

# **AN ECONOMIC PROFILE OF RESOURCE-BASED TOURISM IN ONTARIO, 1999**

**Prepared for: Ontario Ministry of Tourism and Recreation  
Resource-Based Tourism Unit, Tourism Branch**

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## **Table of Contents**

<b>I. INTRODUCTION.....</b>	<b>3</b>
<b>II. EXECUTIVE SUMMARY .....</b>	<b>4</b>
<b>III. RESOURCE-BASED TOURISM IN ONTARIO .....</b>	<b>5</b>
<b>A. Visitors &amp; Their Spending in Ontario’s Resource-Based Tourism Region.....</b>	<b>5</b>
<b>B. Nights by Accommodation Type in Ontario’s Resource-Based Tourism Region.....</b>	<b>11</b>
<b>C. Activities - Overnight Visits to Ontario’s Resource-Based Tourism Region .....</b>	<b>12</b>
<b>D. Jobs, GDP, Taxes .....</b>	<b>13</b>
<b>IV. GLOSSARY .....</b>	<b>15</b>
<b>V. APPENDIX.....</b>	<b>17</b>
<b>A. Methodology .....</b>	<b>17</b>
1. Identifying Ontario’s Resource-Based Tourism Region.....	17
2. Identifying Ontario’s Resource-Based Tourists.....	18
<b>B. Census Divisions Designated as “Resource-Based” .....</b>	<b>20</b>
<b>C. Appendix Table 1 .....</b>	<b>21</b>
<b>D. Detailed Economic Impact Tables.....</b>	<b>22</b>
<b>VI. NOTES .....</b>	<b>25</b>

## I. INTRODUCTION

Ontario offers tourists outdoor experiences in its forests, meadows and hills and on its lakes, rivers and streams. These tourism experiences include visiting national and provincial parks, fishing, swimming, engaging in other water sports, hunting, walking and hiking, camping, skiing and wildlife viewing. The resource-based tourism experiences and the tourists who travel to engage in them bring economic activity to the areas of Ontario they visit. These resource-based tourism activities tend to occur on Crown lands and waters in Ontario. As a percentage of the land mass, Crown lands and waters encompass approximately 87% of Ontario.

This report, commissioned by the Resource-Based Tourism Unit, Tourism Branch of Ontario's Ministry of Tourism and Recreation (MTR), provides an estimate of the volume, value and economic importance of resource-based tourism activity in the province using information available from over 43,100 trip records with a destination or stop in Ontario contained in Statistics Canada's major domestic and international tourism surveys.<sup>1</sup>

Assuming estimates in the 50% range, findings are deemed to be accurate nineteen times out of twenty at  $\pm 2.8\%$  for domestic resource-based travellers;  $\pm 1.8\%$  for U.S.A. resource-based travellers; and  $\pm 5.8\%$  for overseas resource-based travellers. Additional methodological details and definitions are provided in the appendix to this report.<sup>2</sup>

The report covers *all* tourism activity in over 67 million hectares of Ontario's lands and waters, by visitors who engage in at least one outdoor or nature-oriented activity during their stay in Canada. Once a traveller is identified as a resource-based tourist or visitor, *all spending and nights in Ontario* for his or her entire stay in the province and *all activities* engaged in on the entire trip are included in estimates provided in this report.

## II. EXECUTIVE SUMMARY

- Many visitors engage in resource-based tourism activities on Crown lands and waters in Ontario. As a percentage of the land mass, these Crown lands and waters encompass approximately 87% of Ontario.
- During 1999, over 5.6 million Canadians, Americans and overseas visitors engaged in resource-based tourism throughout the 67 million hectares of Ontario's lands and waters that comprise the province's Resource-Based Tourism Region.<sup>3</sup>
- Resource-based tourism in Ontario tends to be *overnight* tourism. Of the 5.6 million resource-based trips in Ontario in 1999, close to 9-in-10 or 4.8 million were overnight trips. These trips generated almost 19 million person nights in Ontario's Resource-Based Tourism Region.
- Resource-based visitors and tourists spent almost \$1.1 billion in Ontario during their same-day or overnight stays in the province on all spending categories including accommodation, food/ beverage, transportation, recreation and retail. Most of this money – \$830 million – was spent in the province's Resource-Based Tourism Region. These values cover *all* tourism activities engaged in by these visitors.
- In total, \$2.2 billion in industry output (sales) were generated throughout the province in order to meet the demand of resource-based visitors. Over \$1.0 billion in sales was retained within the economy of Ontario's Resource-Based Tourism Region.
- Contribution to Gross Domestic Product (GDP) by resource-based visitors in Ontario reached \$1.0 billion for the province as a whole during 1999.
- Resource-based tourists' spending in Ontario's Resource-Based Tourism Region and in other parts of Ontario while getting to resource-based parts of the province generated approximately 18,900 direct jobs, and an additional 12,600 indirect and induced jobs province-wide.
- Of the 31,500 total jobs generated, 64%, or 20,400 part-time, full-time and seasonal jobs, were retained in Ontario's Resource-Based Tourism Region, while the rest were generated in other parts of Ontario.
- All levels of government benefited from tourism spending in Ontario's Resource-Based Tourism Region. Province-wide, this tourism activity generated \$452 million in taxes for all levels of government.

### III. Resource-Based Tourism in Ontario

#### A. Visitors & Their Spending in Ontario's Resource-Based Tourism Region

In 1999, there were 5.6 million resource-based tourists on same-day or overnight trips in Ontario (person visits).<sup>4</sup> Most of these visitors came from Ontario (71%), followed by Americans (21%), residents of other Canadian provinces (5%) and residents of other countries (3%) [see Table 1].

**Table 1**

<b>Resource-Based Tourists in Ontario's Resource-Based Tourism Region, 1999</b>		
Person Visits (000s)	Total	Percent
<b>Total</b>	<b>5,586</b>	<b>%</b>
Ontario	3,983	71%
Other Canada	268	5%
USA	1,175	21%
Other Countries	160	3%

*Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, page 2.*

Most resource-based tourism in the province takes place in the spring (24%) or, more commonly, the summer calendar quarter (58%). The first and fourth calendar quarters each accounted for just under one-tenth of all resource-based tourism in the province (9% each) [see Table 2].

