



**Working Together on Tourism Issues in
North Western Ontario**



Tourism Intentions Survey Report

September 2008

**Kenora District Camp Owners Association
And
North Western Ontario Tourism Association**

TGD Consulting

Kenora District Camp Owners Association and the North Western Ontario Tourism Association

The Kenora District Camp Owners Association or (KDCA) and the Northwestern Ontario Tourism Association or (NWOTA) represent tourism advocacy throughout North Western Ontario. As active lobby groups they address critical issues facing the tourism industry and the economy of North Western Ontario.

Tourism's Role in the Economy of North Western Ontario

Tourism is vital to the economy of North Western Ontario. In Sunset Country alone tourism employs nearly 10,000 individuals and contributes \$ 451 million to the economy. More than half a million tourists visit the Sunset Country annual.

2008 Survey

NWOTA and KDCA surveyed the 15,000 people that visited one of 20 Mid West National Marine Manufactures Association (NMMA) sport shows (www.boatshows.com) last spring. At the entrance to the show NMMA had a computer survey available to input adapt and then enter a draw.

The survey was conducted using survey monkey. Prizes offered for survey participation were (8) iFinder H2O hand held GPS units. 1757 of the 15,000 offered an opportunity to participate responded.

KDCA /NWOTA wish to acknowledge the assistance of Alex Athanassokos, Research and Industry Competitiveness (MTR) who helped us design the survey.

KDCA /NWOTA wish to acknowledge the assistance of the National Marine Manufactures Association for their assistance and generosity in making this survey possible.

Key Findings

Tourist respondents who had visited Northwestern Ontario had the following responses:

The North West is a repeat visitor destination.

Those that had visited the North West in the last 12 months intended to return to visit within the next two years (96%). The overwhelming majority of those that had visited within the past last two years intended to return within the next two years (86%). And more than half of the respondents that had not visited in the past two years intended to return (58%).

The North West attracts visitors only based on its natural assets.

Wilderness and Wildlife related responses topped the reason for interest in visiting the region for holidays. Fishing (46%), Wilderness (15%), Boating (7%), Hunting (9%) including other similar responses nature related responses were 90% of responses from those that had visited the region. For respondents who had not visited the region only dropped to 87%.

The North West requires additional marketing.

Survey respondents who had not visited and were not interested in visiting gave responses indicating that they had low or no awareness of the region (49%).

The North West rates highly as a destination.

99% of respondents who had visited the region rated it positively, and agreed that it provided value for cost, was friendly, and was a great fishing, hunting and outdoor destination

Barriers to visitation continue to be economic and border related.

10% of those answering the survey had heard negative information that could cause them to be less inclined to visit the region. 53% of these responses related to US or Canadian economic interests, 16% were border concerns and 13% passport concerns.

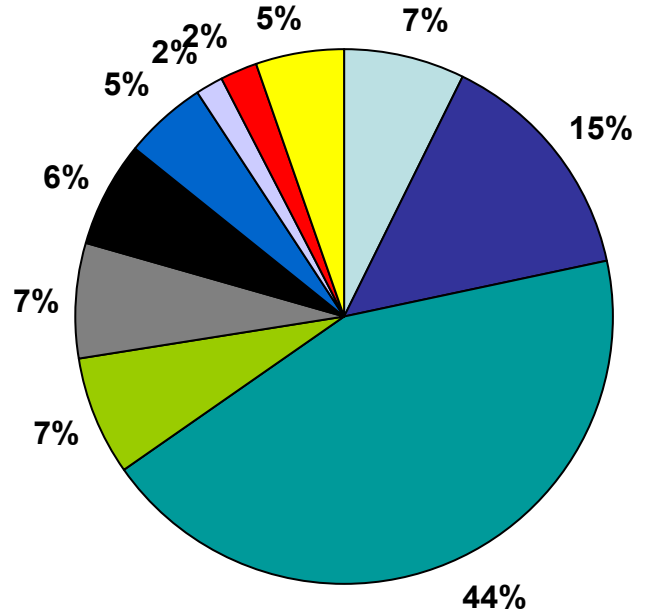
Although small relative number, the group answering that they were concerned about crossing borders figure is consistent with previous analysis of increased security and checking procedures at the International Border.

