

CANADIAN TRAVELLERS WHO VISITED NORTHERN ONTARIO

A Profile for Marketing Implications

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EXECUTIVE SUMMARY

A PROFILE OF CANADIAN TRAVELLERS WHO VISITED NORTHERN ONTARIO:

- Majority reside in Ontario, particularly Toronto
- Seek undiscovered and less built up destinations
- Seek more solitude and isolation than other Canadian Travellers
- Seek to be more physically challenged than other Canadian Travellers
- Have a strong relationship with outdoor recreation activities, particularly camping and fresh water fishing
- Value accessibility by car more than other modes of transportation
- Are not traveling to be pampered or stay in luxury accommodation
- Have higher incomes compared to other Canadian travellers
- Generally are slightly younger than other Canadian travellers
- Live mainly with a spouse or partner without young children
- A majority use the advice of friends and relatives as an important source of information for planning their trips
- A majority of them made their travel decisions over the Internet (accommodation and air tickets)

PRODUCT IMPLICATIONS:

Experiences that offer relaxation and physical activity

- Product development could move towards offering experiences that incorporate relaxation with physical activity. 67.3% of Canadian travellers to Northern Ontario seek to relax and relieve stress. However, this group of travellers differs on the fact that they also seek to be more challenged physically than all other Canadian travellers.
 - 52.8% swam in lakes during a trip in the past two years
 - 41.9% camped during a trip in the past two years
 - 35.2% fished in fresh water during a trip in the past two years

Camping as a popular activity

- Camping is of significant interest to Canadians who have visited Northern Ontario. Supporting this is the fact that 14.3% of Canadian travellers to Northern Ontario indicated that the availability of camping was highly important in their travel making decisions compared to all Canadian travellers (12.7%). Fewer travellers to Northern Ontario indicated that the availability of camping was of no importance in their travel making decisions (47.3%) compared to all Canadian travellers (51.0%).

A niche market for nature-based activities

- Although shopping at clothing, shoe and jewellery shops and dining at restaurants that offer local ingredients are activities that are common to most Canadian travellers to Northern Ontario, they are also common to most Canadian travellers in general. Among the most frequently mentioned activities by travellers who had visited Northern Ontario, there are a number which relate to the natural environment (swimming in lakes, fresh water fishing, camping, and visiting national or provincial nature parks).
 - There exists an opportunity to capitalize on the existence of specialized outdoor activities in the North such as fresh water fishing.
 - Relaxation in the outdoors is an influential factor as 24.6% of Canadian travelers who visited Northern Ontario indicated that sunbathing/sitting on the beach was a main reason for taking an overnight trip in the past 2 years.
 - The remoteness of the North is also an influential factor.
 - However, given the importance of activities such as shopping and dining, there is a need to emphasize that these activities are available alongside of the specialized, nature-based activities.

FACTORS PREDICTING TRAVEL:

- Northern Ontario's primary travel market includes residents of Ontario. Toronto not only generated most of the Canadian travellers visiting Northern Ontario (primarily because of its population size), but also had the highest incidence of travel to Northern Ontario.
- Factors predicting travel to Northern Ontario include: participation in one of Northern Ontario's intrinsic activities; fresh water fishing as a main reason for travel; and traveling to seek undiscovered, less built up places.

OPPORTUNITIES FOR GROWTH:

- The Primary potential visitor market for Northern Ontario is Toronto.
- Secondary potential visitor markets for Northern Ontario include:
 - Montreal
 - Areas of British Columbia (excluding Victoria and Vancouver)
 - Vancouver and Calgary, however, to a lesser degree
- These areas had the highest incidence of Canadians who did not visit Northern Ontario, rated Ontario highly and indicated that at least one of Northern Ontario's intrinsic activities was a main reason for taking a trip in the past two years.

INTRODUCTION

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines travel behaviour over the past two years, providing detailed information on travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Ontario;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e. in terms of communication strategies); and
- Provide information on how to better fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism
Ontario Tourism Marketing Partnership Corporation
Canadian Tourism Commission
Atlantic Canada Opportunities Agency
Department of Canadian Heritage
Parks Canada Agency
Statistics Canada

Quebec Ministry of Tourism
Travel Manitoba
Tourism Saskatchewan
Alberta Economic Development
Tourism British Columbia
Government of Yukon
Government of Northwest Territories

The survey was conducted in Canada and the United States between January 2006 and June 2006 and it covered only adults (18 years and over). As such, the reference period for the data is 2004 and 2005.

The Canadian survey consisted of a telephone and a mailback survey:

- The household response rate on the telephone was 65.4%.
- Among those who qualified to receive the paper questionnaire the response rate was 53.5%.
- The Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires.

In this second TAMS survey (the first was completed in 2000), the questionnaire was adjusted to better meet the needs of our tourism stakeholders. Some of the differences include:

- More detailed questions regarding activities, as well as identifying the activities that were the primary motivators for trips;
- Identification of the travel decision-maker in the family and the process of selecting trip types;
- Identification of planning sequence regarding destinations, experiences or activities
- Ratings of various factors as to their importance in deciding where to travel
- More detailed questions regarding media habits;
- Additional questions on ethnic/cultural background to identify the country of birth of the parents of the respondents as well as the time of immigration; and
- Ratings of Canadian and foreign jurisdictions as destinations for pleasure travel.

This profile report summarizes the findings of the Canadian TAMS survey and visitation to Northern Ontario.

MARKET SIZE

	Number (000's)	As a % of total Canadian Travellers (20.8 M)
Travellers who took at least one overnight, out-of town trip during 2004-05		
Total Canadian Travellers	20,875	100%
Travellers to Northern Ontario	3,758	18.0%
Travellers to Northern Ontario Only	1,247	6.0%
Travellers to Southern Ontario	9,262	44.4%
Travellers to Southern Ontario Only	6,750	32.3%
Travellers to Northern and Southern Ontario	2,511	12.0%
Travellers to Ontario	10,855	52.0%

Highlights:

- A total of 3.7 million Canadians visited Northern Ontario in 2004-05.
- Canadian travellers visited Southern Ontario approximately 2.5 times as much as they did Northern Ontario.
- 33% of Canadians who travelled to Northern Ontario visited only that region of the province.
- Travellers to Northern Ontario consisted of 35% of all travellers to Ontario.
- Given that 67% of travellers to Northern Ontario also visit the southern part of the province there maybe opportunities for joint marketing and development of packages (e.g. Moccasin Trail Tour package - Discover Ontario Parks by motorhome whereby travellers arrive and sleep in Toronto and then travel to Northern Ontario).