**Table 2**

<b>Calendar Quarter of Visit to Ontario's Resource-Based Tourism Region, 1999</b>		
Person Visits (000s)	Total	Percent
<b>Total</b>	<b>5,586</b>	<b>%</b>
Quarter I (January – March)	522	9%
Quarter II (April – June)	1,335	24%
Quarter III (July – September)	3,251	58%
Quarter IV (October – December)	479	9%

*Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, page 34-1.*

Ontario's resource-based tourism region attracted 11% of all the visitors to the province in 1999, including 16% of same-day trips and 11% of all overnight trips with a destination in Ontario. Of the 11.8 million visitors to the 12 resource-based census divisions, close to half (47%) were travellers who engaged in resource-based activities on their trip (5.6 million) [see Table 3].

**Table 3**

<b>Volume of Resource-Based Tourism in Ontario, 1999</b>			
Person Visits (000s)	Total	Overnight Visits	Same-Day Trips
Total Person Visits – Ontario (All Activities)	105,362	39,148	66,213
Total Person Visits to Ontario’s Resource-Based Tourism Region (12 Census Divisions - All Activities)	11,845	7,408	4,438
<b>Resource-Based Tourism in Ontario (Visited Resource-Based Tourism Region &amp; Participated in Resource-Based Activity)</b>	<b>5,586</b>	<b>4,832</b>	<b>753</b>
<i>Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, page 34-1. Numbers in overnight and same-day columns may not add to total due to rounding.</i>			

Resource-based tourism in Ontario tends to be *overnight* tourism. Of the 5.6 million resource-based trips in Ontario in 1999, close to 9-in-10 (4.8 million) included nights spent in at least one of the Ontario’s twelve resource-based census divisions (87%) [see Table 3].

Furthermore, of the total (all activities) 7.4 million overnight visitors to Ontario’s resource-based tourism region, two-thirds or 4.8 million engaged in resource-based activities while on their trip. In contrast, of the 4.4 million total same-day visits to this region, only about one-sixth or 753,000 visitors included a resource-based activity on their trip [see Table 3].

Of all Ontario residents who travelled in the province’s resource-based tourism region, close to half (48%) engaged in resource-based activities in 1999. This is about the same level of resource-based activity that is evident among travellers from other Canadian provinces (47%) and among American visitors (43%) but appreciably lower than that evident among overseas visitors. Although relatively few overseas visitors went to Ontario’s resource-based tourism region (185,000), almost all who did travel to this region also engaged in at least one resource-based activity while on their trip to Canada (86% or 160,000) [see Table 4].

**Table 4**

<b>Tourists in Resource-Based Tourism Region Who Engage in Resource-Based Tourism Activities – By Origin, 1999</b>			
(Person Visits 000s)	Total Visits in Resource-Based Region	Total Visits in Resource-Based Tourism Region with Resource-Based Activities	% (Horizontal)
Total	11,845	5,586	47%
<b>Place of Origin</b>			
Ontario	8,374	3,983	48%
Other Canada	566	268	47%
USA	2,720	1,175	43%
Other Countries	185	160	86%
<i>Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, page 2.</i>			

In 1999, resource-based tourists in Ontario spent \$1.09 billion in the province. This spending represents 65% of the total \$1.68 billion spent in the 12 resource-based census divisions that constitute Ontario's resource-based tourism region [see Table 5]. Tourists who participated in resource-based activities are an important segment of the tourism economy in Ontario's resource-based tourism region, especially for the accommodation and recreation sectors, where they account for three-quarters of the region's tourism receipts.

**Table 5**

<b>Tourists' Spending in Ontario for Visits to Ontario's Resource-Based Tourism Region By Expenditure Type, 1999</b>					
<b>Expenditure Type</b>	<b>All Travel To Ontario's Resource Based Region</b>		<b>Travel To Ontario's Resource Based Region with Resource Based Activities</b>		<b>Resource-Based Share of Expenditure Category Spending (horizontal percent)</b>
	\$million	%	\$million	%	
Accommodation	\$ 434,685	26%	\$ 330,064	30%	76%
Food and Beverages	\$ 306,285	18%	\$ 186,699	17%	61%
Private Transport	\$ 265,009	16%	\$ 146,246	13%	55%
Recreation	\$ 168,489	10%	\$ 126,037	12%	75%
Retail/Other <sup>1</sup>	\$ 310,704	18%	\$ 164,754	15%	53%
Public Transport <sup>2</sup>	\$ 199,649	12%	\$ 135,502	12%	68%
<b>Total</b>	<b>\$ 1,684,821<sup>3</sup></b>	<b>100%</b>	<b>\$ 1,089,302</b>	<b>100%</b>	<b>65%</b>

*Source: 1999 Canadian and International Travel Surveys, Statistics Canada.*  
<sup>1</sup>Includes clothing, food/beverages bought at stores, other retail, other.  
<sup>2</sup>Includes local transport and carrier fares.  
<sup>3</sup>Includes spending that is assigned to their place of residence by residents of the twelve resource-based tourism census divisions for travel to locations outside the region.

Of the \$1.09 billion spent in Ontario by resource-based tourists, \$830 million was spent in Ontario's resource-based tourism region itself (12 census divisions) and \$259 million was spent in other parts of Ontario, primarily on the costs of getting to the resource-based tourism region (i.e., public carrier fares spent by foreign visitors that is assigned to their point of entry to Canada) [see Table 6].

**Table 6**

<b>Resource-Based Tourists' Spending in Ontario's Resource-Based Tourism Region &amp; Other Parts of Ontario on Trips to Ontario's Resource-Based Tourism Region, 1999</b>				
	Total	Canada	USA	Overseas
Spending Assigned to Resource-Based Region	\$ 829,857	\$ 355,737	\$ 422,886	\$ 51,234
Spending Assigned to Other Parts of Ontario	\$ 259,444	\$ 38,071	\$ 66,255	\$ 155,118
<b>Total</b>	<b>\$ 1,089,302</b>	<b>\$ 393,808</b>	<b>\$ 489,141</b>	<b>\$ 206,352</b>

*Source: 1999 Canadian and International Travel Surveys, Statistics Canada. Figures may not add to total because of rounding.*

Of the total expenditures associated with resource-based tourists, Ontario residents spent \$367.7 million (34% of the total) and Canadians from other provinces spent \$26.1 million (2% of the total), for a total of \$393.8 million in spending by the domestic market. Americans spent \$489.1 million (45% of the total) and residents of other countries spent \$206.4 million (19% of the total). The

comparatively large expenditure by overseas tourists in other parts of Ontario (\$155 million) reflects the inclusion of their transportation costs to reach Canada assigned to ports of entry in Ontario. These ports are generally outside the boundaries of the twelve resource-based census divisions.

