

Arctic Development

**THE NORTHERN TOURISM EXPERIENCE - 1994 DOMESTIC & INBOUND MARKETS TO
CANADA'S NORTH**

STRATEGIC MARKETING PLAN FOR TOURISM FOR 1

Tourism

Analysis/Review

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The Northern Tourism Experience

1994 Domestic & Inbound
Markets To Canada's North

Prepared for:

*Canadian Tourism Commission
Department of Canadian Heritage
NWT Economic Development & Tourism
Saskatchewan Tourism Authority
Yukon Department of Tourism"*

Prepared by:

Judy Rogers


**Research
Resolutions**

September, 1996

The Northern Tourism Experience

G. Axley

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1. INTRODUCTION

Background

The *Northern Tourism Experience* Project is a multi-phased effort to learn more about tourism activity in Canada's North by examining tourism data from Statistics Canada's 1994 Canadian and International Travel Surveys (CTS, ITS). The project is, in part, an extension of the original examination of the country's Northern region — The Pilot Project (Phase 1) — reported in *Northern Highlights: A Summary of Tourism In Canada's North* (March, 1995).'

Components of the project include:

- Detailed computer tabulations of the 1994 Canadian and International Travel Surveys;
- *Domestic Tourism In Canada's North* — a report that compares domestic tourism in Canada's North in 1992 with comparable data in 1994 using a relatively broad definition of *The North*; and
- *The Northern Tourism Experience: 1994 Domestic & Inbound Markets* — a report that examines domestic, 'USA and Overseas tourism using a more remote definition of the region.

Support for the Northern *Tourism Experience Project* was provided by the following partners:

Canadian Tourism Commission
Department of Canadian Heritage
Northwest Territories Economic Development & Tourism
Saskatchewan Tourism Authority
Yukon Government, Department of Tourism

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- Northern Tourism Experience: 1994 Domestic & Inbound Markets

Northern Tourism Experience: 1994 Domestic & Inbound Markets provides an overview of tourism in Northern Canada in 1994, including trips made by Canadians, residents of the USA and Overseas. All information used in this report has been extracted from special tabulations of Statistics Canada's Canadian and International Travel Surveys (CTS, ITS).

The survey methodologies of the Canadian and International Travel Surveys are quite different and produce different units of analysis.² It is also important to note that the Yukon and NWT, along with all of Canada's Indian Reserves, are systematically excluded as points of *origin* by the Canadian Travel Survey. These locations are, however, included as possible *destinations* for qualifying trips taken by Canadians, Americans and visitors from other countries.

By segmenting Canada into *new* geographical regions such as North, South, Northeast and Northwest, estimates from the CTS and ITS provided herein do not necessarily match domestic or international tourism estimates provided by Statistics Canada. The reader is advised to utilize Statistics Canada data for all *official* statistics.



Key Concepts & Terms Used In This Report

CANADA'S NORTH

A geographic region defined in consultation with sponsors to reflect the northern portion of Canada. See Appendix C for the geographical definitions of this region.

NORTHEAST

A sub-set of Canada's North, eastward from the Manitoba/Ontario border. See Appendix C for further details.³

NORTHWEST

A sub-set of Canada's North, westward from the Manitoba/Ontario border. See Appendix C for further details.

EXPERIENCE (NORTHERN/ SOUTHERN)

Within the CTS (domestic market) records were assigned to Canada's North on the basis of the *destination* of the trip. Within the ITS (USA and other countries), the assignment was made on the basis of **any nights spent in** Canada's North. The same USA or Overseas trip can, and most often does, also include nights spent in Canada's South, but so long as the trip has **any** nights in the North, it is assigned only to the North. Hence, the terms "Any Northern Experience" and "No Northern Experience" are used within all international data.

GERMAN- SPEAKING COUNTRIES

Germany, Austria, Switzerland

OUTDOOR ACTIVITIES

An unduplicated count of trips in which participation in one or more of the outdoor activities provided in the CTS and ITS questionnaires is noted by the respondent, along with "any camping nights" (accommodation) and/or a visit to a national/provincial park. See Notes for the itemized activity list from each survey.'



**OVERSEAS/
OTHER
COUNTRIES**

Visitors from *overseas* are those who reside outside Canada and the USA. They are also referred to as visitors from *other* countries.

PEAK SEASON

April, May, June, July, August, September

**TRIP - Canadian
Travel Survey**

All CTS data derive from a telephone survey of Canadian households conducted with independent samples for each calendar month. Approximately 117,000 households were surveyed in 1994 to obtain the incidence and details of travel by Canadians, reported for a one-month period and aggregated over the year.

The unit of measurement within the CTS is a qualifying trip made by individuals 15 years of age or over. A qualifying trip is made for any purpose other than commuting to work or school, moving to a new residence, or as a member of a crew. All trips included in this analysis require that the individual travel a minimum of 80 kilometres one way from home.

A *household trip* in the CTS is the trip taken by the designated respondent, regardless of the number of people from the household that went on the trip. The household trip is, therefore, a measure of the occurrence of a trip rather than a reflection of the number of people in the household who took the trip.

A *person trip* in the CTS is the total number of household members who accompanied the designated respondent on a trip he/she made.

**TRIP - International
Travel Survey**

The unit of measurement within the ITS is a trip to Canada by residents of countries other than Canada. Self-completion questionnaires are distributed to a sample of non-residents as they enter Canada, for completion and return once the trip is over. Although response rates for USA and Overseas visitors are low, the returned questionnaires are projected to actual border crossing counts.



Travel party is the reporting unit within the ITS. A travel party might include more than one household.

A *person trip* in the ITS is the total number of individuals on the trip to Canada. A *party trip* in the ITS is the occurrence of the trip, regardless of the number of people in the travel party.

**“TRIPS” &
‘VISITORS’**

Throughout this report, *trips* and *visitors* are occasionally used to denote all trip measures, including *person trips* and *household or party trips*. *Summary* tables are always based on analogous units: *person trips* for both the ITS and CTS or *household trips* for the CTS and *party trips* for the ITS. The unit — person or household/party — used in the summary table is identified in the notes at the base of each table.

II. THE NORTHERN TOURISM EXPERIENCE: CHALLENGES & OPPORTUNITIES

The main body of this report provides a summary of findings contained in hundreds of pages of detailed computer tabulations from the Canadian and International Travel Surveys (1994). For estimates of the size and value of tourism in Canada's North and the characteristics of the market, the reader is directed to Chapters III through VI of the main report. In the following paragraphs, some of the tourism challenges and opportunities offered by the vast Canadian North are described.⁵

The Northern tourism experience is like any other travel experience for many Canadians.

Even though Canadians represent about 8-in-10 overnight visitors to Canada's North over the year, most of these people are *not* traveling for pleasure. Instead, they are in the North to visit with their friends and relatives, to conduct business, or for other reasons. Fewer than 4-in-10 Canadian visitors in the North are there for pleasure, compared to 3-in-4 American visitors and 2-in-3 Overseas visitors to the region.

MAIN PURPOSE OF TRIPS TO CANADA'S NORTH - ALL SEASONS'

	Among Canadians	Among Americans	Among Overseas Visitors
Pleasure	38%	74%	68%
Business	16/0	50/0	7%
Visit Friends & Relatives	41%	8%	22%
Other Purposes	5/0	14%	4%

Although they are less likely to be on pleasure trips, Canadians are the only year-round source of tourism for the North.

Canadians utilize their North as a tourism destination at more than twice the rate Americans and Overseas visitors do during the *winter*. About two-fifths of all overnight trips taken by Canadians to the North occur in the six month period between October and March.

The North is a *fair weather* destination for the non-domestic market.

The concentration of American and Overseas trips to the North in the six month period from April through September, and particularly in July, August and September is consistent with these markets' utilization of the North as a *pleasure trip destination*.

TIMING OF TRIPS TO CANADA'S NORTH⁷

	Among Canadians	Among Americans	Among Overseas Visitors
Quarter I	18%	80/0	4%
Quarter II	26%	27%	30%
Quarter III	37%	58%	57%
Quarter IV	20%	7%	8%

On a year-round basis, most Canadians do not utilize the outdoors in the North.

Because Canadian trips tend to be more evenly spread throughout the year and have a wider variety of purposes, they utilize traditional "tourism" infrastructure such as commercial accommodation and restaurants at a lower rate than is evident within the non-domestic market. In fact, about 6-in-10 Canadian trips to the North over a full year include *no* outdoor activities and rely on non-commercial accommodation such as private cottages and the homes of friends and relatives.

USE OF INFRASTRUCTURE IN CANADA'S NORTH -- ALL SEASONS*

	Participate In No Outdoor Activity In Canada's North	Use Non-Commercial Accommodation
Canadians	63%	58%
Americans	24/0	14%
Overseas Visitors	14%	26%

Canada's dominance as the source of tourism in the North diminishes quite dramatically within the peak season *pleasure* market.

Although they continue to represent the majority of holiday visitors with a Northern experience during the six months between April and September, Canadians make only 6-in-10 of the 1.8 million overnight pleasure trips to the region in peak season. Residents of the USA contribute more than 1-in-3 of these trips and Overseas residents contribute 1-in-20.

OVERNIGHT TRIPS TO CANADA'S NORTH⁹

	All Purposes - All Seasons	Pleasure - Peak Season
Total Person Trips (1994)	5,109,000	1,834,000
By Canadians (Total)	78%	59% ¹⁰
By Northern Residents	24%	17%
By Southern Residents	54%	42%
By Americans	19%	36%
By Overseas Visitors	3%	5%

Residents of Canada's South constitute a pleasure travel market that is somewhat larger (42%) than the American market (36%). Because so many of these Canadians are *cottagers* or stay with friends and relatives, however, they do not make the same contribution to public and commercial activities or to the economy of Northern communities as do American visitors.

While technically a part of the "pleasure" market, the 6-in-10 overnight trips by Canadians who do not use commercial accommodation, including more than 3-in-10 who are staying in private cottages, suggest a relatively intractable domestic tourism base. This market is unlikely to respond to traditional marketing approaches for increased *touristic* utilization of the region. At the same time, cottagers make a different type of contribution to the North: they pay property taxes, rely on local utilities and, to some extent, on the services and retailers in local communities.¹⁰

Canadians make the most substantial contribution to economic activity in the North over the full year, but Americans are the key source of consumer spending in the peak season pleasure market.

The prominence of Canadians as a source of tourism spending in Canada's North over the year is a function of their year-round use and their correspondingly high volume of trips to the region. It also reflects the high-cost, year-around business trips they make to the region. Canadians account for almost two-thirds (\$738 million) of the \$1.2 billion in consumer spending that *remains* in Canada's North over twelve months. In contrast, American visitors leave about \$354 million in the North, and their Overseas counterparts spend \$62 million in the region during the full year.

Within the *peak season pleasure market*, however, it is the Americans rather than the comparatively high-volume, low-spending Canadians that make the greatest contribution to the tourism economy of the region. They spend \$321 million during the six month peak season, compared to Overseas visitors' \$54 million,

SPENDING THAT STAYS CANADA'S NORTH¹¹

	All Purposes - All Seasons	Pleasure - Peak Season
Total Spending That Stays In Canada's North (1994)	\$1,154,000,000	\$493,000,000
By Canadians	64%	240/o
By Americans	31%	650/o
By Overseas Visitors	5%	11%0

Once the many family visits and business trips with their particular reliance on the commercial accommodation and rest aurant sectors are removed, Canadians account for only \$118 million in spending that remains in the North (24% of total peak season pleasure spending).

Spending patterns between American and Overseas visitors are similar, with the exception of accommodation, recreation and retail.

Average per person per night spending that is retained by the North from American and Overseas visitors in the peak season are about the same for transportation in Canada^z, and food/beverages, but Americans spend somewhat more money on

accommodation, and on recreation and entertainment than do Overseas visitors. Conversely, Overseas visitors seem to spend more money shopping — and are

PER PERSON PER NIGHT AVERAGE SPENDING THAT STAYS IN CANADA'S NORTH -- PEAK SEASON, PLEASURE¹³

	Americans	Overseas Visitors
Per Person Per Night Average (Total)	\$117	\$122
Accommodation	\$46	\$37
Transportation In Canada	\$20	\$25
Food & Beverages	\$22	\$26
Recreation	\$18	\$11
Other/Retail	\$11	\$23

more apt to “go shopping” as an activity — than are Americans. Their lower shelter costs likely reflect Overseas visitors’ propensity to stay with friends and relatives in the North rather than in commercial forms of accommodation.

The North American market for Canada’s North is “close by”, creating very different feeder markets for the Northeast and Northwest.

For the most part, *eastern* Canadians and Americans go to destinations in Canada’s *Northeast* and *western* Canadians and Americans go to locations in Canada’s *Northwest* on their pleasure trips. Proximity and available automobile access routes between Ontario and the East North Central and West North Central States such as Michigan, Wisconsin and Minnesota make these the key North American feeder markets for the Northeast.

In contrast, Pacific states, and the more densely populated western Canadian provinces - Alberta and British Columbia - are the primary feeder markets for the Northwest. The Americans who spend a night in the Northwest, and particularly Alaskans with any nights in the Yukon include those “in transit”, likely traveling on the Alaska Highway.



KEY SOURCES OF PEAK SEASON PLEASURE TRIPS¹⁴

	To Canada's Northeast	To Canada's Northwest
Canada	56%	63%
USA	42/0	28%
East North Central States	24%	4%
West North Central States	10/40	3%
Mountain States	1%	4%
Pacific States	*	8%
Alaska		3%
Overseas	2%	9%
German-Speaking Europe	1%	5%
All Other Europe	1%	3%
All Other	*	1%

*Less than 0.5%.

Americans are more important for the Northeast but the Northwest attracts a higher proportion of Overseas visitors.

Almost one-tenth of the peak season holiday traffic in Northwestern Canada comes from Overseas, with one-twentieth emerging from Germany, Austria and Switzerland. In contrast, the Northeast draws only one-fiftieth of its peak season pleasure visitors from outside North America.

Trips by American or Overseas visitors to Canada's North bring *enhanced* benefit to Canada as a whole.

To *reach* Canada's North, most Overseas and many American visitors must spend some time in Canada's South. The reality of access routes brings with it considerable benefit to Canada as a whole in terms of the number of nights spent and corresponding revenues for the nation's tourism industry.

NUMBER OF NIGHTS IN CANADA/THE NORTH -- ALL PURPOSES,
ALL SEASONS⁸

	Americans	Overseas Visitors
Average Nights In Canada On Trips With Any Canadian Destination	3.8	10.8
Average Nights In Canada On Trips With At Least One Night In The North	5.7	16.3
Average Nights In The North On Trips With At Least One Night In The North	4.2	5.2
NET BENEFIT	1 T O 2 EXTRA NIGHTS	5 T O 6 EXTRA NIGHTS

In effect, *Canada* obtains one to two extra nights per trip on the American trip with at least one night spent in the North, and between five and six extra nights per trip on the analogous Overseas trip.

Considerable spending accrues to Canada's South on trips by American and Overseas visitors with any nights in the North.

Because they spend more nights in the South per trip than do Americans, Overseas visitors who go to the North end up spending about three-quarters of their total expenditures in Canada's *South* on key items such as accommodation, food and beverages, recreation and retail. In contrast, Americans with at least one night in the North spend between three-quarters and two-thirds of their money in Canada's North.

% OF SPENDING ON . . . THAT STAYS IN CANADA'S NORTH¹⁶

	Americans	Overseas Visitors
Accommodation	75%	28%
Food/Beverages	67/0	26/0
Recreation	73%	28%
Retail	64/0	29/0



Since their spending is so much more concentrated in the North, American visitors seem to be a more attractive market for Northern tourism operators to pursue.

Even though the Overseas market may involve higher per trip spending than does the American trip, only a small proportion of this spending actually *occurs* in Canada's North. The Overseas market, and particularly those coming from non-European countries, also show a relatively strong inclination to visit friends and relatives in the North, thereby reducing their utilization of and spending in the accommodation and hospitality sectors of the region. For these reasons, Americans may be a more cost effective market for Canada's North to attract.

Activity profiles suggest that trips to the North are outdoor-based.

Canadians, American and Overseas visitors in Canada's North take pleasure trips for different experiences. The reader should note that the activities listed could have taken place *anywhere* in *Canada*. For the domestic market, the likelihood that the activities actually took place in the North is somewhat greater than is the case for the American market. In turn, Americans spend one to two nights in Canada's South on their trips North, suggesting that some of their activities may take place in the South. Overseas visitors' activities are the most likely to be split between the North and South since these visitors spend five to six nights in the South on their Northern trip.

Canadians who go to the North are *not* "typical tourists".

Their primary activities include seeing friends and relatives (450/0), going to cottages (320/0), and fishing (37?40). They do not shop, sightsee, go to parks or historic sites, or engage in cultural experiences at anywhere near the rate that Americans and Overseas visitors in the North do.

Of the three visitor groups, those from Overseas are most inclined to follow the "typical tourist" pattern.

Almost all sightsee (900/0), shop (860/0) and go to parks or historic sites (85%). They also go to zoos, museums, or natural displays (64%); dine out or go to clubs (45%);

“camp (400/o); and visit friends and relatives (36%), although these activities may occur in Canada’s North or South. Unlike Americans and Canadians on trips to Canada’s North, Overseas visitors are not particularly interested in fishing.

ACTIVITIES ON OVERNIGHT PEAK SEASON PLEASURE TRIPS TO CANADA’S NORTH

	Canadians	Americans	Overseas Visitors
	%	%	, %
Visit Friends & Relatives	45	15	36
Shopping	19	58	86
Sightseeing	29	66	90
Festival/Fair	5	14	14
Sports Event	6	3	9
Museum/Art Gallery	6	N/A	N/A
Zoo/Museum/Natural Display	N/A	28	64
Zoo/Natural Exhibit	4	N/A	N/A
Cultural Performance/Events ¹	2	6	14
Swim/Other Water Sports	23	11	25
Hunting/Fishing	37	33	15
Dining/Nightlife*	19	37	45
National/Provincial Park/Historic Site ³	16	58	85
Any Cottage Nights	32	6	1
Any Camping Nights	30	27	40
At Least One Outdoor Activity	69	85	94
No Outdoor Activities	31	15	7

¹ITS attending cultural events; CTS attend cultural performance. ²Includes Dining in high quality restaurant, night-life/entertainment.. ³In ITS, category includes “regional parks”.

Americans fall between the Canadian and Overseas visitors to the North in their shopping, sightseeing, and park/historic site visitation patterns, but they closely resemble Canadians in their interest in fishing and camping.



Camping is particularly popular among West Coast Americans and visitors from German-speaking Europe whereas non-European Overseas visitors are likely to stay with friends or relations.

Almost one half of the visitors from the three Pacific states — Washington, Oregon and California — spend nights camping in Canada's Northwest. From the national perspective, one-third of all American visitors who camp in the North live in Pacific or Mountain states, or Alaska. German-speaking Europe yields about one-half of all the Overseas campers in the North, and countries outside of Europe generate the highest proportion of Overseas house guests in the region (41%).¹⁷

American *Anglers* are very single-minded -- they come to fish and that's about all they do!

Almost one-half of the Americans who fish on a peak season pleasure trip in Canada's North engage in no *other* outdoor activity. Only one-third go to park or historic sites, shop or sightsee while on their trip. Anglers are concentrated in Canada's Northeast. In fact, of all American "fishing trips" to the North in the peak season, more than 8-in-10 include nights in the Northeast. These Anglers, like the Northeastern USA visitor base as a whole, tend to come from three states: Minnesota, Wisconsin and Michigan.

The heavy concentration of American Anglers in Canada's Northeast creates a relatively homogenous visitor base for the region.

Americans who come to the Northeast in the peak season seem to come for the fishing, whereas those who go to the Northwest are more likely to engage in a variety of nature-based activities including camping, and visiting park or historic sites. British Columbians, Albertans and Californians are the primary sources of broad-based nature-oriented tourism in Canada's Northwest.

Canada's national and provincial parks and historic sites are equally popular in the Northeast and Northwest.

Even though Anglers may be concentrated in the Northwest and campers maybe focused on Canada's Northwest, visits to national, provincial parks and historic sites are equally common in each northern region.

Fishing and national/provincial parks and historic sites are the single largest activity-based economic drivers in Canada's North during the peak season.

Of the \$771 million that *stay* in the North in the peak season, one-third are linked to fishing trips (\$256 million). About the same amount is associated with visits to the country's parks and historic sites (\$252 million). Camping trips account for about \$137 million, and those with no outdoor activities represent more than one-third of the peak season total (\$275). (Note: The same spending may appear in more than one activity group since the activity groups are not mutually exclusive.)

**SPENDING ASSIGNED TO THE NORTH BY ACTIVITY GROUPS --
PEAK SEASON**

Total Spending Assigned To The North In Peak Season	\$771 Million	
	\$	%
Any Parks/Historic Sites	\$252 million	33% •
Anglers/Hunters	\$256 million	33?40
Any Camping	\$134 million	17%
No Outdoor Activity	\$275 million	37%
1-2 Outdoor Activities	\$389 million	50?40
3+ Outdoor Activities	\$102 million	13%

Access corridors and product diversity are impediments to getting the large American visitor base in the Northeastern and Midwestern USA to Canada's North on more than a "fishing trip in Northern Ontario".

Throughout the findings, Canada's Northeast emerges as a *cottaging and/or fishing* peak season destination for Ontarians and for residents of midwestern and eastern



border states such as Minnesota, Michigan and Wisconsin. Almost no domestic tourism for the North emerges from Canada's second largest province - Quebec - to either the Northeast or the Northwest. In fact, whether from the Canadian or American perspective, there is minimal tourism activity in Canada's North that crosses a "continental divide" at the Manitoba/Ontario border.

Undoubtedly, the focus on the Northeast by Ontarians, and by East and West North Central USA residents is related to the highway network since most American Northern visitors enter Canada by car (63%) or bus (18%), and almost all Canadians in the North are in their cars. But access routes are not a sufficient explanation for the relatively undiversified visitor base in Northeastern Canada, particularly in light of the Northwest's ability to attract greater activity diversity and greater regional (origin) diversity. Either the Northwest has a more developed and diversified product base to offer potential visitors than does the Northeast, or it has been more successful at communicating its product offerings to the North American and Overseas markets than have Northern Ontario, Quebec and Newfoundland/Labrador.

Canada's North has a special appeal to men and to young people in the peak season.

More American and Canadian peak season visitors to the North are men than are women, reflecting the special enthusiasm men seem to have for fishing and camping. Perhaps because fewer of them are Anglers, Overseas visitors to the North are as likely to be men as women. Almost all groups who travel in the North are made up of people over fifteen years of age, although higher proportions of Canadian and Overseas trips are composed of people in the teenage and young to middle-aged adult segments (15 to 24 years; 25 to 44 years) than is the case among Americans.

The USA market for the North, and particularly for Canada's Northwest is somewhat older. About 3-in-10 American travel parties to the North are composed entirely of adults who are 55 years of age or over (25% for the Northeast and 33% for the Northwest).

The North, like all destinations, attracts fewer Canadians over 65 years than would be expected in light of this age group's share of the total adult population. Again, like all other destinations for overnight pleasure trips, the North attracts somewhat more affluent Canadians — about one-third have household incomes of at least \$60,000.

Each regional sponsor has a somewhat different market profile.

The Yukon's non-resident travel market is highly dependent on overnight visitors from the USA (79%), although a significant minority of the trips originating in Alaska are "pass through" trips for the Yukon. In addition to Alaska, the Yukon draws much of its USA tourism from the three Pacific states.

The NWT is more dependent on Canadian tourism than is the Yukon, and correspondingly less dependent on tourism from the USA or Overseas.

Within the Overseas market, the Yukon and Northwest Territories (combined) are particularly attractive to Germans: 4-in-10 overseas trips over the year to the Territories are made by residents of Germany. Switzerland and Austria contribute a further 1-in-8, making German-speaking Europe a key source of overseas visitation to the region (53%). Australia and New Zealand also contribute to tourism in the Territories (10Vo).^{*8}

Because information on Northern Saskatchewan includes both resident and non-resident, it is not surprising that this region relies heavily on its own and neighboring provinces for its tourism. More than 9-in-10 trips to Northern Saskatchewan are made by Canadians.

Some conclusions and next steps . . .

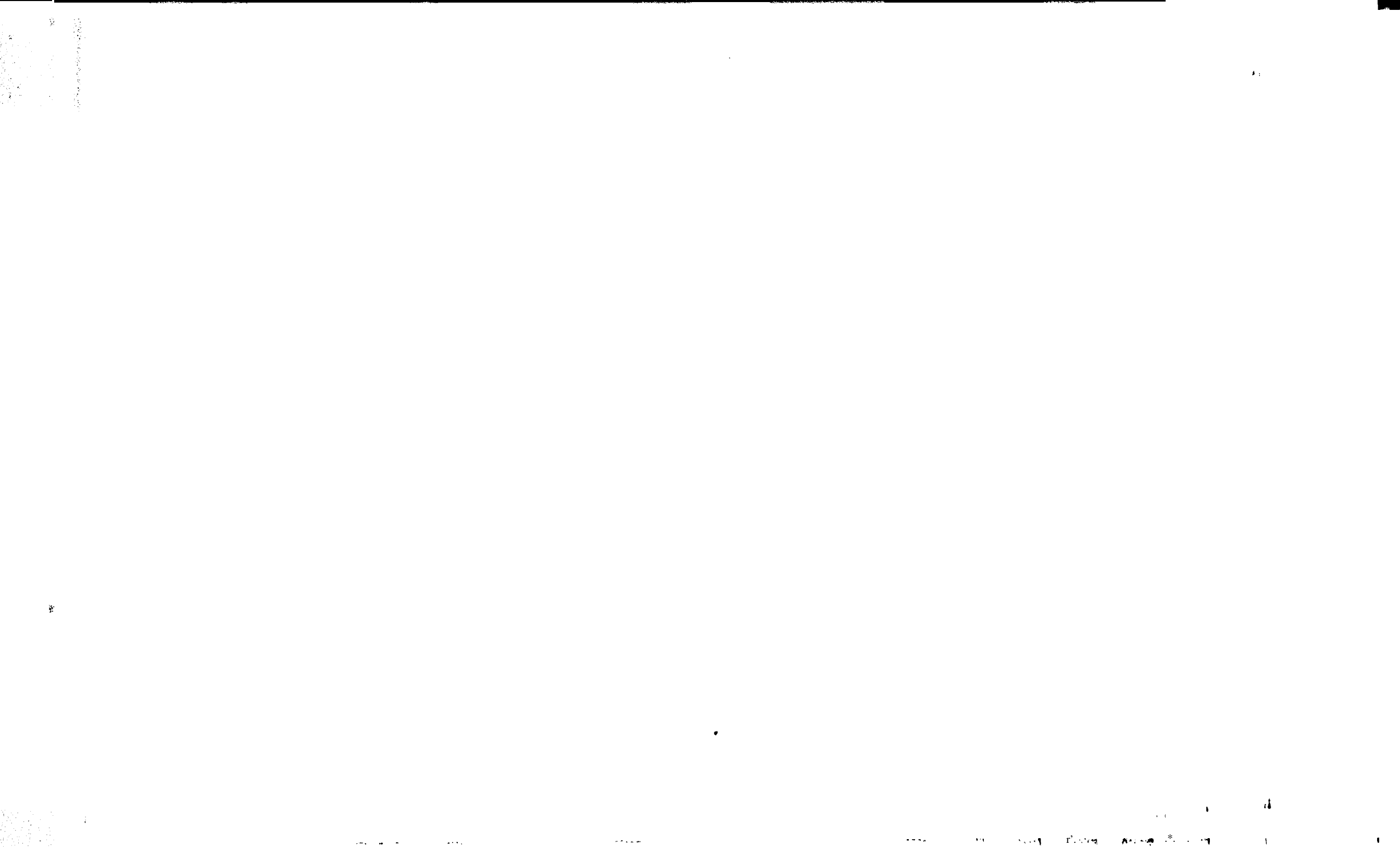
- . Canada's North emerges as a multi-faceted tourism region that offers many different tourism experiences and attracts very different types of visitors from around the world. From an economic perspective, however, the North relies very heavily on nature-based tourism, and particularly, on fishing.
- . The Northwest is particularly attractive to Western Canadians and Americans and to German-speaking Europeans who enjoy camping and other non-consumptive outdoor experiences. The Northeast, on the other hand, draws a very high proportion of Anglers, primarily from Ontario and nearby states such as Michigan, Wisconsin and Minnesota.