PLACE OF RESIDENCE

Place of Residence	Canadian Travellers who visited Northern Ontario (000's)	As a % of total Northern Ontario travellers (3.7 M)	Travellers to Northern Ontario as a % of each regions total travellers
ATLANTIC PROVINCES	85	2.3%	7.0%
Halifax	17	0.5%	1.2%
Other Atlantic	67	1.8%	5.8%
QUEBEC	358	9.5%	22.9%
Quebec City	42	1.1%	2.2%
Montreal	175	4.7%	11.5%
Gatineau	30	0.8%	0.9%
Other Quebec	110	2.9%	8.4%
ONTARIO	2,962	77.9%	38.8%
Ottawa	131	3.5%	2.9%
Kingston	31	0.8%	0.4%
Oshawa	88	2.4%	1.1%
Toronto	1,116	29.7%	16.5%
Hamilton	217	5.8%	2.2%
St. Catharines-Niagara	84	2.2%	1.2%
Kitchener	117	3.1%	1.4%
London	117	3.1%	1.5%
Windsor	77	2.1%	1.0%
Greater Sudbury	61	1.6%	0.5%
Thunder Bay	50	1.3%	0.4%
Other Ontario	832	22.2%	9.6%
MANITOBA	173	4.6%	3.3%
Winnipeg	132	3.5%	2.1%
Other Manitoba	41	1.1%	1.2%
SASKATCHEWAN	33	0.9%	3.0%
Regina	8	0.2%	0.6%
Saskatoon	11	0.3%	0.8%
Other Saskatchewan	13	0.4%	1.6%
ALBERTA	102	2.7%	10.8%
Calgary	35	0.9%	3.6%
Edmonton	40	1.1%	3.3%
Other Alberta	26	0.7%	3.9%
BRITISH COLUMBIA	78	2.1%	14.2%
Vancouver	42	1.1%	7.5%
Victoria	11	0.3%	1.1%
Other British Columbia	25	0.7%	5.6%

- A majority of Canadian travellers to Northern Ontario reside in Ontario (77.9%), with concentration in Toronto (29.7%).
- Outside of Ontario, Quebec accounted for the largest percentage of travellers visiting Northern Ontario (9.5%).

DESTINATIONS VISITED IN THE PAST 2 YEARS

DESTINATION	Canadian Travellers who visited N Ontario (000's)	% of total Northern Ontario travellers
Nfld and Labrador	193	5.2%
Prince Edward Island	320	8.5%
Nova Scotia	518	13.8%
New Brunswick	540	14.4%
Quebec	1,548	41.2%
Manitoba	608	16.2%
Saskatchewan	473	12.6%
Alberta	787	21.0%
British Columbia	801	21.3%
Yukon	34	0.9%
Northwest Territories	30	0.8%
Nunavut	21	0.6%
United States	2,204	58.7%
Mexico	435	11.6%
South/Central America	198	5.3%
The Caribbean	709	18.9%
Europe incl.UK/Russia	528	14.1%
Asia	191	5.1%

Highlights:

- The United States was the most popular destination visited by Canadians who travelled to Northern Ontario (58.7%), followed by Quebec (41.2%).
- The Caribbean was the most popular international destination (18.9%) after the United States.

ACTIVITIES PARTICIPATED IN DURING THE PAST 2 YEARS WHILE ON A TRIP OF ONE OR MORE NIGHTS¹

Highlights:

- Three activities recorded above 50% participation by Canadian travellers who visited Northern Ontario:
 - Shopping at clothing, shoe and jewellery shops (59.6%)
 - Dining at restaurants that offer local ingredients and recipes (58.8%)
 - Swimming in lakes (52.8%)
- Other popular activities included:
 - Sunbathing/sitting on the beach (46.8%)
 - Strolling around the city to observe its buildings & architecture (44.9%)
 - Shopping at bookstores and music stores (44.7%)
 - Camping (public, national/state/provincial/ municipal/ or private campground setting) (41.9%)
 - Shop or browse local arts and crafts studios or exhibitions (40.6%)
 - Going to outdoor cafes (40.2%)
 - Fresh water fishing (35.2%)
 - Visiting national or provincial nature parks (35.1%)
 - Going to Casinos (34.2%)
- 18.7% of Canadian travelers who visited Northern Ontario indicated that sunbathing/sitting on the beach was a main reason for taking an overnight trip in the past 2 years. Other activities which were a main reason for taking a trip included:
 - Fresh water fishing (15.5%)
 - Visiting national or provincial/state nature parks (15.4%)
 - Camping in a public campground (14.8%)
 - Swimming in lakes (13.3%)
- 31.5% of Ontario residents who visited Northern Ontario have a cottage in the province.

¹ Participation in these activities was not necessarily in Northern Ontario.