Figures obtained by industry survey indicated annual losses at .6% of total visitation due to border issues. However, given the repeat customer nature of tourists in the North West the losses remain significant.

Responses:

A. Respondents by Residence:

By State	No.	Percent
Canada	3	0.17%
AL	6	0.35%
AR	2	0.12%
CA	3	0.17%
CO	1	0.06%
CT	2	0.12%
FL	7	0.40%
GA	3	0.17%
ID	1	0.06%
IL	755	43.64%
IN	119	6.88%
IA	21	1.21%
KS	87	5.03%
KY	126	7.28%
LA	2	0.12%
MD	1	0.06%
MI	27	1.56%
MN	124	7.17%
MO	251	14.51%
NE	2	0.12%
NV	1	0.06%
NJ	1	0.06%
NY	2	0.12%
ND	3	0.17%
NC	1	0.06%
OH	11	0.64%
OK	1	0.06%
OR	1	0.06%
PA	3	0.17%
SC	1	0.06%
SD	2	0.12%
TN	111	6.42%
TX	3	0.17%
UT	1	0.06%
VA	1	0.06%
WA	4	0.23%
WV	1	0.06%
WI	39	2.25%
	1730	100.00%



B. Respondents by Demographic Profile:

Age	18-24	25-34	35-44	45-54	55-64	65-74	65-75+
	3.4	12.6	23.7	32.9	22.2	4.8	.4
Race	Caucasian*	Black	Asian	Native	Mixed	Other	
	94.1	1.9	.8	.3	.8	2.1	
<i>* 5% of all respondents were Hispanic or Latino origin or descent</i>							
Gender	Male			Female			
	77.3			22.7			
Marital Status	Married/Common Law	Divorced		Single	Widowed		
	84.1	5.9		7.6	.8		
Family @ Home	No Children	1 Child	2 Children		3 Children	4 or more Children	
	50.3	17.6	21.7		7.5	2.9	
Household Income	0-\$34,999	\$35,000-\$74,999	\$75,000-\$149,999		\$150,000 Plus	No response	
	3.1	17.6	40.3		19.7	19.3	

Question 1. Have you ever visited Northwestern Ontario?

Yes	29 %
No	71 %

(of those that responded)

Question 2. When was the last time you visited Northwestern Ontario?

Within the last 12 Months	17 %
Within the last 13-23 Months	19 %
More than 2 years ago	69 %

Question 3. Is it your intention to visit Northwestern Ontario within the next year or two?

	Visited <u>Within 12 Months</u>	Visited <u>13-23 Months</u>	Visited <u>2+ years</u>
Interested	96%	86%	58%
Not Interested	0%	9%	22%
Don't Know	4%	5%	20%

Question 4. If you are interested in visiting Northwest Ontario, What aspects about the region interest you?

	All Responding	Visited NWO	
		Yes	No
Fishing	46%	53%	38%
Wilderness	15%	12%	17%
Boating	7%	3%	10%
Hunting	9%	8%	10%
Hiking	1%	1%	4%
*Destination	6%	10%	1%
Lakes	3%	3%	3%
Did not know	6%	1%	9%
Camping	2%	2%	2%
Sightseeing	1%	1%	1%
Canoeing	1%	1%	1%
Other	4%	3%	4%

Question 4. If you are interested in visiting Northwest Ontario, What aspects about the region interest you? Cont...

