OVERVIEW OF TOURISM OPPORTUNITIES FOR NORTHERN ONTARIO (RTO13)

PREPARED FOR

TOURISM NORTHERN ONTARIO

BY

Research Resolutions & Consulting Ltd.

Ontario

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INTRODUCTION

Over an eighteen month period, Tourism Northern Ontario commissioned Research Resolutions & Consulting Ltd.[1] to provide *situation analyses* for a variety of tourism sectors of particular interest to the region (see below).

Attractions Tourists	July 2014
Festival & Event Tourists	June 2014
North American Motorcycle Tourists	March 2014
North American Hunters	February 2014
Snowmobile Tourists	January 2014
High Yield Nature/Outdoors Tourists[2] [3]	November 2013
High Yield Anglers[4]	March 2013

Stand-alone reports and presentations were generated for each of the projects, providing in-depth information about each target market. While these materials are useful in their own right, Tourism Northern Ontario commissioned Research Resolutions & Consulting Ltd. to prepare a single brief overview of opportunities for tourism growth in Northern Ontario offered by each segment and to highlight synergies and/or conflicts that might be encountered by promoting tourism within one segment vis à vis another.

Estimates of each target market's volume, value, economic impact and tourists' attitudes and interests are *not* addressed in detail in this overview. Readers are, therefore, encouraged to review individual summaries and reports for a fuller depiction of each target market.

[1] This document was prepared by Judy Rogers, President, Research Resolutions & Consulting Ltd. (16 Hepbourne Street, Toronto, ON M6H 1J9; rogers.judy@sympatico.ca.)

[2] Throughout this report, *nature-based* tourists are those who participated in one or more outdoor activities such as camping, hiking, wildlife viewing, going to nature parks and boating but did **not** engage in fishing or hunting.

[3] "High yield' indicates that the tourist spent at least some of his/her nights in Northern Ontario's **paid roofed lodging.**

[4] See above.

FINDINGS

CHALLENGES IN ACHIEVING GOALS

In its 2012 – 2017 Tourism Marketing Strategy, Tourism Northern Ontario identified an interest in increasing utilization of *non-private roofed accommodation* and increasing the number of tourists who live *outside the region.* To achieve these goals, tourism businesses in Northern Ontario will have to consider the needs and interests of tourists who are already coming to the region and those who can be enticed to come.

Several overarching findings will influence Northern Ontario's ability to meet its growth objectives:

- The outdoors is a salient if not core element in the lure of Northern Ontario for tourists in each segment.

- Many Canadian tourists are *near locals* who billet with friends and relatives, stay in their private cottages or in campgrounds in Northern Ontario. Conversely, American tourists in each segment tend to rely on paid roofed lodging during their stay.

- Almost by definition, *niche* markets tend to be relatively small. For example, the markets for motorcycle touring and hunting are more limited than the markets for festivals and events or attractions.

- Some activities offered in Northern Ontario are more apt to be the *reason* for taking a trip whereas others tend to be one-of-many activities a tourist engages in on a trip driven by other purposes. Fishing, hunting and motorcycle touring are segments with strong motivational elements whereas festivals and events or attractions more commonly provide tourists with things to see and do on a trip taken to see friends and relatives or for general pleasure purposes.

- The physical realities of distance from major population centres, limited transportation corridors and climate restrict the size of potential markets for Northern Ontario.

Goals in *2012 – 2017 RTO13 Tourism Marketing Strategy*

- *Increase the percentage of visitation that stays in non-private roofed accommodation. In other words, focus on "heads in beds".*
- *Increase the percentage of visitation from outside of the region.*
- *Increase the percentage of visitation for the purposes of pleasure trips.*

THE OUTDOORS IS THE COMMON ELEMENT

Interaction with the outdoors is a significant component of the experience for the majority of Northern Ontario's tourists. In 2012, about half of *all* overnight visitors to RTO13 participated in at least one outdoor activity on the trip. One quarter went fishing and the same proportion went to a nature park, camped, hiked or engaged in some other outdoor pursuit (nature-based). In contrast, only one tenth of the region's overnight tourists went to museums, historic sites, concerts or plays, festivals or fairs or other cultural attractions and events. The festival/event and attraction segments account for only about one tenth of Northern Ontario's overnight tourists.

Typical Canadian, American and overseas tourists to the region go fishing (24%) at four times the rate as visitors to Canada (6%) or to Southern Ontario (6%). Analogously, though in much smaller numbers, Northern Ontario's overnight tourists hunt (3%) at three times the rate as do tourists in Southern Ontario or Canada as a whole (1%, each). As such, fishing and hunting are Northern Ontario's signature activities. Other outdoor activities are about as popular across Canada as they are in the North.

