An Overview of Tourism in Chatham-Kent

An Analysis of Domestic & International Travel Surveys (2001)

Presented To:

The Municipality of Chatham-Kent

January, 2003

Presented By:

Research Resolutions & Consulting Ltd.

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I. Introduction

Tourism in Chatham-Kent is vital to many businesses and to the many people who come to the region annually to enjoy its natural beauty along the shores of Lake St. Clair and Lake Erie, its attractions and events including many farming festivals and the African Heritage Tour, its business opportunities and to spend time with friends and relatives. By attracting visitors to the region, Chatham-Kent obtains revenue across a variety of economic sectors including accommodation, restaurants and grocery stores, transportation services, attractions and events, and retail.

At the request of the Municipality of Chatham-Kent, Research Resolutions & Consulting Ltd. undertook an examination of special tabulations of Statistics Canada's Canadian and International Travel Surveys (CTS, ITS) made available by the Ontario Ministry of Tourism and Recreation (MTR). Tourism highlights described in the following pages reflect travel over the 2001 calendar year.

Some points to keep in mind in the following analysis:

- Unless specifically noted, the primary unit of analysis is a person *visit* -- a same-day or overnight stay in Chatham-Kent.

- Visits by Canadians are those that take them at least 40 kilometres from home (one-way) for *same-day* trips. No distance minimum is imposed on domestic travel for *overnight* trips. Visits by Americans and Overseas visitors have no distance minimums.

- "Chatham-Kent" is defined as Census Division 35 36 (Chatham-Kent), as declared by the survey respondent. The region includes Chatham-Kent and Moravian.

- Consumer spending can be divided into (a) dollars spent by visitors *who spent time in Chatham-Kent* and (b) touristic spending by residents of the region to *leave* the region (e.g., fares for residents' trips to other destinations) and travel costs by non-domestic visitors to reach Canada (inbound fares).[1] Within the text and tables provided herein, estimates of spending and economic impact estimates are associated with visits *to* Chatham-Kent. Carrier fares and some other transportation spending by area residents *to leave* the region and carrier fares to come and go from Canada by U.S. and overseas visitors have been excluded.

This summary provides an overview of current markets, value and characteristics of visits to the region. There is considerably more information in the tabulations provided by Research Resolutions & Consulting Ltd. (under separate cover). Tourism planners and marketers in the Chatham-Kent area are encouraged to explore this information in detail.

Summary information from the Travel Activities and Motivation Survey (TAMS) is also provided to aid Chatham-Kent tourism planners and businesses in understanding the market potential for the types of tourism products the municipality offers.

II. Main Findings - Tourism in Chatham-Kent

- **Chatham-Kent has a diversified tourist mix, attracting visitors from Ontario and the U.S.A.**

  During 2001, two-thirds of the 749,000 person visits to Chatham-Kent were same-day excursions (504,000) and the balance were overnight trips (245,000). Most same-day excursions were made by Ontario residents (74%), although Michigan residents made over 100,000 same-day trips to Chatham-Kent during 2001.

- **Overnight tourism in the region is characterized by pleasure and visiting friends and relatives.**

  Close to one-quarter million overnight visits were made to Chatham-Kent in 2001 (245,000), with Ontario residents accounting for almost 6-in-10 of these visits (141,000). Americans, primarily from Michigan, represent the second largest market for overnight tourism in Chatham-Kent (99,000).

  Over half of all overnight tourism in Chatham-Kent is *pleasure* travel, divided between Ontario residents (72,000 million) and Americans (56,000) travelling to the region. The region attracts little tourism from overseas (2,000 overnight person visits).

- **Because so much of the tourism in Chatham-Kent is pleasure-oriented, considerable use is made of roofed commercial lodging and campgrounds in the region.**

  Over the course of the year, 158,000 person nights were spent in hotels, motels, and other roofed commercial lodging in the region. A further 100,000 person nights were spent in Chatham-Kent's campgrounds and trailer facilities. Somewhat more nights were spent in commercial *roofed* accommodation by Americans (83,000) than by Canadians (74,000), but camping nights are dominated by Canadians (61,000).

- **The strong "pleasure" orientation of tourism in the region creates a seasonal skew.**

  Over one-third of all overnight tourism takes place in the third calendar quarter (June – September).

- **Visitors spent $43.0 million in Chatham-Kent during 2001.**

  In spite of the brevity of their stays in the region, same-day visitors contributed one-third of all tourism spending in the region in 2001 or almost $14.0 million. The balance of the $43.0 million spent on tourism in Chatham-Kent, or $29.2 million, was spent by overnight visitors.

- **Tourism in Chatham-Kent generated 1,120 jobs and almost $50 million in industry output (sales) for the municipality during 2001.**

  Based on the $43.0 million in spending assigned to Chatham-Kent for people who visited the region in 2001, tourism activity generated approximately 1,380 direct, indirect and induced jobs throughout Ontario, with 80% of them or about 1,120 jobs in Chatham-Kent. In turn, these jobs generated $26.5 million in wages and salaries province-wide, with close to two-thirds of these wages and salaries retained by Chatham-Kent ($17.2 million).

  Total sales in the province generated by visitors to Chatham-Kent reached approximately $92.3 million across the province, of which $50 million were retained in the region.

  All levels of government benefited from tourism spending in Chatham-Kent as it generated $18.6 million in taxes, province-wide, including $2.8 million at the municipal level of which about $2.0 million were retained by the municipality, $7.3 million at the provincial level and $8.5 million at the federal level.

- **Opportunities for the future include *hosting* programs and concentration on the increasingly important *immigrant* domestic market segments.**

Many of Chatham-Kent's tourists are visiting friends and relatives in the region rather than going to cultural events, sightseeing or engaging in outdoor activities. The interaction of tourists with the local population creates an opportunity to market the attractions and events in the region *through* hosts. To increase tourist participation in various activities, encouragement may have to be offered to hosts to take their guests out to *see and do* in the local area. In turn, the resident population may require education about the attractions and events available in their own community. They may also be more inclined to take their guests to local attractions, events and sites if they are provided with some form of incentive (e.g., vouchers that discount admission fees for out-of-town guests, etc.).

- **According to the Travel Activities and Motivation Survey (TAMS), opportunities will increase for cultural tourism and soft adventure outdoor tourism**.

The largest activity-based market segments on both sides of the Ontario/U.S. border are expected to be oriented toward **art galleries or museums** – types of attractions that are available in Chatham-Kent.

