trip, or about 4-in-10 of *all* Attraction Tourists in Canada. Ontario's success in attracting these tourists is, at least in part, a function of the fact that the province supports a larger population than does any other and many of its attraction visitors are residents of the province.

Similarly, the large population in Quebec combined with propensity of Quebec residents to travel within their own province yield a large overnight attraction market (4.6 million) or one quarter of the country's Attraction Tourists (24%).

Overnight Attraction Tourists to . . . Province

	Attraction Tourists in Canada	
Overnight Visitors	19.4 million	% of Canada's Attraction Tourists
Location(s) in Which Nights Spent		
Ontario	7,960,000	41%
RTO13	**432,000**	**2%**
Southern Ontario	7,615,000	39%
Quebec	4,596,000	24%
Manitoba	490,000	3%
Saskatchewan	537,000	3%
Alberta	2,242,000	12%
B.C.	3,832,000	20%
Atlantic	1,527,000	8%

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

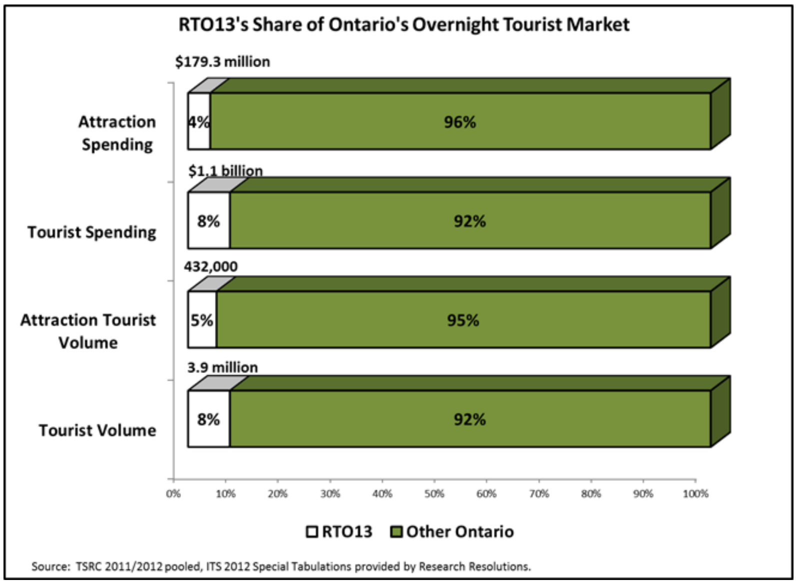
[1] All markets include Canada, U.S.A. and overseas origins.

ATTRACTION TOURISTS IN RTO13

During 2012 about 430,000 Attraction Tourists were on overnight trips in RTO13 and spent $179.3 million in the region.

These tourists accounted for 1-in-20 Attraction Tourists in Ontario (5%) whereas the region's share of *all* overnight tourism in the province was somewhat higher (8%). Similarly, *all* overnight tourists in RTO13 represented a larger contribution to spending in the province (8%) than did the attraction sector (4%).

In addition to their tourism volume and value in Northern Ontario, Attraction Tourists support tourism infrastructure for *other* market segments and benefit local residents.



Iconic and/or large scale attractions such as Science North, Casino Sault Ste Marie and the Agawa Canyon Tour Train draw tourists from outside the region to Northern Ontario. These and other attractions offer tourists in the region a critical element in destination choice: *something to see and do*. They also serve to retain local history and culture and provide entertainment for residents of communities throughout the North.

As with festivals and events, attractions offer a *two-for-one benefit*: hosting.

About one third of Northern Ontario Attraction Tourists are in the region in order to visit friends and relatives. When local hosts accompany their 130,000 guests over a year to attractions in the community, guests and hosts contribute to attendance and, in turn, add to an attraction's bottom line.

Most Attraction Tourists in RTO13 are Ontario residents.

One fifth of the region's Attraction Tourists live in Northern Ontario (87,000) and one third live in other parts of Ontario (148,000). RTO13 also draws about 44,000 of the attraction market from other Canadian provinces, including 13,000 from Manitoba. The USA, however, is a much greater source of Attraction Tourists than are other provinces. Over 2012, 135,000 or about one third of Northern Ontario's Attraction Tourists came from the United States. Comparatively few tourists from overseas went to attractions on trips to the region (18,000).

Attraction Tourists in RTO13 are a near-microcosm of *all* overnight visitors to the region with respect to gender but tend to be older.

The relatively even gender split among Northern Ontario's Attraction Tourists is equally characteristic of the segment's tourists in Southern Ontario. Tourists of all ages are in RTO13's market for attractions. More than one quarter are under 35 years, almost one third are between 35 and 54 years and two fifths are 55 years of age or over (41%).

There are more older tourists in the Northern Ontario's Attraction segment (41%[2]) than is the case among typical tourists in the region (30%) or among Attraction Tourists in Southern Ontario (29%). The higher concentration of older Attraction Tourists in RTO13 explains why their average age (48.6 years) is higher than RTO13's typical tourist (44.8 years) and higher than Southern Ontario's Attraction Tourists (43.5).

Northern Ontario's Attraction Tourists spend between three and four nights in the region.

Their stay in the North is the same as the region's *typical* overnight tourist (3.5 nights, on average) but almost one night shorter than members of the market segment with a destination in Southern Ontario (4.3 nights).

In 2012 Attraction Tourists spent more than 1.5 million nights in Northern Ontario (1,526,000).

Over half of the nights in RTO 13 were spent by Canadian Attraction Tourists (837,000), two fifths were spent by Americans (592,000) and a further 97,000 were spent by overseas tourists in the region.

Most nights spent by segment members in RTO13 were in unpaid lodging or campgrounds. [3]

Roofed commercial lodging accounts for over one third of the nights spent by Attraction Tourists in RTO13 (555,000 or 36%). Most of these nights were spent in Northern Ontario's hotels and motels (378,000). Attraction Tourists also spent about 224,000 of their nights in the region's campgrounds (15%).

The remainder of nights spent in the region by Attraction Tourists were in private homes or cottages. This *unpaid* lodging accounts for half of this market segment's nights in Northern Ontario, or 747,000 nights.

[2] 55 years of age or over.

[3] The questionnaires for Statistics Canada's US and Canadian travel surveys provide different lodging choices for survey respondents. Furthermore, respondents self-identify their lodging type from an available list that does not provide descriptions to aid in differentiating a "lodge" from a "resort" or "commercial cottage/cabin". This analysis can only provide information *as reported*, recognizing that consumer responses may not match industry definitions of lodging types.

Of the activities that define the market segment, historic sites are the most popular among RTO13's Attraction Tourists.

While on their overnight trip, over half of Northern Ontario's Attraction Tourists went to an historic site (57%), somewhat fewer went to a museum or art gallery (37%) and fewer still spent time in a casino (24%).

In addition to the activities that define the market segment, about two fifths of the region's Attraction Tourists went to a nature park, one quarter did some boating and about one fifth were camping and/or fishing. In fact, two thirds of the market engaged in some form of outdoor activity while on the Northern Ontario trip.

ECONOMICS OF ATTRACTION TOURIST'S TRIPS IN NORTHERN ONTARIO

Attraction Tourists contribute to tourism revenues in Northern Ontario.

Attraction Tourists on trips in RTO13 spent about 16% or $179.3 million of the $1.1 billion spent by *all* overnight tourists in RTO13. This segment contributes at an appreciably higher rate in Southern Ontario (32%) than it does in the North, largely as a result of the South's appeal to American and overseas Attraction Tourists and their propensity to utilize paid roofed lodging.

RTO13's Attraction Tourists spend about $680.00 per *trip* in the region.

On a *per trip* basis, Attraction Tourists in Northern Ontario spend almost $680.00 or one third *more* than Northern Ontario's typical overnight tourist ($423.00). When trip spending is adjusted for the number of nights spent in RTO13, the average *per diem* is $125.00 for each typical overnight visitor but reaches $200.00 for RTO13's Attraction Tourists.

Not surprisingly, if more of Northern Ontario's Attraction Tourists could be convinced to utilize the region's hotels, motels and other paid lodging, their yields would increase substantially. Instead of $680.00, each Attraction trip would yield almost $800.00 if paid roofed lodging were used.

Attraction Tourists – Spending on the Trip

	RTO13	Southern Ontario
Total Spending in Region	$179,300,000	$4,037,000,000
Average Per Trip	$679.00	$835.00
Average Per Party Per Night	$200.00	$188.00

Differences in *per trip* and *per diem* spending between Attraction Tourists in Northern and Southern Ontario are likely explained by longer stays in the south, driven at least in part by the prevalence of overseas tourists in Southern Ontario's attraction market.[4]

[4] While overseas visitors tend to stay much longer at their destination than do Americans or Canadians, they also tend to billet with friends and relatives instead of relying on the commercial accommodation sector. Thus, *per trip*

Attraction Tourists contribute to the economic wellbeing of Northern Ontario.[5]

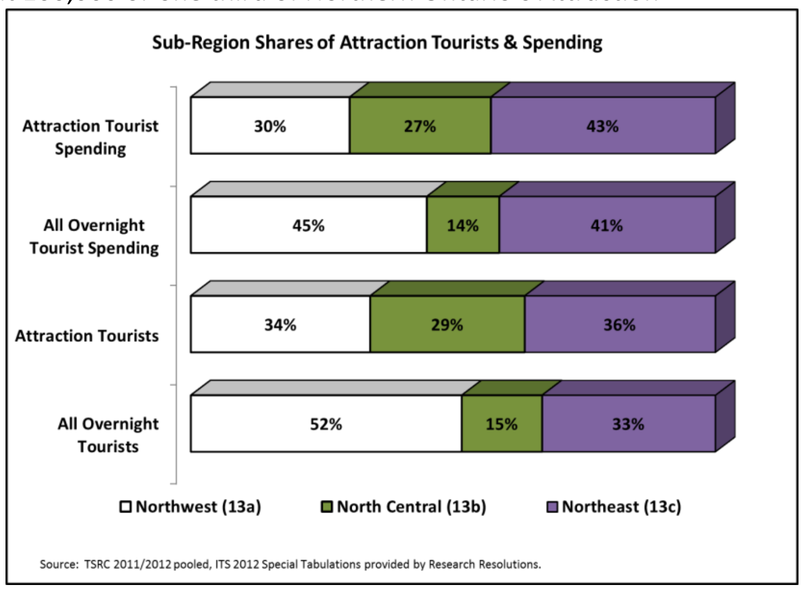
These tourists contributed $143.2 million toward Ontario's gross domestic product (GDP). Approximately 2,452 jobs and $93.1 million in wages were generated throughout Ontario as a result of their spending.

At $67.8 million in taxes, all levels of government benefited from spending by Attraction Tourists in RTO13. Of the $67.8 million, approximately $37.1 million were federal government taxes, a further $30.3 million were provincial taxes and $402,000 were municipal taxes.

More than 90% of the economic benefits generated in Ontario by Northern Ontario's Attraction Tourists were retained *within* the region.

RTO13's sub-regions all benefit from Attraction Tourists.

Northwest Ontario (13a) attracted about 160,000 or one third of Northern Ontario's Attraction Tourists during 2012. These tourists spent over $54.0 million in the sub-region, accounting for close to one third of the segment's spending in RTO13 over the year. These proportions are lower than the sub-region's share of all overnight tourists' volume and spending.



North Central (13b) attracted almost 140,000 overnight attraction visitors. These tourists spent about $48.0 million in North Central, representing more than one quarter of the segment's 2012 volume and spending in RTO13. North Central is noticeably more successful in attracting Attraction Tourists and their revenues than the area's share of *all* overnight tourists would suggest. The relative strength of North Central vis à vis other sub-regions may attest to the lure of the Agawa Canyon Tour Train.

The Northeast (13c) sub-region hosted approximately 170,000 Attraction Tourists (36%) who spent $77.0 million or two fifths of the amount spent throughout Northern Ontario (41%). The sub-region's share of Attraction Tourists and associated spending is on par with its share of *all* Northern Ontario overnight tourists.

spending in Southern Ontario is driven upward because of longer stays while *per diem* spending is driven downward because of low or non-existent lodging costs for many of the nights spent by overseas tourists in the region.

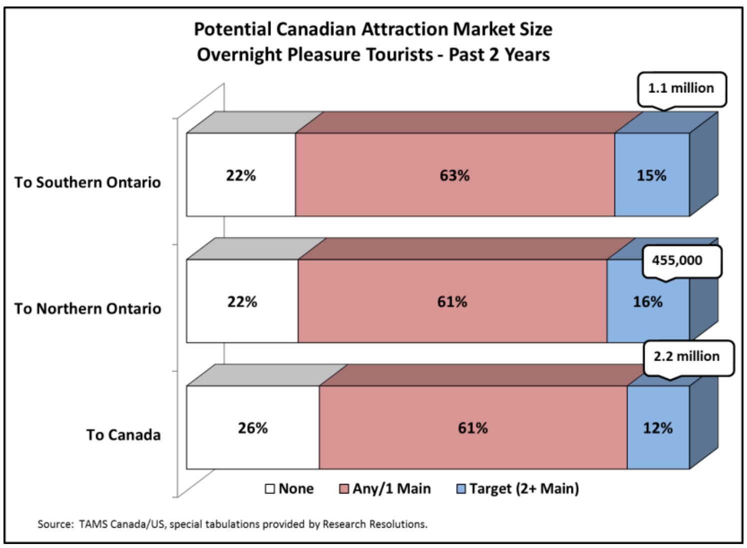
[5] Estimates of economic impact are based on MTCS's TREIM model. Figures include direct, indirect and induced impacts. Note that the spending estimate used in the TREIM model is based on the 2012 TSRC (*not* pooled) in order to achieve greater comparability with the MTCS's estimates. See appendix for further discussion.