Almost all expenditures made on resource-based tourism in Ontario by Canadian (90%) and American tourists (86%) accrues to the province's resource-based tourism region but only one-quarter of the expenditures made by overseas visitors accrues to these locations, again because of the substantive transportation spending assigned to parts of the province outside the resource-based tourism region [see Table 6].

Average spending on trips to Ontario's resource-based tourism region is appreciably lower among Canadians than it is among American or overseas visitors, likely because Canadians stay in private rather than commercial forms of accommodation and because public carrier fares to reach Canada are included in estimates of foreign visitors' spending.

On average, a Canadian same-day resource-based visitor spends \$24.00 per person in Ontario and the corresponding American same-day visitor spends \$93.00 per person. The disparities by origin are equally pronounced for overnight visits – on average, a resource-based Canadian tourist spends \$94.00 per person in the province while an American spends more than four times this amount or \$397.00 per person. At \$357.00 per person, the overseas resource-based tourism visitors' average overnight visit spending is much closer to the American's than it is to the Canadian's [see Table 7].

**Table 7**

<b>Average Per Person Per Visit Spending in Ontario on Resource-Based Trip, 1999</b>			
Per Person Per Visit	Canada	USA	Overseas
<b>Ontario's Resource-Based Tourism</b>	<b>\$84.00</b>	<b>\$360.00</b>	<b>\$320.00</b>
Same-day visit	\$24.00	\$93.00	N/A
Overnight stay	\$94.00	\$397.00	\$357.00
<i>Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, page 8-1. Averages reflect spending in Ontario among visitors to Ontario's resource-based tourism region who participated in resource-based activities on their trip.</i>			
<i>Note: averages are based on total spending in Ontario on resource-based trips, including spending assigned to parts of the province outside the twelve resource-based tourism census divisions. The base size for overseas same-day visitors is too small to produce reliable average spending estimates but same-day spending is included in the calculation of "total" overseas average spending. Inclusion of this same-day spending explains why the "total" is lower than the "overnight" average estimate.</i>			

Average party size for Canadians (1.9) and overseas resource-based visitors (2.0) is somewhat smaller than it is for Americans (2.5).<sup>5</sup> Conversely, the average length of stay in resource-based census divisions is higher among resource-based tourists from overseas (4.7 nights, on average) than is the case for Americans (3.6 nights, on average) or Canadians (3.0 nights, on average). These differences produce very different average spending estimates at the trip level: Canadians spend an average of \$160.00 in Ontario on a resource-based trip, Americans spend \$915.00 in the province and overseas visitors spend \$715.00 in Ontario, on average [see Table 8].



**Table 8**

<b>Average Per Visit Spending in Ontario on Resource-Based Trip, 1999</b>			
Per Visit	Canada	USA	Overseas
<b>Ontario's Resource-Based Tourism</b>	<b>\$160.00</b>	<b>\$915.00</b>	<b>\$715.00</b>
Same-day visit	\$51.00	\$208.00	N/A
Overnight stay	\$184.00	\$1,026.00	\$790.00

*Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, page 8-1. Averages reflect spending in Ontario among visitors to Ontario's resource-based tourism region who participated in resource-based activities on their trip.*

*Note: averages are based on total spending in Ontario on resource-based trips, including spending assigned to parts of the province outside the twelve resource-based tourism census divisions. The base size for overseas same-day visitors is too small to produce reliable average spending estimates but same-day spending is included in the calculation of "total" overseas average spending. Inclusion of this same-day spending explains why the "total" is lower than the "overnight" average estimate.*

Although resource-based visitors accounted for 47% of the total **visits** to Ontario's resource-based tourism region, their **spending** accounted for 66% of all spending by tourists in the region – including those who did *not* participate in any resource-based tourist activity [see Tables 9, 10].

**Table 9**

<b>Dependence of Resource-Based Census Divisions on Tourists Participating in Resource-Based Activities -- Spending, 1999</b>			
	Total Tourism Spending in Resource-Based Census Divisions (All Visits)*	Resource-Based Tourists' Spending in Resource-Based Tourism Region	Resource-Based Tourists' Spending as % of Total Spending in Resource-Based Tourism Region
	\$millions	\$millions	Horizontal %
<b>Ontario's Resource-Based Tourism Region (Total)</b>	<b>\$ 1,251,765</b>	<b>\$ 829,857</b>	<b>66%</b>
Nipissing	\$ 88,621	\$ 57,965	65%
Parry Sound	\$ 77,825	\$ 60,257	77%
Manitoulin	\$ 27,248	\$ 22,522	83%
Sudbury District	\$ 26,319	\$ 18,052	69%
Timiskaming	\$ 29,534	\$ 11,784	40%
Algoma	\$ 191,883	\$ 101,630	53%
Thunder Bay	\$ 147,809	\$ 66,533	45%
Rainy River	\$ 81,887	\$ 48,003	59%
Kenora	\$ 245,196	\$ 202,348	83%
Peterborough	\$ 101,501	\$ 50,085	49%
Muskoka	\$ 175,380	\$ 139,164	79%
Haliburton	\$ 58,562	\$ 51,516	88%

*Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, pages 17, 22.*

*\*All visits includes those that did or did not have a resource-based tourism activity.*

Individual census divisions with the most pronounced dependence on resource-based tourism as a proportion of total visits and total spending within the census division include Manitoulin, Kenora, Parry Sound, Haliburton and Muskoka. In each of these census divisions, resource-based tourism represents at least three-quarters of total spending assigned to the census division.

**Table 10**

<b>Dependence of Resource-Based Census Divisions on Tourists Participating in Resource-Based Activities – Person Visits, 1999</b>			
	Total Tourists in Resource-Based Census Divisions (All Visits)*	Resource-Based Tourists in Resource-Based Tourism Region	Resource-Based Tourists as % of Total Tourists in Resource-Based Tourism Region
Person visits	(000s)	(000s)	Horizontal %
<b>Ontario's Resource-Based Tourism Region</b>	<b>11,845</b>	<b>5,586</b>	<b>47%</b>
Nipissing	1,206	489	41%
Parry Sound	870	563	65%
Manitoulin	259	158	61%
Sudbury District	460	247	54%
Timiskaming	280	84	30%
Algoma	1,636	605	37%
Thunder Bay	1,215	544	45%
Rainy River	765	207	27%
Kenora	941	590	63%
Peterborough	1,666	503	30%
Muskoka	2,134	1,330	62%
Haliburton	706	505	72%

Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, pages 1, 2.  
 \*All visits includes those that did or did not have a resource-based tourism activity.