Within the Ontario resident market, **golf** and **winter outdoors**, including activities such as cross country skiing, snowmobiling and ice fishing, followed by **cultural performances** also represent strong opportunities. Between its many golf courses, boating and other water-based activities in the warm weather along with ice fishing and other winter activities that can be found in Chatham-Kent's countryside and on the shores of Lake St. Clair and Lake Erie in the winter, the region offers tourism experiences that appeal to many Ontario residents. At present, domestic overnight tourism market is not golfing or doing winter sports in Chatham-Kent but with more strategic marketing and promotion, they might be enticed to do so.

- **The growing immigrant population in Ontario offers new challenges to tourism planners.**

Foreign-born potential *domestic* tourists, many of whom will be concentrated in the Toronto area, may seek tourism experiences that respect their language, cultural traditions and cuisine.

To attract this market, tourism businesses in Chatham-Kent may have to adapt their products and services to meet the needs of various cultural and ethnic groups. The region might also consider marketing agricultural events such as the Tilbury Family Festival, Thamesville Threshing Festival or the Dresden Exhibition to new Canadians as ways to learn more about Canada's rural traditions.

- **The U.S.A. market for Chatham-Kent may soften because states in the Great Lakes basin will not grow at the same rate as the total U.S.A. population over the next two decades.**

In fact, Chatham-Kent's key feeder state – Michigan – will grow at only 5% compared to 9% for the region as a whole. This comparatively low growth rate may have implications for sustaining the important U.S. tourist market for Chatham-Kent in the future.

III. An Overview Of Tourism Activity In Chatham-Kent

Chatham-Kent attracted almost 750,000 person visits in 2001 or close to one percent of the 104 million person visits that took place in Ontario during the year. Canadians, Americans and visitors from other countries spent approximately $43.0 million on touristic activities in the region. These estimates include trips made for a wide variety of purposes, including visiting friends and relatives, business, and pleasure; and trips that involve same-day and overnight stays in Chatham-Kent.

	Person Visits In Chatham-Kent		Tourism Spending In Chatham-Kent	
Total	**749,000**		**$43,000,000**	
Canada	515,000	69%	$23,800,000	55%
USA	231,000	31%	$18,900,000	44%
Overseas	3,000	*	$400,000	1%
Same-Day Visit	504,000	67%	$13,900,000	32%
Overnight Visit	245,000	33%	$29,200,000	68%

*Spending estimates rounded to nearest 100,000. Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, 1, 2. Percentages may add to more than 100% because of rounding. Figures may not add to total due to rounding. *Less than 0.5%.*

Two-thirds of all visits to Chatham-Kent were same-day excursions (504,000) including trips of 40 kilometres one way from home made by residents of Ontario. The remainder were overnight visits (245,000). Even though same-day trips represent most of the *volume* of tourism in the municipality, overnight trips represent most of the *value.* Two-thirds of all spending in the region takes place on overnight trips.

Consistent with other counties in Ontario, the **domestic** market is the main source of tourism volume and value for Chatham-Kent. Canadians account for 515,000 visits to the region and $23.8 million in travel spending. Americans account for about 230,000 visits (31%) but a higher proportion of tourism spending -- $18.9 million or 44%. Overseas travellers to Chatham-Kent were comparatively rare in 2001 (3,000), representing no more than one percent of tourism volume or value.

The basic pattern of tourism in Chatham-Kent closely matches the provincial pattern, with the majority of trips to the destination taking place in a single day.

	Chatham-Kent		Ontario	
Total Person Visits	**749 ,000**		**103,821,000**	
Same-day	504,000	67%	64,537,000	62%
Leisure Overnight (Pleasure/VFR)	214,000	29%	32,641,000	31%
Business/Other Overnight	30,000	4%	6,643,000	6%

Spending estimates rounded to nearest 100,000. Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 1. Percentages may add to more than 100% because of rounding.

A. Major Markets - Overnight Visits In Chatham-Kent

1. The Domestic Market

Ontario is the primary source of tourism for Chatham-Kent in total and within the overnight tourism sector. In 2001, Ontario residents made 141,000 overnight person visits to Chatham-Kent, or 58% of all overnight visits. Relatively little overnight visitation to Chatham-Kent originated in other parts of Canada (1%).

Overnight Person Visits	**245,000**	
Canada	143,000	59%
U.S.A.	99,000	41%
Other Countries	2,000	1%
Ontario (Total)	141,000	58%
Michigan	63,000	26%
Toronto CMA	27,000	11%
Indiana	9,000	4%
Ottawa- Hull CMA	9,000	4%
Windsor	8,000	3%
Niagara Falls	7,000	3%
Ohio	6,000	3%
Other Canada (excl Ontario & Quebec)	2,000	1%

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 3.

Toronto is the largest domestic overnight market for Chatham-Kent, generating over 1-in-10 of all overnight person visits. Windsor and Niagara Falls contribute 1-in-33 overnight visitors to the municipality (3% each).

2. Key USA Feeder Markets

Americans represent for about two-fifths of all overnight visitors to Chatham-Kent, or 99,000 person visits (41%). The region primarily draws overnight American visitors from its nearest neighbour -- Michigan (63,000). More limited numbers of overnight visitors from the U.S.A. come from Indiana and Ohio. Americans also take same-day excursions within the region – they made 132,000 same-day visits during 2001. These visits may have been stops on an overnight trip to other Canadian destinations or a same-day trip to Chatham-Kent with no other stops in Canada (see Table 5 for figures).

3. Overseas

Very little of Chatham-Kent's overnight visitors in 2001 were from overseas, representing about 2,000 visitors. This level of foreign visitation is likely to remain low over the next few years. Even before the terrorist attack on the United States in September, 2001, Canada had been experiencing double-digit declines in arrivals from major traditional markets such as Germany, France and Japan. These declines were attributed to unfavourable exchange rates vis à vis the Canadian dollar for many continental European currencies and the persistent economic difficulties in Japan. (see appendix for Canada-level overseas and USA arrivals over time). The September 11th terrorist attack has undoubtedly had a further negative impact on inbound travel to Canada.

Overnight visits to Chatham-Kent differ from the provincial pattern with respect to visitors' origins:

- Compared to Ontario as a whole, Chatham-Kent attracts a lower proportion of Canadian overnight tourists (59% for the region versus 75% for the province);
- Because of its proximity to Michigan, the region attracts an appreciably higher proportion of American overnight tourists than is the case across the province (41% for the region versus 20% for the province); and
- Overseas tourists are not as important to the total overnight tourism mix of the region as they are to Ontario as a whole (1% for the region versus 5% for the province).

B.

	Chatham-Kent		Ontario	
Total Overnight Person Visits	245,000		39,284,000	
Canada	143,000	59%	29,610,000	75%
U.S.A.	99,000	41%	7,879,000	20%
Other Countries	2,000	1%	1,795,000	5%

Spending estimates rounded to nearest 100,000. Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, pages 10, 12. Percentages may add to more than 100% because of rounding.