Further evidence of the importance of the outdoors for tourism in Northern Ontario is found in the fact that only about one tenth of the region's tourists go to cultural, heritage and entertainment events and attractions versus one half who engage in outdoor activities (49%) while on overnight trips in Northern Ontario.

Table 1: Tourists vote with their feet . . . activities on 2012 overnight visits

	To Canada	To Northern Ontario	To Southern Ontario
Any outdoor activity	**37%**	**49%**	**32%**
Any hunting/fishing	7%	26%	7%
Fishing	6%	24%	6%
Hunting	1%	3%	1%
Any nature-based[5]	26%	27%	20%
Any cultural activity[6]	**17%**	**11%**	**18%**
Any festival/event	12%	8%	13%
Any attraction	16%	11%	17%

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

The strong interest in the outdoors and the comparatively low level of interest in cultural and entertainment attractions and events are evident in several segments examined by Research Resolutions (see excerpts from reports, appended).

[5] Excludes hunting/fishing

[6] E.g., festivals, concerts, museums, historic sites, etc.

GETTING *HEADS ON BEDS*: A PROXIMITY CHALLENGE

With the exceptions of high yield Anglers and Nature-based tourists, Northern Ontario draws most of its overnight visitors in each target segment from Northern and Southern Ontario.

By virtue of their proximity, many of the region's tourists have friends or relatives with whom they billet or have private cottages in Northern Ontario. In turn, the further away an overnight visitor lives, the more likely he/she is to rely on RTO13's roofed accommodation sector . . . and the more revenue he or she brings to the region.

Thus, segments that can be drawn from *away* are more apt to contribute to RTO13's objective of increasing "heads in beds". And *away* for Northern Ontario tends to be the U.S.A. By and large, Northern Ontario's American market for each segment is *nearby*. The states that share a border with Northern Ontario are currently the primary sources of U.S. tourists in the region.

Table 2: Northern Ontario's Overnight Tourists' Place of Residence

	Hunters*	High Yield Anglers	All Anglers	High Yield Nature	All Nature	Festivals & Events	Attractions	Canadian Snow-mobilers*
Canada	**85%**	**25%**	**63%**	**63%**	**84%**	**86%**	**65%**	**100%**
Ontario	**84%**	**22%**	**52%**	**40%**	**65%**	**69%**	**54%**	**81%**
Toronto CMA	**	2%	4%	8%	10%	11%	16%	4%
Other Southern Ontario	21%	15%	19%	24%	22%	24%	18%	37%
Northern Ontario	**64%**	**5%**	**29%**	**8%**	**33%**	**34%**	**20%**	**40%**
Winnipeg	**	2%	8%	11%	12%	3%	3%	12%
Other Canada	**	1%	3%	11%	7%	14%	6%	7%
USA	**15%**	**74%**	**37%**	**31%**	**13%**	**11%**	**31%**	**N/A**
Mid-Atlantic (NY, PA, NJ)	0%	4%	2%	1%	1%	**	1%	N/A
East North Central	**5%**	**35%**	**17%**	**12%**	**5%**	**6%**	**14%**	**N/A**
Wisconsin	3%	9%	5%	3%	1%	3%	4%	N/A
Michigan	3%	9%	4%	3%	2%	1%	6%	N/A
Illinois	**	7%	3%	1%	**	**	**	N/A
Ohio	**	5%	2%	4%	1%	1%	2%	N/A
West North Central	**5%**	**27%**	**14%**	**9%**	**4%**	**1%**	**7%**	**N/A**
Minnesota	4%	17%	10%	4%	3%	**	4%	N/A
All Other USA	5%	9%	4%	8%	3%	4%	9%	N/A

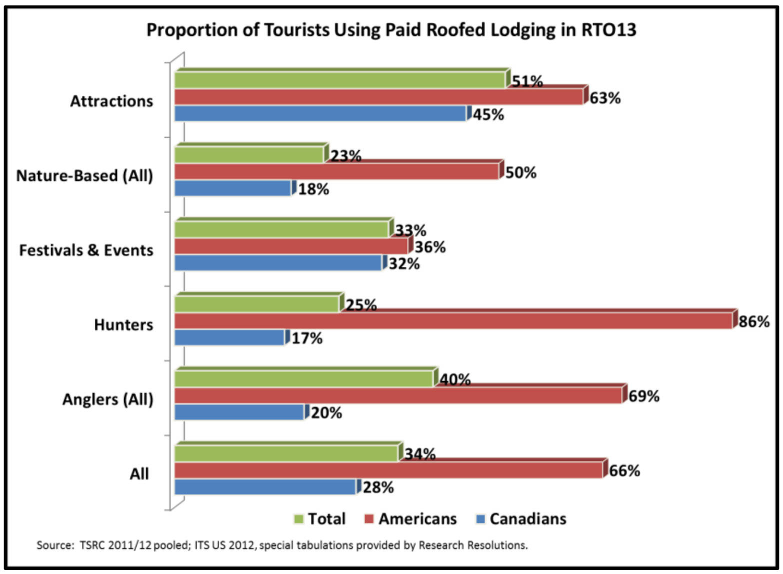
Source: Festivals & Events, Attractions: TSRC 2011/12 pooled; ITS US 2012, Anglers, Nature-Based TSRC 2010/ITS 2011 special tabulations provided by Research Resolutions. Figures for Motorcycle tourists and American Snowmobilers are not available. * Small base size – interpret with caution. **Less than 0.5%.