- Markets for the Northwest, and to an even greater extent, the Northeast are primarily “regional”. They reflect road access routes and proximity. There are, therefore, opportunities to break down regional barriers by creating or packaging tourism activities that entice potential visitors to go further afield than they currently go.
- Very little non-domestic pleasure travel occurs in the North in non-peak periods, leaving the region reliant on Canadians who visit friends and relatives and conduct business there to support hotels, restaurants, and the tourism sector in general between October and March. Even though most American and Overseas visitors to Canada’s North are traveling without school-aged children, and are not hindered by the realities of “school breaks”, their activities suggest that they are “fair weather” visitors. Almost all participate in at least one outdoor activity while on their Northern trip — activities such as camping and fishing that may not be readily shifted to other seasons.
- There are strong economic arguments to be made to encourage American and Overseas travel to Canada’s North since these trips provide *extra* benefits to tourism in Canada as a whole. More nights are spent *in Canada* on a trip that includes an overnight stay in the North than on those that do not include the North as part of the itinerary. Thus, by enticing a visitor to the North, the tourism industry in both the North and South benefits.
- On balance, the American market is more beneficial for Canada’s North than is “the Overseas market. Not only do *more* Americans take trips in the North than do Overseas visitors, but they make a considerably greater economic contribution to the North than do those coming from other countries. The North *retains* about three-quarters of American visitors’ total trip spending on key items such as accommodation, food, entertainment and shopping, but retains only *one-quarter* to one-third of this spending from Overseas visitors.
- Activity and origin profiles reveal numerous visitor segments that should be amenable to targeted marketing efforts. For example, Anglers spend more nights away from home on their trips than do other activity segments. If they are Americans, they are also heavily reliant on commercial cottages and lodges for accommodation. They use boats and private planes to a considerably greater extent than do other Northern visitors . . . and many *only* fish while in the North. Park Visitors, on the other hand, are closer to “all round tourists” — they sightsee, shop, go to festivals and fairs, camp out, eat in restaurants or



go to clubs. About one-fifth of the American Parks/Sites Visitors to the North seem to be on bus tours whereas none of the American Anglers is.

- . Tourism planners and marketers are encouraged to explore the report and detailed tabulations in pursuit of market segments of key interest, while recognizing that differences in question structure between the ITS and CTS create difficulties in combining the sizeable domestic market for Canada's North with the USA and Overseas markets to build a profile of specific activity groups such as "all anglers", "all hunters" or "all park visitors". Such profiles would be extremely useful, but cannot be created until the activity list in the ITS is made identical to the one used in the CTS.¹⁹
- To maximize the utility of *The Northern Tourism Experience Project*, more analysis should be undertaken. Based on the information examined to date, fruitful *next steps* might include the following
 - . Activity-based reports, focusing on the characteristics of specific activity segments in the entire North or in a particular region;
 - . Origin-based reports, looking at the differences between visitors from the Western United States and those from the Mid-West and North Central states or specific provinces or states, as base sizes permit; and
 - . Comparisons between activity segments in Canada's South and their counterparts in the North to determine the possibilities for attracting "Southern visitors to the North and to identify the unique features of the North that do not seem available in the South.



III. NORTHERN TOURISM — 1994

A. MAJOR TOURISM MARKETS

1. Putting The North In Perspective

Canada's North is a vast expanse of lakes, forests and tundra with a few communities and many natural attractions and resources. Although it covers a tremendous amount of 'Canada's land mass, it attracts relatively few visitors.

Of the 88 million overnight person trips taken by Canadians in 1994²⁰

fewer than 4 million had a destination in Canada's North (5%). These trips are about evenly divided between those destined for the Northeast (1.8 million) and the Northwest (2.2 million).

Table 1

Overnight Trips To Canada			
	Origin		
	Canada	USA	Other Countries
Total (000's)	87,984	11,853	3,225
Destination/Location Of Nights Spent	%	%	%
Canada's North	5	8	5
Northeast	2	5	1
Quebec/Nfld	1	*	*
Ontario	2	5	1
Northwest	3	3	3
Man/Sask	1	*	*
Alberta	1	*	1
B.C.	1	1	2
Yukon/NWT	*	2	1
Canada's South	82	94	99
USA	111	IN / AI	N / AI
Other countries	3	N/A	IN / AI

Overnight person trips. * Less than 0.5%. Source: 1994 Detailed Tabulations, Volume I, pages 4-1/6; Volume III, page 17. 1/6; Volume IV, page 15-1/6. Note: Figures for USA and Overseas trips add to more than 100% because visitors with nights in the North could also have spent nights in the

Of the almost 12 million overnight person trips taken by Americans to Canada in 1994, one-twelfth included at least one night in Canada's North. This proportion represents 592,000 overnight person trips to the Northeast, and somewhat fewer to the Northwest (382,000). In contrast, Canada's Southeast attracts almost eight million American overnight person trips with no Northern experience, and the Southwest attracts more than three million.

Virtually all overnight visitors from countries outside Canada and the USA spend at least one night in Canada's South — largely because it is almost impossible for these visitors to access the North without passing through the South. Most do not



reach the North on their trip to Canada: of the 3.2 million overnight trips taken in 1994 by visitors from Overseas, only 145,000 included at least one night in Canada's North.

As these figures clearly show, tourism in the North, while vital to the region, is considerably smaller than is tourism in the southern part of the country — among Canadians, Americans and visitors from other countries. In the following pages, the travel characteristics of the select group of Northern visitors are explored in considerable detail since the North is the focus of this project. Readers interested in exploring comparisons between travel in Canada's North and South are referred to the Detailed Tabulations.

2-a. Northern Trips - Same-Day & Overnight

More than nine million person trips — including same-day excursions and overnight trips made for pleasure, business, visiting friends and relatives or for personal reasons — were made to Canada's North in 1994. These trips are almost evenly divided between those with destinations or overnight stops in the Northeast (4.5 million) and the Northwest (4.6 million).

The vast majority of trips in Canada's North are made by Canadians (80%), although the USA is a very important market, particularly for Canada's

Northeast. USA residents contribute almost one-fifth of all tourism to Canada's North (18%), and more than one-quarter of tourism in the Northeast (27%). In the Northwest, Americans contribute less than one-tenth of all tourism activity.

Table 2

Origin Of Trips To Canada's North - All Seasons, All Purposes (All Person Trips - Same Day & Overnight)			
	Destination: Canada's North		
	Total	North East	North West
Total (000's)	9,049	4,491	4,558
Place of Residence	%	%	%
Canada ¹	80	72	88
USA ²	18	27	9
Other Countries ³	2	1	2

¹Total same-day and overnight person trips by Canadians 15+, 80 kms or more from home. ²Same-day person trips with stop only in the specific region and overnight person trips with at least one night spent in the region by residents of USA/Other Countries. Note: Northeast and Northwest may add to more than total North because nights could have been spent in more than one region. Source: Special calculations from 1994 Detailed Tabulations, ITS and CTS.

Countries other than Canada and the USA contribute modestly to the total number of person trips in Canada's North (2%), partly because it is almost impossible for these visitors to take same-day trips to the region. As is evident in the following section, the importance of the Overseas market increases when only *overnight* tourism in the North is examined.

2-b. Northern Trips - Overnight

Canada remains the dominant source of tourism in the North when only *overnight trips* are examined. Almost 8-in-10 of the 5.1 million overnight person trips to the region originate in



Canada, and almost 2-in-10 originate in the USA. Overseas residents who spend at least one night in Canada's North account for 1-in-33 person trips to the region.

Table 3

Origin Of Overnight Trips To Canada's North - All Seasons, All Purposes			
	Destination: Canada's North		
	Total	North East	North West
Total (000's)	5,109	2,397	2,715
Place of Residence	%	%	%
Canada ¹	78	74	82
USA ²	19	25	14
Other countries ³	3	2	4

¹Total overnight person trips by Canadians 15+, 80 kms or more from home.
²Overnight person trips with at least one night spent in the region by residents of USA/Other Countries in travel party to Canada. Note: Northeast and Northwest may add to more than total North because nights could have been spent in more than one region. Source: Special calculations from 1994 Detailed Tabulations, IIS and CTS

The USA is a more critical source of overnight tourism for the Northeast (25%) than it is for the Northwest (14%). The Northwest, on the other hand, obtains twice the level of overnight visitors from Overseas (4%) than does the Northeast (2%).

2-c. Northern Trips - Overnight Peak Season, *Pleasure*

Canada's dominance as the source of tourism in the North diminishes quite dramatically within the peak season *pleasure* market (April through

September). Canadians make 6-in-10 of the 1.8 million overnight pleasure trips to the region in peak season, but residents of the USA contribute more than 1-in-3 of these trips and Overseas residents contribute 1-in-20.

Table 4

Origin Of Overnight Peak Season Pleasure Trips To Canada's North			
	Destination: Canada's North		
	Total	North East	North West
Total (000's)	1,834	1,028	806
Place of Residence	%	%	%
Canada ¹	59	56	63
USA ²	36	42	28
Other Countries ³	5	2	9

¹Total overnight person trips by Canadians 15+, 80 kms or more from home.
²Overnight person trips with at least one night spent in the region by residents of USA/Other Countries in travel party to Canada. Note: Northeast and Northwest may add to more than total North because nights could have been spent in more than one region. Source: Special calculations from 1994 Detailed Tabulations, IIS and CTS

Canada's Northeast and Northwest have very different market profiles within the overnight peak season pleasure segment. While both are highly dependent on travel by Canadians, the Northeast is considerably more dependent on tourism from the USA (42%) than is the Northwest (28%), whereas countries *other than* Canada and the USA are particularly important sources of pleasure travel in Canada's Northwest (9%, compared to 2% in the Northeast). See Section 3 for more information on feeder markets.



3-a. Key Feeder Markets For Overnight Trips To Canada's North

Proximity and access routes are critical determinants in key sources of overnight travel to Canada's Northeast and Northwest. As is evident in Table 5, the two regions of the North draw from substantively *different* domestic and USA resident populations.

Canada's Northeast

The Northeast derives a very substantive portion of its overnight visitors from its *home* market. Ontario is the single largest contributor to overnight trips to the region (42%), followed at some distance by Quebec (19%).

East North Central states, and particularly Michigan and Wisconsin, are also important feeder markets for Canada's Northeast. Their importance is due, in part, to these states' close proximity to the Canada/USA border.

West North Central states are considerably more important as feeder markets for the "Northeast (7%) than they are for the Northwest (1%).

The Northeast obtains almost none of its overnight visitors from western Canadian provinces, Mountain or Pacific states, Alaska or countries outside Canada and the USA.

Canada's Northwest

In contrast, the Northwest is primarily fed by overnight visitors from Alberta (39%) and British Columbia (25%).

Table 5

Key Origin Markets For Overnight Trips - All Purposes, All Seasons			
	Destination: Canada's North		
	Total	North East	North West
Total (000's)	5,109	2,397	2,715
Place of Residence	%	%	%
CANADA ¹	78	74	82
Quebec	9	19	*
Ontario	20	42	1
Manitoba	10	11	9
Alberta	21	*	39
B.C.	14	*	25
USA ²	19	25	14
East North Central	7	13	2
Michigan	3	5	*
Wisconsin	2	4	*
West North Central	4	7	1
Minnesota	2	4	*
Mountain	1	1	2
Pacific	2	*	4
California	1	*	2
Alaska	1		3
OTHER COUNTRIES	3	2	4
German Speaking Europe	1	1	2
Other Europe	1	1	1
All Other	1	*	1

¹Total overnight person trips by Canadians 15+, 80kms or more from home.
²Overnight person trips with at least one night spent in the region by residents of USA/Other Countries in travel party to Canada. Note: Northeast and Northwest may add to more than total North because nights could have been spent in more than one region. Source: 1994 Detailed Tabulations. Volume 1, pages 3.1/3. See Tabulations for base sizes. *Less than 0.5%.



-- These provinces deliver almost no visitors to Canada's Northeast.

States in the Pacific Region — California, Oregon and Washington — and Alaska make a more substantive contribution to overnight tourism in the Northwest than they do in the Northeast.

Visitors from German-speaking countries in Europe, including Germany, Austria and Switzerland, are more likely to travel to Canada's Northwest (2%) than to the Northeast (1%).

3-b. Key Feeder Markets For Overnight Trips To Sponsors' Regions

Introduction

Several cautionary comments are required prior to presenting estimates for sub-regional tourism within Canada's North.

- a) Overnight trips by Yukon and NWT residents are systematically excluded within the Canadian Travel Survey. Consequently, estimates of tourism in the territories represents **non-resident** travel. Estimates for Saskatchewan, on the other hand, include both resident and non-resident travel.
- b) Small base sizes require that sub-regional information be interpreted with caution.

THE SPONSORS' REGIONS

Each sub-regional sponsor of the project has a unique visitor profile.

The Yukon

The Yukon is highly dependent on visitors from the-USA, and particularly on those who live in Alaska and the three Pacific states. Almost 8-in-10 of all the overnight person trips with nights spent in the Yukon originate in one of these locations, and many represent *in transit* traffic to and from Alaska.zl

Table 6

Origin Of Overnight Trips To Yukon, NWT, & Saskatchewan's North - All Seasons, All Purposes			
	Destination		
	Non-Resident Tourism		Resident & Non-Resident
	Yukon	NWT	Sask.
Total	285,000	44,000	145,000
Place of Residence	%	%	%
Canada ¹	6	50	94
USA ²	79	41	6
Other Countries ²	15	9	*

¹Total overnight person trips by Canadians 15+, 80 kms or more from home.
²Overnight person trips with at least one night spent in the region by residents of USA/Other Countries in travel party to Canada. Source: Special calculations from 1994 Detailed Tabulations, ITS and CTS. Caution: small

Estimates provided from the CTS and ITS closely resemble those obtained in the 1994 *Yukon Visitor Exit Survey* in terms of total non-resident volume and market share. The Yukon's survey and CTS/ITS estimates point to the importance of the USA, and particularly Alaska, along with German-



-- speaking' Europe as key sources of tourism for the Yukon.^z

The Overseas market contributes a larger share of overnight tourism to the Yukon (15%) than does the domestic market (6?40).

The Northwest Territories

The NWT attracts about one-half of its non-resident visitation from Canada. Most of the remaining one-half derives from the USA, with only a modest influx of visitors from Overseas (9%). These figures must be interpreted with caution because of the small base sizes.

Estimates derived from the CTS/ITS analysis resemble, but are not identical to, estimates obtained in the 1994 *NWT Exit Survey*. Differences are likely a function of different survey methods and different definitions of visitors and qualifying trips.²³

Saskatchewan

Saskatchewan is especially dependent on the domestic market for its northern overnight visitors. More than 9-in-10 of these visitors are residents of Canada.

OVERSEAS VISITORS TO THE YUKON & NORTHWEST TERRITORIES

More than one-half of overnight Overseas visitors to Canada's two ter-

ritories come from three countries: Germany, Australia, and New Zealand.

Table 7

Origin Of Overnight Trips To The Territories (Overseas)	
Place of Residence	Total Overseas Trips To Territories %
Europe	80
German Speaking	53
Germany	41
Other Europe	27
AU Other	20
Asia	8
Australia/ New Zealand	10

Total overnight party trips by residents of Other Countries. Source: 1994 Detailed Tabulations, Volume IV, pages 9A-1/2.

3-c. Key Feeder Markets For Overnight Peak Season Pleasure Trips To Canada's North

As noted previously, the *peak season pleasure market* for Canada's North is considerably more reliant on the USA and Overseas than is the *all-purpose, all-season market*.

The biggest feeder markets for overnight pleasure trips between April and September to Canada's North include Ontario (170/0), East North Central states of the USA (15%), Alberta (12%) and Manitoba (1 OVO).

Europe, whether one of the three German-speaking countries or not, accounts for considerably more peak



“season pleasure tourism in Canada’s North (5%) than do “all other” countries (1%).

Even though Canada’s Northeast and Northwest enjoy about equal volumes of tourism throughout the year, the Northeast captures a larger share of the peak season pleasure segment (56%, or 1.0 million person trips) than does the Northwest (44%, or 0.8 million person trips).

Table 8

Key Origin Markets For Overnight Peak Season Pleasure Trips			
	Destination: Canada’s North		
	Total	North East	North West
Total (000’s)	1.834	1.028	806
Place of Residence	%	%	%
CANADA¹	59	56	63
Quebec	6	n/a	n/a
Ontario	17	n/a	n/a
Manitoba	10	n/a	n/a
Saskatchewan	4	n/a	n/a
Alberta	12	n/a	n/a
B.C.	8	n/a	32/a
USA ²	36	42	28
East North Central	15	24	4
Michigan	5	9	1
Wisconsin	4	6	1
West North Central	7	10	3
Minnesota	4	6	1
Mountain	2	1	4
Pacific	4	*	8
California	3	*	6
Alaska	1	-	3
OTHER COUNTRIES*	5	2	9
German-Speaking Europe	3	1	5
Other Europe	2	1	3
All Other	1	*	1

¹Total overnight person trips by Canadians 15+, 80 kms or more from home, main purpose pleasure. ²Overnight person trips with at least one night spent in the region by residents of USA/Other Countries in travel party to Canada, main purpose, pleasure. Note Northeast and Northwest may add to more than total North because nights could have been spent in more than one region. Source: 1994 Detailed Tabulations, Volume I, pages 3-1/3, Vol. II, pages 2-4/5. See Tabulations for base sizes. *Less than 0.5%. n/a = not available in tabulations Columns may add to more than 100% due to round-



B. THE NORTHERN TOURISM EXPERIENCE: OVERNIGHT TRAVEL IN CANADA'S NORTH

4-a. Reasons For Going North

Most Americans who go to Canada's North do so for pleasure (74%), but many Canadians have friends and family to visit (41% / 0) or, less commonly, business to conduct (16%). In fact, about the same number of Canadian overnight trips to the North are made for *pleasure (380A)* as are made to visit friends and relatives.

Overseas visitors are most likely to be in the North on a pleasure trip (68%), although 1-in-5 are motivated by an interest in seeing friends and relatives (22%).

Table 9

Main Purpose Of Overnight Trips To Canada's North - All Seasons			
	Origin		
	Canada	USA	Overseas
	%	%	%
Pleasure	38	74	68
Business	16	5	7
Visit Friends/ Relatives	41	8	22
Other	5	14	4

¹Total overnight person trips Source: 1994 Detailed Tabulations, Volume II, page 110-1; Volume III, pages 29-1/2; Volume IV, pages 25-1/2.

4-b. Timing Of Going North

The strong *pleasure* orientation of travel by Americans and Overseas residents to Canada's North is re-

-flected in the time of year these visitors take their trips. Almost 6-in-10 overnight non-resident trips with any nights in Canada's North occur during July, August and September, and about 3-in-10 take place during April, May and June." Only about 1-in-7 overnight trips by Americans with any nights in Canada's North take place during the six winter months, and only 1-in-8 such trips by Overseas residents are made in these six months.

Canadians, because they go to the North for reasons other than pleasure, spread their trips out over the year to a much greater extent than do non-residents. Nonetheless, almost 4-in-10 overnight trips by Canadians with a Northern destination are made in July, August and September (37%). The spring quarter attracts 1-in-4 of these trips, while each of the winter quarters attracts just under 1-in-5 such trips.

4-c. Length Of Stay

Introduction

The CTS measures the *length of stay away from home* on the entire trip. The ITS, however, measures the *number of nights spent in specific sub-regions*

of Canada. The figures presented in this section for the domestic and non-domestic market are, therefore, not directly comparable and should be interpreted only in light of the unit of measurement each represents.

On average, a visitor spends four to five nights in the North.

The average overnight trip destined to Canada's North keeps the Canadian away from home for almost four nights, on average.²⁵ Americans who spend any nights in the North spend about four nights in the region, whereas Overseas residents who visit the North for at least one night tend to spend about five nights there.

Americans going North spend an extra two nights in Canada,

A trip to Canada's North seems to extend the stay of the non-resident visitor and produces touristic activity for Canada's South as well as for the North. On average, each American's overnight trip to Canada (any destination) involves almost four nights (3.8), whereas a trip with a night in the North keeps the American visitor in Canada for almost six nights (5.7).

Of these six nights, about four are spent in the North (4.2). The remaining night or so is spent in Canada's South.

Table 10

Length Of Stay In Canada/Canada's North - All Purposes, All Seasons		
	USA	Overseas
Average Nights . . .	#	#
<i>In Canada - All Overnight Trips To Any Canadian Destination</i>	3.8	10.8
<i>In Canada On Trips With At Least One Night In Canada's North</i>	5.7	16.3
<i>In Canada's North On Trips With At Least One Night In Canada's North</i>	4.2	5.2
<small>Total overnight person trips. Source: 1994 Detailed Tabulations, Volume III, pages 38.1, 48-1; Volume IV, pages 32.1, 34-1.</small>		

Overseas residents going North spend an extra five to six nights in Canada.

Attracting Overseas visitors to the North for at least one night provides tourism benefits to the entire country. The average length of stay of all overnight visitors to Canada from Overseas is almost eleven nights, but trips with any nights in the North average more than 16 nights in the country. About five of these nights are spent in the North, and the remaining eleven nights are spent in Canada's South.

The further an overnight visitor to Canada's North has to travel to reach this region, the more time he or she spends in the North.

For example, there is minimal variation in the number of nights spent in the North among residents of "border states" — those in the Pacific, Mountain, East North Central regions and



Alaska. Americans traveling from other parts of the USA, including West North Central, New England, Middle and South Atlantic, East and West South Central, tend to stay longest in the North (4.5/4.6 nights).

Among Overseas visitors to Canada's North, those from German-speaking countries stay the longest time. On average, these trips involve almost six nights in the region.

Table 11

Length Of Stay In Canada's North — Key Non-Resident Markets	
	Average Number of Nights In Canada's North
Total USA	4.2
East North Central	4.0
West North Central	4.6
Minnesota	3.9
Pacific/Mountain/ Alaska	4.0
All Other	4.5
Total Overseas	5.2
Total Europe	5.3
German-Speaking Countries	5.9
Non-German Speaking Countries	4.6
Total Other Countries	4.9
Total overnight person trips. source: 1994 Detailed Tabulations, Volume III.	

The number of nights spent in Canada's North does not differ appreciably among American visitors on *pleasure* trips compared to those who are traveling for other purposes. Within the Overseas market, however, there are indications to suggest that a pleasure trip is *shorter* (4.7 nights, on average) than is one taken for other purposes — primarily to

visit friends and relatives (7.1 nights, on average).²⁶

Activities seem to have a stronger influence on length of stay than does place of residence.

Canadians

Canadians who fish or hunt on trips to Canada's North during the peak season spend about five nights away from home, whereas those who go to cultural attractions or events²⁷ spend almost six nights away - although some of these nights may be spent in Canada's South.

Table 12

Length Of Stay & Activities: Canadians In Canada's North During Peak Season	
	Nights Away From Home
	Average
Total Canada (Peak Season)	4.0
ACTIVITY GROUPS	
Campers	4.7
Naturalists	5.3
Anglers/Hunters	5.1
Cultural Activities	6.0
INTENSITY	
No Outdoor Activities	3.4
1-2 Outdoor Activities	4.0
3 + Outdoor Activities	6.3
Total overnight person trips, peak season. Source: 1994 Detailed Tabulations.	

Intensity of participation in the outdoors also has an impact on the length of Canadians' trips in the North. Those who participate in one or two outdoor activities spend an average of four nights away from home, but those who participate in at



least three outdoor activities spend more than six nights away.

Americans & Overseas Visitors

Whether they are from the USA or other countries, visitors in the North who go hunting or fishing on their peak season pleasure trip spend longer *in the North* than does the overnight peak season pleasure visitor in general. Campers, who tend to be visitors from German-speaking Europe, also spend longer in the North than do those who visit parks or go to historic sites.

Table 13

Length Of Stay & Activities: Americans/ Overseas Visitors In Canada's North During Peak Season (Pleasure)		
	# Of Nights In Canada's North	
	USA	Overseas
Total (Peak Season, Pleasure)	4.2	4.6
ACTIVITY GROUPS		
Campers	4.8	5.0
Park/Historic Sites	4.0	4.1
Anglers/Hunters	5.9	8.7*
Cultural Activities*	4.4	4.0
INTENSITY		
No Outdoor Activities	2.3	3.6
1-2 Outdoor Activities	4.0	4.4
3+ Outdoor Activities	6.9	5.5
<small>Total overnight party trips, peak season, main purpose pleasure. Source: 1994 Derailed Tabulations, Volume III page 53-1, Volume IV, page 46-1. *Caution small base size</small>		

Just like Canadians who go to the North in the peak season, the more outdoor activities USA and Overseas visitors take part in, the longer they spend in the North:

. from a low of two nights for Americans who engage in **no** outdoor activities to a high of almost seven nights among those who participate in three or more outdoor activities; and

. from a low of between three and four nights for Overseas visitors who partake of no outdoor activities to a high of between five and six nights for those who participate in at least three outdoor activities.

4-d. Activities On The Trip

Introduction

Neither the ITS nor CTS provides information on where within Canada the visitor actually engages in a specific activity. Since so many Americans and Overseas visitors go to both the North and South of Canada while “in the country, information on activities should be understood as a measure of *what visitors like to do while in Canada* rather than *what they did while in Canada's North*.

Canadians' activities reflect their multi-season, multi-purpose utilization of Canada's North.

Overnight visitors to Canada's North have different activity profiles, depending on where they live, or, perhaps, on their reason for the trip. For example, Canadians who go to Canada's North on an overnight trip are



particularly likely to visit friends and relatives (59%) because they are more apt to have friends and relatives in the region than are non-Canadians, and because about 4-in-10 trips are taken with the expressed *purpose* of seeing these folks. Other popular activities among Canadians include:

- . shopping (23%);
- sightseeing (20%);
- . going to restaurants/clubs (21%);
- . hunting or fishing (15%);
- spending time at a private cottage (12%); and/or
- camping (1%).

It is important to remember that trips by Canadians to the North are more diversified in terms of both purpose and season than are those made by visitors from the USA and other countries. Because they come throughout the year and for business, pleasure, visiting, and other reasons, Canadians are less apt than their counterparts from the USA and Overseas to orient their trip toward outdoor activities. In fact, over the year, 6-in-10 overnight person trips by Canadians to the North involve no outdoor activities.

USA and Overseas visitors are keen participants in many activities. After all, it's summer and they are on holiday!