B. Major Markets – Same-Day Visits In Chatham-Kent

Many of the 504,000 same-day person visits to Chatham-Kent in 2001 are made by Ontario residents (74%), with a substantial concentration in the Windsor CMA (148,000 or 29%). Many Michigan residents also come to the region on day-trips. Over 100,000 of these Americans visited Chatham-Kent on same-day excursions in 2001.

Total Same-Day Person Visits	504,000	
Canada	372,000	74%
U.S.A.	132,000	26%
Other Countries	1,000	*
Ontario (Total)	372,000	74%
Windsor CMA	148,000	29%
Michigan	106,000	21%
Middlesex County	86,000	17%
Chatham-Kent	23,000	5%
Toronto CMA	12,000	2%

*Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 3. *Less than 0.5%.*

C. Spending in Chatham-Kent

From a revenue perspective, the same-day market is quite important to the region, representing about 1-in-3 of the dollars spent on tourism by visitors to Chatham-Kent, or $13.9 million of the $43.0 million spent by all visitors to the region. Domestic visitors account for about two-thirds of the same-day spending in Chatham-Kent (66%). The remaining spending on same-day trips is done by American visitors ($4.7 million).

	Person Visits In Chatham-Kent		Tourism Spending In Chatham-Kent	
Total	749,000		$43,000,000	
Same-Day (Total)	**504,000**	**67%**	**$13,900,000**	**32%**
Canadians	372,000	74%	$9,100,000	66%
Americans	132,000	26%	$4,700,000	34%
Overseas	1,000	*	*	*
Overnight (Total)	**245,000**	**33%**	**$29,200,000**	**68%**
Canadians	143,000	59%	$14,700,000	50%
Americans	99,000	41%	$14,100,000	49%
Overseas	2,000	1%	$400,000	1%

*Spending estimates rounded to nearest 100,000. Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, 1,2. Percentages may add to more than 100% because of rounding. Figures may not add to total due to rounding. *Less than 0.5%.*

Half of the $29.2 million in spending on overnight visits to Chatham-Kent – $14.7 million – is done by **Canadians**. **American** visitors account for about two-fifths of all overnight visits to Chatham-Kent (41%) but represent a larger share of overnight tourism revenues ($14.1 million, or 49%). **Overseas** visitors who spend at least one night in Chatham-Kent contribute about one-third of a million dollars in the region ($362,000).

IV. Trip Characteristics of Overnight Visitors In Chatham-Kent

A. Purpose Of Trip

1. Volume

Of almost one-quarter million overnight person visits to Chatham-Kent in 2001, over half were made for pleasure purposes (129,000 or 53%) and one-third were made to visit friends and relatives (85,000 or 35%). One-twentieth of the overnight trips over the year were taken to conduct business (13,000 or 5%).

Total Overnight Person Visits	245,000	
Pleasure	**129,000**	**53%**
Canadians	72,000	30%
Americans	56,000	23%
Business	**13,000**	**5%**
Canadians	7,000	3%
Americans	6,000	3%
Visit Friends & Relatives	**85,000**	**35%**
Canadians	63,000	26%
Americans	22,000	9%

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 1. All percentages are based on total overnight person visits. Figures for overseas overnight visitors are not shown because of extremely small base sizes.

The two primary tourism flows to the region – Canadians and Americans – are well represented in the overnight *pleasure* tourism market segment. Not surprisingly, however, Canadians are more apt to have family and friends to visit in the region than are their American counterparts. Hence, a considerably larger number of Canadian residents go to Chatham-Kent to visit friends and relations (63,000) than is the case for Americans (22,000).

When overnight market segments are examined to identify the main source of visitors, it is clear that domestic travellers from Ontario, predominate in the *leisure* market. Canadians account for over 1-in-2 overnight *pleasure* visits (56%) and 3-in-4 overnight visits to *see friends and relatives* (74%). In contrast, the relatively small overnight *business* market is almost evenly split between American (46%) and Canadian visitors (54%).

	Pleasure	**Visit Friends & Relatives**	**Business**
Total Overnight Person Visits	129,000	85,000	13,000
Canada	56%	74%	54%
USA	43%	26%	46%
Overseas	1%	-	-

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 1. All percentages are based on total overnight person visits. Percentages may not add to 100% due to rounding.

2. Value

Overnight *pleasure* trips make up over half of all overnight *visits* to Chatham-Kent (53%) and the same proportion of all overnight tourism spending in the region – 53% or $15.6 million. A somewhat different pattern is evident within the VFR overnight segment: these overnight visits represent over one-third of the overnight volume in Chatham-Kent (35%) but a lower proportion of the overnight spending (29% or $8.3 million), largely because people who travel to see their friends and relatives are less reliant on the commercial accommodation and hospitality sectors than are those who travel for pleasure or business reasons.

Total Spending in Chatham-Kent on Overnight Visits	**$29,200,000**	
Pleasure	$15,600,000	53%
Business	$2,300,000	8%
Visit Friends & Relatives	$8,300,000	29%
Other	$2,900,000	10%

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 2. All percentages are based on total spending in Chatham-Kent on overnight person visits. Figures and percentages many not add to total because of rounding.

In contrast, because of their heavy reliance on the commercial accommodation and food/beverage sectors, overnight *business* trips contribute one-twelfth of all overnight spending ($2.3 million or 8%), but represent one-twentieth of overnight person visits in Chatham-Kent (5%).

B. Seasonality

Chatham-Kent supports a variety of traditional outdoor and recreational *peak season* activities and many opportunities for indoor events and attractions in the winter and shoulder seasons. Because the region attracts so much tourism associated with pleasure purposes, it is subject to Canada's traditional fair weather peaks. The "summer" calendar quarter (July through September) accounts for over one-third of all overnight tourism in the region (36%) and the "spring" quarter (April through June) accounts for an additional one-quarter.

Quarter	**All Markets**	**Canada**	**USA**
1st Quarter (Jan-Mar)	18%	19%	16%
2nd Quarter (Apr-June)	26%	26%	27%
3rd Quarter (July-Sept)	36%	35%	38%
4th Quarter (Oct-Dec)	20%	20%	19%

Source Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 7.

C. Nights Spent In Chatham-Kent

Canadian overnight visitors to Chatham-Kent spend two nights, on average, in the region (2.2). American overnight visitors spend about the same length of time (2.1) but all non-domestic trips average 8.2 nights in the region, suggesting that overseas visitors spend considerably longer than do North American visitors on their trips to Chatham-Kent.

Overnight Person Visits	Total	Canada	USA
Average person nights	2.2	2.2	2.1
Average party size	2.0	1.9	2.3
Total person nights	540,000	312,000	213,000

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Tables 5, 8. Overseas estimates are not shown because base sizes are too small to warrant presentation.