While they may not have friends and relatives to billet them, the *near* American markets often have terrain, wildlife and experiences including attractions or festivals and events that are similar to those that can be found in Northern Ontario. As borne out by the figures, hunters, nature-based and festival/event tourists are especially concentrated in the domestic market, with few coming to Northern Ontario from the U.S.

The U.S. share increases substantially among all anglers (37%) and those who rely on paid roofed lodging (High Yield Anglers,74%). Few Americans are found in the nature-based segment overall (13%) but represent a considerably larger share of those who stay in commercial, roofed lodging (High Yield Nature, 37%).

THE IMPORTANCE OF ATTRACTING AMERICAN TOURISTS

The accompanying chart describes the proportion of all overnight tourists in each segment who used a hotel, motel, B&B, commercial cottage, lodge or other form of paid roofed accommodation during their 2012 stay in Northern Ontario.[7]



Among all overnight tourists in Northern Ontario during 2012, one third used some form of paid roofed lodging during their stay (All, 34%). This proportion increases to 51% among attraction tourists and 40% among anglers (any fishing). It falls to about one quarter among hunters (25%) and nature-based tourists (23%). Those who go to festivals and events (33%) stay in paid roofed lodging at the same rate as *all* tourists in Northern Ontario. Only Canadian data are available for snowmobilers. These Canadians are the least likely to utilize Northern Ontario's accommodation establishments on their trips.[8]

Looking at the markets as a whole masks the very important difference between Canadians and Americans in the various segments. As noted earlier, regardless of their activity profile, Americans on overnight trips in Northern Ontario are much better potential customers for the region's hotels, motels, B&Bs, commercial cottages and lodges than are Canadians. And, not surprisingly, because they are paying for their lodging and meals in RTO13's restaurants, the Americans are higher yield tourists than their Canadian counterparts.

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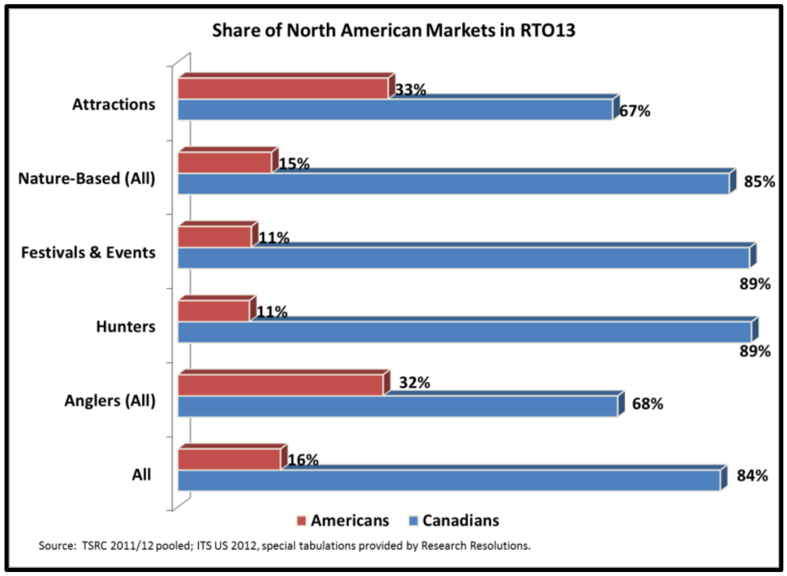
[7] Note that these proportions are may not be identical to those contained in individual situation analyses because most of the reports utilized 2010/2011 files whereas the figures presented here are based on the most current data now available: the 2012 TSRC and ITS studies.

[8] Six percent of the nights Canadian snowmobile tourists spent on trips in Northern Ontario were in paid, roofed lodging.