Because they are so heavily concentrated in July, August and September, American and Overseas visitors to

Table 14

Activities On Overnight Trips To Canada's North - All Purposes, All Seasons			
	Residents Of . . .		
	Canada	USA	Other Countries
	%	%	%
Visit Friends & Relatives	59	21	52
Shopping	23	55	85
sightseeing	20	58	87
Festival/Fair	4	10	13
Sports Event	6	4	11
Museum/Art Gallery	4	N/A	N/A
Zoo/Museum/Natural Display	N/A	22	58
Zoo/Natural Exhibit	2	N/A	N/A
Cultural Performance/Events ¹	2	7	16
Swim/Other Water Sports	9	10	24
Hunting/Fishing	15	29	14
Dining/Nightlife ²	21	36	48
Any winter sports ³	3	2	3
National/Provincial Park/Historic Site ⁴	8	48	76
Any Cottage Nights	12	5	1
Any Camping Nights	11	23	30
At Least One Outdoor Activity	37	76	86
No Outdoor Activities	63	24	14

Total overnight household/party trips. All seasons. ¹ITS attending cultural events, CTS attend cultural performance. ²Includes Dining at high quality restaurant, nightlife/entertainment. ³In CTS, category includes snowmobiling, cross country & downhill skiing. Snowmobiling is not included in the ITS. ⁴In ITS, category includes "regional parks". Source: 1994 Detailed Tabulations, Volume II, 78-7/11; Volume III, pages 76-1/4; Volume IV, pages



Canada's North appear to take advantage of the outdoor activities available within the region to a much greater extent than do Canadians. Non-residents are also more commonly on *pleasure trips* than are their Canadian counterparts.

To an even greater extent than Americans, visitors from Overseas seem to want to sample all that Canada has to offer them while in the country. For example:

. More than 1-in-2 Americans who spend nights in the North go shopping and/or sightseeing. . . but almost 9-in-10 Overseas visitors do so.

• Approximately one-half of USA residents traveling in Canada's North go to a park or historic site while in Canada. . . and three-quarters of Overseas visitors to the region do so.

. About 2-in-10 American visitors go to zoos or natural displays, whereas almost 6-in- 10 Overseas visitors do so.

A Level Playing Field: Activities on Peak Season Pleasure Trips

In order to provide more directly comparable information on what visitors to Canada's North do while on trips that bring them to the region, it is useful to remove the many business and family-oriented trips undertaken by the domestic market. Using the

common denominator of *peak season overnight pleasure trips to the North*, different activity preferences are evident.

Table 15

Activities On Overnight Peak Season Pleasure Trips To Canada's North			
	Residents Of . . .		
	Canada	USA	Other Countries
	%	%	%
Visit Friends & Relatives	45	15	36
Shopping	19	58	86
Sightseeing	29	66	90
Festival/Fair	5	14	14
Sports Event	6	.3	9
Museum/Art Gallery	6	N/A	N/A
Zoo/Museum/Natural Display	N/A	28	64
Zoo/Natural Exhibit	4	N/A	N/A
Cultural Performance/Events ¹	2	6	14
Swim/Other Water Sports	23	11	25
Hunting/Fishing	37	33	15
Dining/Nightlife ²	19	37	45
National/Provincial Park/Historic Site ³	16	58	85
Any Cottage Nights	32	6	1
Any camping Nights	30	27	40
At Least One Outdoor Activity	69	85	94
No Outdoor Activities	31	15	7

Total overnight household/party trips, main purpose pleasure, Peak seasons. ¹ITS attending cultural events; CTS attend cultural performance. ²Includes Dining in high quality restaurant, nightlife/entertainment. ³In ITS, category includes regional parks-. Source: 1994 Detailed Tabulations, Volume II, 203.13/18, Volume III, pages 78-1/4; Volume IV, pages 66-1/4.



- Even though they are on pleasure trips, Canadians (45%) and Overseas Northern visitors (36%) are more inclined than their American colleagues (15%) to visit with friends or relatives while on their trip.

- Shopping and sightseeing are more popular among non-residents, and especially visitors from Overseas, than they are among Canadian Northern visitors.

- Going to festivals or fairs and taking advantage of fine dining and evening entertainment is at least twice as common among USA and Overseas visitors to Canada's North as they are among Canadians.

. National/provincial parks or historic sites are particular favorites within the Overseas visitor group (85%), followed by the Americans (58%) and, at some distance, by Canadians (169'0).

. The strong interest in parks and historic sites among Overseas visitors may explain why these visitor show a particular inclination to camp while on a trip that includes nights in Canada's North (40%).

- Canadians maybe less apt to sightsee and visit parks or historic sites while on Northern trips than are non-domestic visitors because a high proportion of these domestic visitors are going to their own private cottages or vacation homes (32%).

- Americans and Canadians are equally likely to be found in Canada's campgrounds while on a Northern trip. They are also equally likely to be hunting or fishing — activities that they are considerably more likely to engage in than are visitors from Overseas (15%; USA, 33%; Canada 37%).

- Zoos, museums and natural displays are popular among American visitors to Canada's North in peak season (28%), but are considerably *more* popular among Overseas visitors to the region (64%).

Because of differences in the activity categories between the International and Canadian Travel Surveys, direct comparisons to the Canadian market for visiting zoos, museums, and natural exhibits or displays are problematic. Nonetheless, it would seem that such activities are more widespread among Americans and Overseas visitors to Canada's North in the peak season than they are among pleasure trip takers who live in Canada.

4-e. Activity Preferences Within Specific Markets

DOMESTIC ACTIVITY GROUPS

In this discussion, an overview of domestic visitors who engage in specific activities on overnight trips with a destination in Canada's North is provided. More attention is given to this subject in Chapter V.



Three times as many overnight peak season visitors to Canada's North are *Southern Canadians* as are Northern residents. Analogously, three times as many Campers, Anglers/Hunters and cultural visitors to the North are residents of Canada's South.

Naturalists — Canadians who walk, hike, cycle, watch birds or animals but do not fish or hunt — are more apt to be residents of the North (40%) than is the case for those who engage in other outdoor or cultural activities while on peak season overnight trips to the North.

Table 16

Overnight Peak Season Trips To Canada's North Among Canadians In Activity Groups					
	In Total %	Camp %	Naturalists ¹ %	Fish/Hunt %	Culture ² %
Origin					
Canada's North	26	27	40	21	21
Northeast	13	5	9	12	4
Northwest	13	22	31	9	17
Canada's South	74	73	60	79	79
Key Feeder Provinces					
Quebec	10	8	7	10	12
Ontario	31	15	14	34	16
Manitoba	14	10	10	16	7
Sask.	5	9	5	11	7
Alberta	26	39	29	18	33
B.C.	14	18	34	11	23

Total overnight peak season person trips, main destination, Canada's North. ¹Any bird/animal watching, walking/hiking, cycling, but no fishing or hunting. ²Includes any cultural performance, any museum/art gallery, aboriginal/native cultural activity, historic site. Source: 1994 Detailed Tabulations, Volume II, 174.1/4

In fact, Naturalists — the non-consumptive users of Canada's outdoors — tend to be residents of Canada's Northwest. Even though only

1-in-8 overnight peak season person trips by Canadians originate in the Northwest, 1-in-3 Naturalist trips originate in this part of the country. Campers, who might also engage in Naturalist activities, are also over-represented in the Northwest (22%). Anglers are dominated by the **Ontario resident market** — 1-in-3 of the trips to Canada's North that include this activity are made by Ontarians. While they may be ardent anglers, Ontarians who go North in peak season are reluctant to camp, possibly because they are staying in their own cottages. They are also unlikely to engage in non-consumptive uses of the outdoors or to participate in cultural activities while on the trip.

Albertans tend *not* to fish while on a trip to the North in peak season. Instead, Albertans who go North are especially likely to camp. Almost 4-in-10 domestic person trips to Canada's North that include camping originate in Alberta.

British Columbians are especially apt to utilize Canada's outdoors in a non-consumptive manner. One-third of the Naturalists who go North in peak season live in this province.

Quebeckers are not only a very modest feeder market for Canada's North as a whole, but they also represent no more than about 1-in-10 peak season overnight trips that include camping (8%), Naturalist activities (70/0),



“fishing or hunting (10?40) or cultural activities (12%).

Even though overnight peak season domestic visitors to Canada’s North are about evenly split between the Northeast (48%) and the Northwest (5206), activity groups – be they characterized by the outdoors or culture — favour Canada’s *Northwest*.

Table 17

Overnight Peak Season Trips To Canada’s North Among Canadians In Activity Groups					
	In Total	Camp	Naturalists ¹	Fish/Hunt	Culture ²
	%	%	%	%	%
Destina-tion					
Northeast	48	31	28	54	36
Northwest	52	69	72	46	65
Nfld North	1	1	2	1	2
Quebec North	9	8	7	11	12
Ontario North	38	22	19	43	22
Manitoba North	7	2	2	7	1
Sask North	4	7	4	10	4
Alberta North	26	38	29	18	31
B.C. North	15	22	35	10	22
Yukon	1	1	1	1	5
NWT	*	*	1	1	2

Total overnight peak season person trips, main destination, Canada’s North. ¹Any bird/animal watching/walking/hiking, cycling, but no fishing or hunting. ²Includes any cultural performance, any museum/art gallery, aboriginal/native cultural activity, historic site. Source: 1994 Detailed Tabulations, Volume 1751/4. *Less than 0.5%.

About 7-in-10 of all Naturalists and Campers who go North during peak season go to the Northwest and about two-thirds of Northern visitors with cultural interests (65%) also go to the Northwest (see Table 17).

Since so much domestic tourism to Canada’s North is relatively *local*, bringing the residents of the southern

part of a province or region to its northern regions, it is not surprising that the same provincial or regional markets which *feed* camping, angling, Naturalists, and cultural activity market segments are *recipients* of trips that include these activities.

For example, Alberta is a major feeder market for camping (39%) and Alberta’s North is a major destination for Campers (38%).

Ontario overnight trips with a Northern destination in peak season are particularly likely to include fishing or hunting. . . and Ontario’s North attracts more than 4-in-10 of the anglers who take trips to Canada’s North in peak season.

The Sponsors’ Regions

For the most part, provincial and territorial project sponsors attract activity-based trips in about the same proportion as they attract trips in general” to their northern areas, with several notable exceptions:

- Saskatchewan’s North attracts more *angling* trips (10%) than would be expected in light of this province’s share of overnight Northern peak season domestic tourism activity (4%).

. The Yukon seems to have a special appeal to Canadians who travel North and seek cultural activities on the trip (5%, compared to the



Yukon's 1% of the total peak season overnight Northern market).

The Northwest Territories also seems to hold a slightly greater appeal to cultural travelers (2%) than its share of the total market would indicate (less than 1%), although these estimates must be interpreted with caution because of the small sample sizes.

USA ACTIVITY GROUPS IN CANADA 'S NORTHEAST

American visitors to Canada's Northeast who live in the East North Central states are especially apt to take advantage of non-consumptive outdoor activities while on their trips. For example:

More than 6-in-10 Park/Historic Site Visitors and/or Campers in Canada's Northeast live in the East North Central states.

In fact, two states — Wisconsin and Michigan — account for more than one-half of all American Campers in Canada's Northeast.

• Minnesotans represent more than one-fifth of all Anglers/Hunters from the USA in the region, with one-sixth coming from each of Wisconsin and Michigan.

Table 18

Key USA Markets For Activity Groups In Canada's Northeast					
	Total	Hunt /Fish	Parks & Sites	Camp	No Out-Door
	%	%	%	%	%
East North Central	58	51	64	62	58
Wisconsin	14	16	14	22	14
Michigan	25	16	28	29	29
West North Central	22	35	8	22	18
Minnesota	14	22	4	12	11
Mountain/Pacific/Alaska	3	2	3	5	6
All Other	17	12	25	11	18

Overnight party trips with at least one night spent in the region by residents of USA. Source: 1994 Detailed Tabulations, Volume III, pages 11B-1/3. See

Why are so many outdoor-oriented activity groups concentrated in the three American states that are relatively close to Canada's Northeast? Is it because Canada's Northeast only markets to nearby states, or is it because the image and/or infrastructure of the Northeast is considered to be "fine" for relatively local travel, but is not considered "worth" traveling long distances to reach?

As is evident in the following section, Canada's Northwest has a very different ability to attract visitors from across the continental USA.

USA ACTIVITY GROUPS IN CANADA 'S NORTHWEST

Canada's Northwest attracts a more geographically diversified group of Anglers/Hunters, Park Visitors, and Campers than does the Northeast. As just discussed, the Northeast's activity groups are highly concentrated in



three states, whereas the Northwest attracts substantial levels of activity-based visitation from across the continent.

Table 19

Key USA Markets For Activity Groups In Canada's Northwest					
	Total	Hunt /Fish	Parks & Sites	Camp	No Out-Door
	%	%	%	%	%
East North Central	10	12	11	8	7
Wisconsin	3	7	1	1	4
West North Central	8	19	8	5	4
N. Dakota	1	5	-	-	-
Minnesota	3	7	2	1	3
Mountain	14	15	16	19	8
Colorado	3	5	3	5	2
Pacific	28	37	33	39	18
Washington	8	17	7	5	8
Oregon	3	4	3	4	3
California	17	16	23	30	7
Alaska	19	2	10	11	42
All Other	21	14	22	18	20

Overnight party trips with at least one night spent in the region by residents of USA. Source: 1994 Detailed Tabulations, Volume I?, pages 11A-1/3, See

The Angler/Hunter market segment is dominated by Americans from the Pacific States, most notably, California and Washington. Nonetheless, Anglers/Hunters who visit Canada's Northwest are as apt to live in the East or West North Central states as they are to live in the Mountain region.

Park/Historic Site visitors from the USA on trips that take them to Canada's Northwest represent a microcosm of *all* overnight visitors to the region, with one exception. Californians appear to be more avid Park/Site Visitors (23%) than would

be expected in light of their representation in total (17%).

In fact, Californians seem to be more activity-oriented than are other USA visitors to the region. Not only are they more apt to be found among Park/Historic Site Visitors but they are also more apt to camp and are less likely to refrain from outdoor activities on their trip (7%) than would be anticipated based on their contribution to Northwestern visitation.

In contrast, *Alaskans* seem to be the least active: they represent about one-fifth of all overnight American visitors in the region, but are under-represented among Anglers/Hunters, Park/Site Visitors and Campers. These data suggest, in fact, that a significant proportion of the Alaska visitation to Canada's Northwest maybe *pass-through* traffic, on its way from Alaska to a location outside the Northwest: 42% of Alaskans participate in *no* outdoor activity while on the trip that includes at least one night in the Northwest.

OVERSEASACTIVITY GROUPS IN CANADA'S NORTHEAST

Only two activity groups within the visitor population from Overseas to Canada's Northeast are sufficiently large to warrant separate examination: visitors to parks/historic sites and those who go to zoos, museums, or natural displays.



Table 20

Key Overseas Markets For Activity Groups In Canada's Northeast			
	Total	Park & sites	Zoo/ Museum/ Natural Display
	%	%	%
Europe	83	88	80
German Speaking Europe	30	31	31
Other Europe	54	57	50
All Other	17	12	20
Asia	3	2	3
Australia/ New Zealand	2	2	1

Overnight party trips with at least one night spent in the region by Overseas residents. Source: 1994 Detailed Tabulations, Volume IV, pages 9B-1/2. See Tabulations for base sizes.

There are no significant differences in the place of origin of Overseas visitors who go to parks or historic sites or to zoos, museums or natural displays while on a trip that takes them to Canada's Northeast.

OVERSEAS ACTIVITY GROUPS IN CANADA'S NORTHWEST

Europeans, spear-headed by residents of German-speaking countries, contribute most of the Overseas market's park visits and camping in Canada's Northwest. While the three German-speaking countries constitute about 4-in-10 of the Overseas visits to the region, they contribute more than 7-in-10 of the park/Historic Site and Camping visits.

Table 21

Key Overseas Markets For Activity Groups In Canada's Northwest				
	Total	Parks & Sites	Camp	Zoos/ Museums/ Natural Displays
	%	%	%	%
Europe	75	78	86	77
German Speaking Europe	42	45	71	45
Other Europe	33	33	15	32
All Other	25	22	14	23
Asia	11	9	6	10
Australia/ New Zealand	7	7	3	7

Overnight party trips with at least one night spent in the region by Overseas residents. Source: 1994 Detailed Tabulations, Volume IV, pages 9A-1/2. See Tabulations for base sizes.

5-a. Accommodation In The North

Introduction

The ITS provides information on the type of accommodation used in specific regions of Canada including Canada's North, but the CTS only provides information on the types of accommodation used on the entire trip. Thus, information on Northern visitors from the domestic and non-domestic markets is somewhat different.

All commercial forms of accommodation are more popular among non-domestic visitors to Canada's North, primarily because so many Canadians stay with their friends and relatives while on trips to the region (43%) or utilize their own cottages (15%).

American and Overseas visitors to the North rely on motels and hotels in the region at a similar rate but those from the USA are more apt to spend nights in commercial cottages than are their counterparts from Overseas. The reliance on commercial cottages and cabins is consistent with Americans' penchant for hunting and fishing while on a trip to the North.

Table 22

% Using Specific Accommodation On A Trip To Canada's North			
	On Trip	In Canada's North	
	Canada	USA	Other Countries
Spent Any Nights In ...	%	%	%
Hotel	19	22	30
Motel	13	28	28
Cottage/Resort/Lodge	3	17	5
Camping	11	22	25
Other Commercial	4	2	1
Homes of Friends & Relatives	43	9	26
Private Cottage	15	5	*

Overnight Household/Party Trips. Special Table, 221-1, Volume III, page 68.

Camping in the North is popular with more than one-fifth of visitors from the USA and Overseas, but staying with friends and relatives is much more common among Overseas visitors. This finding is consistent with the relatively high proportion of Overseas visitors who come to Canada to see their friends and relatives (see Section 4-a).

As described below, different *activity-based* market segments within domestic, USA and Overseas visitor groups

rely on different forms of accommodation in the North. As will become apparent, *what they do* is closely linked to *where they stay*.

5-b. Variations In Accommodation Choices

The Domestic Market

Accommodation choices for Canadians on overnight trips to Canada's

Table 23

Canadians' Accommodation Choices			
	Canada's North	North-Bound	Intra-North
Spent Any Nights In ... On Trip To Canada's North	%	%	%
Hotel	17	15	21
Motel	12	11	14
Cottage/Resort/Lodge	4	4	3
Camping	11	12	9
Friends & Relatives	45	46	43
Private Cottage	15	17	10

Overnight Person Trips, Special Table, pages 122/23. NOTE: figures do not match those shown in Table 22 because that table is based on household/party trips and this table is based on person trips.

North do not vary appreciably between those who live in the southern parts of the country and go North (Northbound) and those who live in the North and travel within this region (Intra-North).

The USA Market

Camping

Camping is considerably more popular in Canada's North among visitors who come from the Pacific and Mountain states and Alaska than it is



among visitors from East or West North Central states.

Table 24

% Of American Campers In Canada's North Who Live In . . .	
East North Central	16%
West North Central	15%
Pacific/Mountain/Alaska	36%
AU Other States	20 ^h

Overnight party trips. Source: 1994 Detailed Tabulations, Volume III, page

As noted previously, western and mountain state visitors are almost exclusively visitors to Canada's Northwest. This fact explains why so many more American visitors to the Northwest rely on campsites and trailer parks for accommodation (34%) than do their counterparts who go to Canada's Northeast (14%).²⁷ The camping preference in Northwestern Canada is particularly evident among visitors from California, Oregon and Washington (Pacific) — almost one-half of these visitors to the Northwest spend nights camping in the region (47%).

Commercial Cottages/Cabins

Since USA visitors in Canada's Northeast are more likely to be on hunting/fishing trips (41%) than are their cousins who go to destinations in the Northwest (13%),³⁰ it is not surprising that so many more visitors from East and West North Central states spend nights in fishing or hunting lodges or cabins than is the case among visitors from the western part of the USA.

Table 25

% Of American Commercial Cottage/ Cabin Guests In Canada's North Who Live In . . .	
East North Central	20%
West North Central	32%
Pacific/Mountain/Alaska	80/0
All Other States	13%

Overnight party trips. Source: 1994 Detailed Tabulations, Volume III, page

The Overseas Market

Camping

Northern visitors from German-speaking countries in Europe are particularly likely to *camp*. In fact, 1-in-2 are from Germany, Switzerland or Austria, compared to only about 1-in-10 visitors from other parts of Europe and 1-in-8 from the rest of the world.

Table 26

% Of Overseas Campers In Canada's North Who Live In . . .	
German-speaking Europe	49%
Other Europe	10%
Other Countries	12%

Overnight party trips. Source: 1994 Detailed Tabulations, Volume IV, page 50.1

Homes Of Friends & Relatives

Table 27

% Of Overseas House Guests In Canada's North Who Live In . . .	
German-speaking Europe	14%
Other Europe	29%
Other Countries	41%

Overnight party trips. Source: 1994 Detailed Tabulations, Volume IV, page 50.1

Overseas house guests in the North are most likely to be from non-European countries (41%) and are



“least likely to be residents of German-speaking Europe (140/0).

Hotels

Hotels in the North are most popular among visitors from European countries other than Germany, Austria and Switzerland.

Table 28

% Of Overseas Hotel Guests In... Canada's North Who Live In...	
German-speaking Europe	20%
Other Europe	41%
Other Countries	29%

overnight party trips. Source: 1994 Detailed Tabulation, Volume IV, page

6. Transportation In Canada

Introduction

Canadians who take an overnight trip to a destination in Canada's North were asked to identify their *main mode of transport* (the one used to cover the most distance on the trip). USA and Overseas visitors, on the other hand, were asked to specify the mode(s) of transport used to arrive in and depart from Canada, and the mode(s) used to travel *within* Canada. Because of these differences in reporting format, transportation is addressed separately for each major market.

THE DOMESTIC MARKET- ALL PURPOSES

Canadians who take an overnight trip to Canada's North are especially reliant on their cars. Those who go from the South to the North (Northbound) are, however, considerably more likely to use airplanes to get from place to place (120/0) than are those who are traveling *within* the North (20/0). This difference is undoubtedly linked to Northbound *business* travel.

Table 29

Canadians' Transportation Choices & Distance Travelled On Overnight Trips To Canada's North			
	Canada's North	North-Bound	Intra-North
	%	%	%
Auto	87	85	93
Air	9	12	2
Bus	3	2	4
Average Distance Travelled (One-Way)	528 kms	623 kms	309 kms

Overnight person trips. Source: 1994 Detailed Tabulations, Volume II, pages

-- ***A Few Facts About Domestic Business Travel In The North***

. Two-thirds of Northbound air travelers are traveling for *business* reasons.

. Almost one-half of all overnight business travel to the North from the South relies on airplanes (48%).

. Conversely, overnight business travel *within* the North is almost all accomplished by car (94%).

Not surprisingly, overnight trips by Canadians who go from the southern part of the country to the North involve considerably greater distances, on average (623 kms), than do overnight trips within the North (309 kms).

THE DOMESTIC PLEASURE MARKET

The *pleasure travel* market for the North is almost exclusively dependent on the automobile — irrespective of whether the trip is going from Canada's South to the North (Northbound) or is wholly contained *in* the North (Intra-North).

Table 30

Canadians' Transportation Choices & Distance Travelled On Overnight Pleasure Trips		
	North-Bound	Intra-North
	%	%
Auto	94	92
Air	3	1
Bus	3	6
Average Distance Travelled (One-Way)	485 kms	272kms
<small>Overnight person trips, pleasure purpose. Source: 1994 Detailed Tabulations, Volume II, pages 108-1, 1201.</small>		

Pleasure trips by Southern Canadians to the North involve shorter distances (485 kms) than do *all* overnight trips that go from the South to the North (623 kms, see Table 29). Shorter distances for the pleasure market compared to the total domestic visitor market are not surprising since the business sector — a comparatively long distance market — is included in all overnight trips but is excluded from the *pleasure* sector.

Business trips tend to be *long distance* trips because so many of them originate in major urban centres such as Toronto, Montreal and Vancouver which are at the southern extremes of Canada's South and fan out to points throughout the North. In contrast to the 485 kms travelled on the average pleasure trip from South to North, an average business trip from Canada's South to a destination in Canada's North covers 943 kms, one-way.



"THE USA MARKET

Transport To Canada

Americans who go to Canada's North are most likely to enter the country by car (68%), although about one-tenth are either commercial or charter bus passengers (10%) or plane passengers (9%).

Table 31

Americans' Transportation Choices For Entering Canada On Overnight Trips To Canada's North		
	In Total	For Pleasure, Peak Season
	%	%
Auto	68	6 3
Commercial Plane	9	4
Bus	13	18
All Other	10	15

Overnight party trips in total and peak season pleasure. Source: 1994 Detailed Tabulations, Volume III, pages 61.1/62.1. Columns add to more than 100%

During the peak season, Americans on overnight pleasure trips that take them to the North are also most apt to cross the Canada-USA border by car (63%), but almost 2-in-10 are on a bus at the border crossing (18%).

Very few overnight pleasure trips to the *Northeast* are made by plane (1%) whereas one-tenth of the Americans who visit the *Northwest* on an overnight pleasure trip arrive in Canada at an airport (10%).³¹ These differences reflect the more *local* nature of the Northeast's USA market, and the more *continent-wide* nature of the Northwest's USA market.

Transport In Canada

Americans use a wide variety of transportation modes to get from place to place once they are within Canada. The automobile is the most popular for overnight peak season pleasure trips but boats — commercial and non-commercial — are used on more than 2-in-10 trips. Somewhat fewer rely on a bus (18%), train (12%) or plane (commercial/ private 9%).

Table 32

Americans' Transportation Choices In Canada On Overnight Trips To Canada's North		
	In Total	For Pleasure, Peak Season
	%	%
Auto	61	51
Commercial Plane	8	6
Private Plane	3	3
Boat (Any)	17	22
Commercial	12	15
Private	6	7
Train	10	12
Bus	14	18
Bus To Enter/ In Canada	11	15
Not Stated	15	20

Overnight party trips in total and peak season pleasure. Source: 1994 Detailed Tabulations, Volume III, page 56-1. Columns add to more than 100% because of multiple responses.

About one-seventh of the trips by Americans that bring them to Canada's North on a pleasure trip in peak season seem to be bus tours — trips on which a bus is used both to *enter* Canada and as a means of travel *within* Canada (15%).



“Since so many more peak season pleasure visitors to the Northeast are on hunting/fishing trips, it is not surprising that considerably more of these Americans rely on boats when traveling in Canada (27%) than is the case in the Northwest (13%).³²

THE OVERSEAS MARKET

Transport To Canada

Overseas visitors who go to Canada's North are most likely to enter the country by air directly from Overseas (57%), although a substantial minority arrive by air from the USA (12%). The remaining 3-in-10 come to Canada via a land port, by car, bus or train.

Table 33

Route Used To Enter Canada By Overseas Visitors To Canada's North		
	In Total	For Pleasure, Peak Season
	%	%
Air, Direct From Overseas	57	50
Air, Via USA	12	11
Land port	31	39

Overnight party trips in total and peak season pleasure. Source: 1994 Detailed Tabulations, Volume IV, page 55.1.

During the peak season, a higher proportion of Overseas visitors — almost 4-in-10 — enter Canada via a land port and a lower proportion come by air than is the case for all trips to the North over the year.

Transport In Canada

Overseas residents who visit Canada's North use many different modes of transportation to get from place to place once they are within Canada. The automobile is the most popular for overnight peak season pleasure trips that include a night in Canada's North. Overseas visitors who rely on private autos are being driven around Canada by friends or relatives (32%) or, more commonly, are in “in the driver's seat” of a rented car (46%).

Other modes of ground transport, including commercial boats (24%), buses (33%), and commercial air carriers (24%) are popular with between one-quarter and one-third of the Overseas visitors who spend at least one night in Canada's North.

Table 34

Overseas Visitors To Canada's North Transportation Choices In Canada		
	In Total	For Pleasure, Peak Season
	%	%
Auto (Any)	75	72
Private	32	20
Rented	46	54
Commercial Plane	24	22
Private Plane	2	2
Commercial Boat	24	29
Private Boat	5	3
Train	16	18
Bus	33	37
Other/Not Stated	20	19

Overnight party trips in total and peak season pleasure. Source: 1994 Detailed Tabulations, Volume IV, pages 50-1/2. Columns add to more than 100% because of multiple responses



Since such a high proportion of Overseas visitors to the North come during peak season and on pleasure trips, there are no substantive differences between the transportation profile of

the annual, all-purpose visitor group and the sub-set of peak season pleasure visitors.