When the number of nights spent is combined with the number of visitors in each travel party, an estimate of "person nights" is obtained. Over the course of 2001, visitors spent over one-half million person nights in Chatham-Kent (540,000), with over half these nights spent by Canadians (58% or 312,000 person nights), over one-third spent by Americans (39%, or 213,000 person nights), and the balance by overseas visitors (3%).

D. Accommodation In Chatham-Kent

As noted in the previous section, overnight visitors to Chatham-Kent spent approximately 540,000 person nights in private and commercial accommodation facilities during 2001. Close to half of these person nights were spent in non-commercial accommodation – private homes or private cottages (48%). Over one-quarter were spent in hotels, motels, bed and breakfast establishments or other forms of roofed commercial lodging (29%) and almost one-fifth were spent in the region's campsites and trailer facilities (18%).

	All Markets
Total Person Nights in Chatham-Kent	**540,000**
Roofed Commercial Accommodation	158,000
Campgrounds/Trailer Parks	100,000
Private Homes/Private Cottages	261,000
Accommodation Type Unknown	21,000

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 5.

Of the three market flows, Americans are the most reliant on commercial accommodation. One-in-five of the nights they spent in Chatham-Kent in 2001 were in hotels (39,000) and a further 25,000 were spent in motels. Canadian visitors to the region are also comparatively reliant on commercial roofed lodging such as hotels (63,000) and motels (11,000). Equal proportions of Canadian and American overnight visitors to the region spend their nights in campgrounds and trailer facilities in Chatham-Kent (20% of all Canadian nights: 18% of all American nights), reflecting the outdoor and peak summer season nature of tourism in the region.

	Canada	**USA**	**Total Foreign**
Total Person Nights	**312,000**	**213,000**	**228,000**
Hotel	63,000	39,000	40,000
Motel	11,000	25,000	26,000
Other Roofed Commercial Accommodation	-	18,000	18,000
Camping or trailer park	61,000	39,000	39,000
Private home*	173,000	83,000	89,000
Other	5,000	8,000	17,000

*Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 5. *Home of friend/relative or private cottage.*

Because Canadians are especially apt to stay in the homes of friends and relatives or to have private cottages in the region, more than half of all the nights they spend in Chatham-Kent (173,000) are in private lodgings. The vast majority of these nights are spent in the homes of friends and relatives (165,000) rather than in private cottages (8,000).

V. Travel Spending In Chatham-Kent

A. Spending by Category

Visitor spending in Chatham-Kent benefits many sectors of the local economy. The $43.0 million spent in the area contributes to the accommodation sector ($7.5 million, or 18%), restaurants, bars and grocery stores ($14.5 million, or 34%), transportation ($6.1 million, or 14% in public and private transportation expenses), attractions ($6.2 million or 14%) and the retail sector ($8.7 million, or 20%).

All Markets ($)	Total	Same-day	Overnight
All Categories	$43,000,000	$13,900,000	$29,200,000
Commercial Transportation In Canada	$400,000	-	$400,000
Automobile Operation/Rental	$5,700,000	$700,000	$5,000,000
Accommodation	$7,500,000	-	$7,500,000
Food/Beverages	$14,500,000	$5,500,000	$9,000,000
Recreation/Entertainment	$6,200,000	$3,000,000	$3,200,000
Retail/Other	$8,700,000	$4,700,000	$4,000,000

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 11. Numbers may not add to total due to rounding.

Within the overnight travel sector, spending patterns are somewhat different for Canadian and American visitors. Specifically, Canadian visitors to Chatham-Kent spend a higher proportion of their money on transportation and food/beverages than do their American counterparts. In contrast, American overnight visitors spend money on entertainment and retail at about twice the rate as do Canadian overnight visitors.[2]

All Markets ($)	Total	Same-day	Overnight
All Categories	$43,000,000	$13,900,000	$29,200,000
Commercial Transportation In Canada	1%	-	1%
Automobile Operation/Rental	13%	5%	17%
Accommodation	18%	-	26%
Food/Beverages	34%	40%	31%
Recreation/Entertainment	14%	21%	11%
Retail/Other	20%	34%	14%

*Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 11. Percentages may not add to total due to rounding. *Less than 0.5%.*

B. Average Spending

Every same-day visit to Chatham-Kent generates close to $28.00 in consumer spending and every overnight visit generates over four times this amount, or about $119.00 per person. At $65.00 per person per night, American visitors have higher ***per night*** spending than do Canadian overnight visitors ($47.00), largely because two-fifths of the nights they spend in the region are in commercial lodging. For each night that each American visitor spends in Chatham-Kent, $65.00 are left in the community. The corresponding estimate for Canadians is $47.00 per-person-per-night.

V.

Average Spending	**All Markets**	**Canada**	**USA**	**Total Foreign**
Per Person Same-day	$28.00	$24.00	$36.00	N/A
Overnight per person per visit	$119.00	$103.00	$142.00	$143.00
Overnight per person per night	$53.00	$47.00	$65.00	$61.00

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 12; CTS Tabulations, Table 18. Base sizes for overseas visitors are too small to warrant analysis but are included in "Total Foreign".

V. Activities On The Trip

A. All Overnight Leisure Visitors

Activities reported by visitors could have taken place in Chatham-Kent or in other destinations they visited on their *trip in Canada.* It is most likely that a reported activity took place in Chatham-Kent among domestic and American visitors to the area since these travellers tend not to have multiple destinations on their overnight trips in Canada. For overseas visitors, on the other hand, overnight stops in other destinations while on the trip in Canada are relatively prevalent, making it difficult to know *where* on the trip specific activities took place.

In addition to spending time with friends and relatives, visitors to Chatham-Kent shop, engage in outdoor activities, and less commonly, sightsee, and/or attend sporting events.

Same-day visitors in the region are especially likely to visit friends and relatives (62%), shop (22%), go to a sports event (14%), sightsee (11%) or to play a round of golf while in Chatham-Kent (9%).

Because they spend more time in the area, **overnight visitors** to Chatham-Kent engage in a wider variety of activities than do same-day excursionists. More than half of them visit with friends and relatives, but they are also especially likely to shop, sightsee, go to one of the nature parks in the Chatham-Kent region and to participate in a variety of outdoor recreational or sporting activities.

Overnight visitors on trips with a main purpose of **pleasure** are even more likely to engage in a variety of activities including those that rely on the outdoors (51%) and attractions such as parks (18%), historic sites (12%), amusement parks (10%) and festivals or fairs (8%) than are overnight visitors in general.