At the same time, it is important to look at the *volume* each market contributes to Northern Ontario. Most overnight tourists in each segment are Canadians. Only about 1-in-7 nature based tourists and 1-in-10 festival/event tourists and hunters are Americans. The proportion increases to 1-in-3 among attraction tourists and anglers. Northern Ontario's ability to attract American attraction tourists and anglers explains why these segments enjoy comparatively high levels of reliance on paid roofed lodging (51% and 40%, respectively).



RTO13'S SUB-REGION MARKET SHARES

The North's sub-regions attract tourists in each segment at different rates in part depending on their proximity to the U.S., available product and highway access to large population centres such as Toronto, Ottawa and Winnipeg (see Table 3; interpret with caution because some sample sizes are small).

Table 3: Northern Ontario Sub-Regions' Market Shares

% of Overnight Tourists in RTO13	All	Hunters*	High Yield Anglers	All Anglers	High Yield Nature	All Nature	Festivals & Events	Attractions	Canadian Snow-mobilers*
Northeast (13a)	53%	53%	32%	42%	41%	51%	46%	34%	37%
North Central (13b)	16%	5%	14%	13%	36%	20%	20%	29%	34%
Northwest (13c)	34%	43%	63%	49%	39%	37%	38%	36%	33%

Source: All, Festivals & Events, Attractions: TSRC 2011/12 pooled; ITS US 2012, Anglers, Nature-Based TSRC 2010/ITS 2011 special tabulations provided by Research Resolutions. *Small base size – interpret with caution. Percentages add to more than 100% because some tourists spent nights in more than one sub-region on their Northern Ontario trip.

INFRASTRUCTURE & MONEY

When considering the contribution each market segment makes to Northern Ontario, two factors should be taken into account:

- How much *new money* each segment brings into Northern Ontario, and
- The extent to which each segment contributes to sustaining the tourism infrastructure.

New money comes from "away". In turn, tourists that rely on paid roofed establishments spend appreciably more money in Northern Ontario than do those who camp or stay in private lodging (see

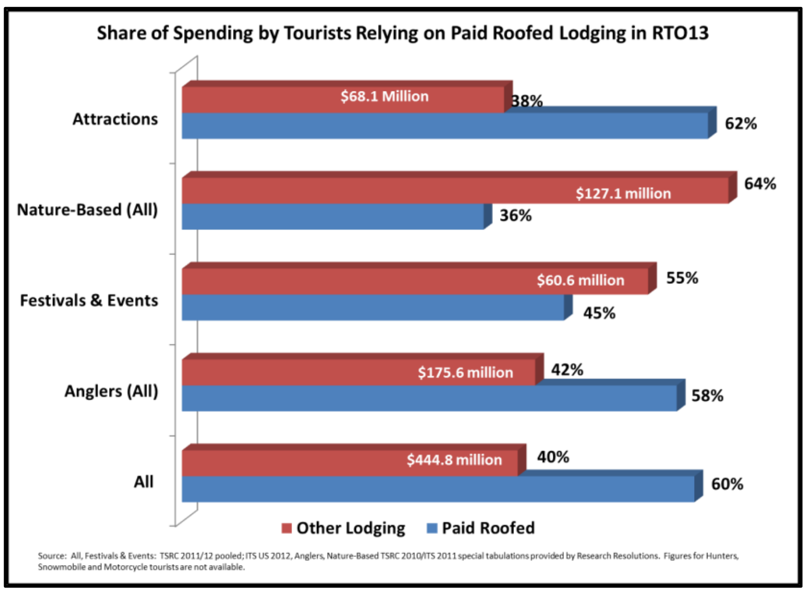
Table 4). And these hotel, motel, B&B and commercial cottage guests are most likely to be from "away". Thus, tourists from Southern Ontario, other Canadian provinces and the U.S. or overseas countries are RTO13's highest yield tourists.

Table 4: Average Spending by Overnight Tourists in Northern Ontario in 2012 (All)

	All Tourists in RTO13	Paid Roofed Lodging in RTO13
Per trip spending	$423.00	$787.00
Per night spending	$125.00	$254.00

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

Recall, however, that *most* tourists in each activity-based market segment do **not** rely on Northern Ontario's lodging establishments. As shown in the accompanying chart, millions of dollars in revenue accrue to Northern Ontario from Anglers ($175.6 million), Nature-based ($127.1 million), Attraction ($68.1 million) and Festival & Event tourists ($60.6 million) who stay in **private** homes, cottages or campgrounds.[9]



Tourists who stay with friends, relatives or in private cottages also make a substantive contribution to the vibrancy and sustainability of the tourism plant. They eat in restaurants, buy gas at local stations, visit festivals, fairs, museums and heritage sites, pay admission fees to nature parks, groom and ride snowmobiling trails, to name a few of their contributions to local economies and tourism infrastructure. Without them, the cities, towns and nature parks in Northern Ontario would have fewer attractions and services with which to attract the smaller share of tourists in each market segment that relies on the region's paid lodging.