ACTIVITIES PARTICIPATED IN DURING PAST 2 YEARS WHILE ON A TRIP OF 1+ NIGHTS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
FISHING - FRESH WATER	1,304	35.2%
FISHING - SALT WATER	164	4.4%
FISHING - TROPHY FISHING	57	1.6%
KAYAKING OR CANOEING – FRESHWATER	794	21.5%
KAYAKING OR CANOEING – OCEAN	160	4.3%
KITE SURFING	9	0.3%
MOTOR BOATING	1,015	27.4%
PARASAILING	67	1.8%
SAILING	220	6.0%
SCUBA DIVING IN LAKES / RIVERS	69	1.9%
SCUBA DIVING IN SEA / OCEAN	95	2.6%
SNORKELING IN LAKES OR RIVERS	169	4.6%
SNORKELING IN SEA / OCEAN	415	11.2%
SUNBATHING OR SITTING ON A BEACH	1,735	46.8%
SWIMMING IN LAKES	1,955	52.8%
SWIMMING IN OCEANS	1,087	29.4%
WATER SKIING	297	8.0%
WHITE WATER RAFTING	124	3.4%
WIND SURFING	60	1.6%
DOG SLEDDING	54	1.5%
FISHING - ICE FISHING	353	9.6%
ICE-SKATING	490	13.2%
SKIING - CROSS COUNTRY	306	8.3%
SKIING - CROSS/BACK COUNTRY AS AN OVERNIGHT TOURING TRIP	57	1.5%
SKIING - DOWNHILL	55	14.9%
SKIING - HELI-SKIING	12	0.3%
SKIING - SKI JOURING	5	0.1%
SNOWBOARDING	193	5.2%
SNOWMOBILING - DAY USE ON ORGANIZED TRAIL	247	6.7%
SNOWMOBILING - AS AN OVERNIGHT TOURING TRIP	91	2.5%
SNOWSHOEING	192	5.2%

ACTIVITIES PARTICIPATED IN DURING PAST 2 YEARS WHILE ON A TRIP OF 1+ NIGHTS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
ATV - USED ONE FOR A SAME DAY EXCURSION	410	11.1%
ATV - USED ONE AS PART OF AN OVERNIGHT TOURING TRIP	90	2.4%
BUNGEE JUMPING	27	0.7%
CLIMBING - ICE CLIMBING	15	0.4%
CLIMBING - ROCK CLIMBING	97	2.6%
CLIMBING - MOUNTAIN CLIMBING / TREKKING	137	3.7%
CYCLING - SAME DAY EXCURSION	485	13.1%
CYCLING - MOUNTAINING BIKING	196	5.3%
CYCLING - AS AN OVERNIGHT TOURING TRIP	34	0.9%
FITNESS - WORKING OUT IN A FITNESS CENTRE	452	12.2%
FITNESS - JOGGING OR EXERCISING OUTDOORS	500	13.5%
GOLFING - PLAYED AN OCCASIONAL GAME	777	21.0%
GOLFING - PLAYED DURING A STAY AT A GOLF RESORT	210	5.7%
GOLFING - TOOK PACKAGE GOLF TOUR TO PLAY ON VARIOUS COURSES	99	2.7%
HIKING - SAME DAY EXCURSION WHILE ON OVERNIGHT TRIP	1,048	28.3%
HIKING/BACPACKING IN WILDERNESS SETTINGS WITH OVERNIGHT CAMPING OR LODGING	391	10.6%
HORSEBACK RIDING - SAME DAY HORSEBACK RIDING EXCURSION	207	5.6%
HORSEBACK RIDING - TRAVELED BY HORSE WITH OVERNIGHT STOPS	10	0.3%
HUNTING - BIG GAME	173	4.7%
HUNTING - SMALL GAME	130	3.5%
HUNTING - BIRDS	92	2.5%
IN-LINE / ROLLER BLADING	106	2.9%
MINI-GOLF	633	17.1%
MOTORCYCLING - DAY EXCURSION WHILE ON OVERNIGHT TRIP	106	2.9%
MOTORCYCLING - AS AN OVERNIGHT TOURING TRIP	66	1.8%
NATURE PARK - VISITED NATIONAL, PROVINCIAL, STATE PARK	1,301	35.1%
SKATEBOARDING	35	1.0%
VIEWING NORTHERN LIGHTS	387	10.5%
WILDFLOWERS / FLORA VIEWING	481	13.0%
WILDLIFE VIEWING - BIRD WATCHING	470	12.7%
WILDLIFE VIEWING - WHALE WATCHING AND OTHER MARINE LIFE	478	12.9%
WILDLIFE VIEWING - LAND BASED ANIMALS	646	17.4%

ACTIVITIES PARTICIPATED IN DURING PAST 2 YEARS WHILE ON A TRIP OF 1+ NIGHTS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
AMUSEMENT PARK	943	25.5%
AQUARIUMS	543	14.7%
BOTANICAL GARDENS	584	15.8%
GARDEN THEME PARK	280	7.6%
MUSICAL ATTRACTIONS	260	7.0%
MOVIE THEME PARK	195	5.3%
PLANETARIUM	128	3.5%
SCIENCE & TECHNOLOGY THEME PARK	351	9.5%
WATER THEME PARK	526	14.2%
WAX MUSEUMS	149	4.0%
ZOOS	678	18.3%
ENTERTAINMENT FARMS (e.g., CORN MAZE, PETTING BARNYARD)	285	7.7%
ART GALLERIES	786	21.2%
HISTORICAL REPLICAS OF CITIES/TOWNS WITH HISTORIC RE-ENACTMENTS	454	12.3%
MUSEUM - CHILDREN'S MUSEUMS	190	5.1%
MUSEUM - GENERAL HISTORY OR HERITAGE MUSEUMS	919	24.8%
MUSEUM - SCIENCE OR TECHNOLOGY MUSEUMS	481	13.0%
MUSEUM - MILITARY / WAR MUSEUMS	463	12.5%
PALEONTOLOGICAL / ARCHAEOLOGICAL SITES	266	7.2%
STROLLING AROUND A CITY TO OBSERVE ITS BUILDINGS & ARCHITECTURE	1,662	44.9%
WELL KNOWN HISTORIC SITES OR BUILDINGS	1,208	32.6%
OTHER HISTORIC SITES MONUMENTS AND BUILDINGS	1,031	27.8%
WELL KNOWN NATURAL "WONDERS"	1,114	30.1%
ARCHAEOLOGICAL DIGS	31	0.9%
COOKING / WINE TASTING COURSES	172	4.7%
COURSES TO LEARN ANOTHER LANGUAGE	58	1.6%
CURATORIAL TOURS	48	1.3%
HARVESTING AND / OR OTHER FARM OPERATIONS	138	3.7%
HISTORICAL RE-ENACTMENTS (AS AN ACTOR)	18	0.5%
INTERPRETIVE PROGRAM AT A HISTORIC SITE OR PARK	195	5.3%
WILDERNESS SKILLS COURSES	92	2.5%

