NORTH AMERICAN HUNTERS IN NORTHERN ONTARIO (RTO13)

A SITUATION ANALYSIS

PREPARED FOR

TOURISM NORTHERN ONTARIO

BY

Research Resolutions & Consulting Ltd.

Ontario

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EXECUTIVE SUMMARY

OVERVIEW OF HUNTING TRIPS IN NORTHERN ONTARIO

Almost one million North American tourists hunt on overnight trips in Canada.

Of the 105.0 million overnight North American tourists in Canada, almost one million (925,000 or 1%) claim to have done some hunting on their trip.

Similar to *all* overnight North American tourists in Canada, Canadians dominate the hunting sector. They account for 9-in-10 of the North American overnight tourists who go hunting on their trips. Americans represent about one-tenth of Canada's North American overnight tourists and the same proportion of those who hunt on their trips (9%).

Ontario attracts more North American hunters than does any other province.

During a year, approximately 275,000 overnight North American tourists in Ontario went hunting on their trip, or about 3-in-10 of *all* North American hunters in Canada. Ontario's success in attracting hunters is, at least in part, a function of the fact that the province supports a larger population than does any other and, in turn, many of its hunters are Ontario residents.

Similarly, the large population in Quebec combined with propensity of Quebec residents to travel within their own province yield a large overnight hunting market for Quebec (229,000) or one quarter of the country's North American hunters (25%).

Overnight Hunters to . . . Province

	North American Hunters in Canada	
	925,000	% of North American Hunters in Canada
Location(s) in Which Nights Spent		
Ontario	275,000	30%
RTO13	**76,000**	**8%**
Southern Ontario	201,000	22%
Quebec	229,000	25%
Manitoba	55,000	6%
Saskatchewan	57,000	6%
Alberta	121,000	13%
B.C.	98,000	11%

Special Tabulations, TSRC 2010/ITS US 2011 prepared by Research Resolutions. Interpret with caution: small base size. Numbers/percentages add to more than total/100% because of duplication.

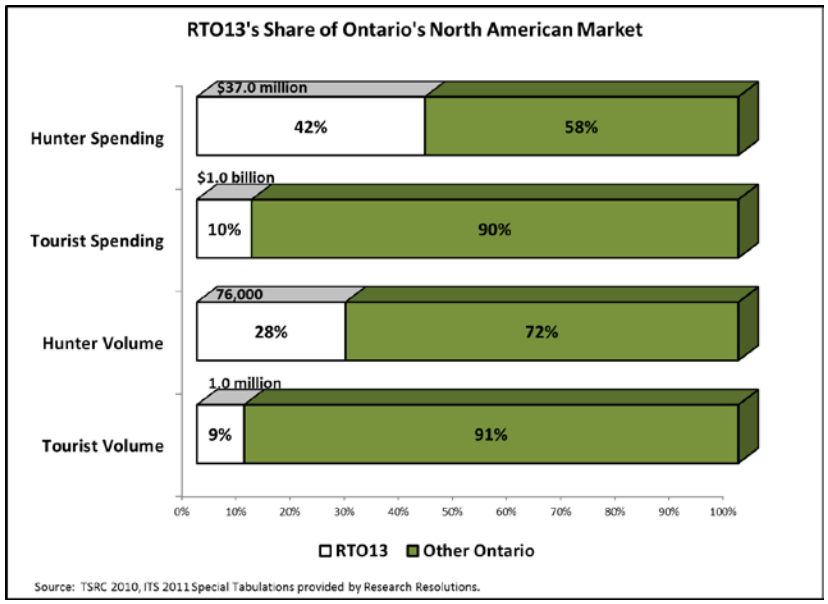
RTO13 pulls well above its weight in attracting North American hunters to the province.

The region captures almost one-tenth of the provinces 41.1 million North American overnight tourists (9%) but attracts 76,000 or 28% of the 275,000 North American hunters in the province during a year.

The resident market fuels RTO13's hunting market. Approximately two thirds of all North American hunters in the region *live* in Northern Ontario (49,000). Residents of other parts of Ontario contribute a further one fifth of hunters (15,000) followed by Americans (12,000).

RTO13 also far exceeds its share of spending within Ontario's North American hunting market.

Northern Ontario contributes about 1-in-10 of all dollars spent by North American overnight visitors to the province (10%) but $37.0 million or more than two fifths (42%)of the $87.6 million spent by North American hunters in Ontario.



At $17.5 million <u>American</u> hunters contribute almost half of RTO13's hunting revenue.

The additional $19.4 million in tourism revenues derive almost exclusively from Ontario residents on hunting trips in RTO13.

Whether they hunt in Northern Ontario or elsewhere, most hunters are men and those who go to Northern Ontario tend to be older men.

Men dominate the hunting tourism market across Canada and the United States. In fact, almost all hunters in RTO13 are men (91%).

Hunters who travel in RTO13 are somewhat older than those in many other parts of Canada. Very few are at the young end of the age spectrum (18 – 24 years) but one third of the region's hunters are at least 55 years of age. Their average age is almost 50 years. By way of contrast, Southern Ontario attracts among the youngest hunters in the country, with an average age of about 42 years.

Northern Ontario's hunters are on pleasure trips that last about six nights.

Destinations across Canada differ in the number of nights hunters spend in them. Trip durations range from a low of 2.8 nights in Southern Ontario and about three nights in Atlantic Canada to almost six nights in RTO13 (5.8). Almost all of these RTO13 hunters are on pleasure trips (95%).

Over the course of a year, hunters spent almost one half million nights in Northern Ontario (438,000).

About three quarters of the nights in RTO 13 were spent by Canadian hunters (339,000) and almost 100,000 nights were spent by American hunters in the region.

Most nights spent by North American hunters in RTO13 were in unpaid lodging. [1]

The most popular accommodations among these hunters are private cottages (36%), privately owned hunting lodges, camps or outposts (25%) and, less commonly, the homes of friends and relatives (7%).

Roofed commercial lodging accounts for almost one fifth of the hunting nights spent in RTO13 (78,000). Most of these nights were spent in Northern Ontario's commercial cottages (57,000). Hunters also spent about one tenth of their nights in the region's campgrounds (46,000).

Despite the low use of commercial lodging by RTO13's hunters, reliance on paid roofed lodging (18% of nights) and campgrounds (11% of nights) is somewhat more common among these hunters than it is among North American hunters travelling in Southern Ontario (paid roofed, 13%; campgrounds, 4% of nights).

ECONOMICS OF HUNTER'S TRIPS IN NORTHERN ONTARIO

North American hunters contribute to tourism revenues in Northern Ontario.

Hunters on trips in RTO13 spend about four per cent or about $37.0 million of the $1.0 billion spent by *all* North American overnight tourists in RTO13. Their comparatively limited contribution to tourism revenues in the region is largely a result of hunters' reliance on private lodging.[2]

At the same time, their spending represents a much greater share of all hunting tourism revenue in Ontario (42%) than their volume would suggest (28%). The difference is largely attributable to the fact that those who hunt in Northern Ontario spend almost six nights in the region (5.8) whereas those in Southern Ontario spend about half this time (2.8 nights).

American hunters outspend their Canadian counterparts in RTO13.

American hunters represent about one seventh of North Americans in RTO13' target market (15%) but close to half of hunters' spending in the region (48%). The substantial contribution American hunters make to tourism revenues in RTO13 is likely a function of their somewhat longer stays in the region and their greater reliance on paid, roofed lodging.

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[1] 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. Percentages are the proportion of *person nights* spent in each type of lodging in RTO13.

[2] Base sizes are too small to provide breakdowns of volume or spending in RTO13's sub-regions.

RTO13's North American hunters spend about $640.00 per *trip* in the region.

Each North American travel party that hunts on a trip in Northern Ontario spends approximately $640.00 for the trip or $119.00 per night. This per-trip spend is more than twice the corresponding spending by North American hunting travel parties in Southern Ontario ($304.00), no doubt reflecting the longer stays by hunters in the North. On a per night basis, however, there is little difference between hunters in the Northern ($119.00) and Southern portions of the province ($104.00).

North American Hunters – Spending on the Trip

	RTO13	Southern Ontario
Total Spending in Region	$36,900,000	$50,000,000
Average Per Trip	$639.00	$304.00
Average Per Party Per Night	$119.00	$104.00
Average Nights in Region	5.8 nights	2.8 nights

Hunters contribute to the economic wellbeing of Northern Ontario.[3]

North American hunters in RTO13 contributed $23.3 million toward Ontario's gross domestic product (GDP). Approximately 376 jobs and $14.4 million in wages were generated throughout Ontario as a result of their spending.

At $11.1 million in taxes, all levels of government benefited from spending by these North American hunters in RTO13. Of the $11.1 million, approximately $5.9 million were federal government taxes, a further $5.2 million were provincial taxes and $62,000 were municipal taxes.

More than 90% of the economic benefits generated in Ontario by these North American hunters in RTO13 were retained *within* the region.

[3] Estimates of economic impact are based on MTCS's TREIM model. Figures include direct, indirect and induced impacts.

THE POTENTIAL HUNTING MARKET FOR NORTHERN ONTARIO[4]

Because most hunters engage in the sport near home, RTO13's potential market is concentrated in Ontario, neighbouring provinces and, for the most part, nearby states.

Source: TAMS Canada/US, special tabulations provided by Research Resolutions. Canadian & American hunters with travel experience in RTO13 over a two year period.

There are almost 900,000 Canadian tourists who hunt in Canada on overnight pleasure trips but most hunt close to home. About 177,000 (20%) of these Canadian hunters have been to Northern Ontario and most of them are Ontario residents (142,000). RTO13 also attracts about 15,000 Quebeckers and 9,000 Manitobans who hunt on trips. When combined, the best estimate of Canadian market potential for hunters to RTO13 is about 166,000.

Few American hunters have been to Canada (4%) and even fewer have been to Northern Ontario.

Although there are about 8.9 million Americans who hunt on overnight pleasure trips, only about 1.5 million or four per cent of them have been to Canada. Of these American tourists, about 269,000 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 Michigan, Minnesota, Wisconsin and Pennsylvania. Texas and New York are also noteworthy potential sources of hunters for the North.

The potential Canadian and U.S. markets share gender and age characteristics.

On both sides of the border, there is an 80%/20% gender split, with men predominating among hunters who have been to Northern Ontario for any type of trip over a two-year period. Only about 1-in-20 are young (18 – 24 years), one quarter are between 25 and 34 years, about the same proportion are between 35 and 44 years and two fifths are between 45 and 64 years of age. On both sides of the border, these hunters' average age is 45 years.

The American market segment has more formal education and is more affluent than the corresponding Canadians.

A university education is more characteristic of American hunters (35%) than Canadians (20%) while almost half of the Canadians have a secondary school diploma or less (48%) compared to about one tenth of Americans in the target market (11%). Consistent with higher levels of

[4]Information in this section is based on people who hunt on overnight leisure trips, irrespective of their destination (from TAMS). They have also travelled in Northern Ontario on an overnight leisure trip over a two-year period but may or may not have gone hunting on their travels in RTO13.

formal education, American hunters who have travelled to RTO13 are more likely to have household incomes of at least $100,000 (46%) than Canadian hunters (30%).

Northern Ontario attracts big game hunters.