C. THE VALUE OF OVERNIGHT TOURISM IN CANADA'S NORTH

7-a. Trip Spending

Introduction

In order to provide as comprehensive a picture as possible of tourism economic activity in Canada's North, certain liberties have been taken with survey estimates of reported consumer spending. Despite different data collection methods between the ITS and CTS, expenditure estimates have been *added* together for some diagnostic analysis. While they provide a useful overview of total consumer spending associated with tourism in the region, these "combined" estimates should be interpreted with considerable caution.

Two types of expenditure estimates are provided:

- i. **Total spending** on the trip, excluding the cost of getting to Canada for USA and Overseas visitors;³³ and
- ii. **Spending that accrues** to a region, generally assigned on the basis of the location of nights spent.³⁴

Expenditure estimates provided herein should be used with caution, and should not be quoted as official statistics. For official estimates, the reader is referred to Statistics Canada.

Total Spending On Overnight Trips To Canada's North

Excluding the costs of *getting to Canada*, visitors spent about 1.5 billion dollars on trips that brought them to Canada's North for at least one night.

Table 35

Total Spending On Overnight Trips With Any Nights In Canada's North *				
	Total	Canada*	USA	Other Countries
In Millions	\$	\$	\$	\$
Total	1,512	839	476	196
Accommodation In Canada	396	154	182	60
Transportation In Canada	527	397	87	43
Food & Beverages	323	190	92	42
Recreation	119	33	69	18
Other/Retail	146	64	48	35

Source: 1594 Detailed Tabulations, Special Calculations. Excludes transportation costs to Canada. Columns may add to more than 100%/total due to rounding. * Includes spending on trips with a destination in Canada's North.

More than one-half of this spending is done by Canadian households on an

-- overnight trip to the North (\$839 million), a further one-third is done by travel parties from the USA (\$476 million) and the remaining one-eighth comes from Overseas visitors who spent at least one night in the North (\$196 million).

Americans are the biggest spenders on a perperson per night basis.

Canadians who take an overnight trip to the North spend \$26.00, on average per night for every person in the household that went on the trip. This average covers all nights the household was away from home since the CTS does not identify the location of nights spent at the sub-provincial level.

Among Americans and Overseas visitors on overnight trips to Canada's North, average spending estimates are for all people in the travel party for each night spent *in the North*.

. Each American spends \$91.00 per night in the North, and each Overseas visitor spends \$77.00.

• Visitors from the two sources of *inbound* tourism spend similar amounts on transportation within Canada and on food/beverages. Each of these items costs about \$15 to \$17 per person per night.

. Accommodation costs for Americans are somewhat higher (\$35) than for Overseas visitors (\$23), likely be-

cause about one-quarter of Overseas visitors are *staying* in the homes of friends and relatives while in the North whereas almost all Americans incur commercial accommodation expenses on their trip.

Table 36

Average Per Person Per Night Spending In The North		
	USA	Other Countries
Total	\$91	\$77
Accorrsmoda-tion	\$35	\$23
Transportation In Canada	\$16	\$15
Food & Beverages	\$17	\$16
Recreation	\$14	\$7
Other/Retail	\$9	\$15

. Americans spend twice as much as Overseas visitors on recreation in the North (\$14 versus \$7), but Overseas visitors are bigger retail spenders (\$15) than are their American counterparts (\$9).

Discretionary Spending (Excluding All Transportation)

For a variety of reasons, direct comparisons in spending between the domestic and non-resident markets is best done with all transportation costs excluded.³⁵ Once all transportation costs are removed, survey estimates suggest that Canadians, Americans and visitors from other countries spend almost one billion dollars on



the trips that brought them to Canada's North (\$984 million, see Table 37).

Accommodation emerges as the single largest discretionary spending item (40%), followed closely by food and beverages (33/0).

Table 37

Total Discretionary* Spending On Overnight Trips With Any Nights In Canada's North*		
	Total	
Millions	\$984	
	\$	%
Accommodation	396	40
Food/Beverages	323	33
Recreation	119	12
Retail	146	15

Source: Special calculations based on 1994 Detailed Tabulations, Volume I, pages 129-2, 131-2, 133-2, 143-1, 149-1, 151-3. Volume III, page 118-1; Volume IV, page 102-1. *Excludes transportation costs to and within Canada. Columns may add to more than 100% total due to rounding. †Domestic trips, includes spending on trips with a destination in Canada's North.

Households or travel parties with any nights in the North use about 12% of their discretionary budget on recreation and entertainment and somewhat more on retail items (15%).

7-b. Spending That Stays In Canada's North

As noted previously, many USA and Overseas residents who spend at least one night in the North *also* spend nights in other parts of Canada. Consequently, not all the spending that is required to finance a trip that involves at least one night in the North is actually spent in the North (accruals).

Of the \$1.5 billion spent on trips that take Canadians, Americans and Overseas visitors to Canada's North for at least one night, less than \$1.2 billion remain in the North. The lion's share — almost two-thirds — of these expenditures are made by Canadians (\$738 million). Americans spend about \$354 million *in the North* (\$170), and Overseas residents contribute about \$62 million (50/0).

Table 38

Spending That Stays In The North On Overnight Trips - All Purposes, All Seasons				
	Total	Canada*	USA	Other Countries
In Millions	\$	\$	\$	\$
Total	1,154	738	354	62
Shelter	344	188	137	19
Transportation In Canada	268	194	62	12
Food & Beverages	304	224	67	13
Recreation	103	43	54	6
Other/Retail	129	83	34	12

Source: 1994 Detailed Tabulations, Volume I, page 63-1; Volume III, page 109-1; Volume IV, page 93-1. Excludes transportation costs to Canada. Columns may add to more than 100% total due to rounding. *Includes spending on trips with a destination in Canada's North and those that have nights spent in the North but are destined to other locations.

7-c. Peak Season Spending That Stays In Canada's North

Peak season spending that stays in the North follows a different pattern than do accruals to the region over the entire year.

Total peak season spending among Americans and Overseas visitors and Canadians on pleasure trips during the six months between April and September³⁶ yield almost \$500 million in spending that accrues to the North.



Table 39

Peak Season Spending That Stays In Canada's North		
Total In Millions	\$493	
Place of Residence	\$	%
Canada ¹	\$118	24
USA ²	\$321	65
Other Countries ³	\$54	11

¹Total spending assigned for overnight peak season pleasure trips.
²Total spending assigned for all overnight peak season trips. Special calculations from 1994 Detailed Tabulations, ITS and CTS

Canadians on peak season overnight pleasure trips in Canada's North contribute about one-quarter of all spending that remains in the region during this time period. The diminished role of the domestic market in peak season spending — from 64% of annual spending to 24% in the peak season — is a function of removing the relatively high-cost business trips and numerous visits made to see friends and relatives that are included in the annual estimates.

Americans replace Canadians as the dominant source of economic activity in Canada's North during the peak season.

These USA visitors contribute almost two-thirds of peak season spending that stays in the region. The Overseas market also gains in importance within the peak season. Overnight visitors from countries other than Canada and the USA contribute about one-tenth of peak season consumer spending to Canada's North.

In the six month peak season, Americans and visitors from Overseas spend about the same amount on a per person per night basis.

Canadians who take an overnight peak season pleasure trip to the North spend \$30.00 that remain within the North, on average, per night for every person in the household that went on the trip. This average covers all nights the household was away from home since the CTS does not identify the location of nights spent at the sub-provincial level. The low spending level is undoubtedly a function of low accommodation and restaurant costs that result from so many of these visitors staying in their own cottages or with friends and relatives.

Among Americans and Overseas visitors on peak season overnight trips to Canada's North, average spending estimates are for all people in the travel party for each night spent *in the North*. These estimates represent dollars that remain in the North.

Each American spends \$117.00 per night in the North, and each Overseas visitor spends about the same amount (\$122.00), reflecting similar levels of transportation and food/beverage spending that stays in the North across the inbound groups. These visitors spend about \$20 to \$25 per person per night on transportation

and the same amount on food/ beverages for a peak season pleasure trip in the North.

Similar to the annual pattern, accommodation costs for Americans are somewhat higher (\$46) than for Overseas visitors (\$37), reflecting the tendency of Overseas visitors to stay with friends and relatives while in the North.

Table 40

Average Per Person Per Night Spending That Stays In The North - Peak Season		
	USA	Other Countries
Total	\$117	\$122
Accommodation In Canada	\$46	\$37
Transportation In Canada	\$20	\$25
Food & Beverages	\$22	\$26
Recreation	\$18	\$11
Other/Retail	\$11	\$23

Also consistent with the annual pattern, USA peak season visitors spend more money on recreation (\$18) than do Overseas visitors (\$11), but retail spending is higher in the Overseas market segment (\$23, per person per night).

7-d. A Different Way To Look At Tourism Value

Within the USA and Overseas markets, considerable *spending is* done in Canada that does not make its way to

the North (*accruals*). A comparison of total *spending versus* total *accruals* suggests that American visitors may be a more economically viable market for the North than are Overseas visitors. This conclusion is based on the following findings:

. Americans and Overseas visitors spend about the same amount of money per person per night in the North during the peak season, but Americans spend *more* than Overseas visitors on an annual basis;

. The total volume of Americans to Canada's North is appreciably greater than is the volume of Overseas visitors; and

. The ratio of *spending to accruals in the North* is dramatically higher for Americans — the North retains about 75 cents for every trip dollar spent on key items such as food, shelter and recreation from Americans who spend at least one night in the North, but retains only 25 cents of the corresponding Overseas visitor's trip dollar spent on these items (see below).

USA Visitors

USA residents with any nights in the North spend considerably more money than do their Canadian counterparts on a *per trip* basis, but a substantial proportion of this spending does not, in fact, accrue to the North. It is spent in Canada's South . . . on the way to and from the North.



Table 41

Americans: Spending Versus Accrued Dollars That Stay In The North				
In Millions of \$s	Shelter	Food	Recreation	Retail
Total Accruals To The North	\$137	\$67	\$54	\$34
Total Spending On Overnight Trips With Nights In The North	\$182	\$100	\$74	\$53
Spending Assigned Outside Canada's North For Overnight Trips With Nights In The North	\$45	\$33	\$20	\$19

All overnight household trips with destination in Canada's North. Total accrued expenditures to the North (as destination dollars). Source: 1994 Detailed Tabulations, Volume III, pages 109-1, 145-4.

Of the 182 million dollars Americans spend for accommodation on a trip that includes nights in Canada's North, 137 million, or 75%, is actually spent in the North. The "loss" to Canada's South for time spent in this region represents one-quarter of Americans' accommodation spending.

% Of Total Expenditures Spent In Canada's South By Americans On Trips With Nights In Canada's North

- Accommodation 25%
- Food/Beverages 33%
- Recreation 27%
- Retail 36%

The North is less capable of holding Americans' retail and food/beverage spending than it is in retaining shelter and recreation spending.

Overseas Visitors

Since Overseas visitors spend much longer in Canada and, almost by definition, must reach Canada's North by spending some nights in the southern

Table 42

Overseas Visitors: Spending Versus Accrued Dollars That Stay In The North				
In Millions of \$s	Shelter	Food	Recreation	Retail
Total Accruals To The North	\$16	\$11	\$5	\$10
Total Spending On Overnight Trips With Nights In The North	\$59	\$42	\$18	\$34
Spending Assigned Outside Canada's North For Overnight Trips With Nights In The North	\$43	\$31	\$13	\$24

AU overnight household trips with destination in Canada's North. Total accrued expenditures to the North (as destination dollars). Source: 1994 Detailed Tabulations, Volume IV pages 941, 102.1.

region of the country, it is not necessarily surprising that many of their expenditures take place *in the South*. It is, however surprising to discover just *how much* of the total spending on key items such as food, shelter, recreation and shopping does not reach the North on these trips.

Irrespective of category, about three-quarters of Overseas visitors' spending is done in Canada's South — even though these visitors spend at least one night in the North.

% Of Total Expenditures Spent In Canada's South By Overseas Visitors On Trips With Nights In Canada's North

- Accommodation 72%
- Food/Beverages 74%
- Recreation 72%
- Retail 71%



7-e. Spending In Canada's Northeast & Northwest

Spending that *remains in* each part of Canada's North is related to the different appeals each region has for Canadian, USA and Overseas visitors.

The Northwest attracts a somewhat larger share of Canadian overnight *visitors*, but it retains even more of the dollars spent by the overnight domestic market than does the Northeast. In fact, the Northwest obtains just over *one-half* of the visitors (56%), but almost two-thirds of expenditures assigned to Canada's North for overnight domestic travel (64%).

In the USA market, the pattern changes: within this market, the Northeast obtains a substantially larger *proportion* of overnight travel (61% of person trips), but the two sub-regions retain about equal proportions of USA visitor spending on overnight trips (NE, 51%; NW, 49%).

Table 43

Distribution Of Trips/Dollars In The North		
	Overnight Person Trips With Any Nights In The North	Expenditures Assigned To The North For Overnight Trips
Canada		
Total	3,990,000	\$738 Million
	%	%
Northeast	44	36
Northwest	56	64
USA		
Total	974,000	\$354 Million
	%	%
Northeast	61	51
Northwest	39	49
Overseas		
Total	145,000	\$62 Million
	%	%
Northeast	25	20
Northwest	75	80

Expenditures exclude transport to Canada. Source: Detailed Tabulations, Volume I, pages 4.6, 63-1; Volume III, 17-6, 1091, Volume IV, 17-6.93-1.

Within the Overseas market, the Northwest is appreciably more popular than is the Northeast, both in terms of overnight person trips (75%/0) and consumer spending that remains in Canada's North (80%).

D. DEMOGRAPHIC PROFILES OF VISITORS TO CANADA'S NORTH

8-a. Introduction To Profiles

The only demographic information available from the International Travel Survey for non-resident visitors to Canada's North are gender and age of all individuals in the travel party. Travel party size and composition can be deduced from this information.

In the Canadian Travel Survey, the individual who is reporting a trip provides his/her age, gender, education and household income but does not report on these characteristics for other household members who may have accompanied the "respondent" on the trip.

In view of the fact that information on Canadians who take various types of trips to Canada's North for each calendar month is available within the CTS, and in light of the additional demographic information available for these travelers, a more extensive discussion of the characteristics of Canadians who utilize the North in specific times of the year and for specific purposes is provided in Chapter V. Here, only limited domestic demographic data are provided as a point of contrast with the profile of

American and Overseas Northern visitors.

8-b. Demographic Profile Of Canadians In Canada's North

More men than women take overnight trips within Canada's North —

Table 44

Canadians (15+) On An Overnight Trip To The North			
	Total North	North-Bound	Intra-North
	%	%	%
GENDER			
Male	57	58	53
Female	44	42	47
AGE			
15-24 Years	17	16	21
25-44 Years	48	48	48
45-64 Years	28	29	24
65 Years +	7	8	7
INCOME³⁷ (HI-I-)			
Under \$20,000	15	16	13
\$20,000-\$59,999	55	55	53
\$60,000 or More	30	29	33
\$80,000 +	12	13	10
EDUCATION			
Some Secondary Or Less	28	26	31
Graduated Secondary	16	16	15
Any Post-Secondary	56	57	54
Graduated University	19	21	13

Characteristics of respondent, based on household trips with a destination in Canada's North. Source: 1994 Detailed Tabulations, Volume II, pages 169-2/3; 171-1, 173-2

irrespective of whether they are travelling from the South to the North (Northbound) or moving from place to place within the North (Intra-North).

The overnight market is dominated by young adults and middle-aged Canadians: about one-half of the overnight trips to the North are reported by a Canadian between the ages of 25 and 44 years. Young people are considerably more prevalent than are older Canadians: 17% are between 15 and 24 years of age but only 7% are 65 years of age or more.

While they span the income spectrum, Canadians who go North are most apt to represent middle income households. More than 1-in-2 have annual incomes in the \$20,000 to \$59,999 range, and about 1-in-3 have higher incomes. Low income households (under \$20,000) and high income households (\$80,000 or more) each contribute about one-seventh to one-eighth of the domestic overnight trips to the North.

Almost 3-in-4 overnight trips to the North by Canadians are made by people who have graduated from high school and about one-fifth of all trips include university graduates (19%). Trips to the North that originate in Southern Canada are more apt to include university-educated visitors (21/0) than are overnight trips that begin and end in the North (13%).

There are no substantive demographic differences between the Canadians who take an overnight trip to Canada's Northeast and those who are destined to the Northwest.

Table 45

Canadians (15+) On An Overnight Trip To The Northeast & Northwest			
	Total North	North-east	North-west
	%	%	%
GENDER			
Male	57	58	55
Female	43	42	45
AGE			
15-24 Years	17	16	18
25-44 Years	48	45	50
45-64 Years	28	31	25
65 Years +	7	9	6
INCOME* (I-II-I)			
Under \$20,000	15	11	19
\$20,000-\$59,999	55	63	48
\$60,000 or More	30	26	33
\$80,000+	12	9	15
EDUCATION			
Some Secondary Or Less	28	30	26
Graduated Secondary	16	11	20
Any Post-Secondary	56	59	54
Graduated University	19	17	20

Characteristics of respondent, based on household trips with a destination in Canada's North. Source: 1994 Detailed Tabulations, Volume II, pages 69.4/5, 71.2734.

Nonetheless, there are directional indications to suggest that the Northwest attracts somewhat younger and more affluent Canadians than does the Northeast.

Canadians who take overnight trips to the North for pleasure during the six months between April and September closely resemble the annual "all purpose" overnight visitor in



terms of gender, age, household income and education.

Table 46

Canadians (15+) On An Overnight Trip To The North		
	All Purposes All Seasons	Peak Season Pleasure
	%	%
GENDER		
Male	57	59
Female	43	41
AGE		
15 - 24 Years	17	23
25 - 44 Years	48	41
45 - 64 Years	28	28
65 Years +	7	9
INCOME¹⁹ (HH)		
Under \$20,000	15	11
\$20,000-\$59,999	55	59
\$60,000 or More	30	30
\$80,000+	12	9
EDUCATION		
Some Secondary Or Less	28	30
Graduated Secondary	16	17
Any Post-Secondary	56	54
Graduated University	19	15

Characteristics Of respondent, based on household trips with 2 destination in Canada's North. Source: 1994 Detailed Tabulations, Volume II, pages 69.4/5, 71-2, 73-4, 196-2/3, 197-1, 198-2.

Most overnight trips to Canada's North — be it the eastern or western part — include only one member of the household. More than 6-in-10 trips fall into this category — a fact which explains the comparatively small household party size (1.6 people, on average). The reader is reminded that this is not a measure of travel party size. It reflects only the number of people on the trip from the *same* household. If members of more than one household went on

the same trip, this information is not captured by the Canadian Travel Survey, although it is the only party-size information available within the International Travel Survey.

Table 47

Canadians' Party Composition & Size On Overnight Trips To The North			
	Total North	North- east	North- west
	%	%	%
HOUSEHOLD PARTY SIZE			
One Person	62	61	63
Two People	24	24	25
Three Or More	14	15	13
Average	1.6	1.6	1.6
HOUSEHOLD PARTY COMPOSITION			
Adult only	85	85	84
With Children Under 15 Years	15	15	16

Overnight household trips with a destination in Canada's North Source: Detailed Tabulations, Volume II, pages 27.3/4.

Since so many trips are made up of only one person in the household, it is not surprising that most overnight trips by Canadian households to the North include only people 15 years of age or older (85%, adult-only).

8-c. Demographic Profile Of Americans In Canada's North

Just as they do among Canadians, men predominate among Americans who spend nights in the North. Three-in-ten parties include only male adults whereas only about 1-in-10 parties include only female adults. The remainder are composed of both men and women (44%) or did not provide



“the information (14%). Similar proportions are evident for Americans who spend nights in Canada’s Northwest and those who go to the Northeast.

Table 48

Americans' Gender & Age Clusters On Overnight Trips To The North			
	Total	Northeast	Northwest
GENDER OF ADULTS	%	%	%
Males Only	30	30	30
Females Only	12	11	13
Both Males & Females	44	41	49
Not Stated	14	18	8
AGE CLUSTERS*			
All 15-24	2	2	2
All 25 - 44	16	13	21
All 45+ Years	47	44	51
All 55+ Years	29	25	33
Mixed Age Groups	14	14	14

Overnight party trips with any nights spent in Canada's North. Source: Detailed Tabulations, Volume III, page 85-1, 93.1/4. Special Tabulations, pages 85A-1, 85B-1. *Based on total overnight party trips ● Adubani parties

Very few American travel parties going to Canada’s North are composed exclusively of young people (2/40), whereas almost one-half are made up of people who are 45 years of age or more (47/0). Americans in the pre-retirement/retirement age group (55 +) makeup more than one-quarter of the North’s visitor parties.

Americans tend to travel in couples,

About one-half of Americans who spend nights in Canada’s North are traveling with one other person, one-

quarter are traveling solo, and one quarter are in a travel party of at least three individuals. On average, the American travel party to the North is made up of 2.3 people.

Visitors to the Northeast travel in somewhat larger groups (2.6, average) than do those who go to the Northwest on an overnight trip (2.1).

Table 49

Americans' Party Composition & Size On Overnight Trips To The North			
	Total North	North East	North West
TRAVEL PARTY SIZE	%	%	%
One Person	27	24	31
Two People	49	45	54
Three Or More	24	31	15
Average	2.3	2.6	2.1
TRAVEL PARTY COMPOSITION			
Adult Only	79	73	87
With Children Under 15 Years	8	9	6
Not Stated	14	18	8

Overnight party trips with any nights spent in Canada's North. Source: Detailed Tabulations, Volume III, page 85-1, 93-1; Special Tabulations, pages 85A-1, 85B-1

Like their Canadian counterparts, Americans traveling to the North are much more likely to be traveling in adult-only groups (79%) than they are to be traveling with children under 15 years of age (8%).

Americans from Western states are younger and more likely to be traveling without children.

Northern visitors from the western United States (Pacific, Mountain,



“Alaska) are not only most likely to travel in adult-only parties (9 1%), but they are also younger than are their counterpane further to the east.⁴⁰ About 1-in-6 travel groups from Pacific and Mountain states, including Alaska, are youthful. They are made up of adults between 15 and 34 years of age (17%). The youthfulness of these western Americans explains the comparatively youthful nature of American visitors to the Northwest, since this region attracts almost all of the USA inbound market from western states (see Section 3-a).

One-third of Americans from East North Central states travel with children.

Americans from East North Central states who go North in Canada are most apt to travel with children. One-third do so, and the remaining two-thirds travel in an adult-only party.”

8-d. Demographic Profile Of Overseas Visitors In Canada’s North

Overseas visitors to Canada’s North are evenly divided between males and females. **One-fifth** of the trips to the region include only male adults, the same proportion include only female adults, and the remainder are made up of adult men and women.

Compared to their American counterparts, Overseas visitors to Canada’s North tend to be somewhat younger: twice as many Overseas parties are made up of people between 25 and 44 years of age (29%) as is the case among Americans (16%).

Table 50

Overseas Visitors’ Gender & Age Clusters On Overnight Trips To The North			
	Total North	North-east	North-west
GENDER OF ADULTS	%	%	%
Males Only	20	19	20
Females Only	20	23	18
Both Males & Females	50	45	52
Not Stated	10	13	10
AGE CLUSTERS*			
All 15 -24	4	3	4
All 25-44	29	30	29
All 45+ Years	36	37	36
All 55+ Years	22	22	22
Mixed Age Groups	8	7	8

Overnight party trips with any nights spent in Canada’s North. Source: Detailed Tabulations, Special Tabulations, page 80-2/4. ● Aduk.oniy

Visitors from German-speaking Europe are somewhat younger than other European visitors to the North.

Fewer than 2-in-10 parties from German-speaking Europe (18?40) are composed entirely of adults who are 55 years of age compared to almost 3-in-10 non-German-speaking European visitor parties (29%). Visitors from countries outside of Europe more closely resemble German-speaking European visitors (16% are



-- in adult only parties in which all members are at least 55 years of age).”

Overseas visitors to the North are more likely to travel in parties of one (33%) or two (50%) than they are to travel in larger parties (3+, 18%⁴⁰). In the vast majority of cases, these individuals are at least fifteen years of age: more than 8-in-10 Overseas travel parties to the North are adult-only.

There are no differences in party size or composition of Overseas visitors who go to the Northeast and those who go to the Northwest.

Table 51

Overseas Visitors' Party Composition & Size On Overnight Trips To The North			
	Total North	North East	North West
TRAVEL PARTY SIZE	%	%	%
One Person	33	36	31
Two People	50	49	50
Three Or More	18	15	19
Average	2.1	1.9	2.1
TRAVEL PARTY COMPOSITION			
Adult Only	83	81	84
With Children Under 15 Years	6	7	6
Not Stated	11	13	9
<small>Overnight party trips with any nights spent in Canada's North. Source: Detailed Tabulations, Volume W.PIK.S81.1, 71.1.</small>			



IV. KEY MARKET SEGMENTS — USA & OVERSEAS

E. ACTIVITY SEGMENTS: PEAK SEASON VISITORS FROM THE UNITED STATES

9-a. Introduction

Americans on pleasure trips that include Canada's North during the peak season utilize Canada's tourism opportunities and infrastructure differently, depending on which activities they participate in. Activity groups of interest are discussed in this section:

. **Anglers/Hunters** are Americans who claim to hunt/fish while in Canada on their overnight trip. Since the peak season excludes the *bunting* season, these visitors can be assumed to be *anglers in* the time span between April and September.

• **Parks & Sites Visitors** represent the net count of those Americans who go to national, provincial or regional parks and/or historic sites on their trip to Canada. These visitors may also fish, hunt, and/or camp during their stay in the country.

. **Campers** are visitors who spend any nights at campgrounds or trailer

facilities while on their trip to Canada. These visitors may overlap with other activity groups such as those who fish, hunt and/or visit parks or historic sites.

. No **Outdoor Activity** visitors are those who may participate in a variety of *other* activities such as sightseeing, shopping, visiting friends, or going to cultural events but do **not** engage in any of the following while on their trip to Canada

- Hunting/Fishing
- Camping
- Visiting Parks
- Swimming/Other Water Sports
- skiing
- . Any Other Outdoor Activities.

The reader is reminded that Section 9 is based on Americans who travelled to Canada's North between April and September, on an overnight trip for pleasure purposes. Activities could have taken place anywhere on the visitor's trip.

9-b. Activities: Americans In The North

Anglers/Hunters are comparatively single-minded: one-half of them engage in no other outdoor activity while in Canada, and comparatively

Table 52

Americans: Activity Segments In Canada's North, Peak Season Pleasure Trips					
	Total %	Hunt /Fish %	Parks & Sites %	Camp %	No Out-Door* %
Friends & Relatives	15	21	12	15	12
Shopping	58	37	71	64	53
Sightseeing	66	34	86	77	63
Festival/Fair	114	6	22	23	7
Sports Event	3	*	3	2	6
Zoo/Museum/Natural Display	28	10	44	47	10
Cultural Events	6	3	9	5	7
Theme Park	3	1	6	2	**
Dining/Nightlife ¹	37	15	48	29	33
OUTDOOR					
Parks/Historic Site	58	35	100	81	-
Swim/Other Water Sports	111	15	11	12	-
Hunt/Fish	33	100	200	36	-
Only Outdoor Activity	16	48	8	-	-
Any Car Camping Nights	27	30	38	100	-
Camping & Parks/Sites	22	21	38	81	-
3+ Outdoor Activities	15	30	22	41	-
Bus Tour ²	15	-	18	-	32

Total overnight party trips. ¹Dining in high quality restaurants/travelled within Canada by bus. Source: 1994 Detailed Tabulations. Volume III, pages 60-2, 80-1/4. ²Includes nightlife/entertainment. ³Entered Canada by bus. Source: 1994 Detailed Tabulations. Caution: Small base size. **Less than 0.5%.

few sightsee, shop, go to festivals, fairs or other types of touristic attrac-

tions while in Canada. Almost one-third are Campers and one-fifth both camp and visit parks or historic sites within the country.