ACTIVITIES PARTICIPATED IN DURING PAST 2 YEARS WHILE ON A TRIP OF 1+ NIGHTS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
AMATEUR SPORTS TOURNAMENTS & COMPETITIONS	542	14.6%
AMATEUR TOURNAMENTS AND COMPETITIONS OTHER THAN SPORTS	79	2.2%
AUTO RACES	189	5.1%
PROFESSIONAL BASEBALL GAMES	306	8.3%
PROFESSIONAL BASKETBALL GAMES	118	3.2%
PROFESSIONAL FIGURE SKATING	47	1.3%
PROFESSIONAL FOOTBALL GAMES	148	4.0%
PROFESSIONAL GOLF TOURNAMENTS	52	1.4%
PROFESSIONAL ICE HOCKEY GAMES	487	13.1%
PROFESSIONAL SOCCER GAMES	30	0.8%
HORSE RACES	141	3.8%
EQUINE (HORSE) COMPETITIONS	62	1.7%
CURLING BONSPIEL	58	1.6%
NATIONAL/INTERNATIONAL SPORTING EVENTS, e.g. THE OLYMPICS GAMES	41	1.1%
HANG GLIDING	13	0.4%
HOT AIR BALLOONING	18	0.5%
PARACHUTING	22	0.6%
DAY VISIT TO A HEALTH AND WELLNESS SPA	401	10.8%
PHOTOGRAPHY	615	16.6%
RECREATIONAL DANCING	297	8.0%
WENT TO CASINO(S)	1,267	34.2%
WENT TO THE MOVIES / CINEMA	1,207	32.6%
WENT TO IMAX MOVIE THEATRES	579	15.6%

ACTIVITIES PARTICIPATED IN DURING PAST 2 YEARS WHILE ON A TRIP OF 1+ NIGHTS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
DINING - AT RESTAURANTS OFFERING LOCAL INGREDIENTS & RECIPES	2,177	58.8%
DINING - AT HIGH-END RESTAURANTS OF INTERNATIONAL REPUTATION	792	21.4%
DINING - AT OTHER HIGH-END RESTAURANTS	1,137	30.7%
DINING - AT A FARM	240	6.5%
SHOP/BROWSE - BOOKSTORES OR MUSIC STORES	1,655	44.7%
SHOP/BROWSE - ANTIQUES	1,025	27.7%
SHOP/BROWSE - GOURMET FOODS IN RETAIL STORES	713	19.3%
SHOP/BROWSE - LOCAL ARTS & CRAFTS STUDIOS/EXHIBITS	1,503	40.6%
SHOP/BROWSE - CLOTHING, SHOES AND JEWELRY	2,207	59.6%
SHOP/BROWSE - GREENHOUSE OR GARDEN CENTRE	752	20.3%
WENT TO LOCAL OUTDOOR CAFES	1,488	40.2%
WENT TO WINERIES FOR DAY VISITS AND TASTING	690	18.6%
WENT TO BREWERIES FOR DAY VISITS AND TASTING	265	7.2%
WENT TO FRUIT PICKING AT FARMS OR OPEN FIELDS	514	13.9%
VISITED FOOD PROCESSING PLANTS SUCH AS CHEESE FACTORY	270	7.3%
LAKESIDE / RIVERSIDE RESORT	1,067	28.8%
SKI RESORT OR MOUNTAIN RESORT	591	16.0%
SEASIDE RESORT	742	20.0%
REMOTE OR FLY-IN WILDERNESS LODGE	108	2.9%
REMOTE OR FLY-IN WILDERNESS OUTPOST	49	1.3%
WILDERNESS LODGE YOU CAN DRIVE TO BY CAR	301	8.1%
COOKING SCHOOL	16	0.4%
WINE TASTING SCHOOL	12	0.3%
COUNTRY INN OR RESORT BECAUSE IT HAD A GOURMET RESTAURANT ON THE PREMISES	204	5.5%
HEALTH SPA	228	6.2%
FARM OR GUEST RANCH	111	3.0%
ON A HOUSEBOAT	68	1.8%
A PUBLIC CAMPGROUND IN A NATURE PARK	1,167	31.5%
A PRIVATE CAMPGROUND	845	22.8%
A CAMP SITE IN A WILDERNESS SETTING (NOT A CAMPGROUND)	437	11.8%
A MOTOR HOME OR RV WHILE TRAVELING OR TOURING (NOT A CAMPING TRIP)	197	5.3%

ACTIVITIES PARTICIPATED IN DURING PAST 2 YEARS WHILE ON A TRIP OF 1+ NIGHTS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
ABORIGINAL CULTURAL EXPERIENCES IN A REMOTE OR RURAL SETTING WHERE YOU STAYED FOR ONE OR MORE NIGHTS	169	4.6%
ABORIGINAL HERITAGE ATTRACTIONS (E.G. MUSEUMS, INTERPRETIVE CENTRES).	370	10.0%
ABORIGINAL FESTIVALS (E.G. POW WOWS)	154	4.2%
ABORIGINAL CUISINE	175	4.7%
ABORIGINAL ARTS AND CRAFTS SHOWS	252	6.8%
ABORIGINAL OUTDOOR ADVENTURE AND/OR SPORTS	40	1.1%
BALLET OR OTHER PERFORMANCES	261	7.0%
CLASSICAL OR SYMPHONY CONCERTS	268	7.2%
COUNTRY/WESTERN MUSIC CONCERTS	228	6.2%
FREE OUTDOOR PERFORMANCES	733	19.8%
JAZZ CONCERT	187	5.0%
LIVE THEATRE	806	21.8%
LIVE THEATRE WITH DINNER	355	9.6%
OPERA	86	2.3%
ROCK&ROLL CONCERTS	704	19.0%
STAND UP COMEDY CLUBS AND OTHER VARIETY SHOWS	405	11.0%
CIRCUS	147	4.0%
CARNIVALS	292	7.9%
INTERNATIONAL FILM FESTIVALS	76	2.1%
LITERARY FESTIVALS	53	1.4%
MUSIC FESTIVALS	341	9.2%
THEATRE FESTIVALS	110	3.0%
FARMERS MARKETS OR COUNTRY FAIRS	1,006	27.2%
EXHIBITION OR FAIRS	536	14.5%
RELIGIOUS FESTIVALS	204	5.5%
FOOD/DRINK FESTIVALS	315	8.5%
ETHNIC FESTIVALS	216	5.8%
WESTERN THEMES SUCH AS RODEOS	110	3.0%
GAY PRIDE	61	1.7%
FIREWORKS FESTIVALS	695	18.8%
HOT AIR BALLOON FESTIVALS	62	1.7%