More than 7-in-10 of the American and Canadian hunters who have been to Northern Ontario over a two-year period hunt for big game when on a hunting trip.

According to a study of *local* and *tourist* hunters in the U.S.A., deer are the most popular target (79%) followed by wild turkeys (23%).[5] Bear (4%) and moose (<1%) are less commonly sought by American hunters, likely because these animals are not as widely available throughout the U.S.A.

Hunters with Northern Ontario travel experience are also anglers.

At least 8-in-10 of the North's potential Canadian and American hunters go fresh water fishing on overnight pleasure trips.[6] Of those on recent hunting trips in RTO13, about 5-in-10 Canadians and 7-in-10 Americans went fishing on the same trip.[7] In light of Northern Ontario's strong angling reputation, co-marketing and/or co-packaging of hunting and fishing experiences is an obvious approach to increasing the attractiveness of the region to North American hunters.

The absolute number of hunters in the U.S. seems to be stable but Canada's market may be declining.

According to the U.S. Fish and Wildlife Service, the number of hunters – both local and tourists – has remained stable between 2001 and 2011, although the population of the country has increased by about nine per cent over the decade. Current information is not available for Canada's hunters but according to the most recent study available from Environment Canada, the number of hunters has been declining.[8]

SOME OBSERVATIONS

Encouraging multi-generational hunting trips

The attractiveness of Northern Ontario to *older* North American hunters and the comparatively few young adults hunting in the region may become an issue for Northern Ontario. Granted, the older segment of the North American population is expected to grow at a faster pace than younger segments. At the same time, the rigors of hunting may move the sport off the priority list for hunters as they reach their sixties and seventies. As older hunters retire from the sport, will they be replaced by younger ones?

Some commentators urge hunting organizations and operators to attract younger hunters by having older, experienced hunters bring their children, grandchildren, nieces and/or nephews

[5] 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, U.S. Fish and Wildlife Service and U.S. Census Bureau
[6] TAMS.
[7] TSRC/ITS.
[8] Environment Canada, *The Importance of Nature to Canadians,* 1996.

on hunting trips to address the potential shrinkage in market demand. Offering intergenerational packages, special programs for young/novice hunters may be required to offset a mid-to long-term decline in the market.

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).

> **Workshops & Local Food Trend**
>
> *Many state departments of natural resources have begun hosting Becoming an Outdoors-Woman (BOW) workshops that offer instruction in skills such as archery, shotgun, and rifle shooting.*
>
> *Women are also leading a surge of support for sustainable food and agriculture initiatives . . . but in many parts of the country, local meat can be difficult to find. Hunting offers an alternative to the grocery store that lets women provide truly free-range and organic meat for their families while also helping create a more sustainable food system, says Lily Raff McCaulou, author of Call of the Mild: Learning to Hunt My Own* Dinner.

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.[9]

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 Northern Ontario Tourism.[10]

Focus on synergies between fishing and hunting.

While it is clearly being done by many outfitters and guides, the pairing of Northern Ontario's fishing and hunting experiences is an obvious tool for attracting both sports' enthusiasts. The bigger issue from a revenue perspective, however, is getting hunters (and anglers) in Northern Ontario to utilize the commercial accommodation and guiding companies that offer these experiences.

Northern Ontario is not alone in having a hunting market that relies on private cottages, private hunting camps and campgrounds instead of commercial enterprises.

As noted in this analysis, most lodging on recent hunting trips by North American hunters is private. Avoidance of commercial lodging is, no doubt, a function of affordability and proximity. Canadian hunters with Northern Ontario travel experience are comparatively likely to have low

[9] http://news.nationalgeographic.com/news/2013/11/131103-women-hunters-local-meat-food-outdoor-sports/

[10] See sidebar, from National Geographic 2013 article. Also see Vancouver Sun article reporting that *growth in the number of graduates from the Conservation Outdoor Recreation Education course required for hunters in B.C. and annual hunting licence sales over the past eight years are beginning to reverse a 31-year decline in hunting's popularity between 1982 and 2003. . . The number of women graduating each year from CORE has been rising steadily — to 1,725 in 2012 from 791 in 2004 — faster even than the number of men.* http://www.vancouversun.com/travel/Ethical+killing+Hipsters+hippies+women+taking+hunting/8237288/story.html

Hunting is an endeavour that comes with baggage, and it suffers at times from its duality. Dreams of splendid meals built around healthy, sustainably harvested wild protein — the goal of the vast majority of hunters — are a sharp contrast to widely circulated, jarring images of blood-soaked trophy kills, animals brought down simply for sport, a fur rug or antlers.

Vancouver Sun

household incomes. Furthermore, they tend to live close to hunting areas and can access hunting sites where they or friends/relatives own cottages or hunting camps or outposts.

The American hunters who come to RTO13 tend to be somewhat more affluent than their Canadian counterparts but even among this group, one quarter are in a lower income strata. With many of them travelling just across the border, they too may own or use private cottages or hunting camps in Northern Ontario.

Promotion of trophy hunting for moose and bear will attract the upscale market.

Getting "near market" hunters to pay for outfitters and commercial lodging will be challenging, partly because many simply may not have the funds required to do so. Instead, Northern Ontario might focus on the high end *trophy hunting* market for wildlife unavailable in their local area – e.g., moose and bear.

Consider the niche segment interested in ethical hunting and natural, local, sustainable food sources as a way to expand Northern Ontario's hunting market.

The increasing public interest in eating locally sourced and natural foods could attract a new niche hunting market: people who want to control the foods they eat. According to a Vancouver Sun article, *the sustainable food movement helps reverse a 30-year decline in [hunting's] popularity*.[11] To expand this market's potential, hunting outfitters and promoters will likely have to counter the widely held image of hunters as *bearded bushmen and camo-clad weekend warriors.*

[11] http://www.vancouversun.com/travel/Ethical+killing+Hipsters+hippies+women+taking+hunting/8237288/story.html

DETAILED FINDINGS

INTRODUCTION

Who are "hunters"?

*Throughout this report, the term **hunters** is commonly used to describe tourists who hunt on overnight trips. There are, of course, many people who hunt in their immediate surroundings or on day trips. Unless otherwise specified, these "local hunters" are excluded from this analysis.*

Tourism Northern Ontario is exploring opportunities for various outdoor tourism activities available in Northern Ontario. With its abundance of deer, moose, bears, upland birds and waterfowl, the region has a long legacy as a hunting destination and a robust network of local guides and outfitters. Hunting is a mainstay of tourism in Northern Ontario, bringing visitors and revenue to many communities. As such, Tourism Northern Ontario is focussing on this important outdoor market.

To learn more about the current role hunting plays in Northern Ontario's tourism mix and the segment's potential for the future, Tourism Northern Ontario commissioned Research Resolutions & Consulting Ltd. to provide a situation analysis.[12]

This analysis provides RTO13 tourism operators, planners and marketers with information about the structure, size and characteristics of the current tourist hunting market in Canada and RTO13.[13] As such, it **excludes** the many hunters who hunt in their local area or on day trips within Northern Ontario

Much of the literature on the size, characteristics and economic impacts of hunting is generated by affinity or advocacy groups. As such, estimates typically include all spending by *local* and *tourist* hunters. Such spending estimates tend to cover tourism-related spending (e.g., lodging, transportation, food) and other expenses associated with the sport (e.g., licenses and equipment). Here, information is limited to North American (Canada/USA) tourists who take *hunting trips.*

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) and International Travel Survey (ITS US), 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation (U.S. Fish and Wildlife Service/ U.S. Census Bureau) and a literature review.

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[12] Judy Rogers, President of Research Resolutions & Consulting Ltd. prepared the report. She can be reached at Research Resolutions & Consulting Ltd., 16 Hepbourne Street, Toronto ON, M6H 1J9; 416 531-9973; rogers.judy@sympatico.ca.

[13] The project was commissioned by Tourism Northern Ontario to Research Resolutions & Consulting Ltd. in December 2013.

NORTH AMERICAN HUNTING TRIPS IN CANADA

MARKET SIZE AT THE CANADA LEVEL

Of the 105.0 million overnight North American tourists in Canada, almost one million (1%) claim to have done some hunting on their trip (see Table 1).[14]

Most tourism in Canada is driven by Canadians. The domestic market accounts for almost 9-in-10 of all overnight North American tourists in the country over the year (89%). Similarly, Canadians account for most of the North American overnight tourists who go hunting on their trips (91%).

Table 1: Canada's North American Hunters by Place of Residence

	North American Tourists	North American Hunters*
Overnight Visitors (Canada/USA)	105.0 million	925,000
Place of Residence		
Canada	89%	91%
U.S.A.	11%	9%

*Special Tabulations, TSRC 2010/ITS US 2011 prepared by Research Resolutions. *Interpret with caution: small base size*

Americans represent about one-tenth of all of Canada's North American overnight tourists and the same proportion of those who hunt on their trips (11%, 9% respectively).

PROVINCIAL MARKET SHARES

Overnight tourists in virtually every region of Canada go hunting, representing between one and two per cent of all North American overnight visitors in the destination province or region. Because of its large population and the appeal of Ontario destinations to the province's own residents, Ontario attracts more North American hunters than does any other province (see Table 2). During the year, 275,000 overnight tourists in Ontario went hunting on their trip. These Ontario tourists represent 3-in-10 of *all* North American hunters in Canada over a year.

Similarly, the large population in Quebec combined with propensity of Quebec residents to travel within their own province yield a large overnight hunting market (229,000) or one quarter of the country's North American hunters (25%). While overnight hunting trips are less common in Alberta (121,000) and British Columbia (98,000) than in Ontario or Quebec, between them, these western provinces attract about one quarter of the North American target market.

The *hunting* markets in Manitoba and Saskatchewan are appreciably smaller than those of the larger provinces primarily because the populations of these Prairie Provinces are quite small. Nonetheless,

[14] In addition to the 925,000 Canadian and American hunters in Canada, about 9,000 came from Overseas, with most of them concentrated in western Canada. Because there were practically no overseas hunters in Ontario during the reference year, the analysis presented here is restricted to the North American market.

more than 55,000 of Manitoba's and 57,000 of Saskatchewan's overnight North American tourists went hunting on their overnight trip.

Of Ontario's 275,000 hunters, 76,000 went to RTO13 on their overnight trips or over one quarter of the province's North American hunters (28%) and one twelfth of *Canada's* North American hunters (8%).

Table 2: Overnight Hunters to . . . Province

	North American Hunters in Canada	
	925,000	% of North American Hunters in Canada
Location(s) in Which Nights Spent		
Ontario	275,000	30%
RTO13	**76,000**	**8%**
Southern Ontario	201,000	22%
Quebec	229,000	25%
Manitoba	55,000	6%
Saskatchewan	57,000	6%
Alberta	121,000	13%
B.C.	98,000	11%

Special Tabulations, TSRC 2010/ITS US 2011 prepared by Research Resolutions. Interpret with caution: small base size. Numbers/percentages add to more than total/100% because of duplication.

ONTARIO'S NORTH AMERICAN HUNTERS

WHICH NORTH AMERICAN HUNTERS CONTRIBUTE TO ONTARIO'S TARGET MARKET?