**B. Nights by Accommodation Type in Ontario's Resource-Based Tourism Region**

Of the 18.6 million person nights spent in the twelve-county region by resource-based tourists, over 1-in-3 were spent in private cottages by Ontario residents (5.8 million), other Canadians (487,000), Americans (591,000) and to a much more limited extent, visitors from overseas (24,000). Commercial housekeeping cottages, cabins, lodges and resorts are popular, especially among American visitors to Ontario's resource-based tourism region. These outdoor-oriented commercial lodgings account for almost 3.7 million person nights spent by resource-based visitors (20%) and almost half (2.4 million) of all the nights spent by those who come to Ontario from the USA (total 4.9 million). Camping is also a popular form of accommodation in the region, accounting for 2.8 million person nights over 1999 (15%) [see Table 11].

**Table 11**

<b>Resource-Based Tourists' Nights in Resource-Based Region, 1999</b>					
Person Nights (000s)	Place of Residence				
	Total	Ontario	Other Canada	USA	Overseas
Total	18,560	11,812	1,074	4,925	749
Hotel nights	555	280	11	211	53
Motel nights	458	89	4	311	54
Commercial cottage/cabin/lodge/resort*	3,683	1,095	70	2,365	153
Camping/trailer parks	2,765	1,746	210	705	104
Private cottages	6,904	5,802	487	591	24
Homes of friends/relatives	2,772	2,007	279	294	192

*Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, pages 16-1/2. Individual accommodation types do not add to total because of varying levels of "other" accommodation named by respondents. \*This category includes housekeeping cottages, hunting/fishing lodges, resorts, etc.*

**c. Activities - Overnight Visits to Ontario's Resource-Based Tourism Region**

Almost all resource-based **overnight** visitors participate in at least one form of outdoor activity that occurs on Crown lands<sup>6</sup>. While cottaging takes place on private lands, cottagers likely use the many bodies of water in the twelve resource-based census divisions of Ontario as a base for their recreational activities.

Swimming and other water sports along with fishing are especially popular activities among Canadian overnight visitors to Ontario's resource-based tourism region. Americans seem to be avid anglers and park visitors, shoppers and sightseers. Overseas visitors, on the other hand, are unlikely to fish or hunt on their trip but almost all of them shop or sightsee and most go to national or provincial parks, and/or visit friends and relatives (see Table 12 for percentages and Appendix Table 1 for figures).

**Table 12**

<b>Activities on Trip Among Ontario's Resource-Based Overnight Tourists, 1999</b>					
In Thousands (000s)	Place of Residence				
	Total	Ontario	Other Canada	USA	Overseas
Total Overnight Person Visits	4,832	3,414	243	1,033	142
<b>Resource-Based Activities</b>					
Hunt or Fish	39%	35%	38%	55%	13%
Camp	19%	18%	28%	18%	16%
National/Provincial Parks*	22%	12%	25%	44%	85%
Swim/Other Water Sports	50%	58%	54%	23%	48%
Cross Country Ski	1%	1%	2%	1%	1%
Downhill Ski	2%	2%	0%	1%	1%
<b>Other Activities</b>					
Visit Friends/Relatives	48%	51%	63%	28%	77%
Shop	29%	21%	28%	48%	90%
Sightsee	34%	27%	39%	49%	91%
<i>Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, pages 10-1/3. *Includes historic sites for USA/Overseas. Activities that were identified in the Canadian Travel Survey (CTS) but not in the International Travel Survey (ITS) are not shown here.</i>					

#### **D. Jobs, GDP, Taxes<sup>7</sup>**

Resource-based tourists' spending in Ontario's resource-based census divisions (and in other parts of Ontario while getting to resource-based census divisions) generated approximately 18,900 direct jobs, and an additional 12,600 indirect and induced jobs province-wide [see Table 13].

Of the total jobs generated (31,600), 64%, or 20,400 jobs, were retained in Ontario's resource-based tourism region (14,400 of which were direct jobs), while the rest were generated in other parts of Ontario. Estimates of jobs produced by the economic impact model use the same definition as is used in Statistics Canada's Labour Force Survey (LFS). Thus, jobs generated by the model include part-time, full-time and seasonal jobs. They also include paid employees and unpaid family employees [see Table 13].

In total, \$2.2 billion in industry output (sales) were generated throughout the province in order to meet the demand of resource-based visitors, 46% of which was retained within the economy of Ontario's resource-based tourism region.

All levels of government benefited from tourism spending in Ontario's resource-based tourism region as it generated, province-wide, \$452 million in taxes for all levels of government.

Details of the economic impact of resource-based tourism in Ontario's resource-based tourism region and province-wide are appended.

**Table 13**

<b>The Economic Impact of Resource-Based Tourism in Ontario, 1999<sup>1</sup></b>		
<b>Economic Impact Item</b>	<b>Resource-Based Tourism</b>	
(Millions)	Province-wide Impacts	Impacts Retained in 12 Resource-Based Census Divisions
<b>Resource-Based Tourism Spending Associated with Visits Ontario's Resource-Based Tourism Region (12 Census Divisions)</b>	<b>\$1,089.3</b>	<b>\$829.9</b>
<b>Total Industry Output (Sales)</b>	<b>\$2,231.5</b>	<b>\$1,020.4</b>
Direct – Tourism Related Industries	\$1,089.3	\$829.9
Direct – Other Industries & Indirect	\$ 566.7	\$17.2
<b>Gross Domestic Product (GDP)</b>	<b>\$1,023.7</b>	<b>\$493.3</b>
Direct – Tourism Related Industries	\$389.8	\$284.8
Direct – Other Industries	\$50.1	\$2.5
<b>Total Labour Income (Wages &amp; Salaries)</b>	<b>\$653.0</b>	<b>\$337.1</b>
Direct – Tourism Related Industries	\$293.1	\$213.4
Direct – Other Industries	\$26.7	\$1.2
<b>Total Employment (number of jobs<sup>2</sup>)</b>	<b>31,589</b>	<b>20,362</b>
Direct – Tourism Related Industries	18,061	14,433
Direct – Other Industries	882	50
Indirect	7,020	3,472
Induced	5,626	2,407
<b>Total Taxes</b>	<b>\$452.4</b>	<b>\$253.0</b>
Federal	\$207.9	\$110.2
Provincial	\$176.7	\$102.7
Municipal	\$67.8	\$40.1