Main Reason	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
Trip reason sunbathing/sitting on beach	700	18.7%
Trip reason fishing - fresh water	584	15.5%
Trip reason nature park	577	15.4%
Trip reason public campground park	557	14.8%
Trip reason swimming in lakes	498	13.3%

CAMPING

CAMPING RELATED TRAVEL	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
CAMPING (NET)	1,573	41.9%
A PUBLIC CAMPGROUND IN A NATURE PARK	1,167	31.5%
A PRIVATE CAMPGROUND	845	22.8%
A CAMP SITE IN A WILDERNESS SETTING (NOT A CAMPGROUND)	437	11.8%

Highlight:

- 41.9% of Northern Ontario travellers participated in some form of camping which makes camping an ideal product offering for the North.

Type of Shelter

TYPES OF SHELTERS USED BY CAMPERS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Campers
TENT	1,207	32.1%
TENT TRAILER	129	3.4%
TRUCK CAMPER OR VAN	77	2.1%
TRAVEL TRAILER/ FIFTH WHEEL	187	5.0%
MOTOR HOME OR RV	122	3.3%
NOT STATED	983	26.2%

Highlight:

- Of the Canadians who visited Northern Ontario and went camping over the past 2 years, 32.1% used a tent for shelter.

TOURS & CRUISES IN PAST 2 YEARS

Tours

TYPES OF TOURS TAKEN IN PAST 2 YEARS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
AN ORGANIZED OR GUIDED GROUP TOUR WHERE YOU STAYED FOR ONE OR MORE NIGHTS AT DIFFERENT LOCATIONS	387	11.9%
AN ORGANIZED OR GUIDED GROUP TOUR WHERE YOU STAYED FOR ONE OR MORE NIGHTS AT A SINGLE LOCATION (e.g., CASINO, SPA, etc.)	328	10.1%
AN ORGANIZED OR GUIDED GROUP TOUR EXCURSION OF LESS THAN ONE DAY'S DURATION (A SAME DAY TOUR) WHILE ON A TRIP OF ONE OR MORE NIGHTS	933	28.7%
A SELF-GUIDED (i.e., NOT PART OF AN ORGANIZED GROUP TOUR) SAME DAY TOUR EXCURSION WHILE ON A TRIP OF ONE OR MORE NIGHTS	1,317	40.5%
A SELF-GUIDED TOUR (i.e., NOT PART OF AN ORGANIZED GROUP TOUR) ON WHICH YOU STAYED IN DIFFERENT PLACES FOR ONE OR MORE NIGHTS	728	22.4%
NONE OF THE ABOVE	1,154	35.5%
"Where did you go on these same day tours?"	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
AROUND THE COUNTRYSIDE - SCENIC DRIVES	992	58.6%
AROUND THE CITY	998	58.9%
AS A PILOT OR PASSENGER OF AIRPLANE OR HELICOPTER	88	5.3%
ON THE WATER (SIGHTSEEING CRUISE)	629	37.2%
TO A WINERY / WINERIES	250	14.8%
TO A FACTORY / FACTORIES	110	6.5%
TO A CASINO	398	23.5%
WILDERNESS / OUTDOOR TOUR	620	36.6%
SOME OTHER TYPE OF TOUR	432	25.5%

Cruises

TYPES OF CRUISES TAKEN IN PAST 2 YEARS WHERE YOU STAYED ON-BOARD FOR 1+ NIGHTS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
OCEAN CRUISE - ALASKA	54	1.7%
OCEAN CRUISE - CARIBBEAN	252	7.9%
OCEAN CRUISE - OTHER	99	3.1%
GREAT LAKES CRUISE	55	1.7%
CRUISE ON THE ST. LAWRENCE RIVER	63	2.0%
CRUISE ON ANOTHER LAKE OR RIVER	134	4.2%
SUBMARINE CRUISE	2	0.1%
SOME OTHER TYPE OF CRUISE	76	2.4%
DO NOT TAKE A CRUISE	2,631	82.3%

Highlights:

- 40.5% of Canadian travellers who visited Northern Ontario took a self guided same-day tour while on an overnight trip in the past 2 years. The most popular type of same-day tour was a tour “Around the City”, closely followed by the “Around the countryside-scenic drives”.
- An organized or guided group tour excursion of less than one day’s duration (28.7%) was the second most popular same-day tour type for this group of travellers.
- The majority of Canadian travellers who visited Northern Ontario did not take an overnight cruise in the past 2 years (82.3%), compared to 68.3% of all Canadian travellers.

BUSINESS OR JOB-RELATED TRAVEL IN PAST 2 YEARS

TYPES OF BUSINESS TRIPS IN PAST 2 YEARS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
BUSINESS MEETINGS	772	22.3%
TRADE SHOWS	344	9.9%
BUSINESS CONVENTIONS	305	8.8%
CONFERENCES OR SEMINARS	635	18.3%
EMPLOYER-PAID TRAINING	458	13.2%
SOME OTHER BUSINESS REASON	518	15.0%
I HAVE NOT TAKEN ANY OUT-OF-TOWN JOB-RELATED TRIPS OF 1+ NIGHTS IN THE PAST 2 YEARS	2,045	59.1%

Highlight:

- More than half of all Canadian travellers who visited Northern Ontario had not taken any overnight business trips in the past 2 years. Of those that did take a business-related trip, 22.3% attended a business meeting.