More detail is available for the domestic market's activities than is the case for Americans and overseas visitors. Consequently, the domestic market is examined on its own in the following section.

All Markets	**Total**	**Same-Day**	**Overnight**	**Pleasure O'night**
Total Asked About Activities	749,000	504,000	245,000	129,000
	%	%	%	%
Visit Friends Or Relatives	59	62	53	28
Shopping	28	22	39	29
Sightseeing	16	11	25	26
Attend Sports Event	12	14	9	14
Visit National/Provincial Nature Park	6	3	12	18
Visit a Historic Site	6	5	8	12
Go to a Bar, Nightclub	5	2	11	8
Visit Theme or Amusement Park	3	1	5	10
Visit a Museum/Art Gallery	2	*	5	5
Visit Zoo, Aquarium or Botanical Garden	2	*	5	8
Attend a Festival or Fair	2	*	4	5
Attend a Cultural Performance	1	1	2	*
Go to a Casino	*	*	1	-
Participate In Sports /Outdoor Activity (Any)	29	20	44	51
Golfing	6	9	2	3
Boating	2	*	4	4
Fishing	2	1	4	5
Hunting	1	1	2	-

*Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 6. *Less than 0.5%. Excludes U.S. same-day visitors to Canada and non-responders.*

B. Canadian Overnight Visitors

Canadians who take overnight trips to Chatham-Kent are people and outdoor-oriented. They are visiting friends and relatives in the region (61%) and participating in a variety of outdoor activities (48%). Shopping is also popular among these Canadian visitors (42%). About 1-in-4 go sightseeing and half this proportion go to sporting events, bars or clubs and/or nature parks while on their overnight trip to Chatham-Kent.

Canadian Overnight Visitors	**Total***
Total Asked About Activities	143,000
	%
Visit Friends Or Relatives	61
Participate In Sports /Outdoor Activity[1]	48
Shopping	42
Sightseeing	26
Attend Sports Event	14
Go To A Bar Or Nightclub	12
Visit A National Or Provincial Nature Park	12
Visit A Zoo, Aquarium, Botanical Garden	8
Visit Theme or Amusement Park	7
Visit A Museum Or Art Gallery	4
Attend A Cultural Performance	3
Took A Cruise Or Boat Trip	3
Attend A Festival, Fair	2
Visit An Historic Site	1
Go to a Casino	-
Attend an Aboriginal/Native Cultural Activity	-

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, CTS Detailed Tables, Table 9. [1]*Details of outdoor activities are provided on the following table.*

There is limited interest in attractions such as zoos or aquariums, museums or art galleries, cultural performances or historic sites among these visitors. In fact, the African Heritage Tour and associated attractions likely attract more American overnight visitors: 17,000 Americans on overnight trips to Chatham-Kent claim to have visited an historic site in Canada whereas only 2,000 of their Canadian counterparts make this claim.

Swimming and walking/hiking are the most popular outdoor activities among Canadian overnight visitors to Chatham-Kent. Despite the many opportunities in the region to engage in bird watching or animal viewing, Canadians do not seem to engage in this activity. Similarly, they do not engage in outdoor winter activities such as snowmobiling or cross country skiing. Although a sizeable minority of same-day visitors to the region golf (33,000), very few Canadians on overnight trips to Chatham-Kent are likely to be found on the greens (1,000).

Canadian Overnight Visitors	Total
Total Asked About Activities	143,000
	%
Participate In Sports /Outdoor Activity (NET)	48
Swimming	19
Walking Or Hiking	16
Boating	3
Cycling	2
Fishing	1
Snowmobiling	-
Golfing	*
Other Water-Based Activities	-
Bird Or Wildlife Viewing	-
Hunting	-

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, CTS Detailed Tables, Table 9.
**Less than 0.5%.*

VI. Other Important Information

A. Party Size & Composition

Most Chatham-Kent visitors are travelling in small groups and in adult-only parties (no children under 15 years). Party composition is relatively consistent across all markets, although Canadian overnight visitors to Chatham-Kent are slightly more likely to be travelling with children (26%) than are Americans (22%).

	Canada	USA	Total Foreign
Average Party Size – Overnight Trips	1.9	2.3	2.3
Party Composition			
Adults Only	74%	79%	79%
With Children Under 15 Years	26%	22%	21%

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 8.

B. Potential Partners

By examining where *else* people stay who spend at least one night in Chatham-Kent, it is possible to identify *routes* and, in turn, potential partners for packaging and promotion. As is evident from the figures, there is very little multiple-location activity within the domestic or American markets. In other words, Canadians and Americans who spend nights in Chatham-Kent tend *only* to spend nights in this area. Nonetheless, 1-in-20 American overnight visitors in the region also spent at least one night in Niagara Falls (5%) and slightly more spent at least one night in Toronto (8%) on their trip.

	Canada	**USA**
Niagara Falls	-	5%
Ottawa – Hull CMA	1	*
Kitchener CMA	7%	2%
Toronto CMA	7%	8%
Montreal	-	2%

Source: Ontario Ministry of Tourism and Recreation & Research Resolutions, 2001, Harmonized CTS/ITS Detailed Tables, Table 15.
**Less than 0.5%.*

C. Economic Impact Estimates for Chatham-Kent

Visitors to Chatham-Kent spent approximately \$43.0 million on tourism activities and services in the municipality.[3] This spending ripples through the local and provincial economy, generating additional economic activity including sales (industry output) and jobs in tourism-related sectors such as accommodation, transportation, food services and in other sectors such as manufacturing and agriculture. When all the impacts of spending by tourists in Chatham-Kent are combined, the \$43.0 million generated approximately 825 **direct jobs** in Chatham-Kent, and an additional 557 indirect and induced jobs province-wide. Of these indirect and induced jobs, about half, or 291, are jobs in Chatham-Kent.

Dollars are in thousands (\$000)	**Province-wide Impacts**	**Impacts in Chatham-Kent**
Tourism Spending Associated with Visits to Chatham-Kent	\$43,000	\$43,000
Total Industry Output (Sales)	**\$92,300**	**\$50,000**
Direct & Indirect	\$66,700	\$39,700
Induced Impact	\$25,500	\$10,300
Total Labour Income (Wages & Salaries)	**\$26,500**	**\$17,200**
Direct Impact	\$10,600	\$10,600
Indirect Impact	\$9,700	\$3,900
Induced Impact	\$6,100	\$2,700
Total Employment (number of jobs[2])	**1,380**	**1,120**
Direct Impact	825	825
Indirect Impact	325	158
Induced Impact	232	133
Total Taxes (Direct, Indirect, Induced)	**\$18,600**	**\$13,100**
Federal	\$8,500	\$5,700
Provincial	\$7,300	\$5,400
Municipal	\$2,800	\$2,100

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

Of the total direct, indirect and induced jobs generated (1,380), 80% or 1,120 jobs were retained in Chatham-Kent.[4] In turn, these jobs generated \$26.5 million in **wages and salaries** province-wide, with close to two-thirds retained by Chatham-Kent (\$17.2 million).