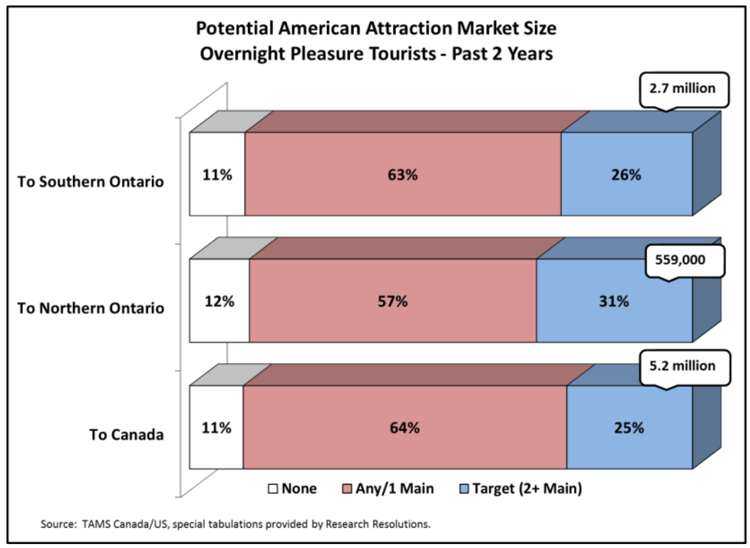
THE POTENTIAL ATTRACTION MARKET FOR NORTHERN ONTARIO

MARKET SIZE

By providing visitors with *things to see and do*, attractions are important components of tourism infrastructure even if they are not necessarily the reason people take pleasure trips.

Visiting attractions is a common trip activity among Canadian and American pleasure travellers. At the national level and among Canadians who have taken overnight pleasure trips to Northern Ontario, three quarters go to attractions either as one of the many things they do on their trips or as a motivation to take a trip (*trip driver*). Thus, of the 2.8 million Canadian pleasure travellers who have visited Northern Ontario over a two-year period, 2.2 million have gone to an attraction on at least one of their trips. [6]





Of these, close to one half million (455,000) take trips in order to visit **attractions**. This is the North's target market for attractions, representing about 1-in-6 of the region's Canadian market (16%, see chart).

Attractions are even more popular trip activities among American pleasure travellers who have been to Canada over a two-year period. Nine-in-ten of them include an attraction among their trip activities. Proportionally, American pleasure tourists with Northern Ontario travel experience are just as likely to visit attractions on their trips as is the market in total and those with travel experience in Southern Ontario.[7]

Close to two million Americans claim to have taken overnight pleasure trips to Northern Ontario over a two year period (1.8 million). Of these, 88% or 1.6 million have included at least one attraction among their trip activities. The subset of these tourists who are highly motivated to

[6] Recall that TAMS findings provide information on *where* tourists travelled and *what they did* on trips (activities) but do not provide information on which activities took place in specific destinations.
[7] Northern Ontario travellers are those claiming to have taken an overnight pleasure trip to the region over a two-year period. "Other" (Southern) Ontario travellers are those who have been to the province over this time period and have *not* visited Northern Ontario on their trips (i.e., the residual of all visitors to Ontario).

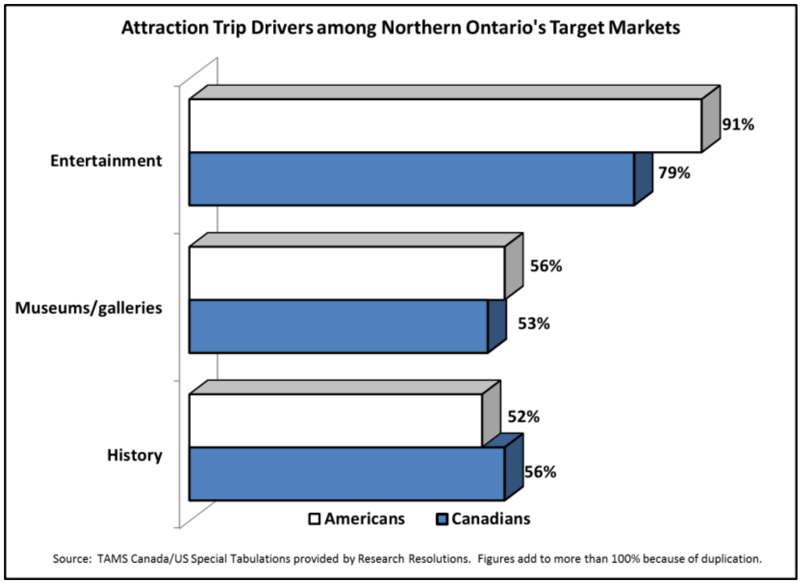
take trips in order to see attractions represents a target market of over one half million (559,000) Americans for Northern Ontario (see chart).

LEADING ATTRACTIONS

Northern Ontario's highly motivated Attraction Tourists visit history-oriented attractions; various types of museums and art galleries; and numerous entertainment-oriented attractions.[8]

Canadians: Of the various types of attractions covered in the study, ***entertainment-oriented*** ones including theme parks and casinos are most likely to be trip drivers among Northern Ontario's domestic target market (79%). **History-oriented attractions** such as historic sites and replicas of cities or towns motivated over half of Canadians in RTO13's potential market for attractions. Equally popular as trip drivers among these Canadians are **museums and art galleries**.

Americans: Northern Ontario's American attraction target market is even more likely than its Canadian counterpart to take trips in order to go to theme parks, casinos or other **entertainment attractions** (91%). About half of these Americans are also motivated to travel in order to see **historic sites** and other history-oriented attractions (52%) and to visit **museums and/or art galleries** (56%).



Similar attractions are most likely to drive trips by Canadian and American Attraction Tourists.

As a broad sub-group, **entertainment** attractions are especially popular trip drivers. On both sides of the border, theme parks on the scale of Disney or MGM followed by casinos are most apt to draw Canadians and Americans in the target market. Zoos are also popular in both groups, though Americans are more apt to take a trip to visit an aquarium (37%) than are the corresponding Canadians (13%), possibly because this type of attraction is more common in the U.S.A. than it is in Canada.

Among **history-oriented attractions,** *well-known historic sites* along with *other sites and monuments* motivate overnight trips for more than one third of Canadian and American Attraction Tourists. *Historical replicas of cities/towns with re-enactments* are more popular trip drivers among Northern Ontario's Canadian Attraction Tourists (26%) than among their American counterparts (16%).

[8] See chart. Percentages add to more than 100% because of duplication.

About half of the Americans and Canadians in the target market go to **museums/galleries** led by *general history museums, art galleries* and *science/technology museums.*

Top Attraction Trip Drivers among Northern Ontario's Potential Market[9]

Canadians

1. Theme parks
2. Well known historic sites/buildings
3. Other historic sites, monuments
4. Zoos
5. Museum - General history or heritage
6. Casinos
7. Historical replicas/re-enactments
8. Art galleries
9. Museum - Science or technology
10. Botanical gardens

Americans

1. Theme parks
2. Casinos
3. Well known historic sites/buildings
4. Zoos
5. Aquariums
6. Other historic sites, monuments
7. Museum - General history or heritage
8. Art galleries
9. Museum - Science or technology
10. Botanical gardens

Northern Ontario offers attractions that coincide with the experiences Attraction Tourists seek.

There are many small and large-scale historic sites to satisfy interest in history-oriented attractions (e.g., Fort William Historical Park) and museums (e.g., Sault Ste Marie Museum; Thunder Bay Museum). There are art galleries in major centres and Dynamic Earth/Science North for Attraction Tourists interested in science and technology museums. The casinos in Sault Ste Marie and Thunder Bay cater to Attraction Tourists who take trips in order to gamble.

North American tourists who take trips motivated by attractions are multi-dimensional – they also take trips driven by other activities including festivals and events, the outdoors and shopping.

Tourists who identify attractions as *trip drivers* also take trips driven by other types of activities, including various types of **outdoor** pursuits, **festivals and events**, **shopping** and the like. Trip drivers among 4-in-10 Canadian Attraction Tourists include *camping, visiting nature parks* and *shopping.* About one third take trips to attend *events* such as fireworks displays and/or *spectator sporting events.* One fifth to one quarter travel in order to attend *live theatre performances*, *hike, view wildlife, attend cultural festivals* (e.g., culinary; ethnic festivals), *popular music concerts* and/or to *fish*.

The list of popular trip drivers among American Attraction Tourists is almost identical to the Canadian sequence, although a higher proportion of Americans travel in order to attend

[9] In rank order, highest to lowest, for Canadians and Americans.

spectator sporting events. Like the corresponding Canadians, these Americans are motivated to travel by several of Northern Ontario's signature outdoor activities – wildlife viewing, nature parks, camping and fishing.

Other Top Trip Drivers among Attraction Tourists with Northern Ontario Experience[10]

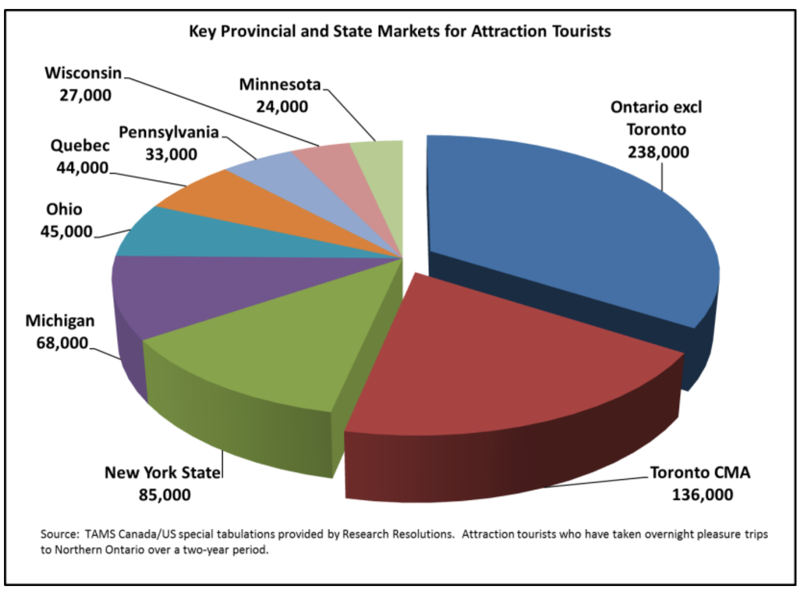
Canadians		Americans	
Camping	44%	Spectator sports	45%
Nature park	39%	Shopping	44%
Shopping	38%	Other festivals(e.g., fireworks displays)	37%
Other festivals(e.g., fireworks displays)	34%	Flora/fauna viewing	33%
Spectator sports	32%	Cultural festivals (e.g., culinary, ethnic)	33%
Hiking	27%	Nature park	31%
Live theatre	26%	Camping	30%
Flora/fauna viewing	25%	Live theatre	29%
Cultural festivals (e.g., culinary, ethnic)	24%	Arts festivals (e.g., music, film)	28%
Rock & roll/popular concerts	24%	Fishing - fresh water	20%
Fishing - fresh water	22%		

PROFILE OF THE NORTH AMERICAN POTENTIAL MARKET

RTO13's potential target market is concentrated in Ontario, neighbouring provinces and, for the most part, nearby states.

Of the 1.0 million North Americans in Northern Ontario's Attraction target market, almost three-fourths live in Ontario, bordering provinces or bordering states (see chart[11]).

Most Canadians who have travelled in the region are Ontario residents (374,000), including the sizeable Toronto market (136,000). RTO13 also attracts about 44,000 Quebeckers who go to attractions on trips.



Although there are about 28.1 million Americans who take overnight pleasure trips in order to go to attractions, only about 5.2 million or one fifth (19%) of them have been to Canada over a two-year period. Of these

[10] In rank order, highest to lowest, for Canadians and Americans.
[11] Chart displays distribution of approximately 700,000 North American Attraction Tourists of the 1.0 million in RTO13's target market.

Americans, about 559,000 have travel experience in RTO13 over a two-year period. The potential U.S. market for Northern Ontario is concentrated in a few near-border states, led by New York, Michigan, Ohio, Pennsylvania, Wisconsin and Minnesota.

The potential Canadian and U.S. markets have a similar gender split but Americans are somewhat older.

On both sides of the border, the North attracts slightly more women than men in the target market (Canada, 54% women; US, 55% women). These Attraction Tourists span the age continuum but Canadians tend to be younger whereas Americans tend to be older. In fact, one third of the Americans are at least 55 years of age while only one quarter of the Canadians are in this age group. These differences are reflected in the average age of Northern Ontario's Attraction Tourists: Canadians are about 42 or 43 and their American counterparts are about 47 years of age.

Americans in the market segment have more formal education than the corresponding Canadians but income levels are similar.

A university education is more characteristic of American Attraction Tourists (41%) than Canadians (31%). Conversely, 3-in-10 Canadians have a secondary school diploma or less (30%) compared to 2-in-10 Americans (20%).

In spite of age and education differences between the two markets, Northern Ontario's Canadian and American Attraction Tourists have a very similar income profile. Each market is divided almost equally among those with household incomes of less than $60,000, between $60,000 and $99,999 and at least $100,000.

The primary factors in a destination choice for Canadian and American Attraction Tourists include its overall safety and its accessibility by car.

Mid-range lodging is also a salient factor for these visitors. Americans put more emphasis on the range of activities for adults, availability of accommodation at the two ends of the budget-luxury spectrum and on direct air access than do their Canadian counterparts. They are more concerned about a destination's facilities for disabled people than are corresponding Canadians, possibly reflecting the fact that the American market is older than the domestic one.

Learning and enrichment are important to Attraction Tourists.