TRIP PLANNING BEHAVIOUR OVER THE PAST 2 YEARS

Trip-Planning Sources

INFORMATION SOURCES USED TO PLAN OVERNIGHT PLEASURE TRIPS IN PAST 2 YEARS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
A TRAVEL AGENT	1,119	33.4%
AN INTERNET WEBSITE	2,313	69.0%
AN ELECTRONIC NEWSLETTER OR MAGAZINE RECEIVED BY E-MAIL	183	5.5%
AN AUTO CLUB SUCH AS AAA	708	21.1%
ARTICLES IN NEWSPAPERS/MAGAZINES	778	23.2%
ADVERTISEMENTS IN NEWSPAPERS/MAGAZINES	526	15.7%
VISITOR INFORMATION CENTRES	871	26.0%
TRAVEL GUIDE BOOKS SUCH AS FODOR'S OR MICHELIN	448	13.4%
ADVICE OF FRIENDS OR RELATIVES/WORD-OF-MOUTH	1,884	56.2%
VISITS TO TRADE, TRAVEL OR SPORTSMEN'S SHOWS	148	4.4%
PROGRAMS ON TELEVISION	269	8.0%
ADVERTISEMENTS ON TELEVISION	167	5.0%
TRAVEL INFORMATION RECEIVED IN THE MAIL	331	9.9%
PAST EXPERIENCE/BEEN THERE BEFORE	1,853	55.3%
MAPS	1,270	37.9%
OFFICIAL TRAVEL GUIDES OR BROCHURES FROM STATE / PROVINCIAL / NATIONAL ORGANIZATIONS	965	28.8%
NONE OF THE ABOVE	173	5.2%

Highlights:

- The majority (69.0%) of Canadian travellers who visited Northern Ontario and were involved with the planning of their overnight pleasure trips in the past 2 years used the internet as a source of information.
- Although the internet was an important source of information, Canadian travellers who had visited Northern Ontario also used the advice of their friends/relatives (56.2%), their own past experience (55.3%), or maps (37.9%).
- 28.8% of Canadians who were involved in trip-planning and visited northern Ontario used official travel guides or brochures from state/provincial/national organizations as sources of information for planning their overnight pleasure trips.

Types of Websites Used

TYPES OF WEBSITES USED TO PLAN OVERNIGHT PLEASURE TRIPS IN PAST 2 YEARS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
A TRAVEL PLANNING/BOOKING WEBSITE (e.g. EXPEDIA, TRAVELOCITY)	1,104	48.6%
AN AIRLINE'S WEBSITE	1,059	46.6%
THE WEBSITE OF A COUNTRY/STATE/PROVINCE/OR CITY TOURISM AUTHORITY	1,216	53.5%
THE WEBSITE OF A HOTEL OR RESORT	1,390	61.2%
A MOTORCOACH WEBSITE	59	2.6%
A CRUISE LINE WEBSITE	228	10.0%
THE WEBSITE OF AN ATTRACTION (MUSEUM, THEATRE, AMUSEMENT PARK)	855	37.6%
SOME OTHER WEBSITE	724	31.9%

Highlights:

- The most common websites used by Canadian travellers who visited Northern Ontario for planning their overnight pleasure trips were websites of hotels or resorts (61.2%), and websites of government tourism authorities (53.5%).
- Other common websites used included: travel booking sites such as Expedia and Travelocity (48.6%) and an airline's website (46.6%).

Bookings over the Internet

“Were any parts of pleasure or vacation trips of 1+ nights taken in the past 2 years booked over the internet by you or someone else in your travel party/household?”	Number of Northern Ontario Travellers (000’s)	% of Northern Ontario Travellers
YES	1,465	55.8%
NO	983	37.5%
DON'T KNOW/NOT SURE	76	2.9%
NOT STATED	99	3.8%

Highlight:

- Over half of the Canadian travellers who visited Northern Ontario had purchased travel services over the Internet in the past 2 years for their overnight pleasure or vacation trips (55.8%)

“What parts of the trip were booked or purchased on the internet?”	Number of Northern Ontario Travellers (000’s)	% of Northern Ontario Travellers
AIR TICKETS	983	67.1%
TICKETS FOR RAIL, BUS OR BOAT/SHIP FARES	287	19.7%
ACCOMMODATION	1,114	76.1%
TICKETS OR FEES FOR SPECIFIC ACTIVITIES OR ATTRACTIONS	381	26.0%
CAR RENTAL	432	29.5%
A PACKAGE CONTAINING AT LEAST TWO OF THE ABOVE ITEMS	256	17.5%
OTHER	50	3.5%

Highlight:

- Of those who had purchased travel services over the Internet, the vast majority purchased accommodation services (76.1%) and air tickets (67.1%). This suggests that there Northern Ontario accommodation business could maximize business opportunities by being connected to an online booking system.

DECISION-MAKING PROCESS FOR PLEASURE OR VACATION TRAVEL

FIRST CONSIDERATIONS WHEN PLANNING THIS TYPE OF TRIP	SUMMER VACATION TRIPS		WINTER VACATION TRIPS	
	Number (000's)	As % of Travellers with Summer Trips to Northern Ontario	Number (000's)	As % of Travellers with Winter Trips to Northern Ontario
STARTED WITH A DESIRED DESTINATION IN MIND	1,559	46.2%	1,173	43.5%
STARTED BY CONSIDERING CERTAIN SPECIFIC ACTIVITIES YOU WANTED TO DO (SHOP, HIKE, GOLF, VISIT AMUSEMENT PARK, etc.)	379	11.2%	441	16.4%
STARTED WITH THE IDEA OF A CERTAIN TYPE OF VACATION EXPERIENCE (FAMILY VACATION, ROMANCE, SOCIALIZING WITH FRIENDS, etc.)	692	20.5%	443	16.5%
LOOKED FOR PACKAGED DEALS WITHOUT CONSIDERING SPECIFIC DESTINATIONS, ACTIVITIES OR TRAVEL EXPERIENCES	40	1.2%	76	2.8%
CONSIDERED SOMETHING ELSE FIRST	96	2.9%	86	3.2%
DON'T KNOW/NOT SURE	136	4.1%	161	6.0%
SOMEONE ELSE PLANNED THE TRIP	83	2.5%	48	1.8%
NOT STATED				

Highlights:

- The survey investigated the decision-making process that Canadians go through when planning their trips and tested whether this process is different when it comes to summer trips as opposed to winter trips.
- More Canadians who visited Northern Ontario and had taken an overnight summer vacation started their trip-planning process by first considering the destination they wanted to visit. This process did not change during the consideration of winter vacations. This would suggest that branding the north or destinations within the north is of paramount importance (as oppose to branding activities).