Festivals, events and attractions are particularly important contributors to the vibrancy of Northern Ontario's destinations by ensuring that tourists have things to see and do when they come. They support tourism infrastructure for *other* market segments and benefit local residents. They also engender civic pride, creating interest among residents to show off their community and, by extension, make tourists feel welcome. Involvement by local residents contributes to a destination's authenticity and provides tourists with a true flavour of the place they are visiting.

[9] Source: All, Festivals & Events, Attractions: TSRC 2011/12 pooled; ITS US 2012, Anglers, Nature-Based TSRC 2010/ITS 2011 special tabulations provided by Research Resolutions. Figures for Hunters, Snowmobile and Motorcycle tourists are not available.

From a financial perspective, festivals, events and attractions often have a *two-for-one* benefit: when local hosts accompany their visiting friends and relatives to them, tourism in Northern Ontario benefits in three interrelated ways:

- Attendance increases because both guest and host attend;
- The increased attendance contributes to the sustainability of the event or attraction;
- The event or attraction can continue to be a vibrant component of tourism infrastructure, thereby adding to the attractiveness of the destination for potential tourists.

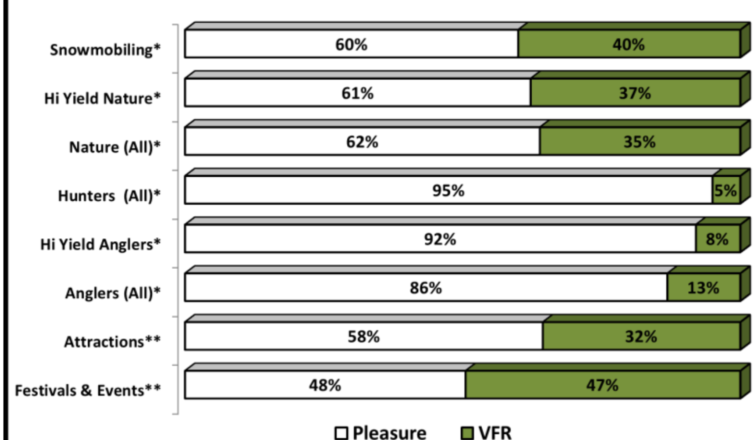
SINGLE & MULTI-DIMENSIONAL TOURISTS

Some activities enjoy widespread participation on overnight trips generating market segments that closely resemble the travelling public as a whole. Others are niche segments that are highly differentiated from Northern Ontario`s *typical* tourists.

Typical tourists	***Niche tourists***
Nature-Based tourists	Anglers
Festival & Event tourists	Hunters
Attraction tourists	Motorcycle tourists
	Snowmobile tourists

Compared to other segments examined, anglers, hunters, snowmobilers and motorcycling tourists are strongly focussed on the defining activity. They are most apt to take trips *in order to* fish, to hunt and/or to tour on their snowmobile or motorcycle. For tourists in these segments, ensuring that their expectations for a fishing or hunting trip or a snowmobiling or motorcycling excursion are met or exceeded is paramount for repeat visitation and for attracting new visitors who share their enthusiasm. Other activities in which these tourists display strong interest and might enhance their Northern Ontario experiences include **sporting** and **music events**.

RTO13's Activity-Based Overnight Tourist Segments



Source: *TSRC 2010, ITS 2011; **TSRC 2011/2012 pooled, ITS 2011, 2012 Special Tabulations provided by Research Resolutions. Major methodological changes in the Travel Survey of Residents of Canada (TSRC) between 2010 and 2011 (onward). These changes preclude direct comparisons of tourism volume and may have an impact on trip characteristics but the size of the differences in VFR versus pleasure within various market segments suggests that these are not simply methodological artefacts but reflect different consumer behaviour. Note: Nature-based

In contrast, Nature-based, Attraction and Festival & Event tourists are multi-dimensional tourists. They may not be travelling *in order to* go to a single festival or event or to engage in a single outdoor experience. Instead, these activities provide tourists with things to see and do while in their destination. Consider how many *more* Festival & Event (47%), Nature-based (35%) and Attraction tourists (32%) are visiting Northern Ontario to see friends and relatives than is the case for other segments such as fishing (13%)

or hunting (5%) (See chart[10]). Like their counterparts in niche market segments, Festival & Event tourists in Northern Ontario are partial to **sporting events** and **music festivals** or performances. Attraction tourists favour theme parks, historic sites and general history or science/technology museums.