Anglers/Hunters are more apt to be visiting friends and relatives than are other American activity segments in Canada's North, but it is impossible to know whether these visitors are gathering with friends — be they Americans they know from "home" or Canadians they have met on their previous trips to Canada — for the annual fishing trip or whether they are visiting relatives who live in Canada.

Park/Historic Site Visitors are quite different from Anglers/Hunters. They are avid *participants* in the tourism opportunities Canada has to offer: they sightsee, shop, go to restaurants and clubs, zoos/museums and natural displays at appreciably higher rates than do American overnight peak season visitors to Canada's North in general. Almost 4-in-10 also camp, suggesting that these Americans are utilizing camping facilities in Canada's national, provincial or regional parks.

One-fifth of *Parks/Sites Visitors* are likely to be charter bus tour passengers (18%) — a fact that may explain their high level of engagement with Canada's "built" tourism attractions such as museums, historic sites,



festivals and fairs, and their relatively low level of engagement with the “out-doors”. Even though they visit parks, these Americans tend *not to swim*, engage in other water sports, fish, or camp.

Campers are more engaged in Canada’s outdoors than are Anglers/Hunters and Parks/Sites Visitors:

- about 4-in-10 Campers engage in at least three outdoor activities while in the country;
- more than one-third fish; and
- the vast majority visit Canada’s parks or historic sites (81%).

Campers fall between Anglers/ Hunters and Parks/Sites Visitors in their interest in shopping, sightseeing, going to festivals or fairs, and utilizing other “built” components of Canada’s tourism industry such as restaurants, and clubs.

Virtually none of these Northern Campers enters and moves about within Canada by bus, suggesting that they are closer to fully independent travellers (FIT) than is the *Parks/Sites Visitors* group as a whole. In fact, most *Campers* are *Parks/Sites Visitors* (81%), but only one-third of *Parks/Sites Visitors* are *Campers* (38%).

Non-Outdoor Visitors seem to adopt a “see but do not touch” approach to tourism in Canada. Even though they visit Canada’s North on a pleasure trip in peak season, they are not

avid participants in their surroundings. They are less apt to shop, sight-see, go to zoos, museums or natural exhibits or to festivals and fairs than are their counterparts who go to parks or camp on their trip.

One-third of Non-Outdoor Visitors to the North are in buses as they enter and travel through Canada — buses with itineraries that may limit the level of direct involvement these travelers can have with Canada’s North as they move through it.

9-c. Accommodation: American Activity Groups In The North

It is not surprising that neither *Anglers/Hunters* nor *Campers* utilize traditional forms of commercial accommodation while in Canada’s North.

Table 53

Americans’ Accommodation Choices In Canada’s North, Peak Season Pleasure Trips *					
	Total	Hunt/ Fish	Parks & Sites	Camp	No Out- Door*
Spent Any Nights In . . .	%	%	%	%	%
Hotel	23	5	29	9	30
Motel	28	9	29	4	53
Cottage/ Cabin	20	48	8	5	9
Camping	26	30	36	96	-
Non- Commer- cial	9	15	6	2	9

Total overnight party trips, main purpose pleasure, peak season. Columns add to more than 100% because of multiple accommodation types in regions. Source: 1999 Detailed Tabulations, Special Tables, page 74-1. NOTE: All figures shown are nights spent in the accommodation type in Canada’s North. *Caution: Small base size.

Those who hunt or fish are especially reliant on commercial cottages/cabins



(48%) or campgrounds (30%), whereas Campers rely almost exclusively on campgrounds and trailer facilities for accommodation in the North.

Only about one-third of *Parks/Sites Visitors* in peak season actually camp in the North — about the same proportion that stay in hotels and in motels in the North.

Hotel and, most particularly, motel operators in the North might find their readiest market among Americans who do *not* engage in any outdoor activities while on a peak season pleasure trip: one-half of these Americans stay in motels (53%) and about one-third find hotel lodging in the North (30%).

9-d. Characteristics: American Activity Groups In The North

Angling and hunting may not be the exclusive domain of American men on overnight pleasure trips to Canada's North in peak season, but this activity segment is certainly dominated by them. Almost one-half of American visitor parties that come to the North and fish or hunt during peak season are composed of men *only*. About one-third of these parties include both men and women (380/o).

Although men-only American travel groups also predominate among the North's Parks/Sites Visitors, Campers, and those who participate in no outdoor activities, more of these

American travel parties include women than is the case for Anglers/Hunters.

Table 54

Americans' Gender & Age Clusters: Peak Season Pleasure Visitors To Canada's North					
	Total	Hunt /Fish	Parks & Sites	Camp	No out. door*
Northern Visitors	%	%	%	%	%
GENDER (ADULTS)					
Males Only	28	45	24	28	20
Females Only	11	5	11	8	11
Both Males & Females	46	38	46	51	53
Not Stated	15	12	19	13	16
AGE ** CLUSTERS					
All 15 - 24	1	***	***	2	3
All 25 - 44	16	10	20	28	7
All 45 + Years	45	38	44	38	59

Total overnight peak season party trips. Source: 1994 Detailed Tabulations, Special Tables, pages 98.2/4. *Caution: Small base size. ● "Adult only" trips.

Very few peak season pleasure trips by Americans who go to Canada's North are made by young people, irrespective of the type of activity in which they participate.

Anglers/Hunters and those who participate in no outdoor activities are least apt to be young or middle-aged adults — only 1-in-10 fishing/hunting parties are made up of adults who are 25 to 44 years of age. In contrast, at least 2-in-10 American groups that travel to Canada's North and visit parks/historic sites and/or camp are made up of individuals in this age group.



Travel parties that engage in *no* outdoor activities while on a trip that includes at least one night in Canada's North are especially likely to be composed of Americans who are at least 45 years of age (59%).

**9-e. Other Travel Facts:
American Activity Groups In The North**

Considerable information on various activity groups is available within the detailed tabulations provided as part of this project. In this section, some highlights are covered to give the reader a taste of the types of profiles that can be constructed for activity segments within the American peak season pleasure market to Canada's North.

Anglers/Hunters rely on many different forms of transportation within Canada. They drive, fly and take boats to a greater extent than do Parks/Sites Visitors or Campers.

They are also heavily concentrated in Canada's Northeast (81%). Only 2-in-10 Anglers/Hunters spend nights in Canada's Northwest.

Of the three sub-regional sponsors, the Yukon is most apt to host **American** Anglers/Hunters in the peak season (7%), followed by Saskatchewan's North (2%) and the Northwest Territories (2%).

Table 55

American Peak Season Pleasure Visitors To Canada's North: Other Travel Facts					
	Total	Hunt /Fish	Parks & Sites	Camp	No Outdoor*
Northern Visitors	%	%	%	%	%
TRANS-PORT IN CANADA					
Any Auto	51	72	43	52	35
Any Boat	22	35	17	11	12
Any Plane	8	18	5	3	3
ANY NIGHTS SPENT IN:					
Northeast	61	81	48	38	74
Northwest	39	19	52	62	26
Saskatchewan	4	3	6	3	-
North	1	2	•		
Yukon	24	7	33	34	22
NWT	2	2	3	4	•*
# OF NIGHTS IN NORTH	4.2	5.9	4.0	4.7	2.3

Total overnight peak season, main purpose pleasure, party UIPS. Source: 1994 Detailed Tabulations, Volume III, pages 25-5/6, 53.1; 60-1. © C.mIUon Small base size. • *Less than 0.5%.

American Anglers/Hunters spend more nights in Canada's North (5.9) than do Campers (4.0) or Parks/Sites Visitors (4.7). Not surprisingly, those who participate in *no* outdoor activities spend the shortest period of time⁷ in Canada's North (2.3).

Parks/Sites Visitors on pleasure trips from the United States in the peak season are evenly divided between those who spend nights in Canada's Northeast (48%) and Northwest (52%), but **Campers** concentrate their overnight stays in the Northwest (62%).

Even though Parks/Sites Visitors go to Saskatchewan at a higher rate than



do Americans on peak season pleasure trips in general, they spend their nights in *Southern* Saskatchewan (5%) rather than in the Northern part of this province (less than 1%).

The Yukon is popular among Campers and Parks/Sites Visitors.

Both Parks/Sites Visitors and Campers are especially likely to spend nights in the Yukon — one-third of the Americans in each activity group do so. As noted elsewhere in this report, the Yukon also attracts a relatively high level of American “pass-through” traffic, primarily from Alaska. This fact undoubtedly explains why one-fifth of the Americans who engage in *no* outdoor activities spend nights in the Yukon.

The Northwest Territories seems to have greater appeal to American Campers (4%) than it does to Anglers/Hunters (2%) in the peak season.

9-f. Ratings Of Canada: American Activity Groups In The North

Visitors to Canada are asked to state whether they regard Canada to be *better, the same, or not as good as* the home country for transportation, accommodation, hospitality of the local people and value for money.

Canada gets its highest marks for hospitality.

In general, American peak season pleasure visitors to Canada’s North are most favorable in their ratings of Canada’s hospitality — almost one-half claim that the hospitality of local people is “better” in Canada than it is in the USA. Among the activity groups, Campers are most enthusiastic about Canadian hospitality (62%). While still quite positive, Anglers/Hunters (48%) and Parks/Sites Visitors (50%) are less enthusiastic about the hospitality of Canadians.

Table 56

American Peak Season Pleasure Visitors To Canada's North: Comparison Of Canada To USA					
	Total %	Hunt /Fish %	Parks & Sites %	Camp %	No Out-door* %
Northern Visitors					
TRANSPORT					
Better	9	8	12	12	5
Worse	13	23	11	22	4
SHELTER					
Better	8	3	11	15	6
Worse	14	14	10	11	29
HOSPITALITY					
Better	45	48	50	62	43
Worse	2	3	1	1	5
VALUE FOR MONEY					
Better	31	32	37	26	19
Worse	33	36	31	48	49

Total overnight peak season, main purpose pleasure, party trips, based on total providing a rating for each characteristic. Source: 1994 Detailed Tabulations, Volume III, pages 10s.1/2. *Caution: Small base size.



Campers do not think they are getting good value for their money.

As many Northern visitors from the USA in peak season think they are getting *better* value for their dollar as think they are getting *worse* value. Campers and those who participate in no outdoor activities while on their trip are the most negative about value-for-money. About 1-in-2 of these Northern visitors claim they are getting worse value for their dollars in Canada than they would in the USA.

Those going to more 'inaccessible' locations are less satisfied with the transportation system.

More than one-fifth of **Anglers/Hunters** and **Campers** seem to think that Canada offers them poorer transportation facilities than they would find in the USA. The prevalence of negative perceptions among these Northern visitors maybe associated with their interest in gaining access to more remote locations — to fish or to pitch a tent — locations that might be more difficult to get to than are parks or historic sites.

Anglers/Hunters are also somewhat more negative about the accommodations they found in Canada — only 1-in-33 claim that their accommodation was *better* in Canada than it would have been in the USA, but 1-in-7 think it was worse.

9-g. Value: American Activity Groups In The North

One way to look at the importance of activity groups to Canada's North is to examine the proportion of all "activity-based" spending that occurs in the region.

Americans who take an overnight trip to Canada in the peak season spend over \$4 billion in Canada. The lion's share of this spending — \$2.8 billion — stays in Canada's South, and almost \$1 billion are spent on commercial carriers that cannot be assigned to either the North or the South. The remainder — \$322 million or 8% — stays in Canada's North.⁴³

Trips *throughout Canada* in which hunting or fishing is the **only** outdoor activity engaged in generate approximately \$280 million in spending by American visitors during the peak season. Almost \$114 million, or 41% of this Angler/Hunter spending stays in Canada's North. Since Anglers/Hunters are more likely to be destined to locations in Canada's North-east, it is not surprising that more of their spending accrues to this region (30%) than to the Northwest (11%).

Americans who visit parks or historic sites on their overnight peak season trip spend close to \$2 billion in Canada, but only \$137 million of this stays in Canada's North. The remainder — over \$1.4 billion —



accrues to Canada's South or is spent on commercial carriers (\$378 million).

Campers, many of whom are also Parks/Sites Visitors, spend almost \$300 million in Canada, but most of this money stays in Canada's South (\$195 million).

Table 57

American Peak Season Visitors To Canada's Regions: Spending Assigned To The North				
In Millions Of Dollars*	Total	Only Hunt/Fish**	Parks & Sites	Camp
Total Spending	\$4,084	\$280	\$1,873	\$295
Assigned To:	%	%	%	%
South	70	41	73	66
North	8	41	7	24
Northeast	4	30	3	7
Northwest	4	11	5	17
Not Assigned (U.S. Fares)	23	18	20	11

*Total spending on overnight peak season party trips (all purposes), including transport. **This category is used to differentiate "any hunt/fish" from those visitors who hunt/fish and engage in *another* outdoor activity on the trip. Source: 1994 Detailed Tabulations, Volume III, page 114-1.

Consistent with the popularity of the Northwest as a camping destination, it is not surprising to find that of the \$69 million that is spent in Canada's North on Americans' camping trips in the peak season, more is spent in the Northwest (\$49 million) than in the Northeast (\$20 million).

Fishing is a key source of consumer spending in the North.

Another way to look at activity-based spending in the North during the peak season is to examine the relative value of various groups to the region. From this perspective, the importance of fishing to the North is clearly evi-

dent: more than half of all peak season spending that stays in the North is associated with a trip that includes fishing (56%), and more than one-third of the value of American overnight tourism in Canada's North is attributable to trips with *only* fishing as an outdoor activity.

A visit to a park or historic site while on a peak season trip to Canada is also associated with considerable tourism value for Canada's North (43%). While many Parks/Sites Visitors may have also camped in the North, *camping* trips contribute only about half the proportion of consumer spending to the region that Parks/Sites trips by Americans do (22%).

Table 58

American Peak Season Visitors' Spending Assigned To The North & South				
n Millions Of Dollars*	Assigned To Canada's North		Assigned To Canada's South	
	\$	% Of Total Spending In The North	\$	% Of Total Spending In The South
On Trips With ... Activities				
Any Hunt/Fish	\$180	56	\$221	8
Only Hunt/Fish**	\$114	35	\$115	4
Any Park/Historic Site	\$137	43	\$1,358	48
Any Camping	\$69	22	\$195	7
No Outdoor Activity	\$33	10	\$1,010	36
1-2 Outdoor Activities	\$240	75	\$1,595	56
3+ Outdoor Activities	\$44	14	\$229	8

*Total spending on overnight peak season party trips (all purposes). **This category is used to differentiate "any hunt/fish" from those visitors who hunt/fish and engage in *no other* outdoor activity on the trip. Source: 1994 Detailed Tabulations, Volume III, pages 114.1/2. NOTE: Columns are additive since the same spending may occur in more than one activity group (e.g., camping and Parks/Sites).



Interestingly, *fishing* is a much more prominent generator of tourism spending for Canada's North (56%) than it is for the South (8%). A similar, though less dramatic pattern is evident for *camping*, but not for Parks/Sites trips. These peak season trips by Americans contribute about the same proportion of consumer spending to both the North (43%) and the South (48%),



F. ACTIVITY SEGMENTS: VISITORS FROM THE UNITED STATES TO CANADA'S NORTHEAST

10-a. Activities: Americans In The Northeast

In order to examine activity groups on Americans' overnight trips to

Canada's Northeast and Northwest, all purposes and seasons must be aggregated to generate sufficient base sizes for analysis.

Table 59

Americans: Activity Segments In Canada's Northeast, All Overnight Trips					
	Total %	Hunt/Fish %	Parks & Sites %	Camp %	No out-Door %
Friends & Relatives	21	25	13	13	27
Shopping	48	36	62	37	46
Sightseeing	50	28	82	59	50
Festival/Fair	6	4	14	2	3
Sports Event	2	*	**	**	
Zoo/ Museum/ Natural Display	11	5	23	16	5
cultural events	2	1	4	2	2
Theme Park	2	**	4	1	1
Dining/ Nightlife ¹	30	10	48	15	27
OUTDOOR					
Parks/ Historic Site	38	26	100	64	-
Swim/Other Water Sports	11	16	13	14	-
Hunt/Fish	42	100	29	66	-
No Other Outdoor Activity	24	57	-	-	1
Any Camping Nights	14	22	24	100	-
Camping & Parks/Sites	9	12	24	64	-
3+ Outdoor Activities	13	24	25	52	-

Total overnight party trips, main purpose pleasure, peak season. ¹Includes Dining in high quality restaurant, nightlife/entertainment. Source: 1999*Detailed Tabulations, Special Tables, ppp/9B-1/4. *P.Less than 0.5%.

Thus, overnight business, pleasure and family visits by Americans throughout 1994 are included in Sections 10 (Northeast) and 11 (Northwest).

Anglers/Hunters in Canada's Northeast are even more focused visitors than are their counterparts nationally. Almost 6-in-10 utilize Canada's outdoors only for fishing and hunting, about one-fifth are Campers and slightly more visit parks or historic sites.

Compared to Northeastern overnight visitors from the USA as a whole, **Anglers/Hunters** are less apt to engage in shopping, sightseeing, nightlife and fine dining, and other cultural activities.

Parks/Sites Visitors from the USA in Canada's Northeast more closely resemble the classic "tourist" than do other activity groups examined. The



-- majority of these visitors sightsee and shop while in Canada, and about one-half go to high quality restaurants or clubs. Approximately one-quarter fish or hunt, and about the same proportion camp while in Canada.

These visitors are three to four times as likely as Anglers/Hunters or Campers to go to festivals/fairs, museums/zoos, and cultural events while on their trip.

Campers in Canada's Northeast are less (single-minded than Anglers/Hunters. At the same time, they are more restrained in their level of engagement with Canada's tourism opportunities than are Parks/Sites visitors. For example, Campers are no more likely to shop than are Anglers/Hunters, but are considerably more likely to sightsee (59%). This interest in sightseeing is, however, much lower than is the case among Parks/Sites Visitors (82%).

Possibly because they are cooking over a campfire in the woods, Campers are unlikely to use Canada's restaurants and clubs (15%). Getting to and coping with a campsite, along with a general appreciation of natural settings may also explain why such a high proportion of Campers engage in at least three outdoor activities (64%).

Many Campers visit parks and/or historic sites while in Canada (64%). Although the data do not provide clear

evidence, the conjunction of park visits and camping may indicate that most of these Northeastern visitors are camping in Canada's national, provincial or regional parks.

Non-Outdoor Visitors from the USA who spend time in Canada's Northeast closely resemble the total visitor population to the region in terms of their interest in shopping, sightseeing, seeing friends and relatives, and dining or engaging in nightlife.

10-b. Accommodation: Americans In The Northeast

Like Anglers/Hunters from the USA to Canada's North as a whole, those who spend nights in the Northeast are particularly apt to rely on commercial cottages or cabins in the region. They are also considerably more likely to find shelter in tents or trailers, or with friends and relatives than they are to use hotels or motels in Canada's Northeast.

Table 60

Americans' Accommodation Choices In Canada's Northeast, All Trips

	Total	Hunt/ Fish	Parks & Sites	Camp	No Out- Door
Spent Any Nights In:	%	%	%	%	%
Hotel	19	4	31	9	24
Motel	27	11	32	2	43
Cottage/ Cabin	24	50	11	9	4
Camping	14	22	23	95	-
Non- Com- mercial	19	20	10	3	31

Total overnight party trips. Columns add to more than 100% because of multiple accommodation types in regions. Source: 1994 Detailed Tabulations, Special Tables, page 73A-1/4. NOTE: Types of accommodation in the rows of this table represent nights spent in these types within the region (e.g., Northeast, Northwest), whereas the "Camping" column is any camping nights on trip to Canada.

Parks/Sites Visitors in the Northeast support a wider variety of accommodation establishments than do other activity groups in the region. They

spread their business among hotels (31%), motels (32%) and, to a lesser extent, campgrounds (23%) and commercial cottages or cabins (11%).

Visitors who participate in **no outdoor activities** are more likely than other activity groups to be staying in *non-commercial* accommodation (private cottages/with family or friends). They are also avid motel patrons (43%) or stay in hotels (24%). Given their apparent lack of interest in the outdoors, it is not surprising that these visitors are unlikely to stay in cottages or cabins.

G. ACTIVITY SEGMENTS: VISITORS FROM THE UNITED STATES TO CANADA'S NORTHWEST

11-a. Activities: Americans In The Northwest

Anglers/Hunters in Canada's Northwest do not concentrate their activities around fishing to the extent that their counterparts in the Northeast do. While more than 4-in-10 participate in no *other* outdoor activity, about the same proportion spend nights camping, and/or visiting parks or historic sites. Three-in-ten engage in at least three separate outdoor activities while on their trip.

About one-half sightsee and/or shop on the trip, and one-third dine out or go to clubs in the evening, but these Anglers/Hunters do not have as diversified a trip in the Northwest as do Parks/Sites Visitors or Campers. Fewer than 1-in-10 go to cultural performances and about the same proportion go to festivals or fairs.

Parks/Sites Visitors and **Campers** in Canada's Northwest have very similar activity profiles, partly because there is considerable overlap between the two groups — one-half of Parks/Sites Visitors are Campers; 86% of Campers are Parks/Sites Visitors. These Northwest visitors are avid users of the activities available in Canada: they are considerably more likely

Table 61

Americans: Activity Segments In Canada's Northwest, All Overnight Trips					
	Total	Hunt /Fish	Parks & Sites	camp	No out-Door
Friends & Relatives	21	21	17	18	28
Shopping	65	51	77	75	47
Sightseeing	67	45	87	84	38
Festival/Fair	15	11	22	28	7
Sports Event	6	2	5	3	9
200/Museum/Natural Display	37	22	54	55	8
cultural Events	12	8	13	10	11
Theme Park	4	3	5	2	1
Dining/Nightlife!	43	33	43	31	48
OUTDOOR					
Parks/Historic Site	61	43	100	86	
Swim/Water sports	8	6	11	11	
Hunt/Fish	13	100	9	15	
No Other Outdoor Activity	6	44			
Any Camping Ni ts	35	40	50	100	-
camping & Parks/Sites	30	30	50	86	
3+ Outdoor	12	33	19	30	

than visitors to Canada's Northwest as a whole, and than Anglers/Hunters to:

- sightsee;
- shop;
- visit zoos, museums and/or natural displays; and
- go to festivals or fairs.

Despite their interaction with the *outdoors*, Parks/Sites Visitors and Campers are no more inclined to fish/hunt, or engage in water-based activities than are Americans in the region as a whole.

Parks/Sites Visitors are less apt to be nature enthusiasts than are Campers in the Northwest. In fact, only 2-in-10 Parks/Sites Visitors engage in at least three outdoor activities, including their visit to a park whereas 3-in-10 American Campers fall within this "high intensity" group in the Northwest.

Non-Outdoor Visitors to Canada's Northwest are best described as "inactive". They are not engaged in any activity, other than restaurant dining, at the level that visitors to the region as a whole are. A significant group of these Americans are Alaska residents who are *passing through* Northwestern Canada on their way to some other destination.⁴⁴

1 I-b. Accommodation: Americans In The Northwest

Anglers/Hunters from the USA in Canada's Northwest are camping or staying in commercial cottages or cabins in the region, although a minority also utilize non-commercial accommodation (16%) or hotels (8%) and motels (13/0).

Compared to Northwestern visitors as a whole and to other activity groups in the region, these Americans are particularly likely to be guests at commercial cottages and cabins. Reliance on this accommodation type is, however, more common among American Anglers/Hunters in the Northeast (50%) than it is in the Northwest (30%).

Table 62

Americans' Accommodation Choices In Canada's Northwest, All Trips					
	Total	Hunt/ Fish	Parks & Sites	Camp	No Out- Door
spent Nights In:	%	%	%	%	%
Hotel	26	8	23	7	40
Motel	28	13	29	7	32
Cottage/ Cabin	9	30	7	4	5
Camping	34	39	47	96	-
Non- Com- mercial	11	16	5	2	18

Total overnight party trips columns add to more than 100% because of multiple accommodation types in regions. Source: 1994 Detailed Tabulations, Special Tables, page 30A-144. NOTE: Types of accommodation in the rows of this table represent nights spent in these types within the region (e.g., Northeast, Northwest), whereas the "camping" column is any camping nights on trip to Canada.

About one-half of **Parks/Sites Visitors** in the Northwest are camping, more than one-fifth rely on hotels for lodging in the region (23%) and more

“than one-fourth use motels in the Northwest (29%).

Campers, not surprisingly, rely on camping and trailer facilities for their accommodation in the North, although a few also use hotels or motels (7% each) in the region.

Non-Outdoor Visitors are almost evenly divided between those who stay in a hotel (40%) or motel (32%) in the region. Considerably more of these inactive American visitors are staying with friends or relatives or in their own private cottages (18%) than is the case among Parks/Sites Visitors or Campers.

H. ACTIVITY SEGMENTS: VISITORS FROM OVERSEAS TO CANADA'S NORTH

12-a. Activities: Overseas Visitors In The North

Activity profiles of Overseas peak season overnight visitors to Canada's North differ from their American counterparts in two important ways:

1. Overseas visitors in each activity group *do* more of the traditional tourist activities than do the corresponding Americans (e.g., shopping, sightseeing, and going to parks/sites or zoos/museums/natural displays); and
2. There is considerably less differentiation across the four Overseas visitor sectors than is the case among Americans.

These differences could be a function of a more diversified American pleasure visitor base — it is, for example, considerably easier for an American to visit Canada's North for a weekend hunting or fishing trip than it is for the Overseas visitor to do so. Trip duration data presented elsewhere in this report support this hypothesis.

The relative "flatness" of cross-activity participation among Anglers/Hunters, Parks/Sites Visitors and Campers from Overseas may also be a function of the small sample sizes of

Table 63

Overseas Visitors: Activity Segments In Canada's North, Peak Season Pleasure Trips					
	Total	Hunt/ Fish*	Parks & Sites	Camp	No out Door
	%	%	%	%	%
Friends & Relatives	36	41	35	27	47
Shopping	86	81	87	85	82
Sightseeing	90	83	91	88	91
Festival/ Fair	12	15	12	10	8
sports Event	9	6	9	9	5
200/ Museum/ Natural Display	64	57	69	65	30
Cultural Events	14	13	16	12	-
Theme Park	21	18	22	24	15
Dining/ Nightlife ¹	45	32	47	39	34
OUTDOOR					
Parks/ Historic Site	85	70	100	90	-
Swim/ Water sports	25	38	26	35	-
Hunt/Fish	15	100	12	22	-
No Other Outdoor	2	14	-	-	-
Any Camp- ing Nights	40	60	43	100	-
Camping & Parks/ Sites	36	47	43	90	-
3+ Outdoor Activities	27	62	30	56	-

Total overnight party trips, main purpose pleasure, peak season. Includes Dining in high quality restaurant, nightlife/entertainment. Source: 1994 Detailed Tabulations, Volume IV, pages 69-1/4. *Caution: Small base size. **Less than 0.5%.

Overseas activity groups available for analysis within the International Travel Survey. These groups may be too small to display subtle variations that might distinguish them, one from the other.

Concerns about the sample sizes of these groups, have, in fact, limited the amount of analysis undertaken in this section. Readers interested in examining accommodation use and traveller characteristics of Overseas activity groups in Canada's North may review the summary tables appended to this document, but are advised to use extreme caution in drawing conclusions from these data.