In total, \$92.3 million in **industry output** (sales) were generated throughout the province in order to meet the demand of Chatham-Kent visitors, over half of which, or \$50.0 million, were retained within the municipal economy.

All levels of government benefited from tourism spending in Chatham-Kent as it generated $18.6 million in **taxes** (direct, indirect, and induced) province-wide. These taxes included $2.8 million at the municipal level of which $2.1 million were retained by the municipality, $7.3 million at the provincial level and $8.5 million at the federal level. Direct taxes represented $1.5 million for the municipality.

VII. The Travel Activities and Motivation Survey (TAMS)

A. Introduction

In this section, summary information from the Travel Activities and Motivation Survey (TAMS) is provided to aid local tourism planners and operators in understanding the market potential for the types of tourism products they offer. TAMS provides estimates of the potential market available to destinations in Ontario. Because the province itself and the states in the Great Lakes basin represent the largest tourism flows to Ontario, these regions are the focus of this analysis.[5]

Within TAMS, tourists of greatest interest to Chatham-Kent are likely to be those who have taken leisure trips in Ontario over the past couple of years and who, while on their travels, participated in the types of activities the region has to offer.[6] In the case of Chatham-Kent, the most likely target groups include:

- Hard and Soft Outdoor Adventurers
- Art Gallery/Museum Enthusiasts
- Golf Enthusiasts.

It is important to note that the tourists described in the TAMS study have taken leisure trips to Ontario and have participated in a cluster of activities while on trips but they may have **engaged in the particular tourism experiences in *any* destination they visited over a two year period**. For example, Hard Outdoor Adventurers who have visited Ontario recently may have been scuba diving and/or white water rafting while on a trip in the past two years, but they may not have engaged in these activities *in Ontario.*

B. Market Segments in Ontario and the Great Lakes States

Table 23 describes the potential market for various *high intensity* segments among Ontario and Great Lake State residents who have taken a leisure trip to Ontario in the past two years. The percentages shown in the table represent the proportion of the *total* market segment that have taken trips to Ontario destinations in the recent past (see Appendix for the total market sizes).

	Ontario Residents		**Great Lakes State Residents**	
	Ontario Travellers	**% of Market Segment**	**Ontario Travellers**	**% of Market Segment**
Adults (18+)	*4,200,000*		*9,800,000*	
Outdoor Oriented Segments				
Hard Outdoor Adventurers	460,000	83%	1,030,000	23%
Soft Outdoor Adventurers	580,000	75%	1,490,000	25%
Winter Outdoors Participants*	710,000	78%	1,140,000	24%
Golf Enthusiasts	710,000	70%	1,690,000	25%
Cultural/Heritage Segments				
Wine/Culinary	560,000	75%	1,920,000	29%
Art Galleries/Museums	1,200,000	67%	3,640,000	25%
Cultural Performances	680,000	78%	1,820,000	26%
Zoos/Aquariums	550,000	56%	2,910,000	25%
Theme Parks	530,000	56%	3,080,000	25%
Casinos	730,000	64%	3,140,000	28%

*Source: Special TAMS Tabulations, pages 15-1/2. Note: by definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts".*Excludes alpine skiers. All estimates have been rounded to the nearest 10,000.*

For example, 580,000 Ontario adults are Soft Outdoor Adventurers and have taken a leisure trip in the past two years to an Ontario destination. These 580,000 Ontario residents represent 75% of *all* Ontario residents in the Soft Outdoor Adventurer segment (780,000). In contrast, 1.5 million residents of the Great Lakes states are Soft Outdoor Adventurers and have taken a leisure trip in the past two years to an Ontario destination. These 1.5 million Americans represent 25% of *all* Great Lakes State residents in the Soft Outdoor Adventurer segment (5.9 million). Using this example, it is clear that the Ontario attracts a higher proportion of tourists from *each* of the market segments within Ontario than it does within the Great Lakes States.

C. Opportunities for Chatham-Kent

The largest markets on both sides of the Ontario/U.S. border are oriented toward **art galleries or museums** – types of attractions that are available in Chatham-Kent. Within the Ontario resident market, **golf** and **winter outdoors**, including activities such as cross country skiing, snowmobiling and ice fishing, followed by **cultural performances** represent strong opportunities for Chatham-Kent. Between its many golf courses, boating and natural outdoor environments in the warm weather (Golf; Soft Outdoor Adventurers) along with ice fishing and other winter activities that can be found in the countryside and on the shores of Lake St. Clair and Lake Erie to attract Winter Outdoor Participants, Chatham-Kent offers tourism experiences that appeal to many Ontario residents.

Ontario Residents	**Great Lakes State Residents**
1. Art Galleries/Museums	1. Art Galleries/Museums
2. Casinos	2. Casinos
3. Golf Enthusiasts	3. Theme Parks
4. Winter Outdoors Participants	4. Zoos/Aquariums
5. Cultural Performances	5. Wine/Culinary
6. Soft Outdoor Adventurers	6. Cultural Performances
7. Wine/Culinary	7. Golf Enthusiasts
8. Zoos/Aquariums	8. Soft Outdoor Adventurers
9. Theme Parks	9. Winter Outdoors Participants
10. Hard Outdoor Adventurers	10. Hard Outdoor Adventurers

Attracting **outdoor adventurers** from the Great Lakes states seems to pose a greater challenge than is the case among Ontario residents. This finding is not surprising in light of the fact that many Great Lakes state residents have terrain and outdoor opportunities in their own *backyards* that are very similar to those Chatham-Kent could offer them. If efforts are made to lure Great Lakes state residents in the Hard, Soft and Winter outdoor markets to Chatham-Kent, the emphasis may have to be on what makes the region's outdoor sites and attractions substantively *different* from those these Americans can find at home.

1. Some General Comments

As Chatham-Kent evaluates where to focus its marketing and promotional efforts and budget, it might take into account the following realities:

1. Ontarians are easier to attract to destinations within the province than are residents of the Great Lakes States;

2. Ontario's population will grow at a substantively higher rate than will the rest of Canada or the Great Lakes Basin over the next two decades (see projections to 2026); and

3. Marketing to the Ontario resident population is appreciably less costly than is directing advertising to market segments in the Great Lakes states.