A learning component figures prominently in this tourism segment. Two fifths of Canadians and Americans want pleasure travel to provide knowledge of others' history and culture and at least one third consider enriching their perspectives on life and stimulating their minds as highly important benefits of pleasure travel.

OBSERVATIONS

Northern Ontario has many attractions that can add to a tourist's experience but may not be sufficient to draw large numbers Attraction Tourists.

Unless a destination has a *mega-attraction* such as Disney World, the British Museum or the Louvre, it is unlikely to draw sizeable numbers of Attraction Tourists solely because of an attraction. Alternatively, if it does not have a *critical mass* of attractions, it may also be challenged to draw Attraction Tourists. While Northern Ontario as a whole might have such a *critical mass*, its very size and the dispersion of important attractions throughout the very large region likely reduce the potential for a dedicated attraction segment.

At the same time, Attraction Tourists seek many of the same experiences as the region's *typical* overnight tourists.

Like all tourists in the region, Attraction Tourists want things to see and do on their trip. In addition to going to entertainment, cultural and historical attractions, they go boating, camping and visit nature parks *at* or *above the rate* as the market overall. Attractions are, therefore, clearly important to providing Northern Ontario's tourists with a multi-dimensional experience, possibly with outdoor experiences as the *hook* that brings them to the region.

RTO13 sub-region's on-line offerings to tourists are acknowledgements of the importance of Northern Ontario's outdoor experiences. [12]

A brief review of initial links on Tourism Northern Ontario's website reveals the absence of references to attractions and the prominence of outdoor experiences for Northern Ontario's largest cities.

Since so many Attraction Tourists also engage in outdoor activities, consideration might be given to *pairing* local attractions with the types of outdoor experiences currently being promoted, particularly in the major urban centres.

Analogous to festivals and events, attractions might be best viewed as *complementary* tourism experiences in Northern Ontario.

The array of museums, galleries, and entertainment-oriented attractions provides visitors with destinations for day excursions from their camp site or private cottage, give hosts activities to share with their guests and enjoy in their own right, and offer those in Northern Ontario on business trips sites to see in their down time.

[12] In Northwestern Ontario's Thunder Bay link, the headline reads *Land a Lake Superior Salmon at Week Long Derby*. Sault Ste Marie's link presents *Caribou Expeditions: 5 Sea Kayak Day Trips Just An hours' Drive North Of Sault Ste. Marie!* and the municipality's site promotes *your next great outdoor adventure!* Only the sub-link to Sudbury promotes an urban theme . . . but not a specific attraction*: Uncovering the Charm of Downtown Sudbury.* As of July 14, 2014. http://www.northernontario.travel/algoma-country

Also like festivals and events, attractions benefit from tourists who stay with friends and relatives because hosts bring their guests, adding to attendance figures and, in turn, to an attractions' bottom line.

Consider the needs of older tourists who seek *new experiences* and *knowledge* about history and culture.

Northern Ontario's Attraction Tourists are older than the region's *typical* tourists – a fact that might be taken into account when pairing or packaging outdoor experiences and attractions for this market segment. For example, *soft outdoor adventure* experiences may satisfy these tourists' interest in the outdoors and the *availability of seating* and/or *wheelchair accessibility* might be mentioned for attractions. Since Attraction Tourists are also especially interested in learning about the history and culture of places they visit, these dimensions of Northern Ontario's attractions might be highlighted in promotional materials aimed at this market.

DETAILED FINDINGS

INTRODUCTION

Northern Ontario offers tourists and local residents a wide variety of attractions. They include everything from a large multi-faceted science museum in a large urban centre (Science North/Dynamic Earth) to smaller museums with highly targeted subjects in smaller centres (Moose Factory Centennial Museum; Hockey Heritage North; Dionne Quints Museum); from a train ride through Agawa Canyon to art galleries, casinos and zoos.

Examples of Northern Ontario Attractions

Museums/Heritage	
Canadian Bushplane Heritage Centre	Sault Ste. Marie
Canadian Forces Museum of Aerospace Defence	North Bay
Cree Cultural Interpretive Centre	Moose Factory
Dionne Quints Museum	North Bay
Dynamic Earth/Science North	Sudbury
Ermatinger-Clergue National Historic Site	Sault Ste. Marie
Fort Frances Museum	Fort Frances
Fort William Historical Park	Thunder Bay
Hockey Heritage North	Kirkland Lake
Kay-Nah-Chi-Wah-Nung National Historic Site	Stratton
Lake of the Woods Museum	Kenora
Moose Factory Centennial Museum	Moose Factory
Sault Ste. Marie Museum	Sault Ste. Marie
Thunder Bay Museum	Thunder Bay
Timmins Museum	Timmins
Galleries	
Art Gallery of Algoma	Sault Ste. Marie
Sudbury Art Gallery	Sudbury
Thunder Bay Art Gallery	Thunder Bay
Entertainment/Other	
Agawa Canyon Tour Trains	Sault Ste. Marie
Amethyst Mine Panorama	Thunder Bay
Casino Sault Ste Marie	Sault Ste. Marie
Casino Thunder Bay	Thunder Bay
Dinosaur Valley Mini Golf	Sudbury
Spruce Haven Zoo	Sault Ste. Marie

Icon attractions are identified as "best bet" products in *Northern Ontario Tourism Marketing Strategy 2012-2017.*[13] In light of attractions' potential contribution to tourism in RTO13, Tourism Northern Ontario commissioned Research Resolutions & Consulting Ltd. to undertake a situation analysis of the attraction tourist market segment.[14]

The primary sources of touristic information used in this analysis are the Canadian and American Travel Activities and Motivation Surveys (TAMS), Statistics Canada's Travel Survey of Residents of Canada (TSRC – 2011/2012 pooled[15]) and International Travel Survey (ITS US/OVS 2012).

The studies capture different information and, as a consequence, the manner in which Attraction Tourists are operationalized for analysis purposes differs from study to study (see appendix for details).

[13] *Rediscovering Northern Ontario: Partnerships for a Strong Tourism Industry, Northern Ontario Tourism Marketing Strategy 2012-2017*, page 49. Iconic attractions are described *as Science North/Dynamic Earth* and *Agawa Canyon Tour Trains.*

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[15] See Appendix for a description of the pooling process and comparisons between pooled and unpooled estimates.

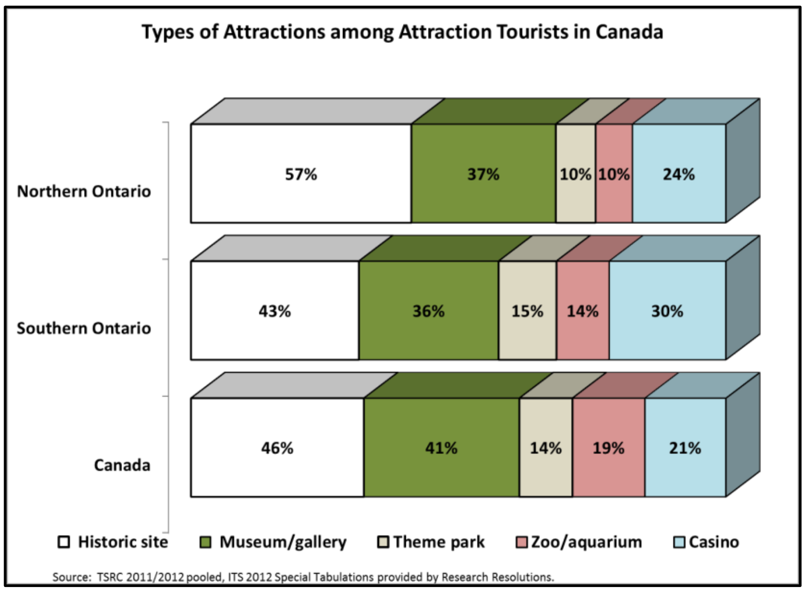
ATTRACTION TRIPS IN CANADA

WHO IS AN ATTRACTION TOURIST?

In the Statistics Canada studies that provide estimates of tourism volume and value, Attraction Tourists include Canadians, Americans and overseas visitors who took an overnight trip to locations in Canada for any purpose and went to one or more of the following while on their trip in 2012:

- Historic site
- Museum or art gallery
- Theme or amusement park
- Zoo or aquarium
- Botanical garden[16]
- Casino

As displayed in the accompanying chart, Canada's overnight Attraction Tourists go to each type of attraction available for analysis.[17] Whether they are visiting locations in Southern Ontario or RTO13, **historic sites** are the most widely visited attraction, drawing almost 3-in-5 Attraction Tourists in Northern Ontario (57%) and about 2-in-5 of the corresponding tourists in Southern Ontario (43%).



Approximately one third include a **museum or art gallery** and at least one quarter of Attraction Tourists go to a **casino** on their Northern or Southern Ontario trip. No doubt because of the number of casinos in Southern Ontario, gambling is somewhat more popular among the South's Attraction Tourists (30%) than in the North's market (24%). The relative scarcity of zoos or aquariums and theme parks in Ontario likely explains the comparatively low levels of visitation at these types of attractions.

[16] This attraction is captured only in the International Travel Survey of American and Overseas tourists.
[17] Percentages add to more than 100% because of duplication.

MARKET SIZE AT THE CANADA LEVEL

Of the 124.7 million overnight tourists in Canada in 2012, about 19.4 million (16%) claim to have gone to an attraction on their trip (see Table 1).

Most tourism in Canada is driven by Canadians. The domestic market accounts for almost 9-in-10 of all overnight tourists in the country over the year (87%). Similarly, Canadians account for most of the overnight tourists who visit attractions on their trips (65%) but attractions also attract a sizeable foreign market. One fourth of Canada's overnight Attraction Tourists are Americans (24%) and a further one tenth are residents of other countries.

Table 1: Canada's Attraction Tourists by Place of Residence

	All Tourists	**Attraction Tourists**
Overnight Visitors	124.7 million	19.4 million
Place of Residence		
Canada	87%	65%
U.S.A.	9%	24%
Overseas	3%	11%

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

PROVINCIAL MARKET SHARES

Overnight tourists in virtually every region of Canada visit attractions. Their large populations and the propensity of provincial residents to go to attractions in their *own* province contribute to the dominance of Ontario and Quebec as destinations for Attraction Tourists. Ontario captures two fifths of this market and Quebec attracts one quarter (see Table 2).

Table 2: Overnight Attraction Tourists to . . . Province

	Attraction Tourists in Canada	
Overnight Visitors	19.4 million	% of Canada's Attraction Tourists
Location(s) in Which Nights Spent		
Ontario	7,960,000	41%
RTO13	**432,000**	**2%**
Southern Ontario	7,615,000	39%
Quebec	4,596,000	24%
Manitoba	490,000	3%
Saskatchewan	537,000	3%
Alberta	2,242,000	12%
B.C.	3,832,000	20%
Atlantic	1,527,000	8%

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

Again, because of the concentration of Ontario's population in Southern Ontario, this area attracts a major share of the market (39%).[18] At the national level, RTO13 attracts about 432,000 or 1-in-50 overnight Attraction Tourists – about on par with Manitoba and Saskatchewan (3% each).

British Columbia at 3.8 million followed by Alberta at 2.2 million Attraction Tourists are also noteworthy destinations for this market segment.

ONTARIO'S ATTRACTION TOURISTS

Two thirds of Ontario's Attraction Tourists are Canadians and half of them live in the province (see Table 3). The United States is also a significant market for the province, bringing almost 2.0 million overnight Attraction Tourists over the year (25%). In fact, American and Overseas tourists combined (37%) contribute three times as many attraction visitors as do residents of all *other* Canadian provinces (902,000 or 11%).

Table 3: Ontario's Attraction Tourists by Place of Residence

	Number	Per cent
Ontario's Attraction Tourists (Total)	7,960,000	100%
Canada	5,061,000	64%
Ontario residents	4,159,000	52%
Other Canadians	902,000	11%
U.S.A.	1,957,000	25%
Overseas	942,000	12%

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

RTO13'S ATTRACTION TOURISTS

VOLUME OF ATTRACTION TOURISTS IN RTO13

RTO13 accounts for 1-in-20 Attraction Tourists in Ontario (5%) – a slightly smaller share of this market than the region's share of *all* overnight tourism in the province (8%) (see accompanying chart). It attracts about one fifth of its Attraction Tourists from within the region (87,000) and considerably more from other parts of Ontario (148,000). RTO13 also draws about 44,000 of the attraction market from other Canadian provinces, including 13,000 from Manitoba. Approximately 135,000 of these tourists came from the U.S.A. and 18,000 are from overseas countries (see Table 4).

[18] Northern Ontario trips are those with overnight visits to the region during 2012. "Other" (Southern) Ontario trips are those with overnight visits in Ontario but *not* in Northern Ontario (i.e., the residual of all overnight trips to Ontario).