<sup>1</sup>Preliminary and subject to change due to further revision. <sup>2</sup>Jobs = full time, part-time and seasonal employment. Jobs are actual numbers, not in millions. See Glossary for definition of "Tourism Related Industries".  
Sources: Statistics Canada, Canadian Travel Survey and International Travel Survey; Ontario Ministry of Tourism and Recreation, Tourism Regional Economic Impact Model (TREIM)

#### IV. GLOSSARY

**Directly Attributable To Tourism** refers to the portion of the tourism-related sectors' economic activity that is attributed to the tourists' spending.

**Direct Impact** refers to the impact that the tourists' spending has on the front-line businesses serving these tourists (i.e. the tourism-related sectors).

**Employment** jobs that are *attributed to tourism* are generated by MTR's economic impact model, which essentially converts tourists' expenditures in a particular industry to jobs according to the industry's production process and part-time/full-time ratios.

**GDP** this figure refers to the total value of wages & salaries, profits and indirect taxes (less subsidies) generated in the industries involved in the production process that is initiated with the tourists' spending.

**Gross Output** refers to the total sales achieved by all industries (direct and indirect) that participate in the production process initiated by the tourists' spending.

**Indirect Impact** refers to the economic impact resulting from the expansion of demand from the industries involved in the direct supply of goods and services to tourists, to other industries.

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

**Initial Impact** refers to the impact on GDP, labor income, jobs or taxes generated by tourism spending in tourism front-line businesses. These front-line businesses are those that sell products and services directly to tourists, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc.

**Jobs** Ontario's Tourism Regional Economic Impact Model (TREIM) uses the Statistics Canada's Labour Force Survey (LFS) definition of a job. Thus, jobs generated by the model include both part-time and full-time as well as seasonal. They also include paid employees as well as unpaid family employees. See *Employment* for jobs that are "attributed to tourism".

**Municipal Taxes** refers to business and property taxes collected by municipalities. Although in the long-term these taxes are correlated with the economic health of the community, in the short-term these taxes may not be related to the community's economic fluctuations.

**Resource-Based Activities** refers to the activities engaged in during the traveller's stay within Canada that have a direct relationship to the outdoors and are likely to occur on Crown land. The activities may or may not have taken place in Ontario census divisions that have been designated as part of the *resource-based tourism region*. Activities include only those captured in the Canadian and International Travel Surveys (Statistics Canada) and those included in the resource-based activity group are listed in the Appendix.

**Resource-Based Tourism Region** The twelve census divisions in Ontario deemed to have at least ten percent of their total land mass dedicated to specific types of Crown land for which MNR had census division level information: hectares of provincial parks, regulated conservation reserves and

OLL sites. Land mass information was provided by MNR. The census divisions included in the resource-based tourism region are listed in the Appendix.

***Resource-Based Tourism in Ontario*** To qualify as a resource-based tourist in Ontario, the same-day or overnight traveller must have had a destination or overnight stay in one of the twelve census divisions in Ontario deemed to have at least ten percent of its total land mass dedicated to specific types of Crown land (hectares of provincial parks, regulated conservation reserves and OLL sites) and to have engaged in at least one of the *resource-based activities* described above on his/her trip in Canada.

***Tourism*** Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.<sup>8</sup> In Ontario, the definition of tourism also excludes same day travellers who, in order to reach their destination, travelled less than 40 kms (one way) away from home.

***Tourism Related Industries*** refers to the sectors that supply the goods and services consumed by tourists. These sectors are: transportation (air, rail, bus and local), accommodation services, food & beverage services, amusement & recreation services, retail and “other” services (car rental, travel agents). Although these sectors supply the goods and services consumed by tourists, they also supply goods and services consumed by non-tourists. As such not all of these sectors’ revenues and jobs are attributed to tourists spending.



## V. APPENDIX

### A. Methodology

In order to generate estimates of resource-based tourism in Ontario, operational definitions were developed to identify the parts of the province that could be characterized as *Ontario's resource-based tourism region* and the types of visitors who could be characterized as *resource-based tourists*.

Using the best available information, two initial criteria were used in developing the operational or working definition of *resource-based tourism in Ontario*:

- 1) The location in which the tourism activity took place should be one in which a substantive proportion of the land mass is Crown land; and
- 2) The visitor had to engage in at least one resource-based tourism activity on his or her same-day or overnight trip.<sup>9</sup>

#### 1. Identifying Ontario's Resource-Based Tourism Region

To identify the parts of the province that would constitute *Ontario's Resource-Based Tourism Region*, MTR approached the Ministry of Natural Resources (MNR) to supply an estimate of the proportion of all Crown lands in each of Ontario's census divisions. The purpose of this request was to determine, based on the best information currently available, those census divisions that have a *high density* of Crown lands. Census divisions were selected as the unit of analysis because they are the smallest unit of analysis available in the Statistics Canada tourism surveys.

MNR responded to this request with a distribution of land mass devoted to three specific types of Crown land as measured in hectares for each of Ontario's census divisions:

- provincial parks,
- regulated conservation reserves, and
- Ontario Living Legacy sites.

Data were not available to provide an estimate of other Crown lands or bodies of water at the census division level. Thus, the operational definition to designate Ontario's Resource-Based Tourism Region includes three types of Crown land (provincial parks, regulated conservation reserves and OLL sites).

To identify "high density" resource-based census divisions, the proportion of total land mass devoted to provincial parks, regulated conservation reserves and Ontario Living Legacy sites was calculated for each census division. A filter was applied to produce twelve census divisions in which at least ten percent of all land mass is comprised of lands that form the operational unit for

this analysis: Ontario's resource-based tourism region. These census divisions are listed below in alphabetical order. The full distribution and proportions can be found in the following section.