OVERNIGHT PLEASURE OR VACATION TRIPS – BENEFITS SOUGHT

BENEFITS SOUGHT FROM PLEASURE OR VACATION TRAVEL IN PAST 2 YEARS (Percentages Based on Number of Canadian Travellers to N. ONT)	Highly Important	Somewhat Important	Of No Importance	Not Stated
TO SEE OR DO SOMETHING NEW AND DIFFERENT	46.1%	47.1%	4.0%	2.8%
TO SEEK SOLITUDE AND ISOLATION	12.4%	40.0%	40.9%	6.8%
TO GAIN KNOWLEDGE OF HISTORY, OTHER CULTURES OR OTHER PLACES	25.1%	57.2%	12.8%	4.8%
TO ENRICH YOUR PERSPECTIVE ON LIFE	28.5%	50.2%	15.9%	5.4%
TO GET A BREAK FROM YOUR DAY-TO-DAY ENVIRONMENT	69.5%	24.0%	3.7%	2.8%
TO STIMULATE YOUR MIND/BE INTELLECTUALLY CHALLENGED	20.4%	50.2%	23.8%	5.6%
TO RELAX AND RELIEVE STRESS	67.3%	25.4%	4.0%	3.3%
TO HAVE A LIFE WITH NO FIXED SCHEDULE (TO DO WHAT YOU WANT, WHEN YOU WANT)	47.5%	37.4%	11.0%	4.1%
TO KEEP FAMILY TIES ALIVE	41.7%	41.7%	13.1%	3.6%
TO RENEW PERSONAL CONNECTIONS WITH PEOPLE (OTHER THAN FAMILY)	19.8%	48.8%	26.5%	5.0%
TO HAVE STORIES TO SHARE BACK AT HOME OR SOMETHING INTERESTING TO TALK ABOUT	13.6%	43.6%	37.7%	5.0%
TO ENRICH YOUR RELATIONSHIP WITH YOUR SPOUSE/PARTNER/CHILDREN	53.4%	30.5%	11.7%	4.4%
TO CREATE LASTING MEMORIES	55.2%	35.1%	6.2%	3.5%
TO BE CHALLENGED PHYSICALLY/TO FEEL PHYSICALLY ENERGIZED	17.8%	44.8%	32.2%	5.3%
TO BE PAMPERED	12.5%	37.4%	45.1%	5.0%

Highlights:

- There are four categories of benefits that 50% or more of Canadian travellers who visited Northern Ontario seek when they take overnight pleasure or vacation trips.
 - Get a break from the day-to-day environment (69.5%)
 - Relax and relieve stress (67.3%)
 - Create lasting memories (55.2%)
 - Enrich relationships with spouse/partner/children (53.4%)
- “To be pampered” had the highest percentage of Canadian travellers to Northern Ontario indicating that this benefit was of no importance (45.1%).
- There were significant differences between travellers to Northern Ontario and all other Canadian travellers on all of the benefits sought. However, two items indicated that the differences between travellers to Northern Ontario and all other travellers were greater on these benefits: to seek solitude and isolation and to be challenged physically/ to feel physically energized.
- 12.4% of Canadian travellers to Northern Ontario indicated that “to seek solitude and isolation” was a highly important benefit sought compared to 8.8% of all other Canadian travellers. Conversely, 40.9% of Canadian travellers to Northern Ontario indicated that the item was not important compared to 46.2% of all other Canadian travellers.
- 17.8% of Canadian travellers to Northern Ontario indicated that “to be challenged physically/ to feel physically energized” was a highly important benefit sought compared to 15.2% of all other Canadian travellers. Conversely, 32.2% of Canadian travellers to Northern Ontario indicated that the item was not important compared to 36.0% of all other Canadian travellers.
- This emphasizes that travellers to Northern Ontario seek a more peaceful and tranquil setting combined with elements of recreation.

IMPORTANT CONSIDERATIONS IN CHOOSING A DESTINATION

How Important are each of the following conditions when choosing a destination for an overnight pleasure trip? (Percentages Based on Number of American Travellers to N. ONT)	Highly Important	Somewhat Important	Of No Importance	Not Stated
NO HEALTH CONCERNS AT THE DESTINATION	50.5%	38.3%	8.7%	2.6%
FEELING SAFE AT THE DESTINATION	70.1%	25.2%	3.0%	1.8%
BEING FAMILIAR WITH THE CULTURE AND LANGUAGE OF THE DESTINATION	12.3%	57.8%	27.4%	2.6%
BEING AT A PLACE THAT IS VERY DIFFERENT, CULTURALLY, THAN YOURS	8.5%	49.0%	39.2%	3.3%
HAVING FRIENDS OR RELATIVES LIVING THERE	8.9%	26.6%	62.2%	2.3%
LOW COST PACKAGE DEALS AVAILABLE FOR THE DESTINATION	21.9%	52.4%	22.8%	2.9%
DESTINATION IS DISABLED-PERSON FRIENDLY	5.5%	18.6%	71.9%	4.0%
LOTS OF THINGS FOR CHILDREN TO SEE & DO	17.4%	21.9%	57.2%	3.5%
LOTS OF THINGS FOR ADULTS TO SEE & DO	39.7%	51.0%	6.7%	2.6%
INFORMATION ABOUT THE DESTINATION AVAILABLE ON THE INTERNET	27.3%	46.7%	22.3%	3.7%
GREAT SHOPPING OPPORTUNITIES	11.7%	42.8%	42.8%	2.7%
AVAILABILITY OF LUXURY ACCOMMODATION	8.2%	29.2%	52.0%	10.6%
AVAILABILITY OF MID-RANGE ACCOMMODATION	32.1%	50.1%	11.4%	6.4%
AVAILABILITY OF BUDGET ACCOMMODATION	21.4%	46.8%	23.6%	8.3%
AVAILABILITY OF CAMPING	14.3%	28.2%	47.3%	10.2%
CONVENIENT ACCESS BY CAR	44.5%	42.2%	10.5%	2.8%
DIRECT ACCESS BY AIR	27.4%	44.6%	21.5%	6.4%
CONVENIENT ACCESS BY TRAIN/BUS	13.6%	38.5%	39.3%	8.7%

Highlights:

- There were two conditions that were highly important to Canadian travellers who visited Northern Ontario: feeling safe at the destination (70.1%) and no health concerns at the destination (50.5%).