Ontario attracts most of its hunters from within the province (see Table 3). In fact, only about 1,000 overnight tourists from other provinces come to Ontario to hunt over a year. The U.S.A. provides a further 17,000 hunters for Ontario (6%). These Americans are highly concentrated in Ontario's near-border states including Minnesota, Wisconsin, Michigan, Ohio and New York.

Fees for hunting licenses may contribute to the low number of Canadian hunters from other provinces coming to Ontario. In Ontario, a Canadian from another province is considered a *non-resident,* and subject to the same fees as hunters who do not live in Canada. Hence, a Manitoba or Quebec resident would pay about $472.00 for a moose hunting license while an Ontario resident would pay about $50.00. In contrast, Manitoba offers a non-resident Canadian rate. At $299.00 this non-resident Canadian rate is set between the $52.00 Manitoba resident rate and the "foreigner" rate of $360.00.[15]

[15] See appendix for more examples.

Table 3: Ontario's North American Hunters by Place of Residence

	Number	Per cent
Ontario's North American Hunters (Total)	275,000	100%
Canada	258,000	94%
Ontario residents	257,000	94%
Other Canadians	1,000	*
U.S.A.	17,000	6%

*Special Tabulations, TSRC 2010/ITS US 2011 prepared by Research Resolutions. *Less than 0.5%. Interpret with caution: small base size.*

RTO13'S NORTH AMERICAN HUNTERS

VOLUME OF NORTH AMERICAN HUNTERS IN RTO13

RTO13 pulls well above its weight in attracting North American hunters to the province (see chart below). The region captures almost one-tenth of the provinces 41.1 million North American overnight tourists (9%) but attracts more than three times this proportion of North American hunters (28%).

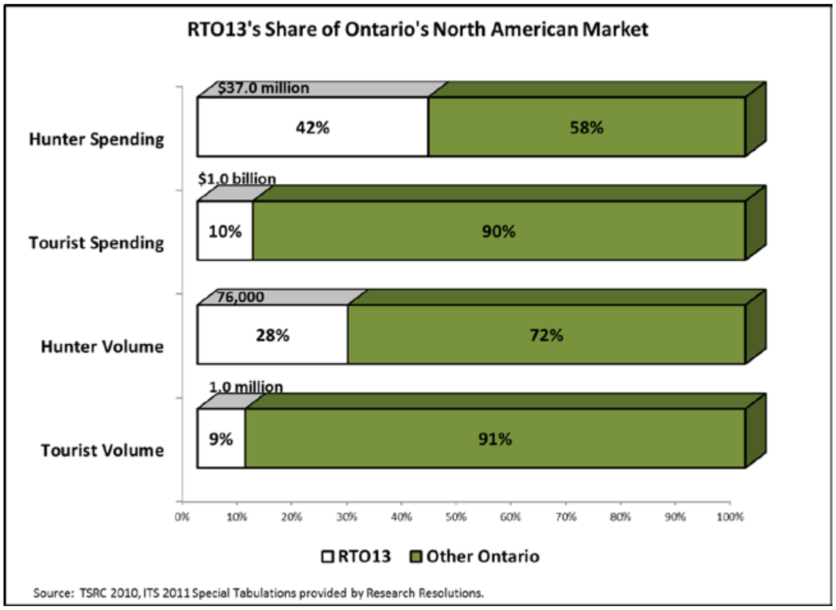
Table 4: RTO13's North American Hunters by Place of Residence

	Number	Per cent
RTO13's North American Hunters	76,000	100%
Canada	64,000	85%
RTO13 Residents	49,000	64%
Southern Ontario Residents	15,000	20%
Other Canadians	*	*
U.S.A.	12,000	15%

*Special Tabulations, TSRC, ITS US & OVS, 2010 prepared by Research Resolutions. *Less than 0.5%. Interpret with caution: small base size.*

The resident market fuels RTO13's hunting market. Approximately two thirds of all North American hunters in the region *live* in Northern Ontario (49,000). Other residents of the province contribute a further one fifth of hunters (15,000) followed by Americans (12,000) (see Table 4).

SPENDING BY NORTH AMERICAN HUNTERS IN RTO13



Not only does RTO13 capture a disproportionately high volume of North American hunters relative to its share of all overnight visitors in Ontario but it also far exceeds its share of spending within this target market (see chart). The region contributes about 1-in-10 of all dollars spent by North American overnight visitors to the province irrespective of their trip activities (10%) but $37.0 million or more than two fifths of the $87.6 million spent by North American **hunters** in Ontario.

At about $37.0 million in tourism spending in RTO13, North American hunters contribute four per cent of the $1.0 billion spent by *all* overnight North American tourists in the region (see Table 5).

Although they represent only fifteen per cent of hunters in RTO13, at $17.5 million American hunters contribute almost half of the region's hunting revenue. The additional $19.4 million in tourism revenues derives almost exclusively from Ontario residents on hunting trips in RTO13.

Table 5: North American Hunter Spending in RTO13 by Place of Residence

	Dollars	Per cent
North American Overnight Tourist Spending in RTO13	$1,000,000,000	100%
North American Hunters	$37,000,000	4%
Place of Residence	$	100%
Canada	$19,400,000	52%
U.S.A.	$17,500,000	48%

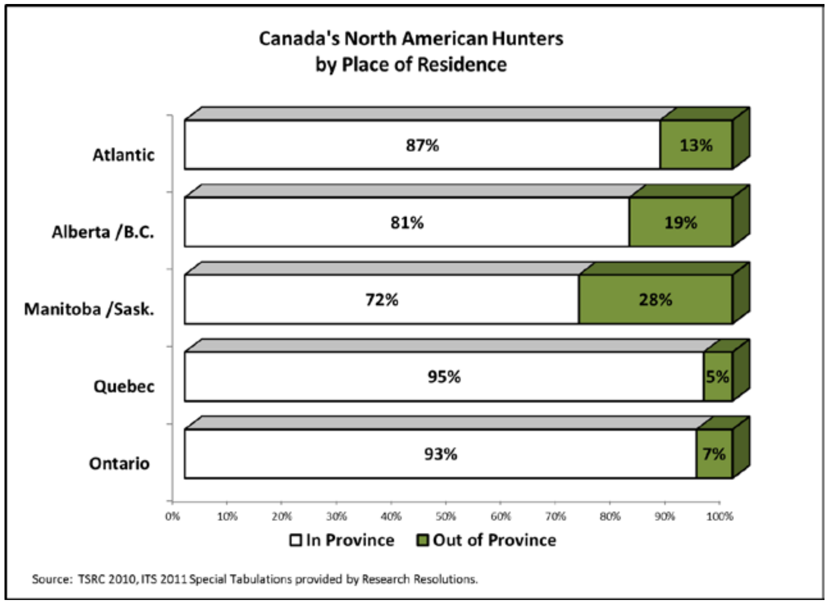
*Special Tabulations, TSRC, ITS US & OVS, 2010 prepared by Research Resolutions. *Less than 0.5%. Interpret with caution: small base size. Figures may not add to total due to rounding.*

NORTH AMERICAN HUNTERS' TRIP CHARACTERISTICS

SOURCE OF CANADA'S HUNTERS

The vast majority of people who hunt on trips live within the same province or region in which they engage in the sport. As is evident from the accompanying chart, more than 9-in-10 of Ontario's hunting market are residents of the province. The same is true for Quebec. The two Prairie Provinces are more successful than any other region in attracting hunters from other provinces, most notably neighbouring Alberta, and the U.S.A.

Almost all of Ontario's out-of-province hunters are Americans. They represent 6% of the 7% of hunters who live outside Ontario and come to the province on hunting trips.



TRIP PURPOSE & LENGTH OF STAY

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

Trip Purpose: Regardless of their destination, almost all North American hunters are on pleasure trips (see Table 6). Those who travel to RTO13 are especially likely to be travelling for pleasure (95%) compared to their counterparts to destinations in other parts of Ontario (78%), western (64%) and Atlantic Canada (66%).

Length of Stay in Location: Destinations across Canada differ in the number of nights hunters spend in them. Trip durations range from a low of 2.8 nights in Southern Ontario and about three nights in Atlantic Canada to almost six nights in RTO13 (5.8).

Table 6: North American Hunters' Location Visited

Location(s) in Which Nights Spent	**RTO13**	**Other Ontario**	**Quebec**	**Manitoba/ Saskatchewan**	**Alberta/B.C.**	**Atlantic**
	76,000	201,000	229,000	109,000	218,000	91,000
	%	%	%	%	%	%
Trip Purpose						
Pleasure	95%	78%	85%	82%	64%	66%
Visit Friends/Relatives	5%	21%	9%	18%	33%	32%
Length of Stay in Location						
Average Length of Stay	5.8 nights	2.8 nights	4.5 nights	4.4 nights	4.7 nights	3.3 nights

Special Tabulations, TSRC 2010/ITS US 2011 prepared by Research Resolutions. Interpret with caution: small base sizes.

AGE & GENDER

Almost all hunters in RTO13 are men (91%) (see Table 7). The male dominance among tourists who hunt is evident across Canada, although women on hunting trips are somewhat more prominent in Atlantic provinces and Southern Ontario than elsewhere.

RTO13's hunters are also somewhat older than those in many other parts of Canada. Very few are at the young end of the age spectrum and one third of the region's hunters are at least 55 years of age. Their average age is almost 50 years. By way of contrast, Southern Ontario attracts among the youngest hunters in the country bringing the average age of this region`s hunters down to about 42.

Table 7: North American Hunters' Gender & Age

Location(s) in Which Nights Spent	**RTO13**	**Other Ontario**	**Quebec**	**Manitoba/ Saskatchewan**	**Alberta/B.C.**	**Atlantic**
	76,000	201,000	229,000	109,000	218,000	91,000
	%	%	%	%	%	%
Gender of respondent						
Male	91%	84%	91%	91%	87%	80%
Female	9%	16%	9%	9%	13%	20%
Age of respondent						
Under 25	*	17%	15%	8%	18%	18%
25-34	24%	13%	10%	32%	17%	20%
35-44	11%	31%	10%	20%	19%	17%
45-54	30%	21%	36%	13%	21%	20%
55-64	25%	10%	25%	16%	10%	12%
65+	15%	7%	4%	11%	15%	13%
Average Age (years)	49.3	41.6	45.5	42.6	43.2	42.9

*Special Tabulations, TSRC 2010/ITS US 2011 prepared by Research Resolutions. Interpret with caution: small base sizes. *Less than 0.5%. Note: average age for Canadians is based on respondents 18+; average for Americans is based on all people in the travel party (all ages).*

LODGING NIGHTS

Nights on hunting trips: Over the course of a year, hunters spent almost one half million nights in Northern Ontario (438,000) (see Table 8). About three quarters of these nights (339,000) were spent by Canadian hunters and almost 100,000 nights were spent by American hunters in RTO13 (22%).

The region's rate of attracting nights among American hunters is appreciably higher than is evident in Southern Ontario (2%), about on par with western provinces (23%) but somewhat lower than the two Prairie provinces (34%).