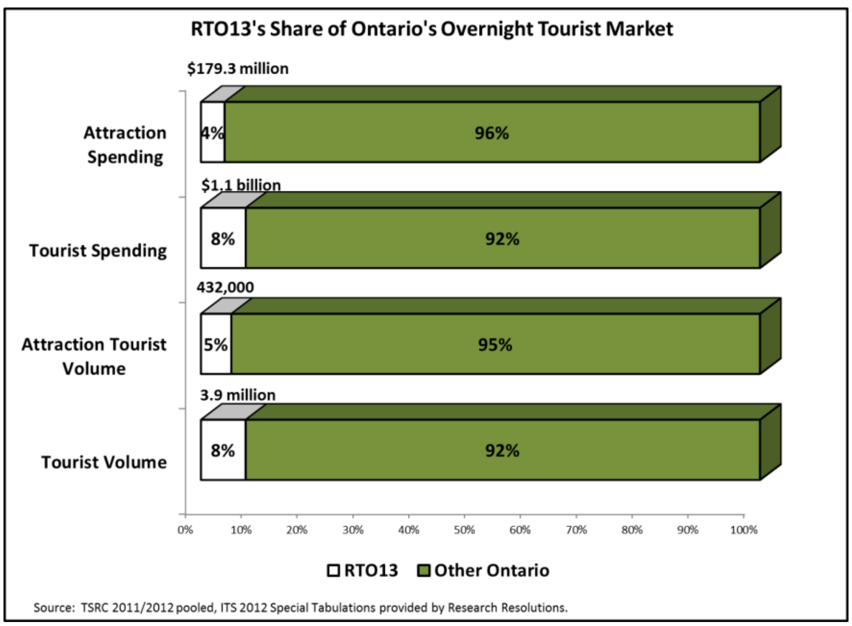
Table 4: RTO13's Attraction Tourists by Place of Residence

	Number	Per cent
RTO13's Attraction Tourists	432,000	100%
Canada	279,000	65%
RTO13 Residents	87,000	20%
Southern Ontario Residents	148,000	34%
Other Canadians	44,000	10%
Manitoba	13,000	4%
U.S.A.	135,000	31%
Overseas	18,000	4%

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

SPENDING BY ATTRACTION TOURISTS IN RTO13

In 2012, RTO13 captured $1.1 billion of overnight tourist spending in Ontario (8%). In that same year, the region's Attraction Tourists spent about $179.3 million, or four per cent of the money members of this market segment spent in Ontario (see chart).



The $179.3 million spent by Attraction Tourists in RTO13 represent one sixth of all overnight visitor spending in the region. Most of the segment's spending is done by Canadians ($114.9 million or 64%). Surpassing their market share of 24%, Americans account for about one third of Attraction spending in the region ($58.2 million or 11%) and overseas Attraction Tourists contribute a further $6.3 million in spending for RTO13 (see Table 5).

Spending by Canadian, American and overseas Attraction Tourists in Northern Ontario is commensurate with each tourism flow's contribution to overnight visitor volumes. In other words, Canadians contribute almost two thirds of the region's Attraction Tourists and the same proportion of spending. Americans provide one third of Attraction Tourists and spending while the comparatively small overseas market represents four percent of volume and spending.

Table 5: Attraction Tourists Spending in RTO13 by Place of Residence

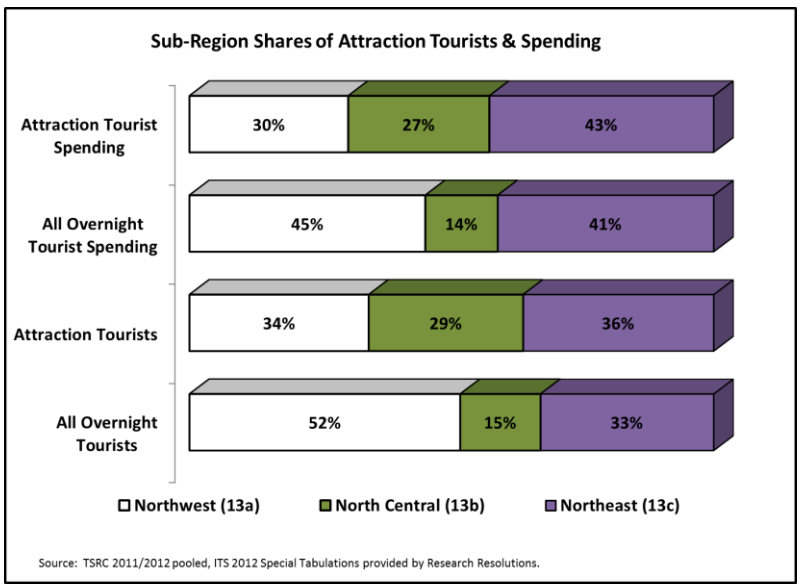
	Dollars	Per cent
Overnight Tourist Spending in RTO13	$1,123,700,000	100%
Attraction Tourists	$179,300,000	16%
Place of Residence	$	100%
Canada	$114,900,000	64%
U.S.A.	$58,200,000	32%
Overseas	$6,300,000	4%

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. Figures may not add to total due to rounding.

ATTRACTION TOURISTS & SPENDING IN RTO13'S SUB-REGIONS

RTO13's sub-regions all benefit from Attraction Tourists. Northwest Ontario (13a) attracted about 160,000 or one third of Northern Ontario's Attraction Tourists during 2012. These tourists spent over $54.0 million in the sub-region, accounting for close to one third of the segment's spending in RTO13 over the year. These proportions are lower than the sub-region's share of all overnight tourists' volume and spending.

North Central (13b) attracted almost 140,000 overnight attraction visitors. These tourists spent about $48.0 million in North Central, representing more than one quarter of the segment's 2012 volume and spending in RTO13. North Central is noticeably more successful in attracting Attraction Tourists and their revenues than the area's share of *all* overnight tourists would suggest. The relative strength of North Central vis à vis other sub-regions may attest to the lure of the Agawa Canyon Tour Train.



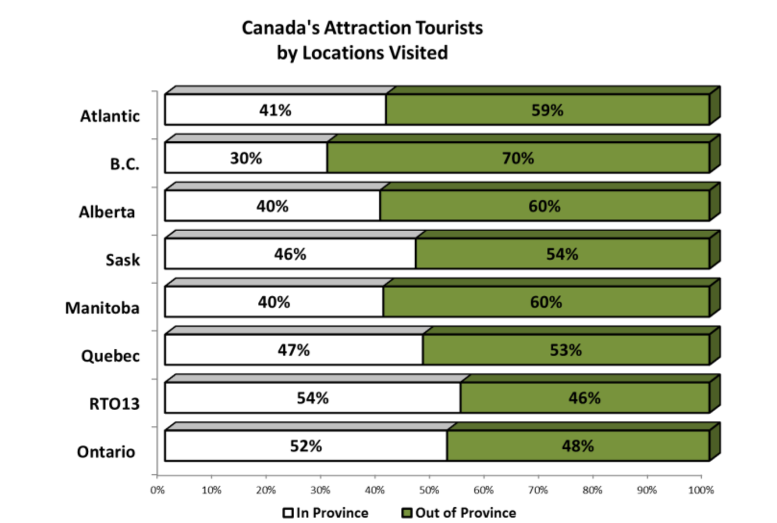
The Northeast (13c) sub-region hosted approximately 170,000 Attraction Tourists (36%) who spent $77.0 million or two fifths of the amount spent throughout Northern Ontario (41%). The sub-region's share of Attraction Tourists and associated spending is on par with its share of *all* Northern Ontario overnight tourists.

ATTRACTION TOURISTS' TRIP CHARACTERISTICS

SOURCE OF ATTRACTION TOURISTS

Canadian tourists on overnight trips select their destinations for visiting attractions at different rates, depending on where they reside. For example, Ontario residents and those living in RTO13 are about equally likely to visit attractions in Ontario as they are to travel outside the province for these experiences. Quebeckers exhibit a pattern similar to Ontarians but British Columbia's Attraction Tourists are more than twice as inclined to travel *outside* of British Columbia (70%) when going to attractions as they are to stay in their home province (30%).

In the following section, key trip characteristics of the target market for RTO13 and other parts of Ontario are provided.



Source: TSRC 2011/2012 pooled, ITS 2012 Special Tabulations provided by Research Resolutions.

TRIP PURPOSE & LENGTH OF STAY

Trip Purpose: About half of RTO13's total overnight market (48%) and more than three fifths (63%) of those in the attraction segment are on pleasure trips (see Table 6). Similarly, about three fifths of the corresponding Attraction Tourists in Southern Ontario are on pleasure trips (60%).

Length of Stay in Location: On average, RTO13's Attraction Tourist spends between three and four nights in the region (3.5 nights). This trip duration is almost one night less than an Attraction Tourist in Southern Ontario (4.3 nights) but on par with a typical Northern Ontario overnight tourist – one who may or may not have gone to an attraction while on the trip (3.5 nights).

Table 6: Attraction Tourists' Trip Purpose & Duration

	All Overnight Tourists	Attraction Tourists	
Location(s) in Which Nights Spent	**RTO13**	**RTO13**	**Southern Ontario**
	3,931,000	432,000	7,615,000
	%	%	%
Trip Purpose			
Pleasure	48%	63%	60%
Visit Friends/Relatives	39%	31%	31%
Length of Stay in Location			
Average Length of Stay	3.5 nights	3.5 nights	4.3 nights

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

AGE & GENDER

Attraction Tourists in RTO13 are a near-microcosm of *all* overnight visitors to the region with respect to gender and age, although there are some noteworthy differences. Attraction Tourists in RTO13 and the region's travelling public as a whole are equally likely to be men and women (see Table 7). This even gender split is equally characteristic of the segment's tourists in Southern Ontario.

Tourists of all ages are in RTO13's market for attractions. On average, they are close to fifty years of age (48.6 years). At the same time, more than one quarter are under 35 years, almost one third are between 35 and 54 years and two fifths are 55 years of age or over (41%).

There are more older tourists in the Northern Ontario's Attraction segment (41%[19]) than is the case among typical tourists in the region (30%) or among Attraction Tourists in Southern Ontario (29%). The higher concentration of older Attraction Tourists in RTO13 explains why their average age (48.6 years) is higher than RTO13's typical tourist (44.8 years) and higher than Southern Ontario's Attraction Tourists (43.5).

Table 7: Attraction Tourists' Gender & Age

Location(s) in Which Nights Spent	**All Overnight Tourists**	**Attraction Tourists**	
	RTO13	**RTO13**	**Southern Ontario**
	3,931,000	432,000	7,615,000
	%	%	%
Gender of respondent			
Male	55%	51%	50%
Female	45%	49%	50%
Age of respondent			
Under 25	14%	11%	18%
25-34	17%	17%	18%
35-44	19%	14%	18%
45-54	21%	17%	17%
55-64	17%	20%	15%
65+	13%	21%	14%
Average Age (years)	44.8	48.6	43.5

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

[19] 55 years of age or over.

LODGING NIGHTS

Nights on attraction trips: Over the course of a year, Attraction Tourists spent 1.5 million nights in Northern Ontario (1,526,000) (see Table 8). Over half of these nights (837,000) were spent by Canadians and two fifths (592,000 or 39%) were spent by American Attraction Tourists in RTO13. Segment members from overseas spent about 97,000 in Northern Ontario (6%).

Table 8: Attraction Tourists' Nights in RTO13

Location(s) in Which Nights Spent	**All Overnight Tourists**	**Attraction Tourists**	
	RTO13	**RTO13**	**Southern Ontario**
Total Person Nights	13,825,000	1,526,000	32,619,000
	#	#	#
Canadians	10,276,000	837,000	13,984,000
Americans	3,337,000	592,000	6,728,000
Overseas	220,000	97,000	11,907,000
	%	%	%
Canadians	74%	55%	43%
Americans	24%	39%	21%
Overseas	2%	6%	37%

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

Southern Ontario captures a lower proportion of its nights from Canadian and American Attraction Tourists than does RTO13 but an appreciably higher proportion from the overseas market (37% vs. 6%). No doubt the sizeable proportion of overseas tourists' nights reflects the large number of recent immigrants in Toronto and other parts of Southern Ontario. These immigrants' families come to visit their relatives and tend to stay for much longer periods than do typical American and Canadian tourists.

Lodging Nights: Roofed commercial lodging accounts for more than one third of the nights Attraction Tourists spent in RTO13 (555,000). Most of these nights were spent in Northern Ontario's hotels and motels (378,000) (see Table 9).[20] Campgrounds and RV parks throughout the region were used for 224,000 of Attraction Tourists' nights in Northern Ontario (15%). The remaining nights – one half of all nights spent by these overnight visitors – were spent in private homes or cottages.

Approximately one third of the nights spent by Attraction Tourists in Northern (36%) and Southern Ontario (35%) are in paid roofed lodgings but camping is appreciably more popular among Northern Ontario's Attraction Tourists (15%) than it is among their counterparts in Southern Ontario (4%).

[20] The questionnaires for Statistics Canada's US and Canadian travel surveys provide different lodging choices for survey respondents. Furthermore, respondents self-identify their lodging type from an available list that does not provide descriptions to aid in differentiating a "lodge" from a "resort" or "commercial cottage/cabin". This analysis can only provide information *as reported*, recognizing that consumer responses may not match industry definitions of lodging types.

Table 9: Attraction Tourists' Lodging Nights

Location(s) in Which Nights Spent	**All Overnight Tourists**	**Attraction Tourists**	
	RTO13	**RTO13**	**Southern Ontario**
Total Person Nights	13,825,000	1,526,000	32,619,000
	#	#	#
Paid, Roofed Lodging (All Types)	**4,317,000**	**555,000**	**11,551,000**
Hotel/Motel	1,949,000	378,000	10,102,000
Other Roofed Commercial[1]	2,367,000	178,000	1,449,000
Other Lodging			
Campground	**1,254,000**	**224,000**	**1,451,000**
Unpaid Lodging (All Types) [2]	**8,254,000**	**747,000**	**19,617,000**
Paid, Roofed Lodging (All Types)	**31%**	**36%**	**35%**
Hotel/Motel	14%	25%	31%
Other Roofed Commercial[1]	17%	12%	4%
Other Lodging			
Campground	**9%**	**15%**	**4%**
Unpaid Lodging (All Types) [2]	**60%**	**49%**	**60%**

Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. [1]*Includes B&Bs, lodges, camps, outposts.* [2]*"Unpaid" lodging includes unknown/not stated responses.*

OTHER ACTIVITIES ON THE TRIP

While on their trip, Attraction Tourists in Northern Ontario do much more than go to historic sites, museums and art galleries, casinos and other entertainment facilities. They are especially drawn to Northern Ontario's outdoors. Two thirds of this market segment participate in one or more outdoor activities (65%) including visiting Northern Ontario's nature parks (41%), its lakes and rivers for boating (26%) and fishing (18%) and, as noted earlier, for camping (20%). About one quarter attend a festival or event while on their trip.