### **Census Divisions in Ontario's Resource-Based Tourism Region**

Algoma  
Haliburton  
Kenora  
Manitoulin  
Muskoka  
Nipissing  
Parry Sound  
Peterborough  
Rainy River  
Sudbury District  
Thunder Bay  
Timiskaming

These twelve census divisions represent a single geographic unit from an analytical perspective even though they are not contiguous.

Cochrane and Renfrew are not included in Ontario's resource-based tourism region even though they attract resource-based tourism activity and expenditures because less than the minimum level of ten percent of their land mass is devoted to provincial parks, regulated conservation reserves and Ontario Living Legacy sites.<sup>10</sup>

## **2. Identifying Ontario's Resource-Based Tourists**

For the purposes of this report, to be considered a *resource-based tourist*, a same-day or overnight traveller visited at least one of the twelve Ontario resource-based census divisions and participated in at least one of the activities listed below.<sup>11</sup> The activity lists differ for Canadian and foreign travellers because Statistics Canada's domestic and international questionnaires have different activity options. It is important to note that these tourism surveys capture "activities on the trip" rather than activities in a specific location visited on the trip.

### **Activities Designated as Resource-Based Tourism**

#### **Canadian Tourists**

hunting or fishing,  
visiting national or provincial parks,  
bird or wildlife viewing,  
nature walks and hiking,  
camping,  
swimming or other water-based sports, and/or  
snowmobiling, cross-country or downhill  
skiing.

#### **USA/Overseas Tourists**

hunting or fishing,  
visiting national or provincial parks or historic sites,  
cross-country or downhill skiing,  
camping, and/or  
swimming and other water sports.

Once a traveller is identified as a resource-based tourist or visitor, all spending and nights in Ontario for his or her entire stay in the province and for *all* activities he or she may have engaged in on the trip are included in estimates provided in this report.

All estimates of tourism volume and value contained in this report derive from the 1999 Statistics Canada Canadian Travel Survey (CTS) and International Travel Survey (ITS). When this report was prepared, these were the most recent data available for all tourism flows to Ontario. Special tabulations of these surveys and this report were prepared for the Ontario Ministry of Tourism and Recreation (MTR) by Research Resolutions & Consulting Ltd. in March, 2002.<sup>12</sup> In addition to this report, detailed computer tabulations for Canada, USA and overseas resource-based tourism in Ontario have been provided to MTR (under separate cover).

**B. Census Divisions Designated as “Resource-Based”**

Note: An operational definition of Ontario’s resource based tourism area is used throughout this report. It is based on information available to MNR at the time this report was prepared. Thus, the operational definition includes only three types of Crown land: provincial parks, regulated conservation reserves and OLL sites. If information by census division for other types of Crown land were available, the designated region would likely be configured differently than it is.

	PROVINCIAL PARKS	REGULATED CONSERVATION RESERVES	OLL SITES	SUM OF CROWN LANDS	TOTAL HECTARES IN COUNTY	% Crown
<b>Census Divisions Designated as “Resource-based”</b>						
NIPISSING	696,616.27	8,135.14	44,549.59	749,300.99	1,801,159.00	41.601%
RAINY RIVER	475,935.92	-	-	475,935.92	1,681,714.00	28.301%
HALIBURTON	89,295.06	1,636.84	5,025.47	95,957.37	416,874.00	23.018%
THUNDER BAY	1,131,026.10	32,087.28	656,775.97	1,819,889.35	10,956,422.00	16.610%
PARRY SOUND	44,222.32	38,733.21	60,527.44	143,482.98	1,005,658.00	14.268%
MANITOULIN	26,599.42	301.25	16,676.63	43,577.30	367,892.00	11.845%
TIMISKAMING	70,504.74	23,765.06	48,927.98	143,197.77	1,270,539.00	11.271%
KENORA	3,776,974.09	761.05	443,116.27	4,220,851.42	39,687,108.00	10.635%
MUSKOKA	8,381.26	7,816.26	25,652.77	41,850.29	403,534.00	10.371%
SUDBURY	211,767.10	17,705.59	208,954.82	438,427.51	4,327,506.00	10.131%
PETERBOROUGH	3,709.09	645.22	34,321.29	38,675.59	395,611.00	9.776%
ALGOMA	205,986.11	52,999.35	234,293.96	493,279.42	5,120,690.00	9.633%
<b>Other Census Divisions</b>						
VICTORIA	1,492.32	-	23,111.41	24,603.73	306,690.00	8.022%
LENOX & ADDINGTON	9,392.61	7,392.34	2,069.92	18,854.87	284,071.00	6.637%
COCHRANE	148,042.30	48,465.98	375,093.52	571,601.80	14,561,801.00	3.925%
FRONTENAC	6,559.15	1,942.98	5,085.60	13,587.73	381,971.00	3.557%
RENFREW	5,589.68	-	9,983.02	15,572.70	764,568.00	2.037%
SUDBURY REGION	159.92	-	3,201.41	3,361.33	260,702.00	1.289%
HASTINGS	451.88	300.43	6,812.85	7,565.16	596,737.00	1.268%
KENT	2,987.39	-	-	2,987.39	249,443.00	1.198%
BRUCE	4,416.19	-	-	4,416.19	404,847.00	1.091%
SIMCOE	5,185.21	-	0.22	5,185.42	484,231.00	1.071%
DUFFERIN	1,500.55	-	-	1,500.55	149,031.00	1.007%
LEEDS & GRENVILLE	2,504.62	-	-	2,504.62	339,003.00	0.739%
LAMBTON	2,154.82	-	-	2,154.82	299,753.00	0.719%
PRESCOTT & RUSSELL	1,365.08	-	-	1,365.08	200,333.00	0.681%
HALTON	634.87	-	-	634.87	95,864.00	0.662%
LANARK	1,320.68	-	551.98	1,872.66	306,396.00	0.611%
PRINCE EDWARD	587.66	-	-	587.66	104,830.00	0.561%
NIAGARA	644.61	244.53	-	889.14	185,085.00	0.480%
GREY	1,486.34	-	-	1,486.34	450,501.00	0.330%
NORTHUMBERLAND	514.90	-	-	514.90	210,769.00	0.244%
PEEL	282.12	-	-	282.12	122,506.00	0.230%
YORK	375.98	-	-	375.98	175,564.00	0.214%
ELGIN	296.07	-	-	296.07	188,417.00	0.157%
HALDIMAND-NORFOLK	450.59	-	-	450.59	291,088.00	0.155%
OTTAWA-CARLETON	241.98	-	151.70	393.68	275,698.00	0.143%
ESSEX	252.46	-	-	252.46	186,149.00	0.136%
HURON	252.50	-	-	252.50	340,176.00	0.074%
MIDDLESEX	217.08	-	-	217.08	335,712.00	0.065%
DURHAM	149.92	-	-	149.92	248,962.00	0.060%
OXFORD	10.14	-	-	10.14	203,230.00	0.005%
BRANT	-	-	-	-	109,123.00	0.000%
HAMILTON-WENTWORTH	-	-	-	-	111,298.00	0.000%
PERTH	-	-	-	-	219,013.00	0.000%
STORMONT DUNDAS & GLENGARRY	-	-	-	-	330,181.00	0.000%
TORONTO	-	-	-	-	63,009.00	0.000%
WATERLOO	-	-	-	-	135,971.00	0.000%
WELLINGTON	-	-	-	-	265,940.00	0.000%