Table 8: North American Hunters' Lodging Nights

Location(s) in Which Nights Spent	**RTO13**	**Other Ontario**	**Quebec**	**Manitoba/ Saskatchewan**	**Alberta/B.C.**	**Atlantic**
Total Person Nights	438,000	554,000	1,027,000	481,000	1,027,000	300,000
	#	#	#	#	#	#
Canadians	339,000	544,000	1,024,000	317,000	790,000	264,000
Americans	98,000	10,000	3,000	164,000	237,000	36,000
	%	%	%	%	%	%
Canadians	78%	98%	100%	66%	77%	88%
Americans	22%	2%	*	34%	23%	12%

*Special Tabulations, TSRC 2010, 2011 prepared by Research Resolutions. *Less than 0.5%. Interpret with caution: small base sizes.*

Lodging Nights: Most of the nights spent by North American hunters in RTO13 were in unpaid lodging (see Table 9).[16] The most popular accommodations among these hunters are private cottages (36%), privately owned hunting lodges, camps or outposts (25%) and, less commonly, the homes of friends and relatives (7%).

Roofed commercial lodging accounts for almost one fifth of the hunting nights spent in RTO13 (78,000). Most of these nights were spent in Northern Ontario's commercial cottages (57,000). Hunters also spent about one tenth of their nights in the region's campgrounds (46,000).

Use of commercial roofed lodging is somewhat more characteristic of hunters in Northern Ontario (18%) than it is in the southern portion of the province (13%) and Quebec (14%) but not as prevalent as is the case among hunters in Manitoba/Saskatchewan (26%).

[16] 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: North American Hunters' Lodging Nights

Location(s) in Which Nights Were Spent	**RTO13**	**Southern Ontario**	**Quebec**	**Manitoba/ Saskatchewan**	**Alberta/ B.C.**	**Atlantic**
Total Person Nights	438,000	554,000	1,027,000	481,000	1,027,000	300,000
	%	%	%	%	%	%
Paid, Roofed Lodging (All Types)	**18%**	**13%**	**14%**	**26%**	**22%**	**22%**
Commercial Cottage	13%	4%	6%	14%	8%	13%
Hotel/Motel	2%	1%	2%	12%	13%	9%
Other Roofed Commercial[1]	3%	8%	6%	1%	1%	*
Other Lodging						
Campground	11%	4%	13%	5%	7%	5%
Unpaid Lodging (All Types)	**68%**	**82%**	**74%**	**64%**	**64%**	**73%**
Private Home	7%	34%	11%	41%	43%	45%
Private Cottage	36%	42%	43%	17%	7%	22%
Other Private[1]	25%	6%	19%	5%	14%	6%

*Special Tabulations, TSRC 2010/ITS US 2011 prepared by Research Resolutions. *Less than 0.5%. Interpret with caution: small base sizes. [1]Includes Hunting Lodge, Camp, Outpost.*

OTHER ACTIVITIES ON THE HUNTING TRIP

In light of Northern Ontario's strong *fishing* reputation, it is not surprisingly that about half the hunters in the region also go fishing on their trip. In fact, hunters in RTO13 fish at more than twice the rate as do hunters in Southern Ontario and all other regions across Canada. Boating and camping are also popular trip activities among RTO13 hunters. At the same time, these hunters exhibit almost no interest in cultural or entertainment activities while travelling in the region.

Hunters in Southern Ontario go boating at about the same rate as their northern counterparts. They are less likely to camp but more likely to golf and/or engage in a cultural or entertainment activity than are RTO13's hunters.

Table 10: Activities on Trips

Location(s) in Which Nights Were Spent	**RTO13**	**Southern Ontario**	**Quebec**	**Manitoba/ Saskatchewan**	**Alberta/ B.C.**	**Atlantic**
	76,000	201,000	229,000	109,000	218,000	91,000
Fishing	47%	14%	19%	21%	22%	12%
Boating/canoeing/kayaking	27%	28%	29%	18%	16%	7%
Camping	24%	7%	16%	15%	21%	21%
National, provincial or nature park	2%	5%	9%	19%	13%	3%
Golfing	*	17%	*	7%	10%	*
Any entertainment/cultural activity	1%	19%	3%	23%	7%	13%
Festival or fair	1%	*	2%	5%	*	*
Historic site	*	17%	*	2%	4%	1%

*Special Tabulations, TSRC 2010, 2011 prepared by Research Resolutions. *Less than 0.5%. Interpret with caution: small base sizes.*

SPENDING ON THE NORTH AMERICAN HUNTING TRIP

North American hunters contributed $1.00 out of every $25.00 spent by all North American overnight tourists in RTO13. In other words, of the $1.0 billion spent by the North American market in the region, hunters spent $36.9 million or four per cent.

At 4%, hunters' contribution to all North American spending in RTO13 is appreciably higher than the corresponding contribution in Southern Ontario, Quebec (1% each) or other parts of Canada (2%).

The average spend per trip also varies across hunting destinations, in part as a function of the number of nights in the region. In RTO13, each hunter's trip brings $639.00 on average, to the region for a trip of about 5.8 nights. This per trip spend is more than twice as high as the $304.00 spent on a hunting trip in Southern Ontario ($304.00) but the duration of the trip is also about double (2.8 nights). Hunters in Alberta/British Columbia spend the most money on their trips ($1,073.00).

When trip spending is adjusted for the number of nights spent in a region, there is some variation in yield on a per night basis. Hunters in RTO13 spend slightly more per night – $119.00 – than do their counterparts in Southern Ontario and Quebec ($104.00 each) and somewhat less than North Americans who hunt in the Prairies of Atlantic Canada ($174.00 and $165.00, respectively). The per-night spend in the western provinces ($230.00 per night) is about twice that achieved in Northern Ontario in part because hunters in Alberta/British Columbia along with those in the Prairie provinces are more likely to spend money on paid roofed lodging during their hunting trips.

Table 11: North American Hunters' Spending in Location Visited

Location(s) in Which Nights Spent	**RTO13**	**Southern Ontario**	**Quebec**	**Other Canada**
All Overnight Visitors	$1,000,000,000	$8,900,000,000	$6,200,000,000	$14,600,000,000
Hunters	**$36,900,000**	**$50,000,000**	**$90,100,000**	**$276,600,000**
Hunters' Share	4%	1%	1%	2%

	RTO13	**Southern Ontario**	**Quebec**	**Man/Sask**	**Alberta/BC**	**Atlantic**
Average Per Trip	$639.00	$304.00	$472.00	$747.00	$1,073.00	$568.00
Average Per Party Per Night	$119.00	$104.00	$104.00	$174.00	$230.00	$165.00
Average Length of Stay	5.8 nights	2.8 nights	4.5 nights	4.4 nights	4.7 nights	3.3 nights

Special Tabulations, TSRC 2010, ITS US 2011 prepared by Research Resolutions. Interpret with caution: small base sizes.

ECONOMIC IMPACT OF NORTH AMERICAN HUNTERS IN RTO13

INTRODUCTION

The $36.9 million spent by North American hunters in Northern Ontario ripples throughout the local and provincial economies.[17] 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.[18]

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.[19]

North American hunters spent about $36.9 million on tourism goods and services in Northern Ontario.[20] Once the imports from other locations in Ontario, other parts of Canada, and other countries are taken into account, tourism spending by North American hunters in RTO13 generated about $13.7 million in direct economic activity (i.e. GDP), and an additional $7.8 million in indirect and induced GDP for Northern Ontario's economy.

There was, therefore, about $21.5 million in GDP retained in Northern Ontario. Other parts of Ontario benefited from about $1.8 million in GDP (direct, indirect, and induced) from target market visitor spending in the region. When combined, the province-wide GDP contribution of North American hunting tourism in Northern Ontario reached $23.3 million.

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[17] MTCS provides the TREIM for estimating purposes.

[18] The economic impact estimates provided in this section reflect visitor spending only, that is, spending by visitors in the hunting tourist 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.

[19] 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.

[20] Spending estimates are based on the 2011 reference year for the North American market.

Table 12: Canadian Hunters Contributions to GDP and Funds Retained in RO13

	Amount Retained in RTO13 (A)	Amount Retained in Other Ontario (B)	Total Contribution to Ontario's GDP (A + B)
Direct	$13,700,000		$13,700,000
Indirect	$4,300,000	$1,100,000	$5,400,000
Induced	$3,400,000	$700,000	$4,100,000
Total GDP	**$21,500,000**	**$1,800,000**	**$23,300,000**

Source: TSRC 2010, ITS US 2011 Special Tabulations prepared by Research Resolutions and special calculations of TREIM for RTO13 (MTCS). Interpret with caution: small base sizes.

JOBS, WAGES, AND SALARIES

Approximately 262 direct jobs and an additional 92 indirect and induced jobs in Northern Ontario were generated as a result of North American hunters' spending. These jobs include part- and full-time positions, on both annual and seasonal bases.[21] Additional employment in the province was generated because of tourists in Northern Ontario who hunt, bringing the total number of direct, indirect and induced jobs to about 376 across Northern Ontario and the entire province.

Over a year, RTO13 retained 94% of the 376 jobs created by hunting tourists in Northern Ontario.[22] These jobs generated $14.4 million in wages and salaries province-wide, with 92% of this amount ($13.2 million direct, indirect, and induced) retained in Northern Ontario.

TAXES

All levels of government benefited from North American hunters' tourism spending in Northern Ontario. This spending generated $5.9 million in federal government taxes, a further $5.2 million in provincial taxes and $62,000 in municipal taxes based on incremental tourism revenue (direct, indirect, and induced) province-wide. RTO13 retained the following amounts from these taxes:

- $3.3 million in direct federal taxes; and
- $3.7 million in direct provincial taxes.

[21] 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.

[22] 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 North American Hunters in RTO13

	Economic Benefits Retained in RTO13	Total Benefits Across Ontario	Proportion of Total Ontario Benefits Retained in RTO13
Total Visitor Spending	$36,900,000		
Gross Domestic Product	**$21,500,000**	**$23,300,000**	**92%**
Direct	$13,700,000	$13,700,000	100%
Indirect/Induced	$7,800,000	$9,500,000	81%
Wages	**$13,200,000**	**$14,400,000**	**92%**
Direct	$8,300,000	$8,300,000	100%
Indirect/Induced	$4,900,000	$6,000,000	81%
Employment (Jobs)	**354**	**376**	**94%**
Direct	262	262	100%
Indirect/Induced	92	114	81%
Federal Taxes	**$5,500,000**	**$5,900,000**	**94%**
Direct	$3,300,000	$3,300,000	100%
Indirect/Induced	$2,200,000	$2,600,000	87%
Provincial Taxes	**$4,900,000**	**$5,200,000**	**95%**
Direct	$3,700,000	$3,700,000	100%
Indirect/Induced	$1,300,000	$1,600,000	82%
Municipal Taxes	**$57,000**	**$62,000**	**91%**
Direct	$20,000	$20,000	100%
Indirect/Induced	$37,000	$42,000	87%

Source: TSRC 2010/ITS US 2011 Special Tabulations prepared by Research Resolutions and special calculations of TREIM for RTO13 (MTCS). Interpret with caution: small base sizes. Figures are rounded to nearest 100,000.

NORTHERN ONTARIO'S MARKET POTENTIAL FOR HUNTERS

In the following pages, the North American tourist market for hunting 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 hunter may have travelled to Northern Ontario over a two-year period but may or may not have gone hunting in the region.