2. More Information on Market Segments

For more information on the demographic profiles and tourism activity preferences of members of various Canadian and American activity-based market segments, the reader is encouraged to obtain copies of a series of reports prepared by Research Resolutions & Consulting Ltd. for the Canadian Tourism Commission. These reports are available on the CTC's website (e.g., *U.S. Heritage Tourism Enthusiasts – A Special Analysis of the Travel Activities and Motivation Survey (TAMS) Executive Summary,* Research report 2002-9).[7]

D. Implications of Population Changes on Tourism Activity Segments

Ontario residents are the primary source of domestic tourism activity in the province now, representing approximately 88% of all overnight person visits by Canadians in the province.[8] Similarly, Great Lakes state residents are the primary source of U.S.A. tourism activity in the province now, representing approximately two-thirds of all overnight person visits by Americans in Ontario.[9] These two markets are also the most prominent sources of overnight tourism in Chatham-Kent. Because of their importance to tourism in the region and in the province as a whole, changes to the demographic profile of Ontarians and Great Lake state residents over time are apt to have an especially dramatic impact on Ontario's tourism volume and value, and the types of activities these residents and American neighbours will seek on their travels.

Key changes in these markets are described below. This information is extracted from reports prepared by Research Resolutions & Consulting Ltd. for the Ontario Ministry of Tourism and Recreation and available from MTR:

- *Impacts of Aging the Canadian Market on Tourism in Ontario* and
- *Impacts of Aging the American Market on Tourism in Ontario.*

For more information on changing demographic and travel behaviour characteristics of Great Lakes state residents and Ontario residents over the next 25 years, the reader is encouraged to visit the MTR website to obtain copies of the full reports.[10]

1. Ontario Residents

Fundamental changes in Ontario's population structure will influence tourism planning and product development over the next two decades:

- Ontario's population will grow at an appreciably higher rate than will the population of Canada as a whole. At an estimated 37% increase in Ontario's adult population by 2026 compared to a 27% increase for Canada, the pool from which Ontario has to draw for the all-important resident market will increase. By 2026, this population is estimated to be over 12 million adults (18+).

- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the province's population. They currently account for approximately one-quarter of the adult population (26%) but will represent about two-fifths by 2026 (41%).

- As the population ages, the proportion of Ontario residents living in households with children will decline. At this time, close to 4-in-10 adult residents live in households with teenagers or children (37%), but this proportion will decline to less than 3-in-10 by 2026 (29%).

- A higher proportion of Ontario residents will be foreign-born in 2026 (37%) than is the case now (31%) with particular increases in Eastern European and Asian immigrants predicted, assuming pre-September 11, 2001 immigration policies.

If the new generation of Ontario residents displays similar tourism activity preferences to their 2000 counterparts, the impact of an aging population will result in a shift away from strenuous outdoor activities and a corresponding shift toward non-strenuous *warm weather* outdoor activities and indoor cultural events and attractions. The comparative reluctance of foreign-born residents to participate in strenuous outdoor experiences will contribute to the move away from traditional outdoor tourism experiences by Ontario residents.[11]

Foreign-born potential domestic tourists, many of whom will be concentrated in the Toronto area, may seek tourism experiences that respect their language, cultural traditions and cuisine. To attract this market, tourism businesses in Chatham-Kent may have to adapt their products and services to meet the needs of various cultural and ethnic groups. The region might also consider marketing agricultural events such as the Tilbury Family Festival, Thamesville Threshing Festival or the Dresden Exhibition to new Canadians as ways to learn more about Canada's rural traditions.

Predicted declines in Ontario residents' interest in traditional outdoor activities such as fishing, canoeing, hunting and camping could have substantive implications for product development and marketing of tourism in Chatham-Kent over the coming years.

2. The Great Lakes Basin

Similar fundamental changes in the U.S. Great Lakes Basin's population structure are expected to occur between now and 2025:

- As the primary market for inbound U.S. tourism to Ontario, the Great Lakes states' population will grow at an appreciably lower rate than will the population of the U.S.A. as a whole, and particularly the southern tier of the U.S.A. At an estimated 9% increase in the Great Lake states' adult population by 2025 compared to a 27% increase for the entire country, the pool of Americans from which Ontario has to draw from for the all-important "border" market will increase at a lower rate than will more distant parts of the U.S.A. By 2025, Great Lakes states' population is estimated to be approximately 65.4 million adults (18+).

- States in the Great Lakes basin will not grow at the same rate over the next two decades. In fact, Chatham-Kent's key feeder state – Michigan – will grow at only 5% compared to 9% for the region as a whole. This comparatively low growth rate may have implications for sustaining the important U.S. tourist market for Chatham-Kent in the future (see Appendix for growth rates by state).

- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the region's population. They currently account for over one-quarter of the adult population (28%) but will represent over one-third by 2025 (36%).

- As the population ages, the proportion of Great Lake state residents living in households with children will decline. At this time, 1-in-3 adults live in households with teenagers or children (33%), but this proportion will decline to less than 3-in-10 by 2025 (29%).

Like their Ontario counterparts, an aging Great Lakes state population will result in a shift away from strenuous outdoor activities and a corresponding shift toward non-strenuous *warm weather* outdoor activities and indoor cultural events and attractions. In some cases, the absolute number of Great Lakes state residents interested in some of the outdoor tourism product Ontario has traditionally featured will actually decline.

With an increasingly aging population, Great Lakes state demand for cultural attractions and performances is expected to grow. For example, art galleries and general history museums can expect increases in the proportions of U.S. travellers who will seek these experiences while on trips. While still relatively small *niche* markets, wineries, dance and classical music or opera performances are also likely to benefit from the aging of the travelling public.

VIII. Appendices

Appendix Table 1: Activity-Based Market Segments		
	Ontario Residents	**Great Lakes State Residents**

	Total Adults (18+ Years)	Ontario Travellers	Total Adults (18+ Years)	Ontario Travellers
Millions of Adults (18+)	*8.9*	*4.2*	*64.3*	*9.8*
Outdoor Oriented Segments				
Hard Outdoor Adventurers	0.6	0.5	4.4	1.0
Soft Outdoor Adventurers	0.8	0.6	5.9	1.5
Winter Outdoors Participants*	0.9	0.7	4.6	1.1
Golf Enthusiasts	1.0	0.7	6.8	1.7
Cultural/Heritage Segments				
Wine/Culinary	0.8	0.6	6.6	1.9
Art Galleries/Museums	1.8	1.2	14.3	3.6
Cultural Performances	0.9	0.7	6.9	1.8
Zoos/Aquariums	0.9	0.5	11.5	2.9
Theme Parks	0.9	0.5	12.5	3.1
Casinos	1.1	0.7	11.1	3.1

*Source: Special TAMS Tabulations, pages 15-1/2. Note: by definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts".*Excludes alpine skiers.*