**C. Appendix Table 1**

<b>Activities on Trip Among Ontario's Resource-Based Overnight Tourists, 1999</b>					
In Thousands (000s)	Total	Ontario	Other Canada	USA	Overseas
Total Overnight Person Visits	4,832	3,414	243	1,033	142
<b>Resource-Based Activities</b>					
Hunt or Fish	1,867	1,183	93	572	19
Camp	911	630	68	190	23
Parks*	1,059	418	61	459	121
Swim/Other Water Sports	2,404	1,972	131	233	68
Cross Country Ski	54	36	5	11	2
Downhill Ski	98	84	-	12	2
Visit friends/relatives	2,297	1743	154	291	109
Shop	1,417	722	68	499	128
Sightsee	1,667	934	94	510	129
Source: 1999 Canadian and International Travel Surveys, Statistics Canada, special tabulations, pages 10-1/3. *Includes <i>historic sites</i> for USA/Overseas.					

## D. Detailed Economic Impact Tables

### Economic Impact of Resource-Based Tourism\*, 1999 (million \$s)

	Impact in 12 R-based Census Divisions	Impact in regions beyond the 12 Census Divisions	Ontario Total
Initial Tourism Spending	\$829.9	\$259.4	\$1,089.3
<b>Gross Domestic Product:</b>			
Initial**	\$284.8	\$105.0	\$389.8
Direct	\$2.5	\$47.6	\$50.1
Indirect	\$111.4	\$199.2	\$310.6
Induced	\$94.6	\$178.6	\$273.2
Total	\$493.3	\$530.4	\$1,023.7
<b>Labour Income:</b>			
Initial**	\$213.4	\$79.7	\$293.1
Direct	\$1.2	\$25.5	\$26.7
Indirect	\$78.0	\$113.4	\$191.4
Induced	\$44.5	\$97.3	\$141.8
Total	\$337.1	\$315.9	\$653.0
<b>Industry Output:</b>			
Initial**	\$829.9	\$259.4	\$1,089.3
Direct and indirect	\$17.2	\$549.5	\$566.7
Induced	\$173.3	\$402.2	\$575.5
Total	\$1,020.4	\$1,211.1	\$2,231.5
<b>Employment - Number of Jobs:</b>			
Initial**	14,433	3,628	18,061
Direct	50	832	882
Indirect	3,472	3,548	7,020
Induced	2,407	3,219	5,626
Total	20,362	11,227	31,589
<b>Taxes (Total):</b>			
Federal	\$110.2	\$97.7	\$207.9
Provincial	\$102.7	\$74.0	\$176.7
Municipal	\$40.1	\$27.7	\$67.8
<b>Taxes (Initial**):</b>			
Federal	\$80.3	\$29.7	\$110.0
Provincial	\$76.8	\$26.6	\$103.4
Municipal	\$27.6	\$7.8	\$35.4

Note: \* Preliminary and subject to change due to further revision.

\*\* "Initial" refers to the impact on GDP, labor income, jobs or taxes generated by tourism spending in tourism front-line businesses. These front-line businesses are those that sell products and services directly to tourists, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc.

Sources: Statistics Canada, Canadian Travel Survey and International Travel Survey

Ontario Ministry of Tourism and Recreation, Tourism Regional Economic Impact Model (TREIM)

**The Economic Impact of Resource-Based Tourism Expenditures in the Resource-Based Tourism Region \*, 1999**  
(million \$s)

	Ontario Total	Impact in 12 R-based Census Divisions	Impact in regions beyond the 12 Census Divisions
Initial Tourism Spending	\$829.9	\$829.9	\$0
<b>Gross Domestic Product:</b>			
Initial**	\$284.8	\$284.8	\$0
Direct	\$42.5	\$2.5	\$40
Indirect	\$241.9	\$111.4	\$131
Induced	\$207.1	\$94.6	\$113
Total	\$776.3	\$493.3	\$283.0
<b>Labour Income:</b>			
Initial**	\$213.4	\$213.4	\$0
Direct	\$22.6	\$1.2	\$21
Indirect	\$148.3	\$78.0	\$70
Induced	\$106.2	\$44.5	\$62
Total	\$490.5	\$337.1	\$153.4
<b>Industry Output:</b>			
Initial**	\$829.9	\$829.9	\$0
Direct and indirect	\$432.2	\$17.2	\$415
Induced	\$435.5	\$173.3	\$262
Total	\$1,697.6	\$1,020.4	\$677.2
<b>Employment - Number of Jobs:</b>			
Initial**	14,433	14,433	0
Direct	758	50	708
Indirect	5,610	3,472	2,138
Induced	4,328	2,407	1,921
Total	25,129	20,362	4,767
<b>Taxes (Total):</b>			
Federal	\$155.5	\$110.2	\$45
Provincial	\$132.8	\$102.7	\$30
Municipal	\$52.7	\$40.1	\$13
<b>Taxes (Initial**):</b>			
Federal	\$80.3	\$80.3	\$0
Provincial	\$76.8	\$76.8	\$0
Municipal	\$27.6	\$27.6	\$0

Note: \* Preliminary and subject to change due to further revision.

\*\* "Initial" refers to the impact on GDP, labor income, jobs or taxes generated by tourism spending in tourism front-line businesses. These front-line businesses are those that sell products and services directly to tourists, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc.