THE POTENTIAL CANADIAN TOURIST HUNTING MARKET

There are approximately 1.0 million Canadians who claim to hunt while on overnight pleasure trips and most of these hunters travel in Canada (888,000) (see Table 14). Canadians who hunt on trips are over-represented in Atlantic Canada (12%) and Quebec (32%) relative to these regions' shares of all travellers (7%, 24% respectively). Conversely, Ontarians are under-represented among hunters. Residents of this province represent 39% of *all* tourists but only 24% of those who hunt and travel within Canada.

Northern Ontario attracts approximately one fifth of tourist hunters with Canadian destinations, or about 177,000. These are Canadians who have visited RTO13 over a two-year period and also went hunting on at least one of their overnight leisure trips. Of these 177,000 travellers, four fifths (80%) are Ontario residents. The most noteworthy out-of-province contributors to the potential hunting market in the North are Quebec (9%) and Manitoba (5%).

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

Place of Residence	**All Pleasure Tourists**	**Hunters with Trips in Canada in Past 2 Years**	**Hunters with Trips in Northern Ontario in Past 2 Years**
Canada	24.8 million	888,000	177,000*
Atlantic Canada	7%	12%	2%
Quebec	24%	32%	9%
Ontario	39%	24%	80%
Manitoba	3%	6%	5%
Saskatchewan	3%	4%	1%
Alberta	10%	10%	2%
British Columbia	13%	14%	1%

*Special Tabulations, TAMS Canada prepared by Research Resolutions.** Interpret with caution: small base sizes.

Because so many hunters hunt near where they live, it is not surprising that Northern Ontario attracts overnight leisure trips by Ontario's hunters at a very high rate (see Table 15). The region enjoys visits by 142,000 or two thirds of Ontario's 212,000 hunters. Almost one quarter of Manitoba's 40,000 hunters are also visitors to Northern Ontario (9,000).

Even though hunters tend to be concentrated in non-urban areas, about 39,000 hunters live in Toronto and approximately two thirds of them, or 25,000, have travelled in Northern Ontario, making them a sizeable potential market for the region.

Table 15: Northern Ontario's Potential Tourist Hunting Market in Canada by Place of Residence

Place of Residence	**Hunters with Trips in Canada in Past 2 Years**	**Hunters with Trips to Northern Ontario in Past 2 Years**	**Northern Ontario's Share** (Horizontal %)
Canada	888,000	177,000	20%
Atlantic Canada	107,000	3,000	3%
Quebec	283,000	15,000	5%
Ontario	212,000	142,000	67%
Toronto CMA	39,000	25,000	64%
Manitoba	40,000	9,000	23%
Saskatchewan	37,000	2,000	5%
Alberta	89,000	3,000	4%
British Columbia	120,000	2,000	2%

Special Tabulations, TAMS Canada prepared by Research Resolutions. Interpret with caution: small base sizes.

THE POTENTIAL AMERICAN TOURIST HUNTING MARKET

The TAMS study provides information on hunters who engage in the activity while on overnight pleasure trips whereas a current U.S. Fish and Wildlife Service study (FWS) provides a valuable source of information on *all* hunters in the U.S.A. – those who hunt locally and who take trips in order to hunt.

- The FWS study pegs the American hunting market at about 13.7 million, or six per cent of Americans 16 years of age or over.
- According to TAMS, among the 222.8 million Americans 18 years of age or over who have taken overnight pleasure trips over a two year period, 8.9 million (4%) include hunting among their trip activities.

Canada's potential market is smaller than the hunting tourism market as a whole because American hunters must be prepared to cross the border to hunt in Canada. The segment of Americans who hunt on overnight pleasure trips and have crossed the US/Canada border for a pleasure trip over a two-year period is about 1.5 million hunters.[23]

Within the 1.5 million, more than one quarter million hunters have taken overnight pleasure trips to RTO13 over a two-year period. These 269,000 Americans represent the North's best potential for attracting American hunters.

Table 16: Total U.S.A. Hunting Market

	Number	Per cent of Population 16+
FWS Study (2011)		
Population 16+	239.3 million	
Hunters (Local & Tourist)	13.7 million	6%
		Per cent of Hunters (Local & Tourist)
Hunters who hunt out-of-state	1.9 million	14%
TAMS US		Per cent of Pleasure Travellers 18+
Pleasure Travellers 18+ (Any destination)	222.8 million	
Tourist Hunters	8.9 million	4%
		Per cent of Tourist Hunters
Any Canadian Destinations	1.5 million	17%
Northern Ontario Destinations	**269,000**	**3%**

Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation *U.S. Fish and Wildlife Service and U.S. Census Bureau.* TAMS US, special tabulations provided by Research Resolutions.

[23] This estimate correlates favourably with the FWS study that suggests that the vast majority of American hunters do ***not*** leave their home state to hunt. In fact, the FWS estimates that only 1.9 million American hunters travel out-of-state in order to hunt.

The incidence of tourists who take hunting trips differs substantively across the U.S.A., with an especially high concentration in the East North Central Region (17%) (see Table 17). Not only are there many hunters in this region but it is also a primary market for Canada and most particularly for Northern Ontario.

Of the American hunters who take pleasure trips to Canada, one quarter live in East North Central states (25%) and one fifth live in Mid-Atlantic states (19%). Northern Ontario's U.S. hunting market is especially concentrated in regions that border the North: East North Central (41%) and, to a lesser extent, West North Central (21%).

States that contribute at least one tenth of hunters with experience travelling in RTO13 include the following:

- Michigan 18%
- Wisconsin 14%
- Minnesota 13%
- Pennsylvania 12%

Northern Ontario also attracts approximately one twentieth of its hunters who live in New York state (6%), Illinois (6%) and Texas (7%).

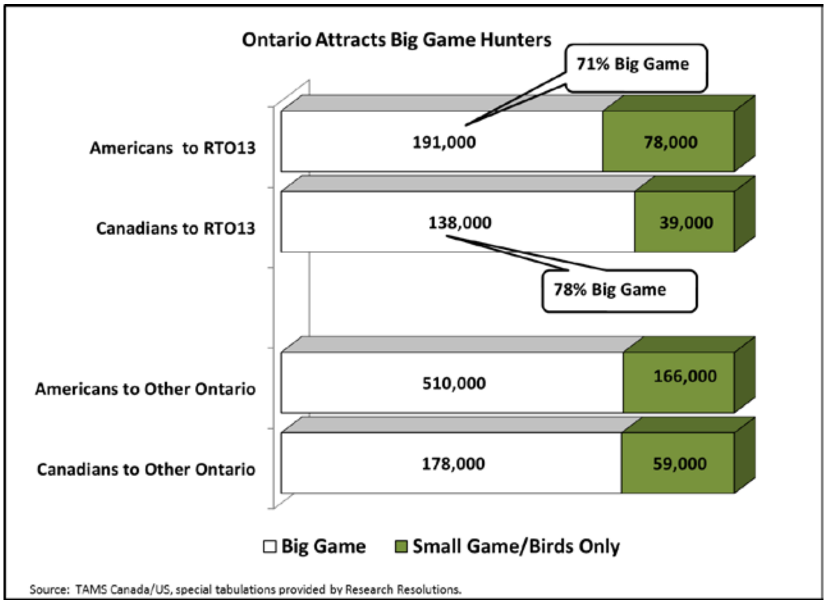
Table 17: American Tourist Hunters to Northern Ontario by Place of Residence

	Pleasure Travellers Who Take Hunting Trips		
	Total	Trips to Canada	Trips to Northern Ontario
Pleasure Travellers 18+	8,900,000	1,500,000	269,000
Place of Residence			
New England	3%	5%	4%
Middle Atlantic	**9%**	**19%**	**18%**
New York State	5%	9%	6%
Pennsylvania	4%	9%	12%
South Atlantic	13%	7%	1%
East North Central	**17%**	**25%**	**41%**
Wisconsin	4%	5%	14%
Michigan	6%	10%	18%
Illinois	3%	4%	6%
Indiana	1%	1%	*
Ohio	2%	4%	2%
West North Central	**12%**	**13%**	**21%**
North Dakota	1%	2%	2%
South Dakota	1%	1%	*
Minnesota	4%	7%	13%
Iowa	1%	1%	3%
East South Central	6%	3%	2%
West South Central	15%	7%	7%
Texas	9%	4%	7%
Mountain	12%	6%	2%
Pacific	12%	12%	4%

Source: TAMS US, special tabulations provided by Research Resolutions. *Less than 0.5%.

BIG GAME HUNTING

Most of Canada's potential hunting market seeks big game.[24] The same is true for Northern and Southern Ontario's markets. Within the North's potential Canadian market, three-quarters hunt for big game on some of their trips (78%) and the remainder hunt only for small game or birds. A similar preference for big game is evident for RTO13's American market (71%).



From the FWS study, the breakdown of big game sought by *all* American hunters shows a very strong preference for deer, possibly because they are widely available across the country. Other big game such as bears and moose are not as popular, likely because they are not as widely available in the United States.

Information on *all* American hunters (locals and tourists) from the FWS study breaks the American hunting market by the type of game sought.

As displayed in Table 18, most Americans hunt deer (10.9 million). Bear hunters in the U.S. are relatively uncommon, at about one half million. Moose hunters are even less common, accounting for just over 100,000 Americans. Small game hunters represent about one third of all hunters (4.5 million) and there are about 2.6 million American migratory bird hunters.[25]

Table 18: Total U.S.A. Hunting Market (Local & Tourist)

	# in millions	
Hunters	13.7	
Big game	**11.6**	**85%**
Deer	10.9	79%
Wild Turkey	3.1	23%
Elk	0.9	6%
Bear	0.5	4%
Moose	0.1	*
Small game	**4.5**	**33%**
Migratory birds	**2.6**	**19%**

Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation *U.S. Fish and Wildlife Service and U.S. Census Bureau.* Note: numbers and percentages add to more than the total because of duplication. *Less than 0.5%.

[24] No definitions are provided in the TAMS survey for the animals included in any of the three categories – big game, small game, birds.

[25] Numbers do not add to total hunters because of duplication. Small game includes squirrel, rabbit, pheasant and quail. Migratory birds include ducks, dove and geese.

PROFILE OF POTENTIAL NORTH AMERICAN HUNTERS

In this section, profiles of RTO13's potential hunting tourist markets in Canada and the United States are provided. The information derives from the TAMS study. People described here meet the following criteria:

- Adults (18+ years)
- Have taken an overnight leisure trip to Northern Ontario over a two-year period;
- Have gone hunting on an overnight leisure trip to any destination over a two-year period.

DEMOGRAPHICS

The potential Canadian and U.S. markets are remarkably similar demographically (see Table 19).

- On both sides of the border, men predominate. Four fifths of the market are men (80%).
- They are unlikely to be young adults (18 – 24 years) but are spread across the remainder of the age spectrum. About one quarter are 25 to 34 years and a similar proportion is 35 to 44 years of age. More of the Canadians (23%) than Americans are 45 to 54 (17%) but a higher proportion of Americans are in the 55 to 64 age group (21%) than are Canadians (15%). Approximately one tenth of North American hunters who have taken trips to Northern Ontario are at least 65 years of age. On average, these hunters are about 45 years of age.
- Canadian hunters have less formal education than their American counterparts. Almost half of the Canadians have a secondary school diploma or less (48%) compared to about one tenth of the Americans (11%). Conversely, a university education is more characteristic of American hunters (35%) than their Canadian counterparts with travel experience in Northern Ontario (20%).
- Likely because they have more formal education, American hunters tend to be more affluent than the corresponding Canadians. Three in ten Canadian hunters have household incomes of at least $100,000 (30%) whereas close to half of the Americans are in this income group (46%).