Appendix Table 2: The Adult Population 2000 & 2025 by State

	2000	2025	Percentage Increase	Percentage of Ontario's 2000 USA Overnight Person Visits*
Great Lakes	60,184,000	65,440,000	+9%	
New York	13,673,000	14,926,000	+9%	18%
Pennsylvania	10,044,000	9,899,000	-1%	6%
Wisconsin	3,805,000	4,537,000	+19%	3%
Michigan	7,266,000	7,659,000	+5%	22%
Illinois	8,858,000	10,060,000	+14%	5%
Indiana	4,344,000	5,055,000	+16%	N/A
Ohio	8,662,000	9,058,000	+5%	9%
Minnesota	3,534,000	4,245,000	+20%	4%

Source: Special TAMS U.S.A. Tabulations, page 5. ITS USA 2000 Special Tabulations, page P2-1.
**Figures are not available for Indiana*

A. International Tourist Arrivals, 1988-2001

(000s)

(Statistics Canada)

Year	U.S.	U.K.	Japan	France	Germany	Total Overseas	Total Arrivals
1988	12,763	527	324	230	263	2,722	15,485
1989	12,184	561	387	243	263	2,927	15,111
1990	12,252	553	411	259	253	2,958	15,210
1991	12,003	530	393	307	273	2,909	14,912
1992	11,819	536	392	310	290	2,922	14,741
1993	12,024	562	408	361	339	3,081	15,105
1994	12,542	577	481	410	367	3,429	15,972
1995	13,005	641	589	430	421	3,927	16,932
1996	12,909	691	648	460	447	4,377	17,285
1997	13,401	734	566	439	398	4,234	17,636
1998	14,893	747	484	402	379	3,935	18,828
1999	15,180	780	516	414	393	4,187	19,367
2000	15,225	866	500	404	385	4,393	19,618
2001	15,590	826	410	356	337	4,034	19,624

B. Glossary of Economic Impact Terms[12]

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

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

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

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

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

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

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

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

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

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

Tourism Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.[13] In Ontario, the definition of tourism also excludes same day travellers who, in order to reach their destination, travelled less than 40 kms (one way) away from home.

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

C. Notes

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[1] Touristic spending that accrues to Chatham-Kent for residents of the region who are taking trips elsewhere, and fares by non-domestic visitors to the county are not included in the main analysis.
[2] See Detailed Tabulations for proportions and figures (Harmonized, page 11-1).
[3] Estimates of economic impacts of tourism provided by the Ontario Ministry of Tourism and Recreation generally include spending on transportation for residents to leave their place of residence. These carrier fares are NOT included in the economic impact calculations provided herein because they do not represent spending by people attracted to the region. The 2001 estimate of spending on carrier fares for Chatham-Kent residents to leave the region for trips to other parts of Canada, the U.S.A. and overseas was $24.0 million (see CTS Tabulations, page 24).
[4] Estimates of jobs produced by the economic impact model use the same definition as is used in Statistics Canada's Labour Force Survey (LFS). Thus, jobs generated by the model include part-time, full-time and seasonal jobs. They also include paid employees and unpaid family employees.
[5] States included in the Great Lakes Basin: New York, Pennsylvania, Michigan, Ohio, Illinois, Minnesota, Wisconsin, Indiana.
[6] The high intensity and participant groups described here were developed by the Ontario Ministry of Tourism and Recreation in conjunction with the Ontario Tourism Marketing Partnership.
High Intensity Soft Outdoors - Minimum of two of the following from the TAMS "activities on trips in past two years" list and not already categorized as "High Intensity Hard Outdoor Adventure": recreational biking, biking as an overnight touring trip, any motorcycling, kayaking or canoeing, motor boating, sailing, wind surfing, hiking/backpacking, horseback riding, hot air ballooning, cross-county skiing, downhill skiing, snowboarding, any snowmobiling. May include consumptive outdoor activities (hunting/fishing).
High Intensity Hard Outdoors - Took trip to experience adventure and excitement in past two years and at least one of: ice or rock climbing, mountain biking; dog sledding; hang-gliding; bungee jumping; heli-skiing; scuba diving. May include consumptive outdoor activities (hunting/fishing).
High Intensity Wine/Culinary - Any of: Stay at cooking school, wine tasting school or gourmet restaurant with accommodation on the premises; or minimum of 2 of the following: touring a region's wineries; going to wineries for day visits; dining at internationally acclaimed restaurants.
High Intensity Gallery/Museum Goers - Minimum of two of the following from the TAMS "activities on trips in past two years" list: Aboriginal museum; art galleries; general history museums; science/tech museums; musical attractions such as Rock 'n Roll museum.
High Intensity Golfers - From TAMS experiences/activities on trips in past two years: Took trip to participate in hobby or sport (e.g., golf, fishing, photography) in past 2 years and any of occasional golf game while travelling; stay at golf resort for one or more nights; take a packaged golf tour to play on various courses.
High Intensity Cultural Performance Tourists - Minimum of three of the following from the TAMS "activities on trips in past two years" list: opera, ballet, theatre, concerts (classical, jazz, rock 'n roll); musical, literary or theatre festival.
High Intensity Casino Gamblers - From the TAMS "experiences/activities on trips in past two years" list: Trip experience to "visit casinos and gamble" and casinos as activity.
Mega-Theme Park Enthusiasts - Minimum of two of the following from the TAMS "activities on trips in past two years" list: movie theme parks, science & technology theme parks; amusement parks such as Disneyland; garden attractions such as Cypress Gardens.
Any Other Winter - Any of: ice climbing, dog sledding, ice fishing, snowmobiling, cross country skiing (any or as a touring trip) [excludes alpine skiers and snowboarders].
[7] http://ftp.canadatourism.com/ctxUploads/en_publications/USA_heritage_TAMS_exec.pdf
[8] See 2001 Canadian Travel Survey Tabulations provided to MTR in July, 2002.
[9] See 2000 International Travel Survey Tabulations (USA) provided to MTR in 2002.
[10] http://www.tourism.gov.on.ca/english/research/tams
[11] See *Big City Attractions* tabulations prepared from TAMS for the Ontario Tourism Marketing Partnership, February, 2002. In the Toronto CMA – the likely reception site for many new immigrants to the province – those born outside Canada participate in outdoor activities such as canoeing, fishing and hunting at about half the rate as do Torontonians who were born in Canada. Participation rates in various urban and indoor-oriented activities such as museums, art

galleries, theatre and concerts in their home community, favour Canadian-born residents but are considerably closer for the two groups than is the case for outdoor activities.

[12] Modified from *Glossary* prepared by Alex Athanassakos, Ontario Ministry of Tourism and Recreation.

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