THE COMPETITIVE CHALLENGE

There are many opportunities for potential tourists to find activities that are similar to those offered in Northern Ontario **closer to home.**

- Many of the North's festivals and events (e.g., film, fall fairs, dragon boat races) and attractions (e.g., general history museums, art galleries, casinos) are available in locations that are easier to reach than is Northern Ontario for residents of Southern Ontario and markets such as New York, Pennsylvania, Ohio and southern Michigan.

- Similarly, many nature-based activities, hunting and fishing are available in terrain that closely resembles Northern Ontario's and can be found closer to where tourists live.

- Destinations with a longer *fair weather* season represent substantive competition for potential tourists in the motorcycle touring segment (e.g., southern U.S. states).

- While the extensive trail system and reliable snow cover in Northern Ontario should attract snowmobiling tourists, the high price of bringing equipment from home to the region and/or the high rental costs to obtain snowmobiles while in Northern Ontario are deterrents.

Thus, the competitive challenge is to develop and promote activities in which Northern Ontario excels, possibly by pairing them with other experiences available in the region.

TOWARD REDUCING GENDER & AGE GAPS

Of the segments examined, Festival & Event, Attraction and Nature-based tourists approach gender parity. Conversely, fishing, hunting, motorcycling and snowmobiling tourists in Northern Ontario are predominantly men. Developing experiences and customizing product offerings that have more appeal to women may help reduce the gender gap.

While tourists in each segment span all age groups, those who travel to Northern Ontario tend to be older than their counterparts in Southern Ontario.

The aging of Northern Ontario's tourists and especially those in the angling and hunting markets might be redressed by developing tourism experiences that appeal to younger consumers who live in neighbouring states and Ontario's urban areas. This suggestion stems from the increasing urbanization of Ontario's population and the province's reliance on immigration to fuel population growth.

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[10] Note that there were major methodological changes in the Travel Survey of Residents of Canada (TSRC) between 2010 and 2011 (onward). These changes preclude direct comparisons of tourism volume and may have an impact on trip characteristics such as the main reason a trip took place. Nonetheless, the size of the differences in VFR versus pleasure within various market segments suggests that these are not simply methodological artefacts but reflect different consumer behaviour.

Urban and immigrant young people may not have grown up with the same comfort level in wilderness settings as older Ontarians, many of whom were raised in rural or small town settings. Hence, the Canadian population on which Northern Ontario needs to draw, and most particularly residents of Toronto, may need help in developing an interest in and comfort with the terrain and outdoor activities Northern Ontario offers.

Promotion of *glamping,* how-to workshops for camping and/or fishing might be necessary to entice younger urbanites into Northern Ontario. As noted below, more comfortable lodging in campgrounds also appeals to an older market that no longer wants to *rough it.*

> *The emerging availability of glamping in locations such as Timmins, Mattawa, and Temagami, with yurts or cabins in park settings is a clear recognition of some Nature-Based Tourists' interest in more luxurious camping facilities. In light of the aging population of outdoor-oriented tourists overall and specifically those who go to Northern Ontario, alternative lodging options such as glamping may become an increasingly important opportunity to attract tourists who want to engage in outdoor activities but no longer want to "rough it".*[11]

Encouraging interest in fishing and hunting among women and younger tourists will likely prove essential to sustaining these tourism markets (see *Gender & Age* excerpts, appended). With fly fishing on a growth trajectory in the U.S., developing fly fishing packages might be worth considering as an additional source of younger anglers.

Northern Ontario's Attraction Tourists are also 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 and options for "comfortable camping" (e.g., yurts, cabins) may satisfy these tourists' interest in the outdoors. Senior friendly amenities at featured attractions that are paired with the outdoor experiences might include the availability of places to sit and rest during the visit and/or wheelchair accessibility. 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.* [12]

[11] *High Yield Nature-Based Tourists in Northern Ontario (RTO13): A Situation Analysis,* page 7.
[12] *Attraction Tourists in Northern Ontario (RTO13): A Situation Analysis,* page 15.

A SUGGESTION BOX

Some of the ideas included the reports may be useful for tourism planners and marketers when developing strategies to increase tourism from the various segments of interest to Northern Ontario. For additional observations and recommendations, readers are directed to the full reports.

PLAYING TO STRENGTHS: PAIRING THE OFFER

- Promote the region's well-developed remote, fly-in sport fishing packages or big game hunting trips with sporting events or country/pop music festivals;

- Develop festival/outdoor packages that combine a festival or event with interpreted walks in nature parks, wildlife viewing, and/or fishing experiences;

- Feature entertainment, cultural and historical attractions with outdoor experiences as the *hook* since Attraction Tourists to Northern Ontario go boating, camping and visit nature parks *at* or *above the rate* as the market overall;

- Provide equipment for motorcycle tourists to go fishing at various junctures along the touring route;

- Package a group of winter activities such as ice fishing, dog sledding, cross country skiing and/or ice skating with a snowmobiling excursion using rentals to introduce tourists to the sport without the cost of sled ownership or the challenge of transporting it from home.