Table 19: Demographic Profile of Potential Hunters for Northern Ontario

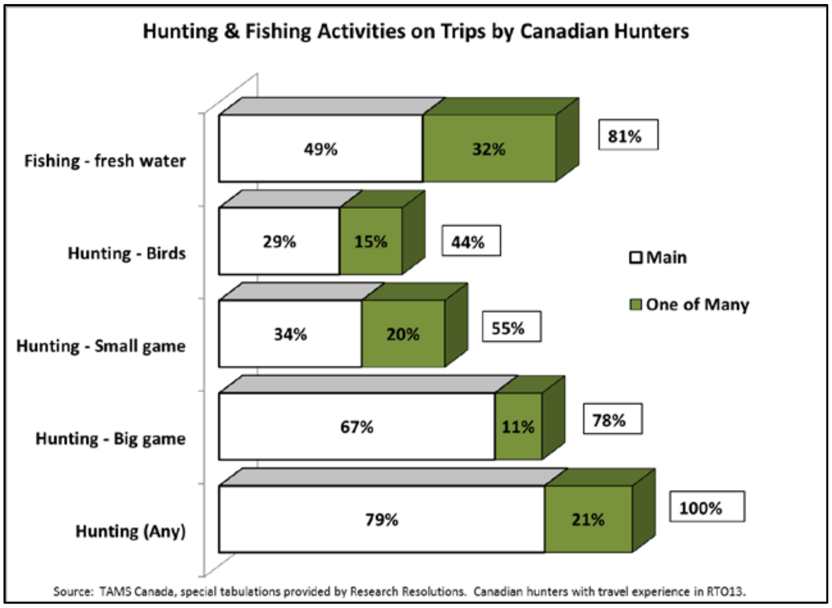
	Hunters with Trips to Northern Ontario	
	Canadians	**Americans**
Gender		
Male	83%	80%
Female	17%	20%
Age		
18-24 years	6%	5%
25-34 years	23%	24%
35-44 years	24%	21%
45-54 years	23%	17%
55 – 64 years	15%	21%
65 + years	10%	12%
Average age (18+)	45 years	45 years
Education		
Less than high school	16%	**
High school diploma	32%	11%
Some post-secondary	8%	35%
Post-secondary diploma/certificate	23%	11%
University degree	20%	35%
Household Income*		
Under $40,000	15%	9%
$40,000 to $59,999	21%	16%
$60,000 to $99,999	34%	43%
$100,000 or more	30%	46%

*Source: TAMS Canada/US, Special Tabulations provided by Research Resolutions. *Household income (2006) based on total stating, reported in Canadian currency. **Less than 0.5%.*

ACTIVITIES ON TRIPS AMONG NORTH AMERICAN HUNTERS WITH NORTHERN ONTARIO TRAVEL EXPERIENCE

HUNTING & FISHING

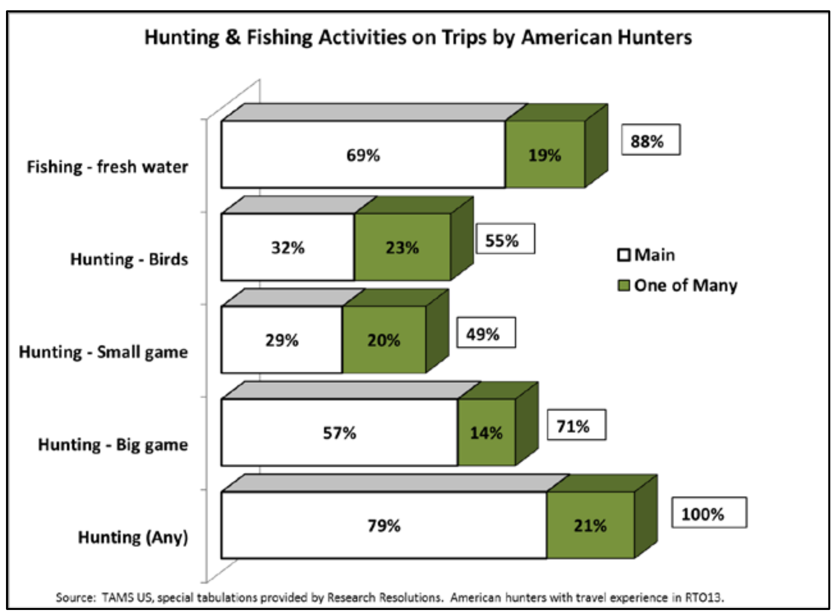
Tourists were asked to identify the activities they had engaged in while on overnight leisure trips over a two-year period. Additionally, they were asked to indicate which of these activities had been the *main reason* for an overnight leisure trip over the same time period.



All tourists described here include hunting as "one-of-many" activities on their overnight trips. By and large, however, if a Canadian or American is going to hunt on an overnight pleasure trip, *hunting* is the primary reason for the trip to take place ("main"). It is the main reason for a trip among 8-in-10 American and Canadian hunters who have travelled to Northern Ontario in the past couple of years.

More than 7-in-10 North American hunters who have travel experience in RTO13 are hunting for big game, although about half also take hunting trips that include small game hunting. Bird hunting is somewhat more common among American hunters (55%) than among their Canadian counterparts (44%) who have travelled in RTO13.

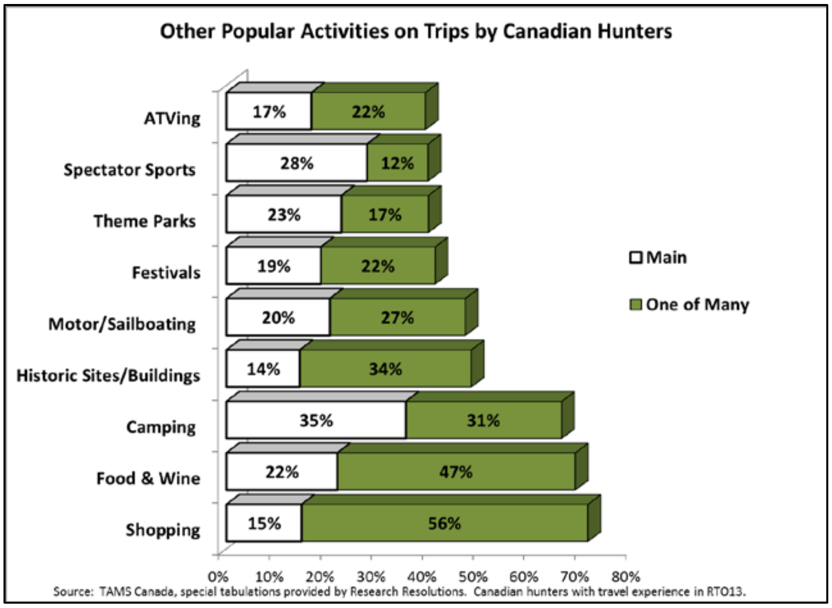
Almost all of Northern Ontario's target market hunters do fresh water fishing on trips, either as the main reason for an overnight pleasure trip (Canada 49%; USA 69%) or as one among many activities on their journeys (Canada 32%; USA 19%). As noted previously, about half of RTO13's North American tourists who hunt on a trip also fish – on the same trip (see Table 10). This finding suggests that pairing hunting and fishing experiences should have considerable appeal to the potential hunting market on both sides of the border.



OTHER ACTIVITIES ON TRIPS

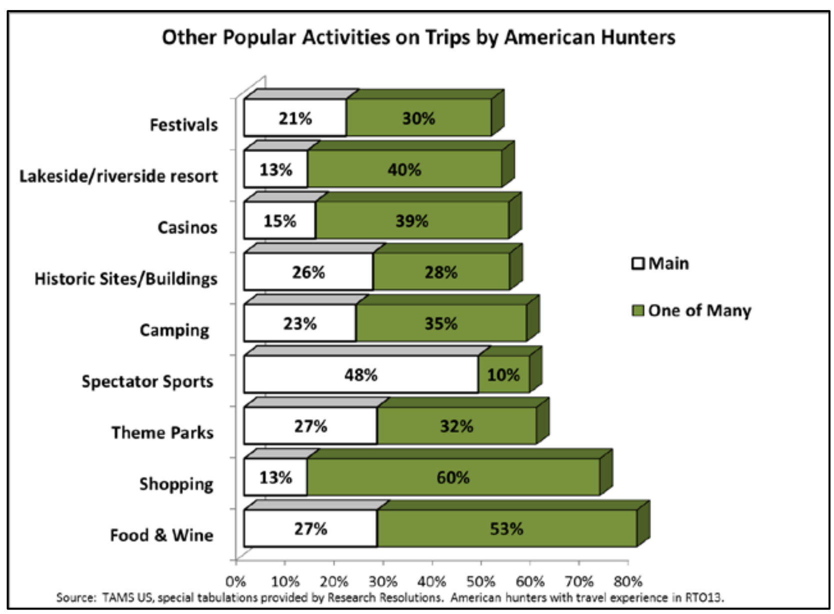
Camping, spectator sporting events, theme parks, boating, various culinary pursuits such as dining in high quality restaurants and festivals are trip drivers for at least one fifth of Canadian hunters. Somewhat fewer include going to historic sites or walking through cities to see buildings as the primary reason for taking a trip.

Of course, many more Canadian hunters participate in these and other activities than identify them as trip motivators (see accompanying chart). For example, as main or one-of-many activities on overnight leisure trips (summed), at least one third of Canadian hunters who have travelled to Northern Ontario engaged in each of the activities listed below.[26]



- Museums (37%)
- Casinos (37%)
- Music performances (35%)
- Lake/riverside resorts (34%)
- Movies (33%)

American hunters with RTO13 travel experience have activity preferences similar to their Canadian counterparts (see chart below). They are, however especially likely to travel to see sporting events (48%, *main reason*). Other prominent trip drivers among these hunters include culinary activities, theme parks, camping, historic sites and buildings, and festivals. As a trip motivation or one of many activities on the trip, these tourists also go to casinos, lake or riverside resorts and shop on their trips.



[26] Includes "main" and "one-of-many" activities.

At least one third of American hunters who have travelled to Northern Ontario engaged in each of the activities listed below either as a *main* or *one-of-many* activities on overnight leisure trips.

- Museums (48%)
- Motor/sail boating (48%)
- Flora/fauna viewing (46%)
- Music performances (45%)
- Aquariums (44%)
- Wilderness lodge you can drive to by car (39%)
- Live theatre (48%)
- ATVing (48%)
- Nature parks (48%)
- Golfing (48%)
- Hiking (48%)

WHERE ELSE HUNTERS TRAVEL

Over a two-year period, the North American hunters described in this report have taken overnight pleasure trips to Northern Ontario . . . but they have also travelled to many other places although the destinations in which they went hunting is not known.[27]

Since so many of the Canadian hunters with recent travel experience in Northern Ontario are residents of the province (see Table 10), it is not surprising that about half of them have also been on overnight pleasure trips to other parts of the province (49%). Almost two fifths have travelled in the United States, one third have taken trips to Quebec and one fifth have gone to destinations outside North America over the two year period.