*Destinations mentioned by those who have never visited
(actual response numbers)

Kenora	3
Lake of Woods	3
Eagle Lake	1

* Destinations mentioned by those who have visited:

Quetico	6
Red Lake	5
Lake of Woods	3
Eagle Lake	3
Boundary H2O	3
Lac Seul	3
Sioux Lookout	3
Thunder Bay	2
Dryden	2
Vermillion Bay	2
Nestor Falls	2
Sault Ste Marie	1
Kenora	1
Ear Falls	1
Armstrong	1
Lake Superior	1
Rainy River	1

Question 5. If you are not interested in visiting Northwestern Ontario, please tell us why?

Respondents answered in their own words. Responses were then analyzed and categorized. Examples of typical responses and the categories they fell under are listed below.

Typical Responses and Categories

Lacked information

"I don't know much about it"

No interest/ other interests

*"Other places I would rather go"
work"*

Expense

*"Too costly to get there
- gas and airfare"*

Distance

"It's very far to travel"

Never considered the destination

"Never thought about it"

Passport Concerns

"Do not have a passport at this time"

Cold

"Don't like cold weather"

Time

*"Don't have enough vacation time from
work"*

Interested at some point in future

"Interested but waiting until I retire"

Prefer to travel in USA only

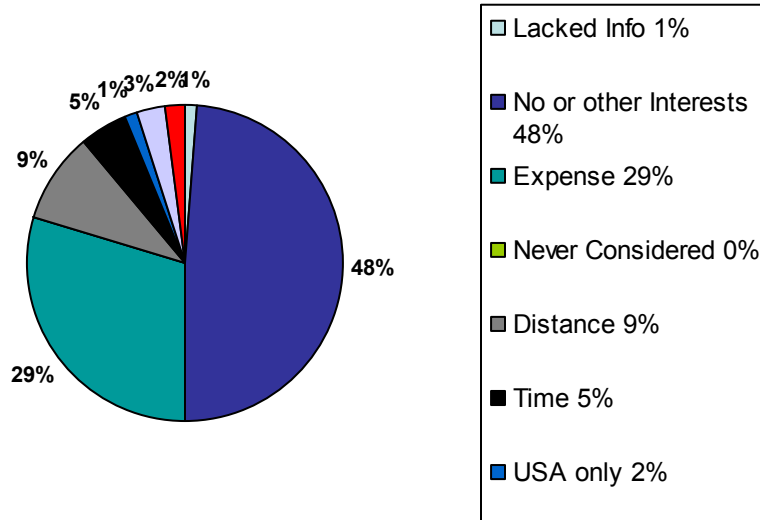
*"There is a lot of the US that we want to
see first"*

Border Concerns

"Way too much hassle at the border"

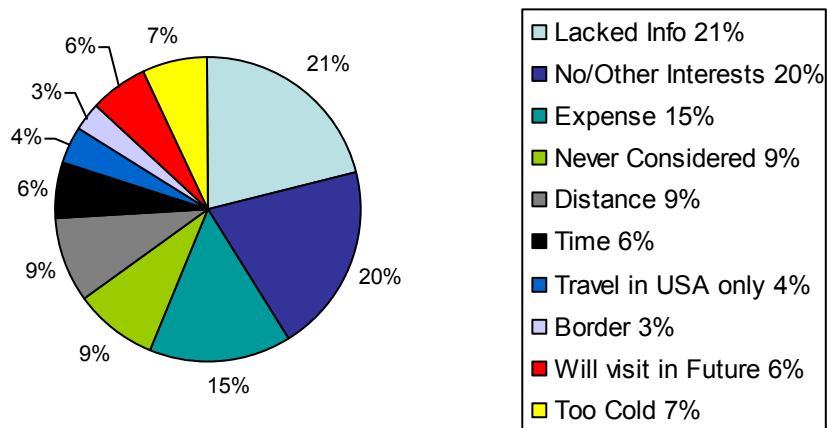
Question 5. If you are not interested in visiting Northwestern Ontario, please tell us why?