Compared to Attraction Tourists in Southern Ontario, those in the North are more likely to visit historic sites (Northern Ontario 57%; Southern Ontario 43%) but the two groups of tourists are quite similar in their attendance levels at museums/galleries, casinos, theme parks and/or zoos/aquariums.

The most salient difference between these two groups, however, is their interest in the outdoors. Nature parks, boating, fishing and camping are two to three *times* as popular among Attraction Tourists in Northern Ontario as they are among those in Southern Ontario.

Table 10: Attraction Tourists' Activities on Trip

Location(s) in Which Nights Spent	**All Overnight Tourists**	**Attraction Tourists**	
	RTO13	**RTO13**	**Southern Ontario**
Overnight Person Visits	3,931,000	432,000	7,615,000
Any Attraction	**11%**	**100%**	**100%**
Historic site	6%	57%	43%
Museum or art gallery	4%	37%	36%
Casino	3%	24%	30%
Theme park	1%	10%	15%
Zoo or aquarium	1%	10%	14%
Any Festival/Event	**8%**	**24%**	**26%**
Festival or fair	2%	10%	11%
Sporting event	4%	11%	8%
Performance/concert	3%	11%	14%
Any Outdoor/Nature	**49%**	**65%**	**41%**
National, provincial or nature park	11%	41%	25%
Boating/canoeing/kayaking	20%	26%	10%
Camping	15%	20%	7%
Fishing	24%	18%	4%
Golfing	2%	4%	4%
Hunting	3%	1%	*

*Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.*Less than 0.5%.*

SPENDING ON THE ATTRACTION TRIP

Attraction Tourists contributed $1.00 out of every $6.00 spent by all overnight tourists in RTO13. In other words, of the $1.1 billion spent by overnight tourists in the region, those who went to attractions spent $179.3 million or sixteen per cent. This is about half the level spent by Attraction Tourists' corresponding contribution in Southern Ontario (32%).

On a *per trip* basis, Attraction Tourists in Northern Ontario spend almost $680.00 or half again *more* than Northern Ontario's typical overnight tourist ($423.00). When trip spending is adjusted for the number of nights spent in RTO13, the average *per diem* is $125.00 for each typical overnight visitor but reaches $200.00 for RTO13's Attraction Tourists.

Table 11: Attraction Tourists' Spending

Location(s) in Which Nights Spent	**All Overnight Tourists**		**Attraction Tourists**	
	RTO13	**Southern Ontario**	**RTO13**	**Southern Ontario**
All Overnight Tourists	$1,123,700,000	$12,762,000,000		
Attraction Tourists' Spending	$179,300,000	$4,037,000,000	$179,300,000	$4,037,000,000
Attraction Tourists' Share	16%	32%		
Average Per Trip	$423.00	$389.00	$679.00	$835.00
Average Per Party Per Night	$125.00	$137.00	$200.00	$188.00
Average # of Nights in Region	3.5 nights	2.9 nights	3.5 nights	4.3 nights
Using Paid, Roofed Lodging in RTO13				
Average Per Trip	$787.00	N/A	$798.00	N/A
Average Per Party Per Night	$254.00	N/A	$293.00	N/A

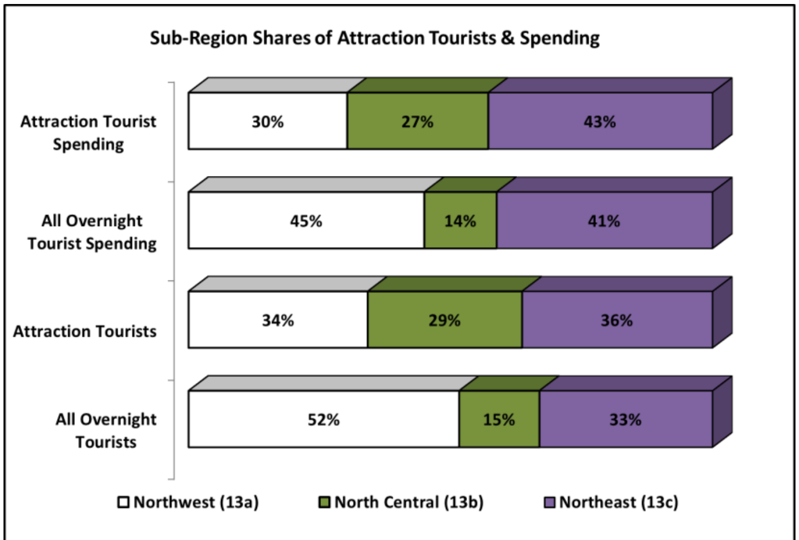
Special Tabulations, TSRC 2011/2012 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

Differences in *per trip* and *per diem* spending between Attraction Tourists in Northern and Southern Ontario are likely explained by longer stays in the south, driven at least in part by the prevalence of overseas tourists in Southern Ontario's attraction market. While overseas visitors tend to stay much longer at their destination than do Americans or Canadians, they also tend to billet with friends and relatives instead of relying on the commercial accommodation sector. Thus, *per trip* spending in Southern Ontario is driven upward because of longer stays while *per diem* spending is driven downward because of low or non-existent lodging costs for many of the nights spent in the region.

Not surprisingly, if more of Northern Ontario's Attraction Tourists could be convinced to utilize the region's hotels, motels and other paid lodging, their yields would increase substantially. Instead of $679.00, each Attraction trip would yield almost $798.00 if paid roofed lodging were used.

ATTRACTION TOURISTS AND SPENDING IN RTO13'S SUB-REGIONS

RTO13's sub-regions all benefit from Attraction Tourists. Northwest Ontario (13a) attracted about 160,000 or one third of Northern Ontario's Attraction Tourists during 2012. These tourists spent over $54.0 million in the sub-region, accounting for close to one third of the segment's spending in RTO13 over the year. These proportions are lower than the sub-region's share of all overnight tourist volume and spending.



Source: TSRC 2011/2012 pooled, ITS 2012 Special Tabulations provided by Research Resolutions.

North Central (13b) attracted almost 140,000 overnight attraction visitors. These tourists spent about $48.0 million in North Central, representing more than one quarter of the segment's 2012 volume and spending in RTO13. North Central is noticeably more successful in attracting Attraction Tourists and their revenues than the area's share of *all* overnight tourists would suggest.

The Northeast (13c) sub-region hosted approximately 170,000 Attraction Tourists (36%) who spent $77.0 million or two fifths of the amount spent throughout Northern Ontario (41%). The sub-region's share of Attraction Tourists and associated spending is commensurate with its share of *all* Northern Ontario overnight tourists.

ECONOMIC IMPACT OF ATTRACTION TOURISTS IN RTO13

INTRODUCTION

The money spent by Attraction Tourists in Northern Ontario ripples throughout the local and provincial economies.[21] These expenditures generate economic activity including contributions to gross domestic product (GDP); jobs in tourism-related sectors such as accommodation, transportation and food services; jobs in other sectors such as manufacturing and agriculture; and taxes.[22]

GROSS DOMESTIC PRODUCT

Gross domestic product is the value of goods and services produced by labour and capital located within a region. This definition helps explain why GDP retained in RTO13 is smaller than the total amount of spending done by visitors to the area in the target market: many of the goods and services provided to serve tourists in RTO13 are produced outside the region.[23]

During 2012 Attraction Tourists spent millions of dollars on tourism goods and services in Northern Ontario.[24] Once the imports from other locations in Ontario, other parts of Canada, and other countries are taken into account, tourism spending by Attraction Tourists in RTO13 generated about $89.1 million in direct economic activity (i.e. GDP), and an additional $45.5 million in indirect and induced GDP for Northern Ontario's economy.

There was, therefore, about $134.7 million in GDP retained in Northern Ontario. Other parts of Ontario benefited from about $8.6 million in GDP (direct, indirect, and induced) from target market visitor spending in the region. When combined, the province-wide GDP contribution of Attraction tourism in Northern Ontario reached $143.2 million.

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[21]Note that the total spending estimate used in MTCS's TREIM model estimating Attraction Tourists' economic impact in RTO13 is based on the unpooled TSRC 2012 and the 2012 ITS US and overseas files for greater consistency with estimates that may be forthcoming from MTCS or other sources. The difference between total tourism spending by Attraction Tourists in RTO13 had the pooled TSRC been used ($179.3 million) and the unpooled ($194.0 million) is about $14.7 million.

[22] The economic impact estimates provided in this section reflect visitor spending only, that is, spending by visitors in the Attraction target market in Northern Ontario. The estimates provided here are the most appropriate ones to use when assessing the results of marketing and promotional efforts, and the appeal of tourism products and experiences in Northern Ontario. MTCS's glossary of terms to be used in conjunction with outputs from TREIM is appended.

[23] 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 RTO13 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 RTO13 and generate economic activity in communities where the materials are produced.

[24] Spending estimates are based on the 2012 reference year for all markets (see Note 21, above).

Table 12: Attraction Tourist Contributions to GDP and Funds Retained in RTO13

	Amount Retained in RTO13 (A)	Amount Retained in Other Ontario (B)	Total Contribution to Ontario's GDP (A + B)
Direct	$89,115,000	$0	$89,115,000
Indirect	$22,937,000	$4,879,000	$27,815,000
Induced	$22,598,000	$3,690,000	$26,288,000
Total GDP	**$134,650,000**	**$8,568,000**	**$143,218,000**

Source: TSRC 2012, ITS US/OVS 2012 Special Tabulations prepared by Research Resolutions and special calculations of TREIM for RTO13 (MTCS). Figures are rounded to nearest 100,000.

JOBS, WAGES, AND SALARIES

Approximately 1,810 direct jobs and an additional 530 indirect and induced jobs in Northern Ontario were generated as a result of Attraction Tourists' spending. These jobs include part- and full-time positions, on both annual and seasonal bases.[25] Additional employment in the province was generated because of tourists in Northern Ontario who visit attractions, bringing the total number of direct, indirect and induced jobs to about 2,452 across Northern Ontario and the entire province.

Over a year, RTO13 retained 2,340 of the jobs created by Attraction Tourists in Northern Ontario or 95% of jobs created by the target market province-wide.[26] These jobs generated $93.1 million in wages and salaries province-wide, with 94% of this amount ($87.4 million direct, indirect, and induced) retained in Northern Ontario.

TAXES

All levels of government benefited from Attraction tourism spending in Northern Ontario. This spending generated $37.1 million in federal government taxes, a further $30.3 million in provincial taxes and $402,000 in municipal taxes based on incremental tourism revenue (direct, indirect, and induced) province-wide. RTO13 retained the following amounts from these taxes:

- $21.2 million in direct federal taxes; and
- $21.3 million in direct provincial taxes.

[25] Note that estimates for tourism economic impact in Northern Ontario published in MTCS's products may differ from those provided herein because the inputs used for the TREIM model are somewhat different and the online TREIM model is based on different assumptions and/or data than the one used internally by MTCS.

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

Table 13. Economic Impact of Attraction Tourists in RTO13

	Economic Benefits Retained in RTO13	Total Benefits Across Ontario	Proportion of Total Ontario Benefits Retained in RTO13
Gross Domestic Product	**$134,650,000**	**$143,218,000**	**94%**
Direct	$89,115,000	$89,115,000	100%
Indirect/Induced	$45,535,000	$54,103,000	84%
Wages	**$87,357,000**	**$93,136,000**	**94%**
Direct	$58,417,000	$58,417,000	100%
Indirect/Induced	$28,941,000	$34,719,000	83%
Employment (Jobs)	**2,340**	**2,452**	**95%**
Direct	1,810	1,810	100%
Indirect/Induced	530	642	83%
Federal Taxes	**$35,344,000**	**$37,056,000**	**95%**
Direct	$21,212,000	$21,212,000	100%
Indirect/Induced	$14,132,000	$23,705,000	60%
Provincial Taxes	**$28,960,000**	**$30,323,000**	**96%**
Direct	$21,332,000	$21,332,000	100%
Indirect/Induced	$7,628,000	$8,991,000	85%
Municipal Taxes	**$376,000**	**$402,000**	**94%**
Direct	$139,000	$139,000	100%
Indirect/Induced	$237,000	$318,000	75%

Source: TSRC 2012, ITS US/OVS 2012 Special Tabulations prepared by Research Resolutions and special calculations of TREIM for RTO13 (MTCS). Figures are rounded to nearest 100,000.

NORTHERN ONTARIO'S POTENTIAL MARKET FOR ATTRACTION TOURISTS

TAMS Attraction Tourists

Information in this section derives from the TAMS study. The Canadians and Americans described here meet the following criteria:

- Adults (18+ years)
- Have taken an overnight leisure trip to Northern Ontario over a two-year period;
- Have identified two or more attractions as a trip driver for an overnight leisure trip to any destination over a two-year period.

In the following pages, the North American tourist market for attractions is explored. Information is based on findings of the Travel Activities and Motivation Surveys (TAMS) conducted in Canada and the United States. The study explores a wide range of activities that are engaged in and/or motivate trips by overnight pleasure travellers in each country. It also provides information on these tourists' destinations worldwide but does not link trip motivations or activities to specific destinations. Consequently, a North American tourist in the target market may have travelled to Northern Ontario over a two-year period but may or may not have gone to an attraction in the region.