All American hunters who have gone to Northern Ontario have also travelled in their own country. Popular Canadian destinations include Southern Ontario (34%), Quebec (25%) and, to a lesser extent, Manitoba (18%). These destinations could be the competitive environment for attracting American hunters to Northern Ontario.

American hunters are about twice as likely as their Canadian counterparts to travel abroad (44% versus 21%). 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 for hunting trips.

[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.

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

	Tourists with Trips to Northern Ontario in Past 2 Years	
	Canadian Hunters	**American Hunters**
Locations Visited in Past 2 Years		
Newfoundland and Labrador	4%	8%
Prince Edward Island	7%	5%
New Brunswick	9%	14%
Nova Scotia	9%	11%
Quebec	33%	25%
Ontario	100%	100%
Northern Ontario	100%	100%
Southern Ontario	49%	34%
Manitoba	14%	18%
Saskatchewan	10%	11%
Alberta	17%	9%
British Columbia	10%	7%
USA (any)	38%	100%
Other Countries	21%	44%

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.

North American hunters 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 tourism destination (Canadians, 8.5; Americans, 8.1). Among Canadians, British Columbia is the only other province to 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 hunting 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 Hunting Tourist Market

	Tourists with Trips to Northern Ontario in Past 2 Years	
	Canadian Hunters	**American Hunters**
Average Rating		
Newfoundland and Labrador	7.7	6.3
Prince Edward Island	7.7	6.8
New Brunswick	7.3	5.9
Nova Scotia	7.8	6.9
Quebec	6.2	6.0
Ontario	**8.5**	**8.1**
Manitoba	5.8	6.5
Saskatchewan	5.7	6.6
Alberta	7.4	6.6
British Columbia	8.7	7.1

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 *any* type of pleasure trip among Canadian and American hunters include the overall safety of the destination and its accessibility by car. Mid-range lodging and/or camping are also salient factors for these hunters. Americans put more emphasis on a 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.

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

% stating each attribute is *highly important*	**Tourists with Trips to Northern Ontario in Past 2 Years**	
	Canadian Hunters	**American Hunters**
Feeling safe	57%	67%
No health concerns	41%	46%
Convenient access by car	37%	45%
Lots of adults to do	36%	56%
Availability of mid-range accommodation	21%	34%
Low cost package deals	19%	15%
Availability of camping	18%	13%
Availability of budget accommodation	16%	21%
Direct access by air	14%	28%
Lots for children to do	14%	17%
Being familiar with the culture/language	11%	10%
Having friends or relatives living there	8%	9%
Offers great shopping	7%	17%
Place very different, culturally, than yours	7%	6%
Convenient access by train/bus	5%	14%
Availability of luxury accommodation	4%	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, Canadian and American hunters put getting a *break from the day-to-day* and *stress reduction* at the top of their lists of the benefits of any pleasure travel. Approximately half of them also see pleasure travel as a way to enrich their relationships with immediate family members, to have unscheduled time, and to come away from a trip with lasting memories. Gaining new experiences and keeping family ties alive are also relatively widely sought benefits of pleasure travel among these North American hunters.

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

% stating each benefit is *highly important*	Tourists with Trips to Northern Ontario in Past 2 Years	
	Canadian Hunters	**American Hunters**
To get a break from your day-to-day environment	72%	63%
To relax and relieve stress	70%	72%
To enrich relationship with immediate family	60%	47%
To have a life with no fixed schedule	55%	51%
To create lasting memories	51%	59%
To see or do something new and different	40%	53%
To keep family ties alive	38%	40%
To gain knowledge of history/cultures/places	25%	32%
To enrich your perspective on life	24%	33%
To be challenged physically	24%	16%
To seek solitude and isolation	22%	27%
To stimulate your mind	19%	22%
To have stories to share back at home	15%	25%
To renew personal connections with people	14%	23%
To be pampered	5%	11%

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

DIMENSIONS OF THE AMERICAN TARGET MARKET

AN OVERVIEW OF U.S. HUNTERS

INTRODUCTION

Some key findings from *2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation* conducted by the U.S. Fish and Wildlife Service and U.S. Census Bureau are provided here. This recent large-scale study offers information about both **local and tourist hunters** within the United States that tourism operators and planners in Northern Ontario are likely to find helpful in assessing the scale and characteristics of the potential American market.

Note that the study covers all types of hunters and that information on hunting destinations is restricted to the United States. Hence, the study does not provide insights into how many or which American hunters are likely candidates for Northern Ontario's hunting experiences.

KEY FINDINGS

TOTAL MARKET SIZE

There are many more Americans who hunt than might be in the market for Northern Ontario's hunting experiences. In this section, the full array of American hunters is explored, including those who hunt locally and/or on day excursions. The objective is to identify what portion of this market is likely to travel to Northern Ontario or other parts of Canada to hunt.

Of the 250 million Americans aged 16 or over, 1-in-20 or 13.7 million are hunters (see Table 24).[28] The majority of these hunters (11.6 million) are seeking big game and most particularly, deer (10.9 million). Bear hunters in the U.S. are relatively uncommon, at about one half million hunters. Moose hunters are even less common, accounting for just over 100,000 Americans.

Small game hunters represent about one third of all hunters (4.5 million) and there are about 2.6 million migratory bird hunters.[29] Of the 13.7 million hunters in the U.S.A., about 9.4 million (69%) are also anglers.

The American hunting market seems stable, with no significant change in the number of hunters between 2001 and 2011.[30]

[28] 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation *U.S. Fish and Wildlife Service and U.S. Census Bureau.* These estimates include Americans who hunt locally and/or on day excursions and those who hunt on overnight trips (tourists).
[29] Numbers do not add to total hunters because of duplication. Small game includes squirrel, rabbit, pheasant and quail. Migratory birds include ducks, dove and geese.
[30] Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation *U.S. Fish and Wildlife Service and U.S. Census Bureau,* page 32.

Table 24: Total U.S.A. Hunting Market (Local & Tourist)

	# in millions	Per cent of Population
US Population 16+	250.4	
Hunters	13.7	6%
		Per cent of Hunters
Big game	**11.6**	**85%**
Deer	10.9	79%
Wild Turkey	3.1	23%
Elk	0.9	6%
Bear	0.5	4%
Moose	0.1	*
Small game	**4.5**	**33%**
Migratory birds	**2.6**	**19%**
Hunters who fish	9.4	69%

Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation *U.S. Fish and Wildlife Service and U.S. Census Bureau.* Note: numbers and percentages add to more than the total because of duplication. *Less than 0.5%.

REGIONAL DIFFERENCES

The incidence of hunting differs substantively across the U.S.A., with an especially high concentration of hunters in the East South Central Region (11%) (see Table 25). Northern Ontario's primary U.S. market in West North Central (10%) had a participation rate noticeably above the national average while East North Central (7%) was slightly above the six per cent national average. Similar participation rates are evident for big game hunters.

Table 25: Hunting Participation Rate by U.S. Census Region (Local & Tourist)

	Rate of Participation in Any Hunting	Rate of Participation in Big Game Hunting
National	6%	5%
New England	4%	3%
Mid Atlantic	5%	5%
East North Central	7%	6%
West North Central	10%	9%
South Atlantic	4%	4%
East South Central	11%	10%
West South Central	7%	6%
Mountain	6%	4%
Pacific	3%	2%

Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation *U.S. Fish and Wildlife Service and U.S. Census Bureau*

IN-STATE VERSUS OUT-OF-STATE HUNTERS

Most American hunters engage in the sport *within* their own state. Of the 13.7 million Americans in the market, only 1.9 million or about one seventh travel beyond their state boundaries to hunt (see Table 26). Within the big game segment, approximately one tenth or 1.3 million Americans hunt outside their home state. In effect, Northern Ontario's potential hunting market in the U.S.A. is limited to this group of hunters.

The rate of out-of-state hunters varies from state to state. About 2.3 million hunters live in the four states that tend to be major sources of tourism for Northern Ontario – Minnesota, Wisconsin, Michigan and Illinois. Approximately one eighth of the hunters in these four states take any hunting trips outside their state of residence over a year (12% or 271,000). Of course, most of these hunters are likely taking trips to another state within the United States, leaving only a fraction that might come to Canada, Ontario or Northern Ontario for hunting.

- The rate of out-of-state hunting is especially high among Minnesotans, with one third claiming to go to another state to hunt. Thus, the outside potential market from Minnesota will be fewer than 168,000 hunters.
- Compared to Minnesota's hunters, those from Illinois (10%), Michigan (6%) and especially Wisconsin (3%) are unlikely to travel out of state to hunt.

Table 26: Out-of-State Hunting (Local & Tourist)

	# of Hunters	Rate of Out-of-State Hunters (All Types of Hunting)	# of Hunters Who Hunt Out-of-State
National	13,700,000	14%	1,900,000
Northern Ontario`s Key Markets	**2,257,000**	**12%**	**271,000**
Minnesota	475,000	35%	168,000
Wisconsin	763,000	3%	22,000
Michigan	507,000	6%	29,000
Illinois	512,000	10%	52,000

Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation *U.S. Fish and Wildlife Service and U.S. Census Bureau*

The TAMS study generally supports findings of the U.S. Fish and Wildlife Service and U.S. Census Bureau study.[31] Over a two-year period, about one sixth (16%) of American hunters who took overnight pleasure trips to *any* destination travelled to Canada on one or more of their trips and one tenth travelled to Ontario. Approximately one third or over 270,000 of the 900,000 American hunters with Ontario travel experience went to RTO13. Of the 6.2 million American big game hunters on pleasure

[31] The Travel Activity and Motivation Study (USA) asked Americans who had taken overnight pleasure trips over a two-year period what activities they engaged in on their trips and which of these activities were trip motivations. It also captured the locations visited over a two-year period. The activities mentioned may or may not have taken place in each of the destinations mentioned by respondents.

trips, almost one fifth have travelled in Canada (1.1 million). RTO13 attracts about 1-in-33 of these big game hunters (190,000).

Table 27: American Tourist Hunters – Destinations over Two-Year Period

	Any Hunting on Trip		Big Game Hunting on Trip	
Americans 18+	9.3 million		6.2 million	
Any Overnight Pleasure Trips to . . . Destination				
Canada	16%	1.5 million	18%	1.1 million
Ontario	10%	900,000	11%	670,000
RTO13	3%	270,000	3%	190,000
Southern Ontario	7%	680,000	8%	510,000

Source: 2006 TAMS US, Special Tabulations provided by Research Resolutions. Numbers are rounded to nearest 10,000. Figures may not add to total because of duplication.

CHARACTERISTICS OF U.S. BIG GAME HUNTERS

Big game hunters are the focus of this section because they represent RTO13's largest and most lucrative hunting segment in the U.S. As noted previously, deer, moose and other big game hunters represent 11.6 million American adults or 85% of all American hunters. Like hunters overall, big game hunters tend to engage in the sport *only* within their own state, although about one-tenth travelled to another state to hunt over the course of a year. Annually, they took about 167.3 million hunting trips in the U.S.A. of which about 7.4 million (4%) were out-of-state.