12-b. Other Travel Facts: Overseas Activity Groups In The North (All Purposes/All Seasons)

In order to provide information on various activity groups within the Overseas market in Canada's North, all trips that included hunting or fishing, a park or historic site visit, camping nights or no outdoor activities, irrespective of the trip's purpose or time of year have been combined. The information contained in this section is not, therefore, directly comparable to the *peak season pleasure travel* segments discussed for the American market.

Even with combined trip purpose and season data, the Overseas information should be interpreted with consider-

able caution because of the comparatively small base sizes.

Overseas Anglers/Hunters and **Campers** are particularly reliant on automobiles to get from place to place in Canada. Those who hunt or fish also show a marked tendency to use private boats (17%) and planes (7%) to reach sites in Canada.

Table 64

Overseas Visitors To Canada's North: Other Travel Facts -- All Purposes, All Seasons					
	Total %	Hunt/ Fish' %	Parks & Sites %	Camp %	No Out- door* %
Northern Visitors					
TRANS- PORT IN CANADA					
Any Auto	75	87	77	86	64
Private Boat	5	17	4	2	**
Comme.r- cial Boat	23	24	26	21	10
Private Plane	2	7	1	2	2
Gxnmer- cial Plane	27	27	24	18	35
ANY NIGHTS SPENT IN:					
Northeast	26	22	22	14	52
Northwest	75	79	79	86	49
Sask (Any)	3		2	3	4
North	**	.	**	1	
Yukon	29	36	32	45	13
NWT	3	1	3	4	3
# O F NIGHTS IN NORTH	5.5	10.0	4.7	5.4	5.0
<small>Total overnight party trips (all purposes, all seasons). source: 1994 Detailed Tabulations, Volume IV, pages 20-4/6, 45-1; 51-1. *Caution: Small base size. **Less than 0.5%</small>					

Like their peak season American counterparts, these Anglers/Hunters drive, fly and take boats to a greater extent than do Parks/Sites Visitors or

those who engage in no outdoor activities in Canada.

Just as all Overseas visitors are concentrated in Canada's Northwest, so too are Anglers/Hunters (79%), Parks/Sites Visitors (79/40) and Campers (86%). Eight-in-ten or more of the participants in each of these activities spends at least one night in Canada's Northwest. Only Overseas visitors who engage in no outdoor activities are evenly divided between those who spend nights in the Northeast and the Northwest.

The Yukon captures at least 1-in-3 Overseas Anglers/Hunters and Parks/Sites Visitors over the year, and even more Campers. Almost 1-in-2 Overseas Campers spend at least one night in the Yukon during their Canadian visit (45%).

Saskatchewan's North and the NWT capture very few Overseas visitors in the three activity segments examined, although the Northwest Territories is directionally more popular among Parks/Sites Visitors (3%) and Campers (4%) than it is among Anglers/Hunters (1%).

12-c. Ratings Of Canada: Overseas Activity Groups In The North (All Purposes/All Seasons)

Visitors are asked to state whether they regard Canada to be *better*, *the same*, or *not as good as* their home

country for accommodation, transportation, hospitality and value. Generally speaking, Overseas visitors are considerably more favorable in their appraisal of Canada vis à vis their own country than are Americans for transportation and accommodation services, the hospitality of local people, and value for the money (see Section 9-f).

This positive skew could be a general "politeness" bias on the part of Overseas visitors, a reflection of the variety of different countries with different levels of tourism service they represent, and/or a sincere appreciation of the services Canada has to offer.

Table 65

Overseas Visitors To Canada's North: Comparison Of Canada To The "Home Country" -- All Purposes, All Seasons					
	Total	Hunt/ Fish*	Parks & Sites	Camp	No Out- door*
Northern Visitors	%	%	%	%	%
TRANSPORT					
Better	27	29	25	20	29
Worse	24	23	26	37	16
SHELTER					
Better	37	43	36	37	33
Worse	5	5	4	8	3
HOSPITALITY					
Better	67	66	69	75	59
Worse	3	1	2	3	5
VALUE FOR MONEY					
Better	49	48	49	43	58
Worse	14	10	15	11	8

Total overnight party trips, based on total providing a rating for each characteristic. Source: 1999-01 Detailed Expenditures, Volume IV, pages 91:1/2.

Whatever the motivation, ratings of the hospitality of the local people are uniformly positive. Evaluations of transportation services in Canada are the most negative — irrespective of the Overseas Visitor's activity group, although **Campers** are more critical of these services (37%40) than are **Anglers/Hunters** (23%) or **Parks/Sites Visitors** (26%). Those who engaged in no outdoor activities on their trip to Canada are the least critical of transportation services (16%).

Unlike American visitors, those from Overseas are more apt to be positively than negatively disposed to the value they obtain for their money in Canada, regardless of whether they are fishing/hunting (48%), going to parks or historic sites (49%40) or camping (43%40).

12-d. Value: Overseas Activity Groups In The North

Overseas Visitors who take an overnight trip to Canada spend over \$4 billion in Canada, but almost all of this spending — 95% — stays in Canada's South, and a further \$149 million cannot be assigned to either the North or the South. The remainder — \$65 million or between 1% and 2% of all spending — stays in Canada's North.

Trips in which hunting or fishing is the only outdoor activity generate the highest "return" for Canada's North.

Almost \$5 million or 15% of the \$32 million in consumer spending on hunting/fishing (only) trips stays in the North. In contrast, of the \$2.5 billion spent in Canada by Overseas visitors who go to parks or historic sites, only about 2%, or \$44 million is spent in the North.

Table 66

Overseas Visitors To Canada's North: Spending Assigned To The North -- All Purposes, All Seasons				
In Millions Of Dollars*	Total	Only Hunt/Fish**	Parks & Sites	Camp
Total Spending	\$4,197	\$32	\$2,492	\$340
Assigned To:	%	%	%	%
South	95	83	94	82
North	2	15	2	6
Northeast	***	4	***	1
Northwest	1	11	2	6
Not Assigned	4	3	4	12

*Total spending on overnight party trips (all purposes, all seasons). • 1%k category is used to differentiate "any hunt/fish" from those visitors who hunt/fish and engage in no other outdoor activity on the trip. • **Less than 0.5%. Source: 1994 Detailed Tabulations, Volume IV, page 97-1.

Because so much more Overseas visitation is concentrated in Canada's Northwest than in the Northeast, it is not surprising that the Northwest captures more consumer spending from Overseas visitors in general (\$52 million) than does the Northeast (\$13 million). In contrast to the pattern in the USA, where Anglers/Hunters and their consumer spending, are concentrated in Canada's Northeast, Overseas Anglers/Hunters spend more in the Northwest (\$3.5 million) than they do in the Northeast (\$1.3 million). An analogous pattern is evident for Overseas Parks/Sites Visitors: they spend \$37 million in the North-



west and about \$7 million in the Northeast.

In terms of their contribution to consumer spending, hunting and fishing are more significant activities for Canada's North (30%) than they are for the South (4%). Parks and historic sites, while representing considerably greater tourism spending in the North than does **fishing** or hunting, are associated with relatively *equal* levels of tourism revenue among Overseas visitors in the North (68%) and the South (59%).

While many of these Parks/Sites Visitors may have also camped in the North, *camping* trips contribute only about half the proportion of tourism spending in the region (34%) that Parks/Sites trips by Overseas visitors do (68%).

Table 67

Overseas Visitors' Spending Assigned To The North & South				
In Millions Of Dollars*	Total Assigned To Canada's North		Total Assigned To Canada's South	
	\$65 Million	Million	\$	Million
	3	70	3,982	Million
Any Hunt/Fish	19	30	138	4
Only Hunt/Fish**	5	7	27	1
Any Park/Historic Site	44	68	2,339	59
Any Camping	22	34	278	7
No Outdoor Activity	7	11	1,166	29
1-2 Outdoor Activities	40	61	2,404	60
3+ Outdoor Activities	18	28	407	10

*Total spending on overnight party trips (all purposes, all seasons). **This category is used to differentiate "any hunt/fish" from those visitors who hunt/fish and engage in no other outdoor activity on the trip. Source: 1994 Detailed Tabulations, Volume VI, pages 98A/22. NOTE: Columns are not additive since the same spending may occur in more than one activity group (e.g., camping and Parks/Sites).

V. KEY MARKET SEGMENTS — CANADIANS

1. ACTIVITY & SEASONAL SEGMENTS FROM THE PERSON FILE

13. Introduction To The CTS Person-File

Profiles presented in this section rely on information from the *Trip* and *Person-File* of the Canadian Travel Survey. The latter file provides the characteristics of the *people* who took trips of various types rather than the characteristics of the *trips* themselves. Information covers all overnight trips reported by an individual during a single calendar month of 1994, aggregated into seasons of interest such as *July/August*, *Fall* (September, October) and *Spring* (April, May, June)."

Activity segments among Canadians who took overnight trips to Canada's North during a month are those who engaged in the specific activity *on a qualifying trip to the North*. Thus, a Peak Season Angler is a person who took a pleasure trip to Canada's North of at least 80 kms or more and claimed to have fished while on this trip. Idiosyncrasies of the CTS do not permit us to state with certainty that the activity took place *in* the North — it could have taken place elsewhere on the trip.

14-a. A Profile Of Canadian Pleasure Travelers, By Season

The *discretionary* domestic market available to the North . . . or any other destination is, in effect, the Canadian population that takes an overnight pleasure trip.

The pleasure travel market is relatively young and relatively affluent.

The pleasure travel market *differs* from the population as a whole in several key respects:

. **Canadians** who take overnight pleasure trips in the summer, spring or fall are somewhat younger, more affluent, and have more years of formal education than does the Canadian population.

. Specifically, one-tenth of Canada's adult (15+) population is at least 70 years of age, whereas about **one-half** this proportion of overnight pleasure **travellers** in each season fall within this age group.

• More than one-fifth of Canada's population has a reported household

income of under \$20,000, but only one-tenth of the travel segment in each season does so. Conversely, twice as many overnight pleasure travelers in the summer and spring (16%, each) report household incomes of at least \$80,000 than is the case among the population at large (8%).

Table 68

Canadians: Profile Of Overnight Pleasure Travellers, All Destinations				
	Canadians 15+ ¹	Took Any Overnight Pleasure Trio In . . .		
		July/ August	Spring	Fall
GENDER				
Male	49	49	50	54
Female	51	51	50	46
AGE				
15 - 24	17	17	16	14
25 - 44	42	48	45	41
45 - 64	27	27	29	33
65+	14	8	9	12
70+	10	4	5	6
INCOME (HH)²				
Under \$20,000	22	10	9	11
\$20,000 - \$59,999	58	57	60	57
\$60,000 or More	20	33	31	32
\$80,000 +	8	16	16	13
EDU- CATION				
Some Sec- ondary Or Leas	34	22	21	23
Graduated Secondary	20	21	20	18
Any Post- Secondary	47	57	59	59
Univ. Degree	13	19	19	18
<small>Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North in reporting month. ¹Profile Of all Canadians is based on the average characteristics over the full year's sample. ²Based on total stating income. Source: 1994 Detailed Tabulation, Volume V (CTSPerson-File), pages 12-1/2; 12-7/10, 1-1.4/5, 14-1, 4/5; 16-2, 8, 10.</small>				

that almost 6-in-10 overnight pleasure travelers have post-secondary educations whereas only about 5-in-10 adult Canadians do.

The "School Year" plays a role.

The impact of the school year is evident in pleasure travelers' age profiles. Fewer young people and those most likely to have school-age children — in other words, Canadians between 15 and 44 years — take an overnight pleasure trip in the fall (55%) than do so in the summer (65%) or spring (61%). In contrast, almost one-half of the fall pleasure travel market is at least 45 years of age, but only one-third of summer season travelers are in this age group (35%).

Differences in the age profile do not suggest differences in income, education or, for the most part, gender. There are, however, directional indications to suggest that more men take overnight pleasure trips during the fall (54%) than do so in the summer or spring. This gender shift maybe attributable to the popularity of hunting among Canadian men.

• Since income is often linked to education, it is not surprising to find



14-b. Canadians In The North: Annual

In this section, the characteristics of the following populations are discussed:

- . Canadian adult population (*Canadians 15+, Total*);
- . Canadian adults who took an overnight pleasure trip, averaged over the twelve calendar months (*Canadians, 15+, Pleasure*);
- . Canadian adults who took an overnight pleasure trip to Canada's North averaged over the twelve calendar months (*Took Any Overnight Pleasure Trip To Canada's North, Total*); and
- . Activity groups among Northern pleasure visitors. To qualify for an activity group, the stated activity must have taken place on a trip to the North (*Took Any Overnight Pleasure Trip To Canada's North, Parks/Sites; Fish/Hunt; Camp*).

As noted in the previous section, pleasure travelers in various seasons differ from the total Canadian adult population in terms of age, gender, education and income. These seasonal differences are also evident on an annual basis: Canadian overnight pleasure travelers are somewhat younger, more affluent and more

educated than is the population as a whole.

When the "typical" Canadian pleasure visitor is contrasted with the one who takes an overnight trip to the North several noteworthy differences are evident:

- . Northern pleasure visitors are more likely to be men (56%) than are Canadian overnight pleasure visitors as a whole (49%);
- Young people are more common among Northern overnight visitors than would be expected based on the profile of the total pleasure travel population. One-fifth of Northern pleasure visitors are between 15 and 24 years, compared to one-sixth of "typical" Canadian overnight pleasure visitors;
- . In keeping with their youth, it is not surprising that more Northern pleasure visitors have yet to complete secondary school (33%) than is the case in the general pleasure travel population (22%);
- . While the general income distribution between all overnight pleasure visitors and those who take trips to Canada's North is quite similar, those who "go North" are less likely to have very high incomes (\$80,000 +, 11%).

Canadian *Parks/Sites Visitors* in the North are equally divided among men

and women. They closely resemble the Northern pleasure visitor as a whole in terms of age and income. This activity segment is, however, more apt to have at least completed secondary school (79%) than is the "typical" Canadian overnight pleasure visitor to the North (68%).

Canadian *Anglers/Hunters* mirror the profile of overnight pleasure visitors to the North in terms of income, education and age, but not in terms of gender. Almost 3-in-4 Anglers/Hunters are men, compared to about 1-in-2 Northern overnight visitors as a whole.

Table 69

Canadians: Profile Of Overnight Pleasure Travellers To Canada's North In 1994						
	Canadians 15+ Years		Took Any Overnight Pleasure Trip To Canada's North ¹			
	Total %	Pleasure ² %	Total %	Parks/Sites* %	Fish/Hunt* %	Camp* %
GENDER						
Male	49	49	56	48	73	69
Female	51	51	44	52	27	31
AGE						
15-24	17	17	21	18	17	32
25-44	42	45	43	45	48	41
45-64	27	28	29	31	28	25
65+	14	9	7	6	8	3
70+	10	5	4	3	4	1
INCOME (HH)³						
Under \$20,000	22	10	9	13	6	8
\$20,000-\$59,999	58	56	56	52	61	58
\$60,000 or More	20	34	35	34	33	35
\$80,000+	8	16	11	7	11	9
EDUCATION						
Some Secondary Or Less	34	22	33	22	31	39
Graduated Secondary	20	20	18	20	21	23
Any Post-Secondary	47	58	50	59	48	38
Univ. Degree	13	19	12	14	12	8

¹Profile of all Canadians based on the average characteristics over the full year's sample. ²Canadians 15+ who took an overnight pleasure trip (80+ kms) to any destination to Canada's North in reporting month. Based on total stated income. Source: 1994 Detailed Tabulations, Volume V (CTS Person File), pages 3-3/4, 44252, 44, 12-4, 13-1, 14-2, 15-2, 16-4. *Caution: Small Base Size.

Canadian *Campers* in the North are noteworthy for the prominence of men (69%) and young people — one-third are between the ages of 15 and 24 years. Because it is a youthful market, fewer Campers have post-secondary education (38%) than is the case within the total Northern overnight pleasure traveller population (500/0).

14-c. Activities: Canadians In The North

With few exceptions, Canadians who take overnight pleasure trips to the North in the summer are considerably more likely to participate in a variety of activities within the region than are those who go in the spring or fall. Even a comparatively "indoor" activity such as visiting friends and relatives while on a "pleasure trip" is appreciably more common in July and August (58%/0) than it is in the spring (31/0) or fall (42%).

While it comes as no surprise that activities such as sightseeing, going to national/provincial parks, historic



sites, attendance at *festivals/fairs*, swimming/other water sports, and walking or hiking are considerably more popular among Canadians in the North during July and August than they are in the shoulder seasons, it is worth noting that *fishing* stretches the outdoor activity season into the spring and *bunting* stretches the it into the fall.

Table 70

Canadians: Activity Profile In Canada's North, By Season				
Activities On Overnight Pleasure Trip To Canada's North In . . .				
	Total (Annual)	JrSly/ August	Spring	Fall
	%	%	%	%
Friends & Relatives	43	58	31	42
Shopping	28	26	21	32
Sightseeing	30	43	23	36
Festival/Fair	5	11	2	-
Sports Event	11	5	9	4
Theme Park	1	2		
Museum/Art Gallery	6	8	6	6
cultural Performance	2	3	1	*
Zoo/Natural Exhibit	3	6		6
Aboriginal/ Native Event	1	2	2	-
Dining/ Nightlife ¹	18	14	30	11
Historic Site	8	14	7	5
OUTDOOR				
National/ Provincial Park	12	22	10	11
Swim/Other Water Sports	19	37	17	7
Fish	25	39	33	10
Hunt	7	*	1	30
Walk/Hike	19	31	10	16
Bird/Animal View	3	5	1	4
Golf	3	5	4	2

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North in reporting month. ¹Includes Dining in high quality restaurant, nightlife/entertainment. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 1040/59. *Less than 0.5%.

14-d. Accommodation: Canadians in The North

Accommodation patterns among Canadians in the North on pleasure trips do not reflect the seasonal shifts that are evident in activities (see previous section). Tents or trailers (camping), for example, are as widely used for accommodation in the summer (38%) as they are in the fall (35%). Hotels, resorts/lodges and commercial cabins also enjoy stable popularity across all three seasons.

Only motels experience noteworthy seasonal variation: they are more widely used by pleasure visitors in the fall (17%) and spring (12%) than in the summer (6%).

Table 71

Canadians: Accommodation In Canada's North, By Season				
Accommodation On Overnight Pleasure Trip To Canada's North In . . .				
	Total (Annual)	July/ August	Spring	Fall
	%	%	%	%
Hotel	18	14	14	14
Motel	12	6	12	17
Resort/ Lodge	3	3	4	4
Commercial Cottage/ Cabin	4	5	4	4
Camping	27	38	28	35
Non-Commercial Private Cottage	40	40	43	40
Private Cottage	24	25	28	19

Canadians 15+ who took an overnight Pleasure trip (80+ kms) to Canada's North/South in reporting month and used specific accommodations while on trip to the region. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 11-1/2 11-19/29.

The comparative seasonal stability among commercial forms of accommodation may be related to the high



proportion of *overnight pleasure travel* in the North that is sheltered in private cottages and the homes of friends/relatives. Four-in-ten Canadians who go North on an overnight pleasure trip in the summer stay in

their own cottage or with friends and relatives. The same proportions of spring and fall visitors rely on these non-commercial forms of accommodation in the region.



J. CANADIAN SUMMER VISITORS TO THE NORTH

15-a. Profile: Canadians In The North In July/August

In this and the subsequent sections, discussion is limited to Canadians who travel to the North on an overnight pleasure trip in July or August.

The prominence of men in the overnight Canadian pleasure travel market in the North evident annually (see Table 69) is not as manifest in July and August. By excluding spring anglers and fall hunters — activity groups that are predominantly men — the summer profile is almost evenly split between men (52%) and women (48%) on overnight pleasure trips to the North.

While Canadian men and women are almost as likely to be Northern pleasure visitors in July/August, the prominence of young people evident in year-round data remains during the prime summer months. The average July/August overnight pleasure visitor to the region from Canada is more likely to be young (26%, 15 to 24 years) than is the Canadian population as a whole or those who take overnight pleasure trips in the summer to any destination (170/0).

Table 72

Canadians: Profile Of Overnight Pleasure Travellers To Canada's North In July/ August			
	Canadians 15+ Years		Took Any Overnight Pleasure Trip To Canada's North ¹
	Total Population ¹	Pleasure ²	Total
	%	%	%
GENDER			
Male	49	49	52
Female	51	51	48
AGE			
15 - 24 Years	17	17	26
25 - 44 Years	42	48	45
45 - 64 Years	27	27	23
65 Years +	14	8	6
70 Years +	10	4	3
INCOME³ (HH)			
Under \$20,000	22	10	8
\$20,000 - \$59,999	58	56	50
\$60,000 or More	20	34	42
\$80,000+	8	16	11
EDUCATION			
Some Secondary Or Less	34	22	26
Graduated Secondary	20	21	23
Any P.O.s-t-secondary	47	57	51
University Graduate	13	19	14

¹Profile of all Canadians is based on the average characteristics of a full year's sample of Canadians 15+ who took an overnight pleasure trip (80+ kms) to any destination to Canada's North in reporting month. ²Based on total stating income. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 3-1/2, 4.1, 5-1, 8-2, 12.1, 4, 13-1, 14.2, 18.2, 16-4. © C.mtiOm Small Base Size.

Northern pleasure visitors in July/August are more concentrated in the upper income range (\$60,000) than is the Canadian who travels to any destination on an overnight pleasure trip during these two months, but there are not substantive

“differences in the education levels of these groups.

15-b. Profile: Canadians In The Northeast & Northwest (July/August)

Contrasts among the *average* overnight pleasure visitor to a destination in Canada's South, North, Northeast and Northwest during the prime summer season reveal the following

. Compared to those destined to the South, Canadians going North, and particularly those going to the Northeast in the summer are younger;

. The North attracts slightly more affluent Canadians — 42% have household incomes of \$60,000 or more — than does the South (32%), but the Northwest attracts the highest proportion of very affluent households. Almost 2-in-10 of the average travelers to this region on an overnight pleasure trip in the summer have household incomes of at least \$80,000.

. This *upscale skew* is not apparent among the corresponding visitors to the Northeast (5%).

• Northwestern visitors are also considerably more likely to be traveling with children (42%) than are

their Northeastern (27%) or Southern Canada counterparts in July/August (32%).

Table 73

Canadians: Profile Of Overnight Pleasure Travellers - July/August				
	To Canada's South	To Canada's North		
		Total	North East	North West
	%	%	%	%
GENDER				
Male	50	52	52	52
Female	50	48	48	48
AGE				
15-24 Years	17	26	29	22
25-44 Years	50	45	43	47
45-64 Years	26	23	20	26
65 Years +	7	6	8	4
70 Years +	4	3	4	1
INCOME** (HH)				
Under \$20,000	10	8	7	9
\$20,000-\$59,999	59	50	49	50
\$60,000 or More	32	42	44	42
\$80,000+	16	11	5	18
EDUCATION				
Some Secondary Or Less	22	26	31	21
Graduated Secondary	20	23	14	31
Any Post-Secondary	58	51	55	47
Graduated University	19	14	18	9
CHILDREN ON TRIPS (> 15 Years)	32	35	27	42

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North in reporting month. *Profile of all Canadians is based on the average characteristics over the full year's sample. **Based on total stating income. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 5.1/2.

Profiles of the July/August activity groups (*Parks/Sites Visitors, Anglers/Hunters, Campers*) and those who travel within the North (*Intra-North*) or to the North from the South (*Northbound*) are provided in the appendix to this report. They are not examined in detail because of the



relatively small base sizes of these groups. The reader is reminded to review the appended summary tables with caution (see Appendix B).

15-c. Activities: Canadians In The Northeast & Northwest (July/August)

By comparing what Canadians elect to do on overnight pleasure trips to *any* destination in July and August and the activities they engage in while in the North and South, a picture of *demand* — what Canadians want to do — and the ability of the North to *satisfy* the activity needs of the domestic market emerges. These comparisons also provide insight into the characteristics that *distinguish* the North from the South for potential domestic visitors.

When taking an overnight pleasure trip to *anywhere in the world* during July or August, Canadians' most prevalent activities include sightseeing (58%), shopping (47%), and visiting their friends and relatives (44%). The second "tier" of activities, practised by at least 1-in-4 summer pleasure travelers, includes:

- swimming or other water sports;
- dining in restaurants or going to clubs;
- walking or **hiking**; and
- visiting a national or provincial park.

Within the third tier, almost 2-in-10 go to historic sites, and about 1-in-6 go to festivals/fairs, fish, go to zoos or natural exhibits, and/or visit museums. Going to sporting events, cultural events, theme parks, golfing and animal viewing are even less popular among these summer travelers.

Since the vast majority of summer overnight pleasure by Canadians is destined to Canada's South, it is not surprising that there is a direct correspondence between what the Southern visitor *does* on his/her trip and what all summer visitors elect to do. The situation is very different for the North. This region does not seem to attract visitors who want "urban" attractions such as shopping, museums or art galleries, cultural performances, fine restaurants or nightlife.

Is it "fishing" or is it the "outdoors"?

While the North is often regarded as a haven for outdoor enthusiasts, the fact that swimming and other water sports, visiting national/provincial parks, hiking and animal viewing are all practised in the North. . . at about the same rate that they are practised by Canadians on summer overnight pleasure trips in the South suggests that Canadians who want to engage in these activities do **not** need to go North to do so.

Instead, the North's "uniqueness" vis à vis the South is in the fishing opportunities it offers. More than 1-in-3 July/August pleasure visitors to the region fish (37%) but only 1-in-6 such visitors to the South claim to do so.

Table 74

Canadians: Activity Profiles - July/August			
Activities on Overnight Pleasure Trip . . . In July/August			
	To Any Destination	To Canada's North	To Canada's south
	%	%	%
Sightseeing	58	43	56
Shopping	47	26	44
Friends & Relatives	44	58	46
Swim/Other Water Sports	40	37	40
Dining/ Nightlife*	33	14	31
Walk/Hike	28	31	27
National/ Provincial Park	25	22	25
Historic Site	18	14	17
Festival/Fair	15	11	14
Museum/ Art Gallery	15	8	14
Zoo/ Natural Exhibit	14	6	14
Fish	14	37	14
Cultural Performance	11	3	10
Sports Event	10	5	9
Theme Park	9	2	9
Golf	8	5	8
Bird/ Animal View	5	5	6
Aboriginal/ Native Event	2	2	2

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North/South in reporting month and engaged in specific activities while on trip to the region. *Includes Dining in high quality restaurant, night-life/entertainment. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 101-1/20. *Less than 0.5%

A Canadian who takes an overnight pleasure trip in the Northeast is more likely to be visiting friends or relatives in the North (66%) than is

his/her counterpart who goes to Northwestern Canada (49%).

Table 75

Canadians: Activity Profile In Canada's North - July/August			
Activities On Overnight Pleasure Trip . . . In July/August			
	To Any Destination	To Canada's Northeast	To Canada's Northwest
	%	%	%
Friends & Relatives	44	66	49
Shopping	47	28	24
Sightseeing	58	36	49
Festival/Fair	15	12	10
Sports Event	10	2	7
Theme Park	9	3	1
Museum/ Art Gallery	15	4	13
cultural Performance	11		6
Zoo/ Natural Exhibit	14	3	9
Aboriginal/ Native Event	2	3	2
Dining/ Nightlife ¹	33	14	14
Historic Site	18	8	20
OUTDOOR			
National/ Provincial Park	25	19	25
Swim/Other Water Sports	40	35	37
Fish	14	35	42
Walk/Hike	28	27	35
Bird/ Animal View	5	4	6
Golf	8	4	6

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North/South in reporting month and engaged in specific activities while on trip to the region. ¹Includes Dining in high quality restaurant, night-life/entertainment. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 101/20. *Less than 0.5%

The Northwestern visitor, on the other hand, is more apt to go to museums, cultural performances, zoos/natural exhibits, and historic sites on a trip to the region than is the Canadian who goes to Northeastern Canada. These findings are quite consistent with the pattern of use



between the Northeast and Northwest evident among American visitors: visitors to Canada's Northwest seem to fill their pleasure trip with a greater variety of activities than do those who go to Canada's Northeast, whether they are Canadians or Americans.