Sources: Statistics Canada, Canadian Travel Survey and International Travel Survey

Ontario Ministry of Tourism and Recreation, Tourism Regional Economic Impact Model (TREIM)

**The Economic Impact of Resource-Based Tourists' Spending in Other Parts of Ontario  
in Order to Get to the Resource-Based Tourism Region \*, 1999  
(million \$s)**

	<b>Total Ontario</b>	<b>Impact in Non R-based Census divisions</b>	<b>Impact in Rest of Ontario</b>
<b>Initial Tourism Spending</b>	<b>\$259.4</b>	<b>\$259.4</b>	<b>\$0</b>
<b>Gross Domestic Product:</b>			
Initial**	\$105.0	\$105.0	\$0
Direct	\$7.6	\$0.9	\$7
Indirect	\$68.7	\$41.8	\$27
Induced	\$66.1	\$38.8	\$27
<b>Total</b>	<b>\$247.4</b>	<b>\$186.5</b>	<b>\$60.9</b>
<b>Labour Income:</b>			
Initial**	\$79.7	\$79.9	\$0
Direct	\$4.1	\$0.4	\$4
Indirect	\$43.1	\$29.0	\$14
Induced	\$35.6	\$20.6	\$15
<b>Total</b>	<b>\$163</b>	<b>\$130</b>	<b>\$33</b>
<b>Industry Output:</b>			
Initial**	\$259.4	\$259.4	\$0
Direct and indirect	\$134.5	\$51.0	\$84
Induced	\$140.0	\$71.2	\$69
<b>Total</b>	<b>\$533.9</b>	<b>\$381.6</b>	<b>\$152.3</b>
<b>Employment - Number of Jobs:</b>			
Initial**	3,628	3,628	\$0
Direct	124	11	\$113
Indirect	1,410	997	\$413
Induced	1,298	842	\$456
<b>Total</b>	<b>6,460</b>	<b>5,478</b>	<b>982</b>
<b>Taxes (Total):</b>			
	<b>\$111.4</b>	<b>\$92.7</b>	<b>\$19</b>
Federal	\$52.4	\$42.7	\$10
Provincial	\$43.9	\$37.3	\$7
Municipal	\$15.1	\$12.7	\$2
<b>Taxes (Initial**):</b>			
	<b>\$64.1</b>	<b>\$64.1</b>	<b>\$0</b>
Federal	\$29.7	\$29.7	\$0
Provincial	\$26.6	\$26.6	\$0
Municipal	\$7.8	\$7.8	\$0

Note: \* Preliminary and subject to change due to further revision.

\*\* "Initial" refers to the impact on GDP, labor income, jobs or taxes generated by tourism spending in tourism front-line businesses. These front-line businesses are those that sell products and services directly to tourists, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc.

Sources: Statistics Canada, Canadian Travel Survey and International Travel Survey

Ontario Ministry of Tourism and Recreation, Tourism Regional Economic Impact Model (TREIM)



## VI. Notes

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<sup>1</sup> Based on Statistics Canada's 1999 Canadian Travel Survey (CTS) and 1999 International Travel Survey (ITS) for USA and overseas visitors to the province. Sample sizes: 21,382 trip records in the CTS with an Ontario destination from the household survey of 174,344 Canadians 15+ during 1999; 17,718 trip records in the ITS USA survey with a stop in Ontario from 34,696 self-completion surveys; and 4,046 trip records in the ITS Overseas survey with a stop in Ontario from 8,022 self-completion surveys.

<sup>2</sup> Sample sizes for resource based visitors and tourists in Ontario: 1,249 trip records in the CTS; 3,086 trip records in the ITS USA; and 288 trip records in the ITS Overseas file.

<sup>3</sup> Visitors with a main destination in a resource-based census division if Canadian or a visit in a resource-based census division if foreign, and with at least one resource-based activity on the trip (see Appendix for list of census divisions and activities). All data derive from special tabulations of Statistics Canada's Canadian Travel Survey and International Travel Survey, 1999.

<sup>4</sup> With the main destination in a resource-based census division if Canadian or a visit in a resource-based census division if foreign, and with at least one resource-based activity on the trip.

<sup>5</sup> See Special Tabulations, pages 28-1; 30-1 for figures.

<sup>6</sup> Estimates of the proportion of visitors who participate in a "Crown land" activity are based on the assumption that all water-based activities and land-based activities in national/provincial parks, and hunting occur on Crown lands and that some camping is also on Crown land (proportions were provided by MTR).

<sup>7</sup> *Economic impact* means the resources that were used to satisfy a sector's demand and the taxes that the economic activity associated with a sector's output generates. This section neither evaluates the costs of the various economic activities, nor the costs and benefits of other non-traded economic activities or non-economic activities generated by a sector's production/consumption.

<sup>8</sup> Excluded from the definition of tourism are: border workers and other travellers that commute to work, temporary immigrants, permanent immigrants, nomads, transit passengers, refugees, members of armed forces, representation of consulates and diplomats.

<sup>9</sup> MTR recognizes that these operational definitions are restricted by the realities of information available to estimate the parts of the province that have a high "density" of public or Crown lands and by the measures included by Statistics Canada in its major tourism surveys.

<sup>10</sup> Estimates of total tourism (person visits) and spending assigned to Cochrane and Renfrew in the original 1999 Canadian and International Travel Surveys (Statistics Canada) are shown below. Please note that these estimates include all travellers regardless of the types of activities they engaged in while on their trip.

Renfrew Census Division: Total Person Visits 1,444,000; Total Spending \$122,737,000

Cochrane Census Division: Total Person Visits 709,000; Total Spending \$73,977,000.

<sup>11</sup> The Canadian Travel Survey (CTS) contains a "main destination" variable but the International Travel Survey (ITS) does not. Consequently, for a Canadian traveller to qualify as a resource-based tourist in Ontario, he/she had to have participated in one of the listed activities and to have named one of the twelve resource-based census divisions as his/her main destination on an overnight or same-day trip. International visitors (USA and overseas) had to have participated in one of the listed activities and to have named one of the twelve resource-based census divisions as his/her destination same-day trip or to have spent at least one night in the census division on an overnight trip.

<sup>12</sup> Research Resolutions & Consulting Ltd., 16 Hepbourne Street, Toronto, ON M6H 1J9 (tel 416-531-9973; email rogers.judy@sympatico.ca).