Not interested in visiting (Visited previously)



	<u>Visited</u>	<u>Never Visited</u>
Lacked Information	2%	21%
No/Other Interests	48%	20%
Never Considered	0%	9%
Expense	29%	15%
Will visit in Future	2%	6%
Prefer to Travel in US	2%	4%
Time	5%	6%
Distance	9%	9%
Border	3%	3%
Cold		7%

Not interested in visiting (Never Visited)



Question 6. Based on your general impressions from anything you have seen or heard, how would you rate Northwestern Ontario as a travel destination?

	All Responding	Visited NWO	
		Yes	No
Excellent	9%	18%	6%
Very Good	35%	49%	22%
Good	50%	32%	55%
Poor	5%	1%	13%
Very Poor	1%	0%	4%

- ❖ 99% of those who have visited voted NWO a good, very good or excellent destination.
- ❖ 83% of those that have not visited voted NWO a good, very good or excellent destination.
- ❖ Respondents who rated the destination as poor tended to have visited longer ago (2+ years)
- ❖ 67% of respondents who rated the destination as good, very good or excellent and have visited intend to return in the next two years.

Question 7. Apart from your personal circumstances, are there any specific events or issues that have impacted you directly or you have heard about that make you less inclined to travel to Northwestern Ontario.

Yes	10%
No	82%
Don't know	8%

Question 8. What are these issues/events specifically? (Those indicating “yes” in question 7)

Economy, gas or cost	53%
Border	16%
Passport	13%
Fishing/bait regulations	8%
Gun Laws	2%
Roads/Infrastructure	2%
US/Cdn Relationship	2%
Spring Bear	1%

Responses Categorized as “Border”
(actual response numbers)

Canada Border	11
Both Borders	7
DWI	3
Wait Times	3
US Border	1

Question 9-1. A place that offers excellent value for the money.

(all responding)

Agree Completely	6%
Agree	24%
Neither agree or disagree	33%
Disagree	3%
Disagree completely	0%
Can't Rate/Don't know	34%

Question 9-2. A great place for enjoying nature and the outdoor.

(all responding)

Agree Completely	34%
Agree	40%
Neither agree or disagree	7%
Disagree	0%
Disagree completely	0%
Can't Rate/Don't know	18%

Question 9-3. A place with clean and unpolluted environment.

(all responding)

Agree Completely	27%
Agree	41%
Neither agree or disagree	11%
Disagree	0%
Disagree completely	0%
Can't Rate/Don't know	21%

Question 9-4. A great place to go fishing:

(all responding)

Agree Completely	19%
Agree	29%
Neither agree or disagree	20%
Disagree	1%
Disagree completely	0%
Can't Rate/Don't know	31%

Question 9-5. A great place to go hunting.

(all responding)

Agree Completely	17%
Agree	40%
Neither agree or disagree	18%
Disagree	1%
Disagree completely	0%
Can't Rate/Don't know	24%

Question 9-6. A great place to take a family.

(all responding)

Agree Completely	17%
Agree	40%
Neither agree or disagree	18%
Disagree	1%
Disagree completely	0%
Can't Rate/Don't know	24%

Question 9-7. A place with lots of things for adults to see and do.

(all responding)

Agree Completely	15%
Agree	37%
Neither agree or disagree	22%
Disagree	2%
Disagree completely	0%
Can't Rate/Don't know	24%

Question 9-8. A place you can easily drive to.

(all responding)

Agree Completely	7%
Agree	23%
Neither agree or disagree	28%
Disagree	16%
Disagree completely	4%
Can't Rate/Don't know	22%

Question 9-9. A friendly place.

(all responding)

Agree Completely	16%
Agree	35%
Neither agree or disagree	20%
Disagree	1%
Disagree completely	0%
Can't Rate/Don't know	28%

Question 10. If you are not interested in or are no longer interested in visiting Northwestern Ontario, where are you traveling to now?

Not Traveling	21%
Local	14%
Florida	10%
Tropical Country	9%
Minnesota	7%
Wisconsin	5%

Question 11. If you did or still do travel to Northwestern Ontario could you give us an estimate of what your group would spend on a trip.

Average \$2,752