WHO IS A TAMS ATTRACTION TOURIST

In the TAMS studies, North Americans who have taken overnight pleasure trips over a two-year period are asked which of about 160 different activities they participated in during their travels. For each one they claim to have participated in, they are asked if it was a *trip driver* – that is, it was the main reason the trip took place. Within the large array of possible activities covered by the study, fifteen have been designated as *attractions* for purposes of this analysis:

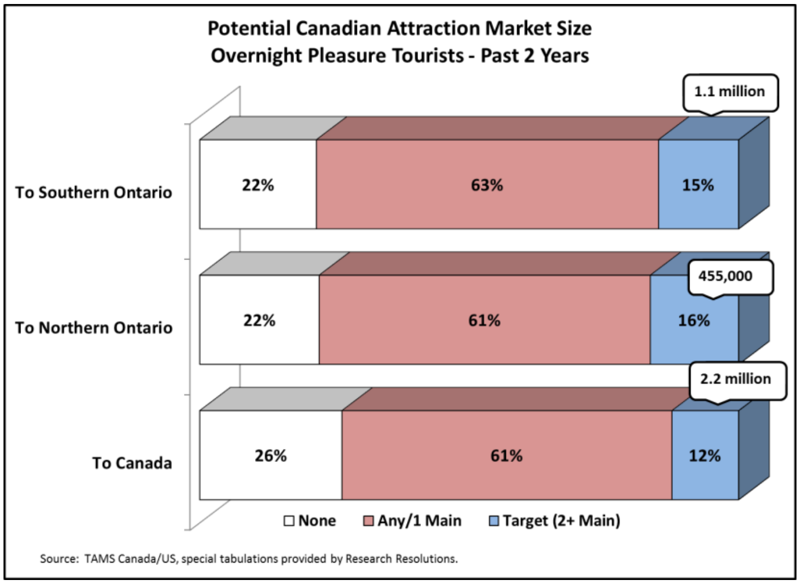
Attractions

History-Oriented Attractions	**Museums/Galleries**
Historical replicas of cities with historic re-enactments	Art galleries
Well known historic sites/buildings	Aboriginal heritage attractions
Other historic sites, monuments and buildings	Museum - Children's
Other Attractions	Museum - Science or technology
Planetarium	Museum - General history or heritage
Botanical gardens	Museum - Military/war
Aquariums	
Zoos	
Theme parks	
Casinos	

Many travellers visit attractions as *one-of-many* activities on their pleasure trips but for analytical purposes, this report focuses on those who are *motivated* to travel in order to do so. Hence, Attraction Tourists are defined to be past two year pleasure travellers who name **at least two of these attractions as a *trip driver*.**

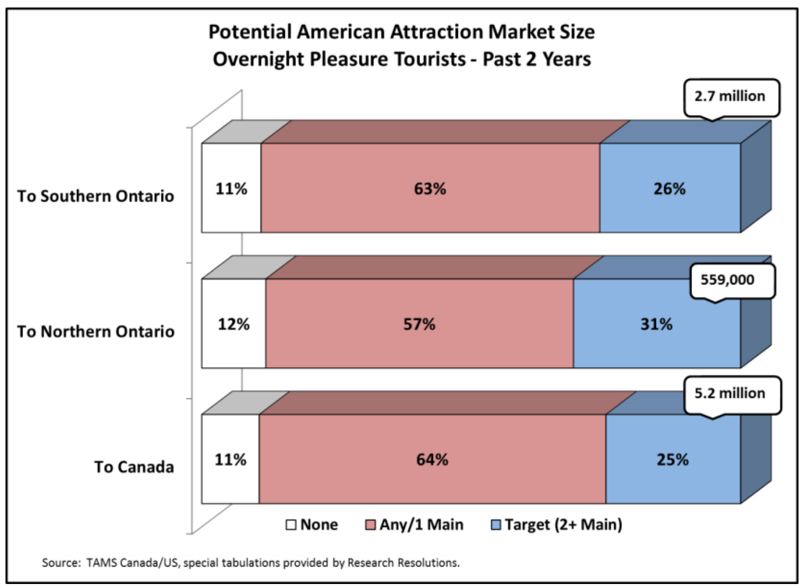
POTENTIAL MARKET SIZE IN CANADA & U.S.A.

Visiting attractions is a common trip activity among Canadian and American pleasure travellers. At the national level and among Canadians who have taken overnight pleasure trips to Northern Ontario, three quarters go to attractions either as one of the many things they do on their trips or as a motivation to take a trip (*trip driver*). Thus, of the 2.8 million Canadian pleasure travellers who have visited Northern Ontario over a two-year period, 2.2 million have gone to an attraction on at least one of their trips.[27]



Of these, close to one half million (455,000) take trips in order to visit **attractions**. This is the North's target market for attractions, representing about 1-in-6 of the region's Canadian market (16%, see chart).

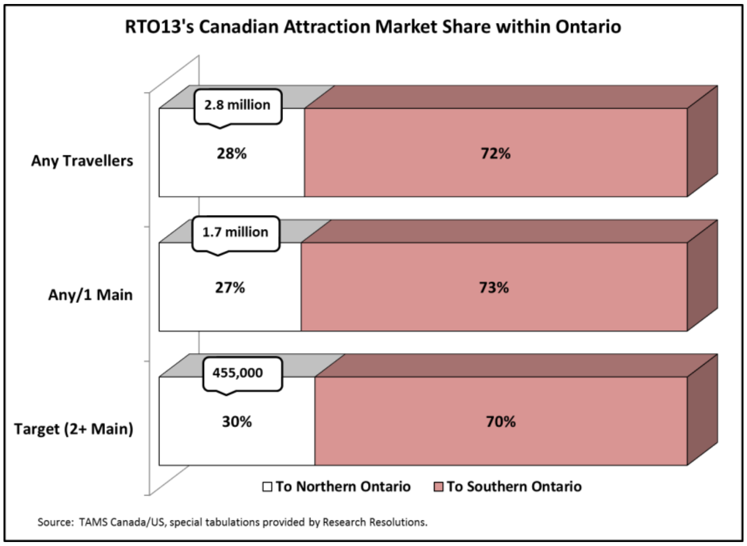
Attractions are even more popular trip activities among American pleasure travellers who have been to Canada over a two-year period. Nine-in-ten of them include an attraction among their trip activities. Proportionally, American pleasure tourists with Northern Ontario travel experience are just as likely to visit attractions on their trips as is the market in total and those with travel experience in Southern Ontario.[28] Close to two million Americans claim to have taken overnight pleasure trips to Northern Ontario over a two year period (1.8 million). Of these, 88% or 1.6 million have included at least one attraction among their trip activities. The subset of these tourists who are highly motivated to take trips in order to see attractions represents a target market of over one half million (559,000) Americans for Northern Ontario (see chart).

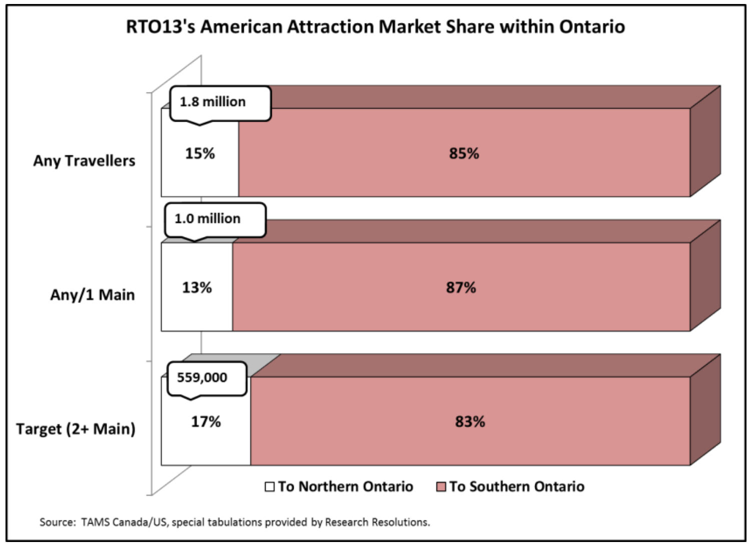


[27] Recall that TAMS findings provide information on *where* tourists travelled and *what they did* on trips (activities) but do not provide information on which activities took place in specific destinations.
[28] Northern Ontario travellers are those claiming to have taken an overnight pleasure trip to the region over a two-year period. "Other" (Southern) Ontario travellers are those who have been to the province over this time period and have *not* visited Northern Ontario on their trips (i.e., the residual of all visitors to Ontario).

TARGET MARKET SHARE WITHIN ONTARIO

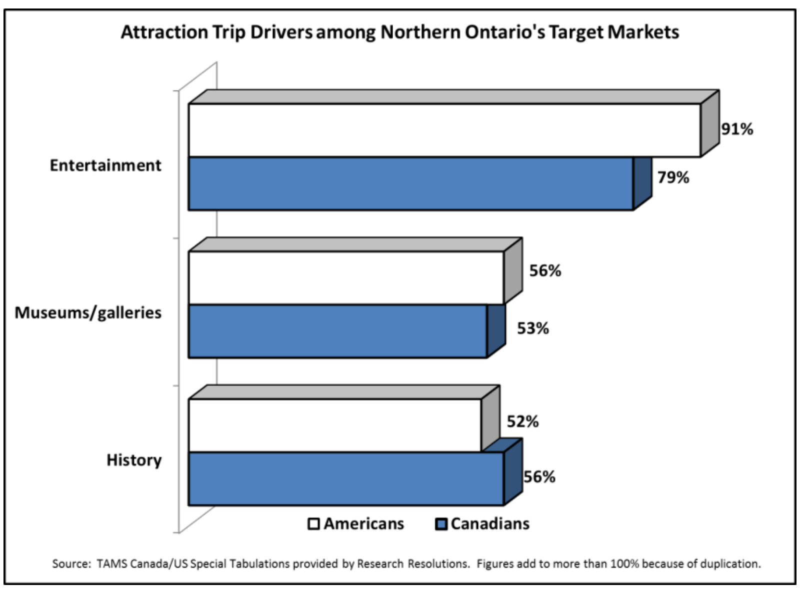
Canadians: Northern Ontario attracts about 3-in-10 of the Canadians who have taken overnight pleasure trips to Ontario over a two-year period (*any travellers,* 28%). As displayed in the accompanying chart, the region captures tourists in the attraction target market in Ontario at about the same rate: 30% of the province's Attraction Tourists have been to Northern Ontario over a two-year span.





Americans: About 1-in-7 Americans who have travelled in Ontario visited destinations in the North over a two-year period (15%). A similar proportion of the attraction target market went to Northern Ontario for an overnight pleasure trip (17%).

Northern Ontario's highly motivated Attraction Tourists visit history-oriented attractions; various types of museums and art galleries; and numerous entertainment-oriented attractions, as displayed in the accompanying chart.[29]



Canadians: Of the various types of attractions covered in the study, ***entertainment-oriented*** ones including theme parks and casinos are most likely to be trip drivers among Northern Ontario's domestic target market (79%). **History-oriented attractions** such as historic sites and replicas of cities or towns motivated over half of Canadians in RTO13's potential market for attractions. Equally popular as trip drivers among these Canadians are **museums and art galleries**.

[29] Percentages add to more than 100% because of duplication.

Americans: Northern Ontario's American attraction target market is even more likely than its Canadian counterpart to take trips in order to go to theme parks, casinos or other **entertainment attractions** (91%). About half of these Americans are also motivated to travel in order to see **historic sites** and other history-oriented attractions (52%) and to visit **museums and/or art galleries** (56%).

PROFILE OF POTENTIAL CANADIAN ATTRACTION TOURIST MARKET

WHERE CANADIANS LIVE

For the most part, Canadians who are motivated to take overnight pleasure trips in order to visit attractions are distributed across the country in the same proportions as is the travelling public as a whole. Hence, about two fifths of them live in Ontario, one quarter reside in Quebec, and at least one tenth of them live in each of Alberta and British Columbia.

Northern Ontario's market for attractions is highly concentrated in Ontario. Four fifths of the 455,000 highly motivated attraction market members who have recent Northern Ontario travel experience live within the province (82%). A further one tenth are residents of Quebec (10%).

Likely because it supports more large-scale attractions such as the Royal Ontario Museum, Ontario Science Centre, National Gallery of Canada, Canada's Wonderland and several casino destinations and is on many highway, air and rail corridors, Southern Ontario attracts avid Attraction Tourists from a broader geographic area than does the North. Ontario residents represent three fifths of the South's market but two fifths are Quebeckers and about 1-in-25 live in Atlantic Canada (4%), Alberta (4%) or British Columbia (6%).

Table 14: Canada's Potential Attraction Tourist Market by Place of Residence

		Attraction Tourists		
Place of Residence	**All Pleasure Tourists**	**To Canada**	**To Northern Ontario**	**To Southern Ontario**
Canada	24.8 million	2.2 million	455,000	1.1 million
Atlantic Canada	7%	6%	1%	4%
Quebec	24%	27%	10%	22%
Ontario	39%	40%	82%	61%
Manitoba	3%	2%	4%	2%
Saskatchewan	3%	2%	1%	1%
Alberta	10%	10%	2%	4%
British Columbia	13%	13%	1%	6%

Special Tabulations, TAMS Canada prepared by Research Resolutions.

RTO13'S SHARE OF THE CANADIAN MARKET – BY PROVINCE

Because so many tourists go to attractions near where they live, it is not surprising that RTO13 attracts overnight leisure trips by Ontario's avid market at a high rate (see Table 15). The region enjoys visits by 374,000 or more than two fifths of Ontario's 864,000 Attraction Tourists. The North is also a destination for about 136,000 or two fifths of Toronto's 334,000 avid attraction visitors. One third of Manitoba's 49,000 Attraction Tourists also have made overnight pleasure trips to Northern Ontario over a two-year period (17,000).