American big game hunters, whether hunting in their own state or out-of-state share many characteristics with the U.S. population as a whole, but exhibit some key differences.[32] Compared to the total population, big game hunters are:

- more than twice as likely to live in rural areas (61% vs. 24%);
- much more likely to be men (88% vs. 48%);
- over-represented in the 45 to 64 year age group (45% vs. 35%) and under-represented among Americans 65 years of age or older (10% vs. 16%)
- over-represented in the $50,000 to $100,000 household income group (43% vs. 30%);
- somewhat less likely to have university degrees (25% vs. 30%);
- over-represented in East North Central (20% vs. 15%) and West North Central states (12% vs. 7%).

[32] For more details on demographics of all U.S. hunters and big game hunters, see summary tables, appended.

Table 28: Profile of American Big Game Hunters (Local & Tourist)

	U.S. Population (16+)	Big Game Hunters
	239.3 million	11.6 million
Gender		
Men	48%	88%
Women	52%	12%
Age		
16 – 24 years	14%	12%
25 – 34 years	17%	14%
35 – 44 years	17%	18%
45 – 64 years	35%	45%
65+ years	16%	10%
Annual Household Income*		
Under $30K	28%	18%
$30K - $49.9K	21%	19%
$50K - $74.9K	17%	23%
$75K - $99.9K	13%	20%
$100K+	21%	20%
Education		
Less than High School Graduation	13%	12%
High School Graduate	34%	38%
Some Post-secondary	23%	25%
University Graduate	30%	25%
Population Density		
Urban	76%	39%
Rural	24%	61%
U.S. Census Region		
New England	5%	3%
Mid Atlantic	14%	13%
East North Central	15%	20%
West North Central	7%	12%
South Atlantic	19%	14%
East South Central	6%	12%
West South Central	11%	13%
Mountain	7%	6%
Pacific	16%	6%
Location of U.S. Hunting Trips		
In state only	N/A	89%
To other states	N/A	11%

Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation *U.S. Fish and Wildlife Service and U.S. Census Bureau.*
Income re-percentaged on total stating.

APPENDICES

PRIMARY INFORMATION SOURCES

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

- Statistics Canada, 2010 Travel Survey of Residents of Canada (TSRC);
- Statistics Canada, 2011 International Travel Survey – U.S. (ITS US);
- *2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation*, U.S. Fish and Wildlife Service and U.S. Census Bureau;
- 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

MTCS GLOSSARY: ECONOMIC IMPACT TERMS[33]

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.

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

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.

HUNTING LICENSE FEES

Hunting license fees vary considerably by province. Additionally, some provinces provide a cost advantage to non-resident Canadians (e.g., Manitoba) whereas other such as Ontario have a single fee for *all* non-residents. The example provided is for moose licenses.

An American hunter would pay appreciably more for a license in Ontario ($472.00) than in neighbouring Manitoba ($360.00) or Saskatchewan ($324.00).

2013/2014 Moose License Fees

	Provincial Resident	Guided Canadian Resident	Guided Non-resident -	Non-Resident	Non-Resident – Other Canada	Foreign
Ontario	$54.57	n/a	n/a	**$472.18**	n/a	n/a
Manitoba	$52.00	n/a	n/a	n/a	$299.00	**$360.00**
Saskatchewan	$32.38	$161.92	**$323.83**	n/a	n/a	n/a

TABLES FROM U.S. FISH & WILDLIFE STUDY (2011)

Table 10. Selected Characteristics of Hunters by Type of Hunting: 2011

(Population 16 years old and older. Numbers in thousands)

Characteristic	U.S. population		Total, all hunting			Big game		
	Number	Percent	Number	Percent who participated	Percent	Number	Percent who participated	Percent
Total persons	**239,313**	**100**	**13,674**	**6**	**100**	**11,570**	**5**	**100**
Population Density of Residence								
Urban	180,723	76	5,797	3	42	4,470	2	39
Rural	58,589	24	7,877	13	58	7,099	12	61
Population Size of Residence								
Metropolitan Statistical Area (MSA)	224,025	94	10,915	5	80	9,059	4	78
1,000,000 or more	127,462	53	3,367	3	25	2,693	2	23
250,000 to 999,999	48,157	20	2,374	5	17	1,898	4	16
50,000 to 249,999	48,406	20	5,174	11	38	4,468	9	39
Outside MSA	15,288	6	2,759	18	20	2,510	16	22
Census Geographic Division								
New England	11,593	5	420	4	3	335	3	3
Middle Atlantic	32,392	14	1,558	5	11	1,530	5	13
East North Central	36,199	15	2,688	7	20	2,336	6	20
West North Central	15,860	7	1,661	10	12	1,368	9	12
South Atlantic	46,417	19	1,870	4	14	1,653	4	14
East South Central	14,206	6	1,531	11	11	1,416	10	12
West South Central	27,195	11	1,909	7	14	1,537	6	13
Mountain	17,013	7	1,043	6	8	730	4	6
Pacific	38,438	16	996	3	7	666	2	6
Age								
16 to 17 years	7,652	3	419	5	3	385	5	3
18 to 24 years	26,517	11	1,288	5	9	1,049	4	9
25 to 34 years	41,613	17	2,079	5	15	1,677	4	14
35 to 44 years	40,779	17	2,416	6	18	2,110	5	18
45 to 54 years	46,167	19	3,143	7	23	2,719	6	24
55 to 64 years	38,469	16	2,842	7	21	2,478	6	21
65 years and older	38,117	16	1,487	4	11	1,151	3	10
65 to 74 years	22,655	9	1,221	5	9	968	4	8
75 and older	15,461	6	266	2	2	182	1	2
Sex								
Male	114,705	48	12,217	11	89	10,220	9	88
Female	124,608	52	1,457	1	11	1,350	1	12
Ethnicity								
Hispanic	32,557	14	271	1	2	214	1	2
Non-Hispanic	206,756	86	13,403	6	98	11,356	5	98
Race								
White	182,872	76	12,852	7	94	10,855	6	94
African American	23,402	10	413	2	3	364	2	3
Asian American	11,647	5	*27	*(Z)	*(Z)	*18	*(Z)	*(Z)
All others	21,392	9	382	2	3	333	2	3
Annual Household Income								
Less than $20,000	30,550	13	991	3	7	876	3	8
$20,000 to $24,999	12,713	5	533	4	4	496	4	4
$25,000 to $29,999	10,441	4	495	5	4	447	4	4
$30,000 to $34,999	11,504	5	556	5	4	486	4	4
$35,000 to $39,999	11,441	5	606	5	4	523	5	5
$40,000 to $49,999	17,091	7	1,129	7	8	908	5	8
$50,000 to $74,999	33,850	14	2,610	8	19	2,332	7	20
$75,000 to $99,999	25,236	11	2,371	9	17	2,087	8	18
$100,000 to $149,999	23,790	10	1,932	8	14	1,433	6	12
$150,000 or more	17,151	7	861	5	6	662	4	6
Not reported	45,545	19	1,591	3	12	1,320	3	11
Education								
11 years or less	31,574	13	1,482	5	11	1,411	4	12
12 years	81,984	34	4,975	6	36	4,454	5	38
1 to 3 years of college	55,014	23	3,510	6	26	2,874	5	25
4 years of college	42,552	18	2,447	6	18	1,915	4	17
5 years or more of college	28,188	12	1,260	4	9	916	3	8

See footnotes at end of table.

Table 50. Anglers and Hunters by Sportsperson's State of Residence: 2011

(Population 16 years old and older. Numbers in thousands)

Sportsperson's state of residence		Fished or hunted		Fished only		Hunted only		Fished and hunted	
	Population	Number	Percent of population	Number	Percent of population	Number	Percent of population	Number	Percent of population
United States, total	**239,313**	**37,397**	**16**	**23,714**	**10**	**4,285**	**2**	**9,389**	**4**
Alabama	3,664	744	20	252	7	*228	*6	264	7
Alaska	526	235	45	129	25	*24	*5	82	16
Arizona	5,084	721	14	462	9	*135	*3	*124	*2
Arkansas	2,238	572	26	252	11	*105	*5	214	10
California	28,562	1,898	7	1,431	5	198	1	269	1
Colorado	3,946	727	18	567	14	*60	*2	99	3
Connecticut	2,781	347	12	265	10	...	...	76	3
Delaware	699	101	14	78	11	*9	*1	*14	*2
Florida	14,855	2,068	14	1,731	12	*78	*1	252	2
Georgia	7,459	981	13	672	9	*138	*2	171	2
Hawaii	995	108	11	85	9	...	...	*21	*2
Idaho	1,172	331	28	169	14	...	...	*119	*10
Illinois	9,988	1,487	15	976	10	*252	*3	260	3
Indiana	4,965	842	17	465	9	*56	*1	322	6
Iowa	2,363	586	25	369	16	*64	*3	152	6
Kansas	2,163	453	21	275	13	*18	*1	159	7
Kentucky	3,376	643	19	327	10	*151	*4	165	5
Louisiana	3,449	802	23	511	15	*69	*2	222	6
Maine	1,066	233	22	92	9	*37	*3	104	10
Maryland	4,480	426	9	337	8	...	...	*72	*2
Massachusetts	5,320	464	9	398	7	...	...	59	1
Michigan	7,787	1,636	21	1,128	14	*170	*2	337	4
Minnesota	4,133	1,400	34	925	22	*71	*2	403	10
Mississippi	2,220	700	32	263	12	*96	*4	340	15
Missouri	4,667	1,001	21	507	11	132	3	363	8
Montana	777	223	29	114	15	*30	*4	78	10
Nebraska	1,387	258	19	143	10	*61	*4	54	4
Nevada	2,024	171	8	122	6	*15	*1	*34	*2
New Hampshire	1,066	168	16	125	12	...	...	*39	*4
New Jersey	6,852	709	10	593	9	*30	*(Z)	86	1
New Mexico	1,551	252	16	185	12	*21	*1	*47	*3
New York	15,503	1,980	13	1,241	8	*172	*1	567	4
North Carolina	7,264	1,394	19	1,077	15	*88	*1	230	3
North Dakota	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)
Ohio	8,999	1,603	18	1,075	12	*168	*2	360	4
Oklahoma	2,828	770	27	551	19	...	...	*193	*7
Oregon	3,061	444	15	263	9	*58	*2	*123	*4
Pennsylvania	10,036	1,277	13	574	6	269	3	434	4
Rhode Island	848	94	11	77	9	...	...	16	2
South Carolina	3,555	615	17	377	11	*42	*1	196	6
South Dakota	631	190	30	*58	*9	*27	*4	106	17
Tennessee	4,945	923	19	637	13	*91	*2	196	4
Texas	18,681	2,711	15	1,631	9	*356	*2	724	4
Utah	2,036	406	20	245	12	*55	*3	106	5
Vermont	512	134	26	64	12	30	6	41	8
Virginia	6,136	842	14	488	8	135	2	219	4
Washington	5,293	968	18	749	14	*54	*1	165	3
West Virginia	1,464	322	22	111	8	*83	*6	128	9
Wisconsin	4,460	1,198	27	434	10	*260	*6	504	11
Wyoming	424	145	34	69	16	*30	*7	46	11

* Estimate based on a sample size of 10–29. ... Sample size too small (less than 10) to report data reliably. (NA) Not available. (Z) Less than 0.5 percent.

Note: U.S. totals include responses from participants residing in the District of Columbia, as described in Appendix D.