SEGMENT-SPECIFIC IDEAS

- **Use club networks for Motorcycling & Snowmobiling tourists.** Each of these activities has a core of dedicated enthusiasts that might be mobilized to include Northern Ontario as a touring destination. Both also support networks of regional clubs. These networks could be conduits for marketing and promotion of Northern Ontario's snowmobile and motorcycle experiences.

- *The ride's the thing:* Fulfill **Motorcycle tourists'** dreams with winding roads, great vistas, plenty of gas stations, secure parking for their bikes, unpretentious lodging and *mom & pop* eateries.

- **Make it easy to be a nature-based tourist.** Reach out to young, urban and immigrant Ontarians who may not be comfortable with Northern Ontario's wild side. For example, offer how-to-pitch-a-tent workshops, hiking tips or other orientation sessions and programming to make the outdoors more welcoming. And coddle older nature based tourists who no longer want to *rough it* but still want to enjoy the outdoors with yurts and cabins-in-the-campground.

- **Anglers:** Develop and market Northern Ontario's fly-fishing opportunities and customize lodging for women. Encourage inter-generational packages to get younger people involved in the sport.

- **Hunters:** Promote the BIG game available in Northern Ontario, develop product and programs aimed at women, and explore how to reach the niche segment interested in ethical hunting and natural, local, sustainable food sources.

- To cut through the clutter of events across Ontario, focus on **festival and event** themes not readily found elsewhere (e.g., Northern Lights, sport fishing derbies, autumn leaves). Consider festivals and events as tourism attractors in their own right but also as complements to Northern Ontario's signature outdoor experiences. Sporting and music events might not only attract Festival & Event tourists but also could interest anglers, hunters and nature-based tourists.

- **Attraction tourists** may find some types of attractions in other destinations that are very similar to those available in Northern Ontario (e.g., casinos, general history museums, art galleries) but they will not find similar *historic sites* or *natural attractions* such as Agawa Canyon. Featuring unique historical and natural attractions with soft outdoor experiences might increase the appeal of Northern Ontario to these tourists.

MEASURING SUCCESS

It can be difficult to distinguish local recreational activity from tourism. For example, there can be many motorcycles on back roads or snowmobiles on trails but how much of this activity is by people who live outside the community? Similarly, attendees at festivals, events and attractions or at marinas and lakes are likely a combination of local residents and tourists.

For strategic planning purposes and to develop sound performance measures, Tourism Northern Ontario is encouraged to develop measurement systems to learn more about the *tourists* who are riding through Northern Ontario on their motorcycles or snowmobiling on the region's trails. Unlike other outdoor and entertainment activities, these market segments are not effectively captured in the Statistics Canada studies that Ontario relies on to estimate tourism volume and value (and are unlikely to be included in these studies in the foreseeable future).

The responsibility to initiate a research program that provides *hard* information on the volume and value of niche segments will likely fall to provincial and regional authorities. In the mid- and long term, it would also be useful to obtain input from tourists in *each* segment about their experiences in Northern Ontario so the region can refine its offering to capture a larger number of them.

A few simple questions asked of each entrant to gated events and attractions could provide a useful tool for understanding who is coming to Northern Ontario (e.g., tallying place of residence and number in the travel party). If the same "form" were used by all museums, galleries, festivals and the like and information were collected and processed regularly, operators, marketers and tourism planners would have an ongoing source of information to aid in growing tourism in Northern Ontario.

APPENDIX

OUTDOORS AS THE COMMON ELEMENT - EXCERPTS FROM REPORTS

HIGH YIELD ANGLERS

Attempts to attract anglers to urban-based cultural and entertainment activities in RTO13 are unlikely to be successful within the current market. This market travels in order to go fishing. Whether more diversified tourism experiences will be sought by younger anglers or women entering the market remains to be seen . . . and should be explored.[13]

HIGH YIELD NATURE-BASED TOURISTS

About one tenth include a visit to an amusement park, casino, sporting event and/or festival/fair while on their Northern Ontario trip.[14]

FESTIVAL & EVENT TOURISTS

Outdoor pursuits, led by visiting nature parks, hiking, wildlife viewing and fresh water fishing motivate overnight trips by more than 4-in-5 Canadian and American Festival & Event tourists with Northern Ontario travel experience.[15]

ATTRACTION TOURISTS

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.[16]

GENDER & AGE - EXCERPTS FROM REPORTS

FISHING

RTO13's American PRL anglers tend to be older men . . . but market growth is expected from younger people and women.