Table 15: Northern Ontario's Canadian Potential Attraction Market by Place of Residence

Place of Residence	**Attraction Tourists**		
	Trips in Canada	**Trips in Northern Ontario**	**Northern Ontario's Share** (Horizontal %)
Canada	2,156,000	455,000	21%
Atlantic Canada	121,000	4,000	3%
Quebec	586,000	44,000	7%
Ontario	864,000	374,000	43%
Toronto CMA	334,000	136,000	41%
Manitoba	49,000	17,000	34%
Saskatchewan	48,000	2,000	5%
Alberta	218,000	9,000	4%
British Columbia	270,000	6,000	2%

Special Tabulations, TAMS Canada prepared by Research Resolutions.

PROFILE OF POTENTIAL AMERICAN ATTRACTION TOURIST MARKET

WHERE AMERICANS LIVE

American pleasure travellers who take trips in order to visit attractions are distributed across all regions of the country but those who have Canadian travel experience tend to be concentrated in border states and especially those in the Mid-Atlantic and East North Central regions. Similarly, those who have travelled to Northern Ontario over a two-year period are most apt to live near the Canadian border. About one quarter of the North's Attraction Tourists are residents of East North Central states, most notably, Michigan and the same proportion are residents of the Mid-Atlantic region, with 1-in-7 residing in New York (15%).

The geographic distribution of Attraction Tourists who have been to Southern Ontario on a pleasure trip over a two-year period is very similar to Northern Ontario's.

Table 16: Potential Attraction Tourist Market in the U.S.A. by Place of Residence

	Attraction Tourists			
	Total	**To Canada**	**To Northern Ontario**	**To Southern Ontario**
Pleasure Travellers 18+	20.8 million	5.2 million	559,000	2.7 million
Place of Residence				
New England	8%	8%	8%	5%
Middle Atlantic	**20%**	**22%**	**27%**	**25%**
New York State	11%	11%	15%	13%
Pennsylvania	6%	6%	6%	8%
South Atlantic	13%	13%	8%	14%
East North Central	**22%**	**22%**	**28%**	**32%**
Wisconsin	2%	2%	5%	2%
Michigan	8%	8%	12%	14%
Ohio	6%	6%	8%	10%
West North Central	6%	5%	6%	6%
Minnesota	3%	2%	4%	3%
East South Central	3%	4%	9%	3%
West South Central	5%	4%	3%	4%
Mountain	4%	4%	4%	2%
Pacific	18%	18%	9%	9%

Source: TAMS US, special tabulations provided by Research Resolutions.

RTO13'S SHARE OF THE AMERICAN MARKET – BY REGION/STATE

Northern Ontario has attracted one eighth of the avid American Attraction Tourist market (11%). From a volume perspective, the region is especially successful in drawing overnight pleasure visitors in this segment from New York and Michigan. In fact, New York emerges as Northern Ontario's largest single market for Attraction Tourists. Of the state's 589,000 Attraction Tourists with Canadian travel experience, Northern Ontario attracted 85,000 (14%).

While Northern Ontario may not attract as many target market tourists from neighbouring Wisconsin and Minnesota, the region captures a sizeable *share* of these states' Attraction Tourists. Northern Ontario attracted over one quarter of the 97,000 Wisconsin residents in the attraction market (28% or 27,000) and about one fifth of the corresponding 110,000 Minnesotans (22% or 24,000 visitors).

Table 17: Northern Ontario's U.S.A. Potential Attraction Market by Place of Residence

Place of Residence	Attraction Tourists		
	Trips in Canada	**Trips in Northern Ontario**	**Northern Ontario's Share** (Horizontal %)
USA Total	5.2 million	559,000	11%
New England	417,000	44,000	11%
Middle Atlantic	1,159,000	152,000	13%
New York State	589,000	85,000	14%
Pennsylvania	324,000	33,000	10%
South Atlantic	661,000	43,000	7%
East North Central	1,115,000	157,000	14%
Wisconsin	97,000	27,000	28%
Michigan	432,000	68,000	16%
Ohio	335,000	45,000	13%
West North Central	283,000	32,000	11%
Minnesota	110,000	24,000	22%
East South Central	220,000	48,000	22%
West South Central	214,000	15,000	7%
Mountain	198,000	20,000	10%
Pacific	911,000	48,000	5%

Special Tabulations, TAMS USA, prepared by Research Resolutions.

TYPES OF ATTRACTION AS TRIP DRIVERS

Canadian and American Attraction Tourists who have taken overnight pleasure trips to locations in Northern Ontario over a two-year period are very similar in the types of attractions they consider to be trip drivers. As a broad sub-group, **entertainment** attractions are especially popular trip drivers. On both sides of the border, theme parks on the scale of Disney or MGM followed by casinos are most apt to draw Canadians and Americans in the target market. Zoos are also popular in both groups, though Americans are more apt to take a trip to visit an aquarium (37%) than are the corresponding Canadians (13%), possibly because this type of attraction is more common in the U.S.A. than it is in Canada.

Among **history-oriented attractions,** *well-known historic sites* along with *other sites and monuments* motivate overnight trips for more than one third of Canadian and American Attraction Tourists. *Historical replicas of cities/towns with re-enactments* are more popular trip drivers among Northern Ontario's Canadian Attraction Tourists (26%) than among their American counterparts (16%).

About half of the Americans and Canadians in the target market go to **museums/galleries** led by *general history museums, art galleries* and *science/technology museums.*

Northern Ontario offers attractions that coincide with the primary experiences Attraction Tourists seek. There are many small and large-scale historic sites to satisfy interest in history-oriented attractions (e.g., Fort William Historical Park) and museums (e.g., Sault Ste Marie Museum; Thunder Bay Museum). There are art galleries in major centres and Dynamic Earth/Science North for Attraction Tourists interested in science and technology museums. The casino in Sault Ste Marie caters to Attraction Tourists who take trips in order to gamble.

Top Attraction Trip Drivers among Northern Ontario's Potential Market[30]

Canadians

1. Theme parks
2. Well known historic sites/buildings
3. Other historic sites, monuments
4. Zoos
5. Museum - General history or heritage
6. Casinos
7. Historical replicas/re-enactments
8. Art galleries
9. Museum - Science or technology
10. Botanical gardens

Americans

1. Theme parks
2. Casinos
3. Well known historic sites/buildings
4. Zoos
5. Aquariums
6. Other historic sites, monuments
7. Museum - General history or heritage
8. Art galleries
9. Museum - Science or technology
10. Botanical gardens

[30] In rank order, highest to lowest, for Canadians and Americans.

Table 18: Specific Attractions as Main Reason for Overnight Pleasure Trip

	Attraction Tourists					
	Canadians with Trips to . . .			Americans with Trips to . . .		
	Canada	Northern Ontario	Southern Ontario	Canada	Northern Ontario	Southern Ontario
Pleasure Travellers 18+	2.2 million	455,000	1.1 million	5.2 million	559,000	2.7 million
History-Oriented Attractions	**55%**	**56%**	**57%**	**57%**	**52%**	**56%**
Historical replicas/re-enactments	20%	26%	20%	17%	16%	18%
Well known historic sites/buildings	42%	42%	45%	45%	39%	42%
Other historic sites, monuments	33%	35%	36%	36%	31%	37%
Museums/Galleries	**49%**	**53%**	**56%**	**50%**	**56%**	**48%**
Art galleries	22%	25%	25%	21%	26%	18%
Aboriginal heritage attractions	9%	16%	9%	10%	10%	10%
Museum - Children's	5%	5%	6%	8%	12%	9%
Museum - Science or technology	16%	21%	20%	19%	26%	22%
Museum - General history or heritage	28%	30%	32%	24%	29%	21%
Museum - Military/war	12%	16%	15%	16%	17%	17%
Entertainment-Oriented Attractions	**75%**	**79%**	**73%**	**86%**	**91%**	**89%**
Planetarium	4%	6%	4%	9%	15%	10%
Botanical gardens	17%	17%	17%	19%	23%	19%
Aquariums	16%	13%	16%	28%	37%	27%
Zoos	30%	34%	26%	28%	38%	30%
Theme parks	53%	59%	52%	65%	73%	69%
Casinos	23%	29%	26%	44%	51%	47%

Special Tabulations, TAMS Canada/USA prepared by Research Resolutions.

OTHER TRIP DRIVERS AMONG NORTH AMERICAN ATTRACTION TOURISTS

Over a two-year period, North American tourists likely take multiple trips with differing motivations. Hence, those who identify attractions as *trip drivers* also take trips driven by other types of activities, including various types of **outdoor** pursuits, **festivals and events**, **shopping** and the like. This is clearly the case among Canadian and American Attraction Tourists with travel experience in Northern Ontario.

Trip drivers among 4-in-10 Canadian Attraction Tourists include *camping, visiting nature parks* and *shopping.* About one third take trips to attend *spectator sporting events* and one fifth to one quarter travel in order to attend *live theatre performances*, *hike, view wildlife, attend cultural festivals* (e.g., culinary; ethnic festivals), *popular music concerts* and/or *fish*.

The list of popular trip drivers among American Attraction Tourists is almost identical to the Canadian sequence, although a higher proportion of Americans travel in order to attend *spectator sporting events.* Like the corresponding Canadians, these Americans are motivated to travel by several of Northern Ontario's signature outdoor activities – wildlife viewing, nature parks, camping and fishing.

Other Top Trip Drivers among Attraction Tourists with Northern Ontario Experience[31]

Canadians		**Americans**	
Camping	44%	Spectator sports	45%
Nature park	39%	Shopping	44%
Shopping	38%	Other festivals(e.g., fireworks displays)	37%
Other festivals(e.g., fireworks displays)	34%	Flora/fauna viewing	33%
Spectator sports	32%	Cultural festivals (e.g., culinary, ethnic)	33%
Hiking	27%	Nature park	31%
Live theatre	26%	Camping	30%
Flora/fauna viewing	25%	Live theatre	29%
Cultural festivals (e.g., culinary, ethnic)	24%	Arts festivals (e.g., music, film)	28%
Rock & roll/popular concerts	24%	Fishing - fresh water	20%
Fishing - fresh water	22%		

The varied interests of Attraction Tourists suggest packaging opportunities for Northern Ontario. Packaging Northern Ontario's attractions with outdoor experiences including camping and wildlife viewing, theatre productions and music or sporting special events are likely to enhance the region's appeal for these multi-dimensional tourists.

[31] In rank order, highest to lowest, for Canadians and Americans.

Table 19: Other Activities as Trip Drivers

	Attraction Tourists					
	Canadians with Trips to . . .			Americans with Trips to . . .		
	Canada	Northern Ontario	Southern Ontario	Canada	Northern Ontario	Southern Ontario
Pleasure Travellers 18+	2.2 million	455,000	1.1 million	5.2 million	559,000	2.7 million
Activities as Main Reason for Trip						
Any Festivals/Events	**42%**	**45%**	**42%**	**46%**	**55%**	**46%**
Arts Festivals	15%	18%	18%	16%	28%	17%
Cultural Festivals	16%	24%	17%	24%	33%	24%
Other Festivals	31%	34%	30%	32%	37%	30%
Spectator Sports	28%	32%	27%	37%	45%	38%
Aboriginal Culture/Events	11%	18%	13%	14%	15%	14%
Shopping	**33%**	**38%**	**35%**	**31%**	**44%**	**30%**
Photography	7%	9%	7%	11%	14%	11%
Rock & roll/popular concerts	16%	24%	18%	15%	12%	15%
Live Theatre	18%	26%	22%	20%	29%	20%
Outdoor Activities	**76%**	**82%**	**78%**	**76%**	**79%**	**77%**
Camping	33%	44%	31%	24%	30%	24%
Nature park	30%	39%	32%	32%	31%	33%
Hiking	20%	27%	19%	15%	19%	14%
Flora/Fauna Viewing	21%	25%	21%	24%	33%	23%
Fishing - fresh water	17%	22%	13%	12%	20%	13%
Kayaking/canoeing	8%	17%	9%	6%	8%	6%
Motor/sail boating	12%	16%	11%	10%	11%	10%
Cycling	10%	13%	10%	6%	7%	6%
Golfing	10%	13%	12%	9%	10%	10%
Fishing - ice fishing	6%	9%	4%	4%	9%	4%
Hunting	5%	7%	3%	7%	8%	7%
Snowmobiling	4%	6%	4%	4%	7%	4%
Motorcycling	2%	3%	1%	3%	4%	4%

Special Tabulations, TAMS Canada/USA prepared by Research Resolutions.

WHERE ELSE ATTRACTION TOURISTS TRAVEL

Over a two-year period, the North American Attraction Tourists described in this report have taken overnight pleasure trips to Northern Ontario . . . but they have also travelled to many other places.[32]

Since so many of the Canadian Attraction Tourists with recent travel experience in Northern Ontario are residents of the province (82%, see Table 14), it is not surprising that three fifths of them have also been on overnight pleasure trips to other parts of the province (67%). The same proportion has travelled in the United States (64%), over two fifths have taken trips to Quebec (44%) and one third have been to destinations outside North America over the two year period (35%).

Virtually all American Attraction Tourists who have gone to Northern Ontario have also travelled in their own country. Popular Canadian destinations include Southern Ontario (45%), Quebec (37%) and, to a lesser extent, British Columbia (19%). These findings suggest that Southern Ontario and Quebec represent RTO13's primary domestic competitors for American Attraction Tourists.

At almost half, American Attraction Tourists (46%) are somewhat more likely than their Canadian counterparts to travel abroad (35%). Most of these Americans are travelling to sun/sea destinations such as Mexico and the Caribbean. Hence, their travel outside North America is unlikely to pose a serious threat for attracting them to Northern Ontario's attractions.