Although there are apparent differences between the Northeast and Northwest in terms of participation in hiking, fishing and visiting parks, these differences are not significant from a statistical perspective.

Do Canadians who *live in* the North do different things on their overnight pleasure trips within the region than do those who live in the South and travel to the North for a holiday?

Although base sizes are relatively small, the tentative answer to this question is "not really". There are suggestions that fishing and sight-seeing are more common among Northbound visitors than they are among Northern residents on a pleasure trip within the region, but in the main, a summer holiday in the North has a similar activity profile, irrespective of whether it is intra- or inter-regional.

Because of small base sizes, information on participation in activities *within* activity groups such as Anglers/Hunters is appended to this report (see Appendix B).

Table 76

Canadians: Activity Profile In Canada's North - July/August			
Activities On Overnight Pleasure Trip To Canada's North In July/August			
	North (Total) %	North- Bound %	Intra- North* %
Friends & Relatives	58	57	61
Shopping	26	28	70
Sightseeing	43	47	33
Festival/Fair	11	11	11
Sports Event	5	4	7
Theme Park	2	2	3
Museum/Art Gallery	8	9	8
cultural Performance	3	4	2
Zoo/Natural Exhibit	6	5	9
Aboriginal/Native Event	2	3	-
Dining/Nightlife ¹	14	18	12
Historic Site	14	13	15
OUTDOOR			
National/Provincial Park	22	22	22
Swim/Other Water Sports	37	39	29
Fish	39	43	30
Walk/Hike	31	34	23
Bird/Animal View	5	6	3
Golf	5	5	6

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North/South in reporting month and engaged in specific activities while on trip to the region. Includes Dining in high quality restaurant, nightlife/entertainment. Source: 1994 Detailed Tabulations. Volume V (CTS Person-File), pages 10-1/20 *Caution: Small Base Size.

15-d. Accommodation: Canadians In The Northeast & Northwest (July/August)

Camping and use of a privately-owned cottage are just as prevalent among Canadians on summer holidays in Canada's North as in the South.

Table 77

Canadians: Accommodation On Pleasure Trips - July/August			
Accommodation on Overnight Pleasure Trip ... In July/August			
	To Any Destination	To Canada's North	To Canada's South
	%	%	%
Hotel	24	14	21
Motel	16	6	14
Resort/ Lodge	3	3	3
Commercial Cottage/ Cabin	3	5	3
Camping	30	38	30
Non-Com- mercial	38	40	41
Private Cottage	19	25	21

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North/South in reporting month and used specific accommodations while on trip to the region. Columns add to more than 100% because of multiple responses. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 11-1/9.

Contrary to expectation, it is the Northern *resident* (29%) rather than the Southerner traveling to the North on a summer holiday (8%) that utilizes the *hotels* in the region. Conversely, there are directional indications to suggest that resorts/lodges and commercial cottages or cabins are favoured among *Northbound* Canadians.

Northern residents and non-residents are just as likely to rely on a private cottage for accommodation on their summer pleasure trip to the region.

Table 78

Canadians: Accommodation Profile In Canada's North - July/August			
Accommodation Used On Overnight Pleasure Trips ... In July/August			
	Any North	North- Bound	Intra- North*
	%	%	%
Hotel	14	8	29
Motel	6	8	2
Resort/ Lodge	3	4	-
Commercial Cottage/ Cabin	5	6	1
Camping	38	40	33
Non-Com- mercial	40	38	46
Private Cottage	25	24	27

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North/South in reporting month and used specific accommodations while on trip to the region. Columns add to more than 100% because of multiple responses. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 11-1/9. *Caution: Small Base Size.

Canadians seem to camp in the Northwest (54%) and to "cottage" in the Northeast (36%).

Table 79

Canadians: Accommodation Profile In Canada's North - July/August			
Accommodation On Overnight Pleasure Trip ... In July/August			
	To Any Destination	To Canada's Northeast	To Canada's Northwest
	%	%	%
Hotel	24	17	10
Motel	16	6	6
Resort/ Lodge	3	5	1
Commercial Cottage/ Cabin	3	6	4
Camping	30	21	54
Non-Com- mercial	38	55	26
Private Cottage	19	36	15

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North/South in reporting month and used specific accommodations while on trip to the region. Columns add to more than 100% because of multiple responses. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 11-1/9.

K. THE IMPORTANCE OF THE OUTDOORS TO CANADA'S NORTH

16. Outdoor Trips & Consumer Spending In The North - Peak Season

While it is primarily a *tourism destination* for American and Overseas Visitors, the North is part of the everyday for many Canadians who go there. It is a place to do business, to see family and friends, and, occasionally, a place to engage in outdoor activities. This structural difference between non-residents and Canadians is as manifest in the main purposes of travel to the

Table 80

Canadians' Spending Assigned To The North By Activity Groups, Peak Season		
	Total Spending Assigned To The North	
In Millions Of Dollars*	\$392 Million	
	\$	%
Parks/Historic Sites	\$65 million	16
Anglers/Hunters	\$57 million	15
Any Camping	\$44 million	11
Any Naturalist Activities	\$23 million	6
No Outdoor Activity	\$237 million	61
1-2 Outdoor Activities	\$114 million	29
3+ Outdoor Activities	\$41 million	10

*Total spending on overnight household trips, peak season that had dollars assigned to Canada's North, including some public transport spending assigned to the region for trips with a destination outside the North. Source: 1994 Detailed Tabulations, Special Tabulations, page 194-1. NOTE: Columns are not additive since the same spending may occur in more than one activity group (e.g., camping and naturalists).

region as it is in tourism-related spending that occurs in the North. About 60% of all peak season revenue that accrues to the region from the Canadian market is associated with

trips that do *not* utilize the outdoor recreational activities available in the

region. In contrast, only about 10% of Americans' and Overseas visitors' peak season spending in the region is associated with "non-outdoors" trips.

Table 81

In Millions Of Dollars	Total Spending Assigned To The North In-Peak-Season					
	Canada		USA		Overseas	
	\$	%	\$	%	\$	%
Any Parks/Historic Sites	65	17	137	43	40	71
Anglers/Hunters	57	15	180	56	19	34
Any Camping	44	11	69	22	21	36
No Outdoor Activity	237	61	33	10	5	9
1 - 2 Outdoor Activities	114	29	240	75	35	61
3+ Outdoor Activities	41	10	44	14	17	30

*Total spending on overnight household trips, peak season that had dollars assigned to Canada's North, including some public transport spending assigned to the region for trips with a destination outside the North. Source: 1994 Detailed Tabulations, Special Tabulations, page 194-1; Volume III, pages 114-1/2, Volume IV, pages 98.1/2. NOTE: Columns are not additive since the same spending may occur in more than one activity group (e.g., camping and naturalists).

When spending that remains in the North during the peak season is combined across domestic and non-domestic visitors, it is evident that the value of lakes, streams and rivers is quite substantial.

Without these fishing sites, would the North attract \$256 million in *consumer* spending? If there were no parks or historic sites, would the



“ region benefit from \$252 million in co-nsumer spending?”

Table 82

Canadian, American And Overseas Spending (Total) Assigned To The North By Activity Groups, Peak Season		
	Total Spending Assigned To The North In Peak Season	
	\$771 Million ¹	
	\$ million	%
Anglers/Hunters	\$256 million	33%
Any Parks/Historic Sites	\$252 million	33%
Any Camping	\$134 million	17%
No Outdoor Activity	\$275 million	37%
1 - 2 Outdoor Activities	\$389 million	50%
3+ Outdoor Activities	\$102 million	13%

¹Total spending on overnight household/party trips, peak season that had dollars assigned to Canada's North, including some domestic public transport spending assigned to the region for trips with a destination outside the North. Source: 1994 Detailed Tabulations, Special Tabulations, page 194-1; Volume III, pages 114-1/2; Volume IV, pages 98, 1/2. NOTE: Columns are not additive since the same spending may occur in more than one activity group (e.g., camping and naturalists).

The importance of peak season outdoor recreation in Canada's North is further evident when the proportion of total consumer spending that accrues to Canada's North for overnight trips during the course of the full year — over \$1 billion — that is devoted to outdoor recreation from April through September is calculated: almost one half of all overnight spending by Canadians, Americans and Overseas visitors to the North derives from peak season trips to the region with at least one outdoor activity (470/0).



APPENDICES

APPENDIX A: Overseas Peak Season Pleasure Activity Groups, Summary Tables

CANADA'S NORTH

Table A.1

Overseas Visitors' Accommodation Choices In Canada's North, Peak Season Pleasure Trips					
	Total	Hunt/ Fish	Parks & Sites	Camp	No Out. door
Spent Any Nights In...	%	%	%	%	%
Hotel	34	10	35	9	53
Motel	29	21	31	12	25
Cottage/ Resort/ Lodge	4	13	3	1	4
Camping	35	56	37	87	-
Non- Commer- cial	12	17	10	8	16

Total overnight party trips, main purpose pleasure, peak season. Source: 1994 Detailed Tabulations, Volume IV, page 64-1. NOTE: Types of accommodation in the rows of this table represent nights spent in these types within the region (e.g., Northeast, Northwest), whereas the "Camping" column is any camping nights on trip to Canada.

Table A2

Overseas Visitors' Gender & Age Clusters: Peak Season Pleasure Visitors To Canada's North				
	Total	Hunt/ Fish*	Parks & Sites	Camp
Northern Visitors	%	%	%	%
Gender O f Adults				
Males Only	20	36	17	23
Females only	14	3	14	10
Both Males & Females	44	54	60	61 •
Not Stated	10	7	9	6
Age Clusters**>				
All 15 - 24	3	3	3	5
All 25 -44	29	16	32	42
All 45+ Years	38	34	36	17
All 15-54	55	49	57	72

Total overnight peak season party trips Source: 1994 Detailed Tabulations, Special Tables, pages 84-1/4 • Gutton, Small Base Size **Adult-only trips.

Table A3

Overseas Visitor Travel Party Composition: Peak Season Pleasure				
	Total	Hunt/ Fish*	Parks & Sites	Camp
	%	%	%	%
Northern Visitors				
Adults Only	85	76	86	85
Any Children Under 15	6	16	5	8
Not Stated	10	7	9	6

Total overnight peak season party trips. Source: 1994 Detailed Tabulations, Special Tables, page 841. ● Gunn; Small Base Size.

CANADA'S NORTHWEST

Table A4

Overseas Visitors: Activity Segments In Canada's Northwest, All Overnight Trips				
	Total	Hunt/ Fish*	Parks & Sites	Camp
Friends & Relatives	45	48	43	35
Shopping	85	84	86	87
Sightseeing	88	85	92	89
Festival/Fair	12	18	13	12
Sports Event	10	8	11	11
Zoo/Museum/ Natural Display	61	55	68	66
Cultural Events	16	20	17	11
Theme Park	19	22	22	23
Dining/ Nightlife'	44	36	47	38
OUTDOOR				
Parks/ Historic Site	81	72	100	89
Swim/Other Water Sports	24	33	25	34
Hunt/Fish	14	100	12	23
Only Outdoor Activity	2	14		
Any Camping Nights	36	57	39	100
Camping & Parks/Historic Sites	32	44	39	89
3+ Outdoor Activities	25	62	29	57

Total overnight party trips, main purpose pleasure, peak season. Includes Dining in high quality restaurant, nightlife/entertainment. Source: 1994 Detailed Tabulations, Volume IV, pages 68A-1/A. ● Caution: Small base size. **Less than 0.5%

Table A5

Overseas Visitors' Accommodation Choices In Canada's Northwest				
	Total	Hunt/ Fish*	Parks & Sites	Camp
	%	%	%	%
Spent Any Nights In ...				
Hotel	32	11	33	11
Motel	28	16	31	13
Cottage/ Resort/ Lodge	4	17	4	1
Camping	31	53	35	88
Non-Commercial	23	20	18	12

Total overnight party trips, any nights spent in Canada's Northwest in specific accommodation type. Source: 1994 Detailed Tabulations, Special Tables, pages 63A: 1/4. *Caution: Small base size: **Less than 0.5%. NOTE: Types of accommodation in the rows of this table represent nights spent in these types within the region (e.g., Northeast, Northwest), whereas the "Camping" column is a net number of nights on trips to Canada.

CANADA'S NORTHEAST

Base sizes for Overseas visitors' activity groups in Canada's Northeast are too small to warrant presentation. See Detailed Tabulations for figures.

APPENDIX B: CTS Person-File Summary Tables

Table B1

Canadians: Profile Of Overnight Pleasure Travellers To Canada's North In July/August						
	Canadians 15 + Years		Took Any Overnight Pleasure Trip To Canada's North ²			
	Ted ¹ %	Pica- sure ² %	Total %	Parks Sites* %	Fish/ Hunt* %	Camp* %
GENDER						
Male	49	49	52	43	63	48
Female	51	51	48	57	37	52
AGE						
15 - 24	17	17	26	19	19	27
25 - 44	42	48	45	53	43	44
45 - 64	27	27	23	25	33	26
65 +	14	8	6	4	5	3
70+	10	4	3	1	3	1
INCOME³ (HH)						
Under \$20,000	22	10	8	10	4	8
\$20,000 - \$59,999	58	56	50	48	55	46
\$60,000 or More	20	34	42	42	42	46
\$80,000+	8	16	11	12	16	14
EDUCATION						
Some Secondary Or Less	34	22	26	22	23	31
Graduated Secondary	20	21	23	19	28	26
Any Post-Secondary	47	57	51	59	50	43
Univ. Graduate	13	19	14	17	12	7

¹Profile of all Canadians is based on the average characteristics over the full year's sample. ²Canadians 15+ who took an overnight pleasure trip (80+ kms) to any destination/to Canada's North in reporting month. ³Based on total stating income. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 3-1/2, 5-1, 8-2, 12-1, 13-1, 14-2, 15-2, 16-4. *Caution: Small Base Sic.

Table B2

Canadians: Profile Of Overnight Pleasure Travellers - July/August To Canada's North			
	To Canada's North		
	Total %	North- Bound %	Intra- North %
GENDER			
Male	52	56	40
Female	49	44	60
AGE			
15-24 Years	26	25	27
25-44 Years	45	44	48
45 - 64 Years	23	25	18
65 Years +	6	6	7
70 Years +	3	3	2
INCOME³ (HH)			
Under \$20,000	8	6	11
\$20,000-\$59,999	50	52	44
\$60,000 or More	42	41	45
\$80,000 +	11	12	8
EDUCATION			
Some Secondary Or Less	26	26	29
Graduated Secondary	23	24	19
Any Post-Secondary	51	50	52
Graduated University	14	15	11
CHILDREN ON TRIPS (> 15 Years)	35	35	34

Canadians 15+ who took an overnight pleasure trip (80+ kms) to Canada's North in reporting month. ¹Profile of all Canadians is based on the average characteristics over the full year's sample. ²Based on total stating income. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 3-1/2, 5-1, 7-1, 12-4, 13-1, 14-2, 15-2, 16-4.

Table B3

Canadians: Activity Profile In Canada's North - July/August			
Activities on Northern Overnight Pleasure Trip ... In July/August			
	Park/Site*	Fish/Hunt*	Camp*
	%	%	%
Friends & Relatives	42	56	48
Shopping	45	27	24
Sightseeing	78	45	45
Festival/Fair	19	9	7
Sports Event	3	1	2
Theme Park	6		1
Museum/Art Gallery	20	4	12
cultural Performance	8	4	4
Zoo/Natural Exhibit	13	6	4
Aboriginal/Native Event	6	4	3
Dining/Nightlife ¹	26	10	5
Historic Site	51	15	19
OUTDOOR			
National/Provincial Park	82	28	35
Swim/Other Water Sports	49	61	52
Fish	45	100	48
Walk/Hike	51	46	40
Bird/Animal View	12	7	3
Golf	9	6	4
Canadians 15+ who took an overnight pleasure trip (50+ kms) to Canada's North in reporting month (July/August) and engaged in specific activities while on trip to the region. ¹ Includes Dining in high quality restaurant, nightlife/entertainment. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 101/20. ● Gusion Small Base Size.			

Table 134

Canadians: Accommodation Profile In Canada's North - July/August			
Accommodation on Northern Overnight Pleasure Trip ... In July/August With Specific Activities			
	Park/Site*	Fish/Hunt*	Camp*
	%	%	%
Hotel	8	1	4
Motel	7	2	1
Resort/Lodge	-	1	-
Commercial Cottage/Cabin	6	9	1
Camping	54	47	100
Non-Commercial	28	41	2
Private Cottage	14	35	*
Canadians 15+ who took an overnight pleasure trip (50+ kms) to Canada's North/South in reporting month and used specific accommodations while on trip to the region. Columns add to more than 100% because of multiple responses. Source: 1994 Detailed Tabulations, Volume V (CTS Person-File), pages 11-1/9. *Less than 0.5%.			

APPENDIX C: Definition Of Canada's North

CTS'94 ("Remote North" Definitions)

DEFINITIONS & NOTES

Introduction

All tabulations were prepared under the supervision of Judy Rogers, Research Resolutions, by The Tilwood Group, Toronto, Ontario and are based on the 1994 Canadian Travel Survey data file, prepared by Statistics Canada and provided to Research Resolutions by the Department of Canadian Heritage. Because of adjustments made for purposes of this analysis, figures provided in these tabulations may not match those provided by Statistics Canada. For all *official* statistics from the International Travel Survey, the reader is referred to Statistics Canada.

To be included in the tabulations, all trip records had to meet the following data availability conditions:

- i) Origin *and* destination coded at the provincial tourism region. Trips with a province "unspecified code for either origin or destination have been systematically excluded since it was not possible to assign these trips to the key analytical regions; and
- ii) One-way distance from home at least 80 kilometres.

All trip tabulations display both the *actual* and *weighted* bases for each column in the table.

Most tables have vertical and horizontal percentages. The upper percentage in a cluster of figures is the vertical percent (percentage on the total shown at the top of the column). Bases for horizontal percentages are, in some cases, the initial column in the table (the column at the left-hand side of the table) and in other cases, are the nearest total column to the left of the percentage.

Units Of Analysis

Units of analysis for the project are restricted to person trips, household trips (where applicable), trip spending and allocated expenditures.

North And South

All provincial travel regions have been assigned to either the "north" or the "south", according to information provided by the provinces, on the basis of tourism regions, with adjustments for Census Divisions within regions and excluding all Census Metropolitan Areas that fall within northern tourism regions. The following table describes the various northern and southern regions of Canada, as used throughout the tabulations.

Table C-1

PROVINCE & TOURISM REGIONS	CANADA'S NORTH	CANADA'S SOUTH	NORTH-EAST	SOUTH. EAST	NORTH-WEST	SOUTH-WEST
Newfoundland & Labrador 05	X		X			
Newfoundland & Labrador Excluding 05		X		X		
New Brunswick, Nova Scotia, PEI		X		X		
Quebec 18 & 14	X		X			
Quebec Excluding 18 & 14		X		X		
Ontario 9, 10, 11 (Excluding Thunder Bay CMA), 12	X		X			
Ontario 1/8, Thunder Bay CMA		X		X		
Manitoba 08	X				X	
Manitoba Excluding 08		X				X
Saskatchewan 07	X				X	
Saskatchewan Excluding 07		X				X
Alberta 08, 13, 14 Excluding c D 11; 06 Excluding CD 10	X				X	
Rest Of Alberta		X				X
BC Regions 07 & 08	X				X	
Rest Of BC		X				X
Yukon & NWT	X				X	

Trip & Visitor Definitions

Intra-North Trips Trips that originate in the North and have a destination in the North.

Intra-South Trips Trips that originate in the South and have a destination in the South.

Northbound Trips Trips that originate in the South and have a destination in the North.



Southbound Trips	Trips that originate in the North and have a destination in the South.
Northern Trips	Trips that originate in <i>any</i> location and have a destination in the North.
Southern Trips	Trips that originate in <i>any</i> location and have a destination in the South.
Domestic Trips	Trips that originate in <i>any</i> location and have a destination in Canada.
Total Trips	Trips that originate in <i>any</i> location and have a destination in <i>any</i> destination (including non-domestic).

Regional Analysis

Because of the complexities of assigning trips and expenditures to both narrow and broad geographical regions, two disaggregated **northern/southern** units were tabulated: Northwest/Southwest (Yukon, NWT, B. C., Alberta, Saskatchewan, Manitoba) and Northeast/Southeast (Ontario, Quebec, Newfoundland, Nova Scotia, New Brunswick, P.E.I.).

For regional analysis (e.g., Northwest), provincial/territorial boundaries constitute the dividing lines (e.g., B. C., Yukon, NWT, Alberta, Saskatchewan, Manitoba). These boundaries constitute an overlay for all definitions. For example, an **Intra-North** Trip in Northwest is one that originated in a northern travel region of any one of the four provinces covered by the definition and that was destined to a northern travel region. In B. C., the Yukon, NWT, Alberta, Saskatchewan or Manitoba.

Value Data

Two types of expenditure data are included in the tabulations:

- . Trip Spending or Costs
- . Allocated Expenditures

◆ *Trip Spending or Costs*

All spending reported for the trip is included in trip spending or trip cost tabulations, irrespective of the location to which such expenditures might be allocated (see below).

◆ *Allocated Expenditures*

Allocated expenditures are those that are assigned to a specific region. They represent an estimate of where spending occurred for the trip. Some spending is assigned to the location of origin, some to destination, and some to the locations in which nights were spent on the trip (assigned on a “per night” basis). Statistics Canada assigns spending at the provincial level only for nights spent on a trip. These allocations are retained in the data file, but additional steps have been taken to refine the allocation process. These refinements and/or deviations from traditional Statistics Canada practices are described below:

◆ Origin & Destination Expenditures

A distinction is made between “origin” and “destination” expenditures. Origin expenditures are those assigned by Statistics Canada to “origin” so long as the trip’s destination is *outside* the region of origin. If a trip’s origin and destination are within the same region, all expenditures are considered to be “destination” expenditures. For example, if a trip commences in Canada’s Northeast and has a destination in the Northeast, automobile operating expenses are assigned to the Northeast as *destination* dollars. While this does not change the location to which dollars are allocated (Northeast), it represents a descriptive change (Statistics Canada assigns all auto operation costs to “origin”). If the trip with a Northeast origin has a destination in the Southeast, automobile operating expenses are assigned to the Northeast as *origin* expenditures (as per Statistics Canada).

◆ Vehicle Rental Expenditures

If origin and destination are in different regions, all vehicle rental expenses for same-day trips and those overnight trips which relied on an automobile as the main mode of transportation are assigned to the location of *origin*, based on the expectation that the vehicle was rented “at home”. All overnight trips that relied on a main mode of transport other than an automobile are assigned as destination dollars to the location of the trip’s destination, assuming that the vehicle was rented once the visitor arrived at his/her destination (e. g., after a flight or train ride to reach the destination).

◆ Vehicle Operation Expenditures

Vehicle operation expenditures are assigned to “origin” for all same-day trips.



◆ Public Carrier Expenditures

No public carrier expenditures are assigned to the place in which the trip originated **if the trip has a destination outside Canada**. All public carrier expenditures for trips with a domestic destination are assigned to "origin".

Allocated expenditure tables have a footnote that reminds the reader that public carrier dollars spent on a trip with a destination outside Canada are *not included* in the tabulations (not available within the database).

◆ Census Metropolitan Area Expenditures

No allocations have been made to Census Metropolitan Areas (CMA's) and non-CMA's in the 1994 CTS data base because this type of aggregation is not included in this analysis.

Assignment Rules

For analytical purposes, the following assignment rules were followed to develop "values" for northern and southern tourism in Canada

- 1) All dollars that are assigned to "origin" by Statistics Canada have been described as "origin" dollars and assigned to the travel region that matches the traveller's place of residence, with the exception of some vehicle rental costs and trips for which the origin and destination region are the same (see #4, below).
- 2) All dollars that are assigned to "destination" by Statistics Canada have been described as "destination" dollars and assigned to the travel region that matches the "destination" of the trip (as reported by the respondent).
- 3) All dollars that are assigned to "locations of overnight stop" by Statistics Canada have been considered "destination" dollars as follows:
 - ◆ if nights are spent in only one province and this province = province of destination, all per night dollars are assigned to the region of destination;
 - ◆ if nights are spent in more than one province and one of these provinces is the province of destination, the per night dollars for the province of destination are assigned to the region *of destination* and all remaining per night dollars are assigned to the respective provinces, *region unknown* (See #5, below).



- 4) If the trip's origin and destination are in the same region (defined to match the basic units of analysis - e.g., total north, total south; northwest, southwest; northeast, southeast), dollars that would have been deemed "origin" dollars according to Statistics Canada's allocations are considered "destination" dollars and are tabulated with other "destination" expenditures.
- 5) For multiple provincial overnight stops, dollars are allocated to the province of overnight stop on a per night basis as follows:

If province of destination is not the same as province of overnight stop, dollars on a per night basis for the province of overnight stop are allocated evenly (50%/50% split) to the northern and southern boundaries of the province if the trip's origin and destination were in the north/south (See example A). If the trip destination and origin are in the same region (e.g., north or south), all per night dollars are allocated to the location of origin/destination (See example B).

Example A: Assume that a trip has 4 nights away. The trip originates in southern B.C. and has a destination in northern Alberta. Two nights are in Alberta and two nights are in B.C. The destination of the trip is in Alberta. The region of destination in Alberta's north would receive 2 nights worth of expenditures and southern B.C. (region unspecified) would receive 2 nights worth of dollars.

Example B: Assume that a trip has 4 nights away. The trip originates in southern B.C. and has a destination in southern Alberta. Two "nights are in Alberta and two nights are in B.C. The destination of the trip is in Alberta. The region of destination in Alberta's south would receive 2 nights worth of expenditures and southern B.C. (region unspecified) would receive 2 nights worth of dollars.

- 6) Origin expenditure data are assigned to the region of origin and remain unchanged in the specifications throughout. Similarly, all dollars in each province are assigned to a region of destination if all nights are spent in a single province (assigned to destination) and remain unchanged as the boundaries of the "north" and "south" expand or contract. The only trips for which re-specification of the location of accrual was required as the geographical boundaries changed were those trips with overnight stops in multiple provinces, and the proportion of "origin" dollars that should be assigned to "destination" for trips that start and end in the same geographical unit.

ITS'94 ("Remote North" Definitions)

DEFINITIONS & NOTES

Introduction

All tabulations were prepared under the supervision of Judy Rogers, Research Resolutions, by The Tilwood Group, Toronto, Ontario and are based on the 1994 International Travel Survey data file, prepared by Statistics Canada and provided to Research Resolutions by the Department of Canadian Heritage. Because of adjustments made for purposes of this analysis, figures provided in these tabulations may not match those provided by Statistics Canada. For all *official* statistics from the International Travel Survey, the reader is referred to Statistics Canada.

To be included in the tabulations, all trip records had to meet the following data availability condition: at least one location of same-day or overnight visit (stop) had to be coded at the provincial tourism region, and, in some cases, Census Division, level. Records that did not meet this condition were systematically excluded since it was not possible to assign these trips to the key analytical regions.

Units Of Analysis

Units of analysis for the project are restricted to person trips, party trips (where applicable), trip spending and allocated expenditures.

North And South

All provincial travel regions have been assigned to either the "north" or the "south", according to information provided by the provinces, on the basis of tourism regions, with adjustments for Census Divisions within regions and excluding all Census Metropolitan Areas that fall within northern tourism regions. See Table C-1 for definitions of the northern and southern regions of Canada.