Four fifths of RTO13's American PRL anglers are men (82%). On average, they are 52 years of age and almost 3-in-10 are at least 65 years of age. This American market is more male-dominated and older than the corresponding domestic market in RTO13 (Canadians: 75% men; average age, 47 years). At the

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[13] *High Yield Anglers in Northern Ontario (RTO13): A Situation Analysis*, page 10.

[14] *High Yield Nature-Based Tourists in Northern Ontario (RTO13): A Situation Analysis*, page 29. This reference is to Canadians. Americans in this market segment and every other one are more eclectic in their trip activities than are the corresponding Canadians.

[15] *Festival & Event Tourists in Northern Ontario (RTO13): A Situation Analysis*, page 41.

[16] *Attraction Tourists in Northern Ontario (RTO13): A Situation Analysis*, page 26.

same time, the U.S. recreational fishing study predicts that future growth in the American fishing market will come from young people and women.

As the increasingly aging American PRL angler for Northern Ontario retires from the sport, replacing him (or her) may be challenging. Are the fishing experiences and accommodations that have historically met the needs of older men going to attract younger Americans and women?

With few other tourism activities drawing large numbers of American tourists to RTO13, fishing is a logical focal point for the region. Will Northern Ontario's tourism operators invest in the maintenance and enhancement of infrastructure so that it meets the needs of older men yet accommodates the possible market expansion to very different market segments: young anglers and women?

HUNTERS

Appealing to women as a way to *grow the sport.*

Another strategy for ensuring the long term viability of the sport is getting more women engaged in it. Presently almost all hunters are men whether they live in Canada or the U.S.A. As noted previously, male dominance is especially characteristic of RTO13's hunters (91% are men).

There has, however, been a noticeable increase in the number of women who are hunting in the U.S.A. According to U.S. Census figures, the number of women hunters grew by 25% between 2006 and 2011. They now represent 11% of U.S. hunters compared to nine per cent in 2006.[17]

Offering introductory workshops for women and/or capitalizing on *eat local* food initiatives are strategies being used in the U.S.A. and in British Columbia that might be worthy of consideration by Tourism Northern Ontario.

NATURE-BASED TOURISTS

Whether Canadians or Americans, RTO13 attracts older PRL Nature-Based Tourists.[18]

About equally divided between men and women, RTO13's PRL Nature-Based Tourists are older than their counterparts in Southern Ontario. Half of the North's Canadian market (49%) and almost three quarters of its U.S. market (70%) is at least 55 years of age. These proportions are twice as high as those for PRL Nature-Based Tourists in Southern Ontario. The prevalence of older visitors explains the comparatively high average ages of Canadian (51 years) and American (60 years) PRL Nature-Based Tourists in RTO13.

FESTIVALS & EVENTS TOURISTS

On both sides of the border, the North attracts slightly more men than women in the target market (Canada, 57% men; US, 56% men). These Festival & Event tourists span the age continuum but Canadians tend to be younger whereas Americans tend to be older. In fact, almost one third of the Americans are at least 55 years of age while only one fifth of the Canadians are in this age group. These differences are reflected in the average age of Northern Ontario's Festival & Event tourists: Canadians are about 42 years of age and their American counterparts are about 46 years of age.

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[17] http://news.nationalgeographic.com/news/2013/11/131103-women-hunters-local-meat-food-outdoor-sports/
[18] PRL = *paid roofed lodging* or *high yield* tourists.

Across Canada, male snowmobile tourists outnumber females by about two to one. The same is true among Canadian snowmobile tourists in RTO13. They are predominantly men (67%) whereas those in Southern Ontario are more evenly distributed by gender (men, 56%); women, (44%).

SNOWMOBILE TOURISTS

Snowmobile tourists to destinations across the country, like those who visit RTO13, are spread across the age spectrum with about 4-in-10 in the 18 to 34 year old bracket. In RTO13, there is a somewhat greater concentration of older snowmobile tourists – 55+ years of age (22%) – than is the case in Canada as a whole (12%) or Other Ontario (7%). Like their counterparts in Canada and Other Ontario, RTO13's snowmobiling tourists are about 40 years old, on average.

MOTORCYCLE TOURISTS

On both sides of the border, men predominate but are somewhat more prominent among Canadian motorcycle tourists (70%) than their American counterparts (63%).

They are concentrated in the middle age and recently-retired age groups. The Canadian market is concentrated in the 35 to 44 year age bracket (39%) whereas almost half of the Americans are between 45 and 64 years of age (47%). These differences result in a somewhat older motorcycle touring market among Americans (45 years, on average) than Canadians (39 years of age, on average).