Table 20: Northern Ontario's Attraction Tourist Market – Other Destinations

	Attraction Tourists with Trips to Northern Ontario in Past 2 Years	
	Canadians	**Americans**
Locations Visited in Past 2 Years		
Newfoundland and Labrador	3%	4%
Prince Edward Island	11%	7%
New Brunswick	18%	7%
Nova Scotia	16%	9%
Quebec	44%	37%
Ontario	100%	100%
Northern Ontario	100%	100%
Southern Ontario	67%	45%
Manitoba	12%	11%
Saskatchewan	11%	9%
Alberta	16%	10%
British Columbia	20%	19%
USA (any)	64%	100%
Other Countries	35%	46%

Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Note: percentages add to more than 100% because of trips to more than one province/region.

32 Recall that TAMS findings provide information on *where* tourists travelled and *what they did* on trips (activities) but do not provide information on which activities took place in specific destinations.

IMPRESSIONS OF CANADIAN PROVINCES

North American Attraction Tourists who have been to Northern Ontario have a favourable impression of the province, giving it a rating of over eight on a ten-point scale for being an appealing destination. Among Canadians, British Columbia and Alberta are the only other provinces to surpass or approach this score and no other province does so among Americans. It is, however, important to note that at least one third of Northern Ontario's American attraction market are *unable* to rate most Canadian provinces, likely because they do have direct experience with them.

Table 21: Ratings of Canada's Destinations among Northern Ontario's Attraction Tourist Market

	Attraction Tourists with Trips to Northern Ontario in Past 2 Years	
	Canadians	**Americans**
Average Rating		
Newfoundland and Labrador	7.2	6.3
Prince Edward Island	7.7	6.6
New Brunswick	7.2	6.0
Nova Scotia	7.8	6.7
Quebec	7.5	7.1
Ontario	**8.4**	**8.1**
Manitoba	5.7	6.1
Saskatchewan	5.3	5.9
Alberta	8.0	6.5
British Columbia	9.1	7.3

Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Averages are based on a ten-point scale ranging from very appealing as a destination (10) to not at all appealing (1). Averages are based on total providing a rating.

KEY ATTRIBUTES OF A DESTINATION

The primary factors in a destination choice for Canadian and American Attraction Tourists include its overall safety, accessibility by car, absence of health concerns and, especially among Americans, an abundance of things to see and do. Mid-range lodging and/or direct air access are also salient factors for these visitors.

In addition to greater emphasis on the range of activities for adults, American Attraction Tourists are more apt than Canadians to place a high level of importance on the following attributes:

- Direct access by air
- Budget accommodation
- Low cost package deals
- Shopping opportunities
- Being familiar with the culture/language
- Luxury accommodation
- Having friends or relatives living there
- Place culturally different than own
- Disabled-person friendly

The higher level of concern about a destination's facilities for disabled people (19%) and the availability of rail or bus service (21%) than is evident among the corresponding Canadians (8%), possibly reflects the fact that the American market is somewhat older than the domestic one –one third of these Americans are at least 55 years of age (see Table 24).

Table 22: Important Attributes in Destination Choice among Northern Ontario's Attraction Tourist Market

% stating each attribute is *highly important*	**Attraction Tourists with Trips to Northern Ontario in Past 2 Years**	
	Canadians	**Americans**
Feeling safe	74%	81%
No health concerns	52%	49%
Convenient access by car	51%	57%
Lots of adults to do	49%	60%
Availability of mid-range accommodation	36%	41%
Direct access by air	33%	42%
Availability of budget accommodation	25%	38%
Lots for children to do	21%	28%
Low cost package deals	20%	31%
Availability of camping	18%	20%
Convenient access by train/bus	18%	21%
Being familiar with the culture/language	17%	29%
Offers great shopping	16%	31%
Place very different, culturally, than yours	11%	20%
Having friends or relatives living there	9%	15%
Disabled-person friendly	8%	19%
Availability of luxury accommodation	6%	21%

Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Proportions stating that an attribute is "highly important" in selecting a destination.

BENEFITS OF PLEASURE TRAVEL

Like tourists in general, Canadians and Americans in the attraction segment put getting a break from the *day-to-day, stress reduction,* creating *lasting memories* and *experiencing new and different things* at the top of their lists of the benefits of pleasure travel. At least half of them also see pleasure travel as a way to enrich their relationships with immediate family members. Having *no fixed schedule* and *keeping family ties alive* are also key benefits among Attraction Tourists who have travelled in Northern Ontario.

A learning component also figures prominently in this tourism segment. About one third of the Canadians and at least two fifths of the Americans want pleasure travel to provide knowledge of others' history and culture and to enrich their perspectives on life.

Table 23: Benefits of Pleasure Travel among Northern Ontario's Attraction Tourist Market

% stating each benefit is *highly important*	**Attraction Tourists with Trips to Northern Ontario in Past 2 Years**	
	Canadians	**Americans**
To get a break from your day-to-day environment	71%	67%
To relax and relieve stress	70%	75%
To see or do something new and different	62%	71%
To create lasting memories	60%	73%
To enrich relationship with immediate family	54%	59%
To have a life with no fixed schedule	46%	55%
To keep family ties alive	46%	46%
To gain knowledge of history/cultures/places	44%	46%
To stimulate your mind	37%	39%
To enrich your perspective on life	36%	43%
To renew personal connections with people	26%	20%
To be challenged physically	24%	26%
To have stories to share back at home	17%	24%
To seek solitude and isolation	17%	13%
To be pampered	16%	27%

Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Proportions stating that an attribute is a "highly important" benefit of pleasure travel.

DEMOGRAPHICS

The potential Canadian and U.S. markets have a similar gender split but Americans are somewhat older. On both sides of the border, the North attracts slightly more women than men in the target market (Canada, 54% women; US, 55% women).

These Attraction Tourists span the age continuum but Canadians tend to be younger whereas Americans tend to be older. In fact, one third of the Americans are at least 55 years of age while only one fourth of the Canadians are in this age group. These differences are reflected in the average age of Northern Ontario's Attraction Tourists: Canadians are about 43 years of age and their American counterparts are about 47 years of age, on average.

Americans in the market segment have more formal education than the corresponding Canadians but income levels are similar. A university education is more characteristic of American Attraction Tourists (41%) than Canadians (31%). Conversely, close to one third of the Canadians has a secondary school diploma or less (30%) compared to about one fifth of the Americans (20%).

In spite of age and education differences between the two markets, Northern Ontario's Canadian and American Attraction Tourists have a very similar income profile. Each market is divided almost equally among those with household incomes of less than $60,000, between $60,000 and $99,999 and at least $100,000.

Table 24: Demographics of the Potential North American Market

	Attraction Tourists					
	Canadians with Trips to . . .			Americans with Trips to . . .		
	Canada	Northern Ontario	Southern Ontario	Canada	Northern Ontario	Southern Ontario
Pleasure Travellers 18+	2.2 million	455,000	1.1 million	5.2 million	559,000	2.7 million
Gender						
Male	46%	46%	44%	52%	45%	52%
Female	54%	54%	56%	48%	55%	48%
Age						
18-24 years	13%	13%	13%	8%	8%	9%
25-34 years	18%	22%	19%	17%	19%	20%
35-44 years	22%	22%	23%	15%	22%	15%
45-54 years	21%	19%	20%	20%	19%	19%
55 – 64 years	15%	13%	15%	20%	12%	18%
65 + years	12%	11%	11%	21%	20%	18%
Average age (18+) (years)	44.2	42.7	43.8	49.4	47.4	47.5
Education						
Less than high school	7%	8%	4%	2%	2%	2%
High school diploma	23%	22%	21%	12%	18%	12%
Some post-secondary	12%	14%	13%	26%	23%	29%
Post-secondary diploma/certificate	23%	24%	20%	9%	15%	10%
University degree	34%	31%	41%	48%	41%	46%
Household Income*						
Under $40,000	21%	16%	18%	18%	17%	18%
$40,000 to $59,999	19%	22%	18%	17%	21%	16%
$60,000 to $99,999	32%	30%	31%	31%	31%	34%
$100,000 or more	28%	32%	33%	34%	31%	32%

*Special Tabulations, TAMS Canada/USA prepared by Research Resolutions. *Household income (2006) based on total stating, reported in Canadian currency.*

APPENDICES

PRIMARY INFORMATION SOURCES

The primary sources of information used in this report include the following:

- Statistics Canada, 2011/12 (pooled) Travel Survey of Residents of Canada (TSRC);
- Statistics Canada, 2012 International Travel Survey – U.S. (ITS US);
- Travel Activities & Motivation Study (2006), Canada, U.S.A.;
- Summaries of TNS Travel Intentions Survey, Ontario Regional Profiles contained in The Strategic Plan;
- TNS Regional Reports— RTO13a, 13b, 13c, RTO13 (2012);
- *Rediscovering Northern Ontario: Partnerships for a Strong Tourism Industry, Northern Ontario Tourism Marketing Strategy*, 2012-2017. Government of Ontario, 2012;
- *Ontario Major Festivals and Events Attraction Research Study* on behalf of Ontario Ministry of Tourism, PKF Consulting Inc., 2008

DEFINITIONS OF ATTRACTION TOURISTS

STATISTICS CANADA SURVEYS

For purposes of this report, all overnight tourists who go to an attraction (from those captured in the Statistics Canada tourism surveys) are included in the analysis. It is based on the most current surveys available: the pooled 2011/2012 TSRC and the 2012 International Travel Survey (ITS US, OVS).

Tourists who engage in one or more of the following activities captured in the Statistics Canada surveys are deemed Attraction Tourists.

- Historic site
- Museum or art gallery
- Theme or amusement park
- Zoo or aquarium
- Botanical garden (ITS only)
- Casino

TAMS

To amplify profile information on the Canadian and American markets for attractions, the analysis draws on information from the Travel Activities and Motivation Surveys (Canada and US). Overnight tourists who name two or more of the following attractions as the main reason for a recent overnight pleasure trip (to any destination) and particularly those who have taken an overnight trip to RTO13 are deemed Attraction Tourists for purposes of this analysis.

Attractions (NET) (2+ as main reason for trip)

History-Oriented Attractions

Historical replicas of cities or towns with historic re-enactments
Well known historic sites/buildings
Other historic sites, monuments and buildings

Museums/Galleries

Art galleries
Aboriginal heritage attractions (e.g., museums, interpretive centres)
Museum - Children's
Museum - Science or technology
Museum - General history or heritage
Museum - Military/war

Other Attractions

Planetarium
Botanical gardens
Aquariums
Zoos
Theme parks
Casinos

POOLED 2011/2012 VS. UNPOOLED 2012 TSRC

In order to increase data stability for estimates of domestic tourism activity in RTO13, Research Resolutions combined the 2011 and 2012 Travel Survey of Residents of Canada (TSRC).[33] As displayed in the accompanying table, the pooling of the two data sets had minimal impacts on overnight visitor and spending estimates for RTO13 but increased the number of trip records (unweighted) by about fifty per cent, from 1,197 to 2,364.

In the interests of consistency with other estimates of tourism economic impact, Research Resolutions has used the *unpooled* 2012 data in Ontario's TREIM model.

	Overnight Person Visits			**Overnight Visitor Spending in Region**		
	Pooled 2011/2012	Unpooled 2012		Pooled 011/2012	Unpooled 2012	
Weighted, 000s						
Canada	109,038	110,099	-1%	$28,619,918	$29,279,614	-2%
Ontario Total	41,688	42,141	-1%	$8,779,276	$9,289,767	-6%
Ontario excl. RTO13	38,512	38,951	-1%	$7,895,105	$8,379,283	-6%
RTO13	**3,281**	**3,261**	**1%**	**$756,244**	**$788,593**	**-4%**
Unweighted						
Canada	68,970	33,996	51%			
Ontario Total	18,668	9,173	51%			
Ontario excl. RTO13	16,408	8,026	51%			
RTO13	**2,364**	**1,197**	**49%**			

[33] The two public use micro data files were combined and averaged to generate the pooled data. Note that as of May 2014, Statistics Canada is considering a more sophisticated approach to pooling. If it is approved, an "official" pooled 2011/2012 TSRC would likely be available in early autumn, 2014.

MTCS GLOSSARY: ECONOMIC IMPACT TERMS[34]

Gross domestic product (GDP): value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership. This GDP is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travellers.

Direct impact: refers to the impact generated in businesses or sectors that produce or provide goods and services directly to travellers, e.g. accommodations, restaurants, recreation providers, travel agents, transportation, and retail enterprises. Direct impact on GDP, employment, and tax revenues is also called tourism GDP, tourism employment, and tourism tax revenues.

Indirect impact: refers to the impact resulting from the expansion of demand from businesses or sectors that directly produce or provide goods and services to travellers, to other businesses or sectors.

Induced impact: refers to the impact associated with the re-spending of labour income and/or profits earned in the industries that serve travellers directly and indirectly.

Employment: refers to number of jobs, including full-time, part-time, and seasonal employment, as well as both employed and self-employed.

Federal tax revenues: include personal income tax, corporate income tax, commodity tax (GST/HST, gas tax, excise tax, excise duty, air tax and trading profits) and payroll deduction that collected by the federal government.

Provincial tax revenues: include personal income tax, corporate income tax, commodity tax (PST/HST, gas tax, liquor gallonage tax, amusement tax and trading profits) and employer health tax that collected by Ontario provincial government.

Municipal tax revenues: include business and personal property taxes that collected by the municipalities. Collection, however, does not follow immediately the consumption or production of goods and services in a municipality by visitors (as is the case with HST or personal income taxes). Rather, these taxes show the percent of the total property taxes collected by a municipality that can be attributed to tourism because of tourism's contribution to the economic activity of the municipality and hence its tax base.

Industry: The industry follows Statistics Canada's 2007 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.

[34]MCTS glossary, from website (http://www.mtr-treim.com/webtreim/data_out/NP1/EconomicImpact.pdf), July 2012.