Trip & Visitor Definitions

Overnight Trips - North (Any Northern Experience)

Trips that have at least one night spent in the North. These trips may also have nights spent in other parts of Canada.

Overnight Trips - South (No Northern Experience)

Overnight trips that have at *no* nights spent in the North.

Same-Day Trips - North

Trips with no nights spent in Canada (e.g., same-day trips), with at least one same-day stop in the North. These trips may also have same-day stops in other parts of Canada.

Same-Day Trips - No Northern Experience (South)

Trips with no nights spent in Canada (e.g., same-day trips), with *no* same-day stop in the North.

Any Northeastern Experience

Trips that have at least one night spent in the Northeast. These trips may also have nights spent in other parts of Canada, including the Northwest. Thus, the sum of "Northwest" and "Northeast" maybe greater than total "North" because of the trips that have nights in both regions.

Any Northwestern Experience

Trips that have at least one night spent in the Northwest. These trips may also have nights spent in other parts of Canada, including the Northeast. Thus, the sum of "Northwest" and "Northeast" may be greater than total "North" because of the trips that have nights in both regions.

Value Data

Two types of expenditure data are included in the tabulations:

- . Trip Spending or Costs
- . Allocated Expenditures

● *Trip Spending or Costs*

All spending reported for the trip is included in trip spending or trip cost tabulations, irrespective of the location to which such expenditures might be allocated (see below).



+ Allocated Expenditures

Allocated expenditures are those that are assigned to a specific region. They represent an estimate of where spending occurred for the trip. Expenditures are assigned to a region on the basis of “nights spent” in the region, using the location coding available within the file. If regional information is not coded, the expenditures are “unassigned”.



APPENDIX D: The 1994 CTS Person-File

Tabulations from the 1994 CTS Person-File are based on the 117,818 interviews conducted over the 12 months of the year during which interviewing took place. Since a separate random, representative sample of Canadians 15 years of age or more was used for each calendar month, and was weighted and projected to the full population for each month, data cannot be "summed" to provide seasonal or quarterly totals from the person file. Instead, an "average" approach to the data was used. Each calendar period of interest, such as annual, July/August, Spring Shoulder (April, May, June) was summed and divided by the total number of months represented by the period. Thus, the annual data represent the sum of twelve months of respondent records, summed and divided by 12; the spring shoulder months are summed and divided by three, and so on.

In order to assign an individual record to a sub-region, and to determine if the person took any qualifying trips *within* the North (Intra-North) or *to the North* (origin, South; destination, North), information on origin and destination at the tourism region level is required. There are 278 records within the CTS that do not have "place of residence" coded at the tourism region level, and a further 153 that have trips recorded, but do not have a tourism region destination coded. Since these households cannot be assigned to relevant categories within this project, they have been excluded from the tabulations. Thus, the total number of household records used in the tabulations is reduced from 117,818 to 117,387.

Within the overnight pleasure trip (80 kms+) segment, the reduction in the number of households available for analysis is approximately one percent on both an unweighed and weighted/projected basis.

	Unweighed	Weighted
Households Who Took Any Overnight Pleasure Trip 80 kms+	10,632	1,920,000
... With Origin/Destination Coded At Tourism Region Level	10,461	1,893,000

APPENDIX E: Comparison Of CTS/ITS Data With Yukon & NWT Visitor Surveys

INTRODUCTION

Both the Yukon and Northwest Territories conducted non-resident visitor exit surveys in 1994. Direct comparisons between visitor profiles from these exit surveys and the ITS/CTS are difficult to make because the methodologies of the studies are quite different. For example, both exit surveys cover the period between July and September whereas the CTS and ITS are annual surveys, amenable to disaggregation only at calendar quarters. The domestic market surveyed in the CTS is also a "main destination" market, and does not provide details about nights spent in provinces or territories en route to or from a main destination.

While these are very significant barriers for direct comparison between the Statistics Canada data and territorial exit surveys, there is value in describing some key similarities and differences between the two sets of estimates. Comparisons provided in the following tables should be interpreted with extreme caution. It is also important to point out that only published reports, rather than detailed computer tabulations for the two exit surveys were available to the author in preparing this analysis (1994 *NWT Exit Survey, General Report on Visitors to the Northwest Territories; 1994 Yukon Visitor Exit Survey, Yukon Results, Main Survey*). Had detailed computer tabulations been available, it might have been possible to make fewer assumptions in developing a comparative analysis.

AN OVERVIEW OF NON-RESIDENT PEAK SEASON VISITORS TO THE TERRITORIES

CTS and ITS data were re-calibrated in an attempt to more closely approximate the two exit surveys in terms of "party trips" and a four-month tourism season (July through September). The CTS/ITS estimates shown on the following table are based on party or household trips to the Yukon and NWT, estimated to have occurred between April and September, 1994.

According to these estimates, approximately 113,000 travel parties took a trip to the Yukon in the six month peak season, compared to the Yukon Exit Survey estimate of 88,100 for a four month period. When the estimates are adjusted to cover the same time period, the CTS/ITS estimate would be lower than the Yukon Exit Survey

(approximately 78,000 visitor parties over the four months). The difference between the two estimates could be a function of the amount of manipulation required to obtain it and/or of methodological differences between the two studies and/or the comparatively low proportion of domestic trips captured in the CTS visà vis the Yukon's Exit Survey (see discussion below for a possible explanation of this difference).

An even more dramatic "dip" in domestic tourism relative to the exit survey is evident for the NWT, resulting in a substantively different estimate of total visitor parties between the CTS/ITS and the NWT Exit Survey. According to the NWT survey, almost 34,000 visitor parties came to the NWT in the four month period between July and September. When adjusted to match this time frame, the CTS/ITS estimate is only 9,300, undoubtedly reflecting the substantively lower estimate of Canadians traveling to the NWT.

Overnight Party/Household Trips (Visitors)				
	Yukon		NWT	
	CTS/ITS (April/Sept)	EXIT SURVEY (July/Sept)	CTS/ITS (April/Sept)	EXIT SURVEY (July/Sept)
PLACE OF RESIDENCE	%	%	%	%
Canada	9	17	40	68
USA	80	73	49	16
East North Central	8	n/a	15	n/a
West North Central	5	n/a	5	n/a
Pacific	14	9*	5	3*
Mountain	11	n/a	20	
Alaska	23	18		1
Overseas	11	10	11	9
German-Speaking Europe	6	4	4	n/a
Other Europe	3	n/a	4	n/a
Non-European Countries	1	n/a	3	n/a

*California/Washington only. Source: CTS/ITS; Yukon Visitor Study, NWT Visitor Study. accommodation All figures should be interpreted with extreme caution because of methodological differences and comparatively small sample sizes.

Why are domestic estimates so different?

In part, domestic estimates for the Territories differ between the exit surveys and the CTS/ITS because the CTS tabulations used in this analysis covers only trips with a **destination** in the region, whereas the exit surveys capture pass-through trips and those that may have nights spent in the region but are not the named destination.



It is also possible that mechanical adjustments to time frames do not take into account the realities of Canadians' travel patterns. Although "main purpose" information was only tabulated in the CTS/ITS on a combined territorial base (Yukon + NWT), the purpose of Canadians' trips to the Territories seems to have a great deal to do with when they travel to the region. Of the 40,000 person trips destined to either the Yukon or NWT, only about 10% or 4,000 person trips are made for pleasure but more than 60%, or 24,000 are made to see friends and relatives. A further 29%, or 12,000 trips are made primarily for business reasons. Much of the VFR and business travel to the region might be expected to take place outside the four month time period covered by the Territories' exit surveys whereas the pleasure trips are more apt to be captured in these surveys.

AMERICANS IN THE TERRITORIES

According to the ITS, about two-thirds of the American overnight trips in the Yukon and NWT (combined) are for pleasure purposes (640/o), but one-fifth are "pass-through" trips, likely taken by Alaskans and other Americans traversing the Alaska Highway. These trips explain the very high proportion of Yukon visitors — whether measured by the ITS or the Yukon Exit Survey — that live in Alaska.

Approximately 116,000 American visitor parties are estimated to have spent a night in the Yukon (106,000) or NWT (10,000) during the entire year (ITS). Approximately 60% of these trips occur during the third calendar quarter. By applying this proportion to ITS estimates, figures very close to those obtained during the four month exit surveys are obtained for both the Yukon and NWT.

YUKON	
ITS Estimate For Quarter III	65,720
Yukon Exit Survey	64,370
NWT	
ITS Estimate For Quarter III	6,200
Yukon Exit Survey	5,800

USA Overnight Party Trips (USA Visitors)				
	Yukon		NWT	
	ITS (Annual)	EXIT SURVEY (July/Sept)	ITS (Annual)	EXIT SURVEY (July/Sept)
	0/0	%	0/0	0/0
USA - Overnight Party Trips	106,000	64,370	10,000	5,800
Place Of Residence	%	%	0/0	0/0
East North Central	11	n/a	31	n/a
West North Central	6	n/a	7	n/a
Pacific	18	13*	8	18*
Alaska	28	25	2	6
Average Party Size**	2.1	2.3	2.1	2.7

*California/Washington only. Source: CTS/ITS; Yukon Visitor Study, NWT Visitor Study. Available in CTS/ITS only for combined Yukon/NWT. accommodation All figures should be interpreted with extreme caution because of methodological differences.

While estimates of the total volume of American trips to the Territories seem quite consistent between the ITS and the two provincial tourism surveys, regional distributions and party size estimates are closer for the Yukon Exit Survey than they are for the NWT Survey. The difference between the NWT and ITS estimates reflects methodological or data handling differences between the two studies.

Because the Yukon represents the lion's share of the 114,000 American overnight trips to the combined Territories, it is not surprising that the annual market distribution for the combined region more closely resembles the distribution provided in the Yukon Exit Survey than the distribution provided in the NWT report.

American Visitors In The Territories: Place Of Residence			
	Annual American Party Trips With Any Nights In The Yukon/NWT (ITS)	American Party Trips Yukon Exit Survey (July/Sept)	American Party Trips NWT Exit Survey (July/Sept)
	114,000	64,370	5,817
	%	0/0	0/0
Alaska	27	25	6
California	10	9	10
Washington	5	4	9
Michigan	4	n/a	9

All figures should be interpreted with extreme caution because of methodological differences. States shown are those listed in the Yukon and/or NWT Exit Survey Reports.

Whether the source is ITS estimates for American overnight visitors with nights in the Yukon or the NWT, or the Yukon Exit Survey (all visitors), the accommodation breakdown is similar. Roofed commercial accommodation is more popular among Americans captured in the ITS (combined Yukon/NWT - 59% hotels/ motels) than is



evident in the Yukon Exit Survey (42%), but camping is equally evident in the two studies.

Americans In The Territories: Accommodation In The North		
	Annual American Party Trips With Any Nights In The Yukon/NWT	All Party Trips Yukon Exit Survey (July/Sept)
Accommodation Used In Canada's North	114,000	88,100
	%	%
Hotels/Motels	59	42
Camping/Trailer Parks	36	32
Commercial Cottage/Cabin/B&B	8	2
Homes of Friends/Relatives	4	3
ITS figures may add to more than 100% because visitors can have stayed in more than one type of accommodation. All figures should be interpreted with extreme caution because of methodological differences. No accommodation data are available in the NWT Exit Survey Report.		

OVERSEAS VISITORS IN THE TERRITORIES

Approximately 20,000 Overseas visitor parties are estimated to have spent a night in the Yukon (19,000) or NWT (2,000) during the entire year and, according to the ITS, approximately 60% of these trips occur during the third calendar quarter. By applying this proportion to ITS estimates, a substantially higher figure emerges for the Yukon and a substantially lower one emerges for the NWT than those produced by the respective exit surveys.

YUKON

ITS Estimate For Quarter III	11,780
Yukon Exit Survey	8,440

NWT

ITS Estimate For Quarter III	1,240
Yukon Exit Survey	3,215

These differences are could result from the difference in time periods covered by the estimate, but could also be a function of different methodologies and weighting or estimation procedures among the surveys.



Overseas Overnight Party Trips (Overseas Visitors)				
	Yukon		NWT	
	ITS (Annual)	EXIT SURVEY (July/Sept)	ITS (Annual)	EXIT SURVEY (July/Sept)
	0/0	0/0	%	%
Overseas - Overnight Party Trips	19,000	8,440	2,000	3,215
Place Of Residence	%	%	%	%
German-Speaking Europe	56	43*	32	n/a
Other Europe	25	n/a	27	n/a
Other Countries	19	n/a	41	n/a
Average Party Size**	2.1	2.3	2.1	2.8

*Germany/Austria only. Source: CLS/ITS; Yukon Visitor Study, NWT Visitor Study. Available in CTS/ITS only for combined Yukon/NWT.

Despite the differences in the overall estimates, a breakdown of the origins of Overseas visitors to the Territories over the year is quite similar to the proportions reported in the Yukon Exit Survey for the four month period (countries listed are those included in the Yukon Exit Survey report).

Overseas Visitors In The Territories: Place Of Residence		
	Annual Overseas Visitor Party Trips With Any Nights In The Yukon/NWT (ITS)	All Overseas Party Trips Yukon Exit Survey (July/Sept)
	20,000	8,440
	%	0/0
Germany	41	34
Austria	3	9
Australia/New Zealand	10	13*
U.K.	10	8

*Australia only. All figures should be interpreted with extreme caution because of methodological differences. No Overseas visitor origin data are available in the NWT Exit Survey Report.

SOME THOUGHTS FOR THE FUTURE

In light of the high degree of comparability between the Yukon Exit Survey and the ITS data for USA and Overseas visitors, both Territories might consider further exploration of this data base (i) as a replacement for individual exit surveys within the non-domestic market or (ii) as a mechanism to up-date exit survey data during the intervals in which territorial exit surveys are not undertaken. Before any decisions are made, further exploration would have to be done to examine estimates of visitor volumes and spending that are directly analogous to the exit survey's time period.



Consideration would also have to be given to the impact of the loss of “other” information captured in territorial exit surveys that is not covered in the ITS.

Potential benefits of using the ITS in lieu of territorial exit surveys include:

- availability of year-round estimates;
- synchronization with other destinations in Canada; and
- potential cost-savings.

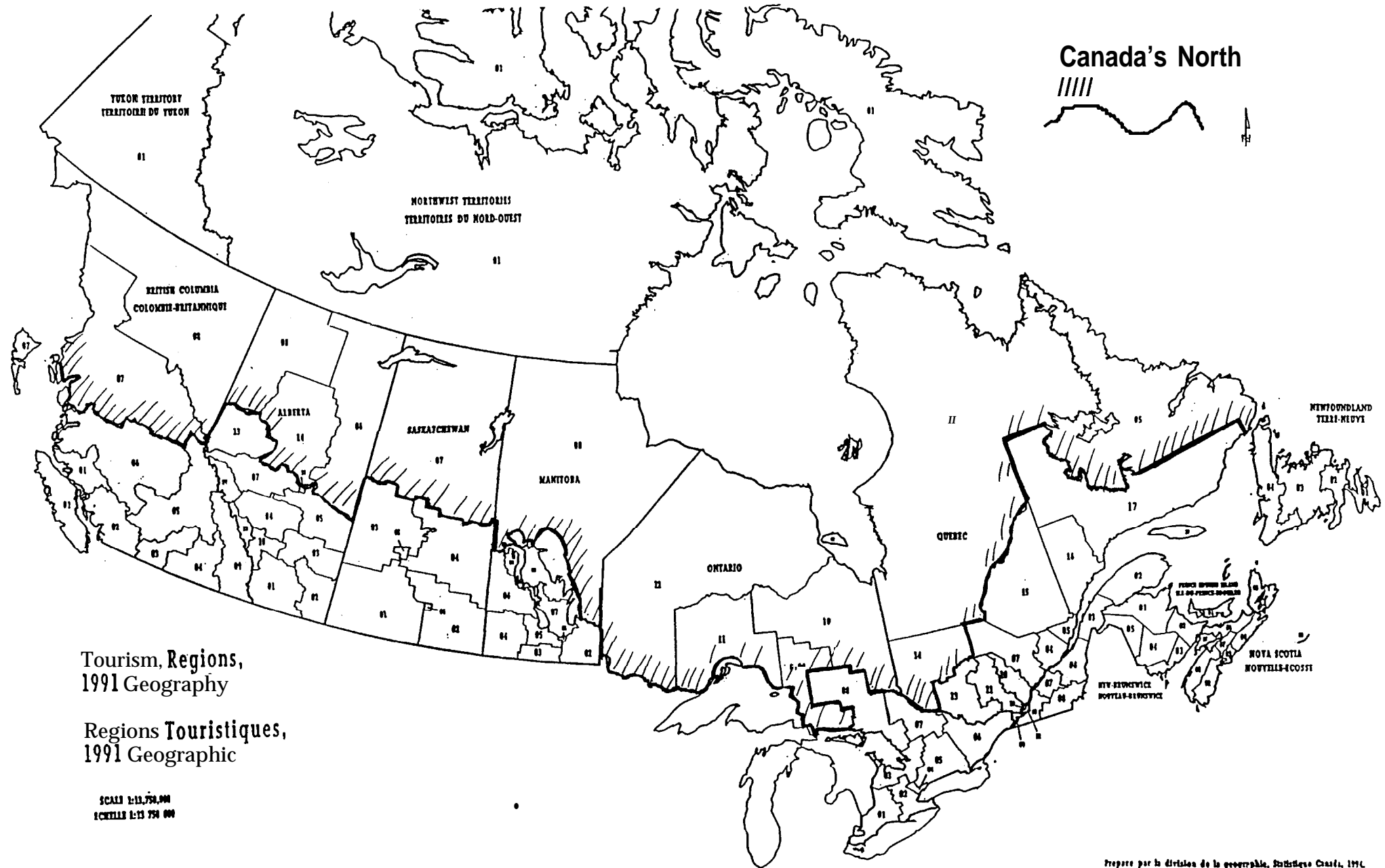
It is impossible to conclude whether the exit surveys or the CTS produce “better” estimates of domestic visitors because there are so many differences between the surveys. More information could be extracted from the CTS to obtain a total of “main destination” and “nights spent in the Yukon or NWT” – an exercise that might redress some of the apparent imbalance in the estimates. As with the ITS, before the territories consider shifting from their own exit surveys to the CTS as a source of domestic tourism data, it may be appropriate to explore origin markets and value data within the CTS to determine how well they match estimates obtained in the territorial studies.

At least some of the differences in domestic tourism estimates between the exit surveys and the CTS that seems evident in the 1994 may be resolved by the methodological changes in the 1996 CTS. This survey is now analogous to the ITS in its ability to capture the “location of nights spent” on a trip in addition to the traditional “destination” variable. Now that the Yukon will be included in the Labour Force Survey, it is possible that the CTS will also be conducted among residents of the territory. For these reasons, the Territories might consider using the CTS as their sources of information on domestic visitors, pending further examination, as discussed above.

MAP OF CANADA'S NORTH

(For Purposes Of The Northern Tourism Experience Project)





NOTES

¹The Pilot Project (Phase I) was designed under the auspices of the Tourism Research Working Group (TRWG) to provide new analysis of the 1992 **Canadian** Travel Survey (CTS) to sponsoring organisations and to Canada's tourism industry at large. The project, undertaken by Judy Rogers, Principal of Research Resolutions, was structured to encourage co-operation among various organisations via sponsorships and support.

²The boundaries used to define Canada's North, South, Northeast and Northwest are described in Appendix C. Unlike the "extended" definition, used in 1992 CTS analysis and the report, *Domestic Tourism In Canada's North*, which compares 1992 and 1994 travel patterns for the domestic market, the definition used herein excludes some major population centres in Ontario, including Thunder Bay. It also excludes "cottage country" in relatively close proximity to the Toronto CMA.

³Within the CTS, all trips are assigned to either Canada's Northeast or Northwest with no duplication because the assignment is based on the *destination* of the trip. Within the ITS, trips may be assigned to multiple geographic regions, based on *where nights were spent* on the trip. Thus, a trip assigned to Canada's North, based on any nights *spent in Canada's North* might be included in both the Northeast and Northwest if nights were spent in each of these regions. There is, however, no duplication in the ITS data between Canada's North and Canada's South since a trip is assigned to the South only if *no nights are spent in Canada's North*, and to the North only if *any nights are spent in Canada's North*.

⁴Outdoor activity lists differ between the CTS and ITS, as described below:

CTS Outdoor Activities	ITS Outdoor Activities
Visit A National/Provincial Park	Visit A National/ Provincial/Regional Park Or Historic Site
Any Camping Nights (Accommodation)	Any Camping Nights (Accommodation)
Swimming	Swimming
Other Water-Based Activities	Other Water Sports
Golfing	Hunting Or Fishing
Hunting	Cross-Country Skiing
Fishing	Downhill Skiing
Bird/Wildlife Viewing	Other Spon
Cross-Country Skiing	
Downhill Skiing	
Snowmobiling	
Walking Or Hiking	
Cycling	
Other Sport/Outdoor Activity	

⁵All estimates in this summary reflect *overnight* trips or visits to Canada's North.

⁶See Table 9 in the main body of the report.

⁷See Table 9 in the main body of the report.

⁸See Detailed Tables, Volume II, Special Tabulations, page 75-2; Volume III, page 99-1; Volume IV, page 86-1.

⁹See Tables 3,4 in the main body of the report.

¹⁰See Detailed Tables, Special Tabulations, page 181-3.

¹¹See Tables 38,39 in the main body of the report.

¹² Excludes transportation costs to Canada.

¹³ See Table 40 in the main body of the report.

¹⁴ See Tables 15, 4 in the main body of the report.

¹⁵ See Table 10 in the main body of the report.

¹⁶ See Section 7-d in the main body of the report.

¹⁷ See Section 5-b in the main body of the report.

¹⁸ See Tables 6,7 in the main body of the report.

¹⁹ For example, the ITS captures hunting and fishing as a single, combined activity whereas the CTS allows anglers and hunters to identify which of the two activities they engaged in on the trip. Similarly, in the ITS, all parks and historic sites are listed as a single activity, whereas in the CTS, visits to national/provincial parks are separated from visits to historic sites.

²⁰ Figures quoted herein are not **official** estimates of domestic or non-resident tourism in Canada and do not match **Statistics Canada's** estimates since only trips that included the necessary location coding at a sub-provincial level are included in the tabulations and analysis provided for this project. **All** Canadian trips meet a minimum one-way distance requirement of **80 kilometres**.

²¹ Of the **115,000** overnight person trips with nights spent in Canada's North that originate in Alaska, 14,000 are made for "in transit" reasons. Only 30,000 of these **115,000** person trips are made for pleasure purposes. See Detailed Tables, **Volume III, USA**, page 29-2.

²² See *1994 Yukon Visitor Exit Survey, Yukon Results Main Survey, The Yukon Government, Department of Tourism, March 1996*, page 5.

² See *1994 NWT Exit Survey, General Report on Visitors to the Northwest Territories, The Economic Planning Section, Policy, Planning & Human Resources, Northwest Territories, Economic Development & Tourism, May 1995*, page 5.

"Party trips. See Detailed Tables, Volume **III**, page 99-1; Volume IV, page 85-1.

²⁵ **Total** overnight person trips. Source: 1994 Detailed Tabulations, Volume II, page 106-4.

"Overnight Party Trips With Any Northern Experience. Source: 1994 Detailed Tabulations, Volume **III**, page 51-1; Volume IV, page 43-1.

"Cultural Activity in the CTS includes: attending an aboriginal/native cultural activity, visiting a **museum/art** gallery, attending a festival or fair, and/or going to an historic site.

2: Cultural Activities in the ITS includes: attending cultural events, visiting a zoo, museum, or natural display.

²⁹ See 1994 Detailed Tabulations, Volume **III**, page 68-1.

⁴⁹ See 1994 Detailed Tabulations, Volume **III**, page 75-1.

³¹ See 1994 Detailed Tabulations, Volume **III**, page 62-1.

³² See 1994 Detailed Tabulations, Volume **III**, page 56-2.

"The Micro Data Files provided by Statistics Canada for the Overseas visitor component of the ITS do not include transport spending to reach Canada on non-domestic commercial carriers. These data are, however, available within the Micro Data File for the USA segment of the study. Since comparable information was not available for both non-resident groups, the figures shown in this report exclude all transport costs "to Canada". This information for USA visitors is included in the Detailed Tabulations.

"Within the CTS, special rules were developed for assigning expenditures if a trip originated in one region, e.g., North and was destined for the other region. These rules are included in Appendix A of the Detailed Tabulations.

³⁵See Note 19. In addition to data availability and comparability between the ITS USA and Overseas files, it is prudent to exclude transportation spending within the domestic market since so many more domestic trips are "business" trips, and therefore, involve a much higher proportion of air transport *within Canada*, than is the case for the USA and Overseas markets. These latter markets are dominated by pleasure travel. While they may incur substantive air carrier costs in getting to *Canada*, they tend not to rely heavily on air transport *within* the country.

³⁶Figures for the USA and Overseas are total peak season, whereas those for Canadians are peak season *pleasure* trips. This approach was adopted to reflect the high pleasure component of peak season *Overseas* and USA travel to the North, and to *diminish* the impact of the many business and VFR trips made by Canadians.

"All household income percentages are based on those responding to the income question. See Detailed Tabulations for base sizes.

*See Note 23.

" See Note 23.

40 See 1994 Detailed Tables, Volume III, page 93-1.

"See 1994 Detailed Tables, Special Tabulations, Volume V, page 93-2.

42 See 1994 Detailed Tables, Special Tabulations, Volume V, page 80-2.

⁴¹This figure differs from the one shown in Table 38 because Table 57 *includes* spending on transport to get to Canada.

44 See Detailed Tabulations, Volume III, page 11-3. Alaskans represent almost one-fifth of USA party trips in Canada's North that include no outdoor activity. Looked at from a different perspective, more than half of the overnight party trips that originate in Alaska and have any nights spent in Canada's North include no outdoor activity (550A).

4s The Canadian Travel Survey (CTS) is a national telephone survey of Canadian households conducted in even numbered years by Statistics Canada. The survey, co-sponsored by national and provincial tourism organizations including the Saskatchewan Tourism Authority, captures details of *qualifying* trips taken by the designated respondent (15 years of age or over) for a single calendar month. Independent monthly samples are drawn from rotations of the Labour Force Survey, also conducted by Statistics Canada. The trip information collected within the CTS is cumulated over the twelve calendar months, to yield the volume and value of trips taken by Canadians during the survey year. Since monthly data are weighted and projected to the *full* Canadian population, the *individual characteristics* of monthly samples cannot be cumulated by season or over the course of the year, without special procedures. To meet the interests of project sponsors, the Person-File of the '94 CTS was tabulated for "peak" and "shoulder" seasons. The *Peak Season* was defined to be July and August; *Shoulder Season* was defined to be April, May, June, September, October. In addition, Spring Shoulder (April, May, June) and Fall Shoulder (September, October) aggregations were created, where sample sizes permitted. In each case, monthly data were summed for the two (peak) or five month period (shoulder), and "averaged" over the period (e.g., divided by the number of *months* of data included in the time period). By averaging Person-File monthly

data, the effects of projection to the full population on a monthly basis are offset. What emerges is a profile of the Canadians who take specific **types** of trips over the "**season**". Because of the twelve independent monthly samples, a potential **traveller** only reports on **one month** in the year. Consequently, no seasonal incidence **data** can be extracted from the 1994 CTS (such data were available from the 1992 CTS because quarterly samples were drawn).

4. See Note 23.

⁴⁷ See Note 23.

⁴⁸ See Note 23.

4. See Note 23.

⁵⁰ See Note 23.

⁵¹ See Note 23.