- There were three additional conditions that were not important to a majority of Northern Ontario travellers when considering a destination for an overnight trip:
 - Travellers looking for accessible travel destinations (72.0% indicated that this was of no importance to them compared to 73.0% of all Canadian travellers)
 - Lots of things for children to see and do (57.2% indicated that this was of no importance to them compared to 55.9% of all Canadian travellers)
 - Availability of luxury accommodation (52.0% indicated that this was of no importance to them compared to 54.6% of all Canadian travellers)
- Almost half of Canadians who visited Northern Ontario felt that convenient access by car (44.5%) was a highly important factor to consider when choosing a destination for an overnight pleasure trip.
- There were significant differences between travellers to Northern Ontario and all other Canadian travellers on all of the important considerations. However, the difference between travellers to Northern Ontario and all other travellers was greater on one particular consideration: availability of camping.
- 14.3% of Canadian travellers to Northern Ontario indicated that “the availability of camping” was a highly important consideration compared to 12.4% of all other Canadian travellers. Conversely, 47.3% of Canadian travellers to Northern Ontario indicated that the item was not important compared to 51.3% of all other Canadian travellers. This emphasizes the non-urban and outdoor recreation focus of these travellers.

IMPRESSIONS & RATINGS OF DESTINATION

Destination Ratings on a 10-Point Scale	Unappealing (scores of 1, 2 or 3)	Neutral (scores 4,5,6)	Appealing (scores of 7,8, 9 or 10)
	Response based on Canadian travellers to Northern Ontario		
NEWFOUNDLAND & LABRADOR	11.3%	25.4%	63.3%
NOVA SCOTIA	6.7%	24.9%	68.3%
NEW BRUNSWICK	6.0%	22.6%	71.5%
PRINCE EDWARD ISLAND	8.4%	32.8%	58.8%
QUEBEC	13.2%	25.8%	61.1%
ONTARIO	3.2%	15.8%	81.0%
MANITOBA	23.9%	47.7%	28.4%
SASKATCHEWAN	28.3%	47.5%	24.1%
ALBERTA	8.4%	26.0%	65.6%
BRITISH COLUMBIA	1.7%	8.4%	90.0%
YUKON	24.4%	26.7%	48.9%
NORTHWEST TERRITORIES	28.0%	32.5%	39.5%
NEW YORK STATE	37.0%	31.1%	31.9%
COLORADO	17.6%	31.0%	51.4%
FLORIDA	16.5%	32.5%	51.0%
CALIFORNIA	13.3%	21.7%	65.0%
HAWAII	10.5%	18.5%	71.0%
ARIZONA	7.1%	11.8%	81.0%

Highlights:

- Canadian travellers to Northern Ontario rated British Columbia as the most appealing destination, followed by Ontario and Arizona (Ontario and Arizona had identical ratings).
- The average rating for Ontario from those who did visit Northern Ontario was 8.1 as compared to 6.9 from those who did not visit Northern Ontario. This significant difference in the ratings of the province by those who have and those who have not visited the North leads one to conclude that there is much to be done in promoting the province.
- British Columbia received the highest ratings from Canadians who did visit Northern Ontario and from those who did not (8.67 and 8.46 respectively). It also received very high ratings by travellers and non-travellers to B.C (9.0 and 8.2 respectively), a result that seems to indicate that British Columbia has been very successful in promoting and branding the province.

GENERAL ATTITUDES

GENERAL ATTITUDES ON A 5-POINT SCALE (CANADIAN TRAVELLERS TO NORTHERN ONTARIO)	APPLIES VERY LITTLE (1)	(2)	(3)	(4)	APPLIES VERY MUCH (5)	NOT STATED
I PREFER TO VISIT UNDISCOVERED PLACES, BEFORE TOO MANY HOTELS AND RESTAURANTS ARE BUILT	26.3%	15.8%	21.9%	17.3%	16.4%	2.3%
I AM ACTIVELY INVOLVED IN A REGULAR RIGOROUS FITNESS PROGRAM	35.6%	19.5%	19.7%	11.1%	11.0%	3.1%
I BELIEVE CHANCE HAS LITTLE TO DO WITH SUCCESS IN LIFE	11.4%	16.1%	34.7%	22.7%	12.8%	2.3%
I HAVE MUCH MORE ENERGY THAN MOST PEOPLE MY AGE	8.9%	16.9%	38.9%	22.0%	11.7%	1.6%
I OFTEN BUY PRODUCTS BEFORE THEY GO DOWN IN PRICE	33.4%	24.3%	23.1%	12.7%	4.6%	1.9%
I MAKE DECISIONS QUICKLY AND EASILY	10.4%	15.5%	32.8%	27.0%	13.0%	1.2%

Highlights:

- Canadian travellers to Northern Ontario are different than all other Canadian travellers on all general attitudes except “I believe chance has little to do with success in life”. Although there were difference on several of the general attitudes, the difference between travellers to Northern Ontario and all other travellers was considerably greater on one general attitude: I prefer to visit undiscovered places, before too many hotels and restaurants are built. More travellers to Northern Ontario indicated this applied to them than all other Canadian travellers.

OPPORTUNITIES FOR GROWTH

- To examine opportunities for growth, this analysis looked at Canadian travellers who have never traveled to Northern Ontario and how they rated the province.

REGION	Canadian Travellers not visiting Northern Ontario		
	LOW APPEAL	MID-APPEAL	HIGH APPEAL
ONTARIO	10.8%	28.5%	60.8%
NEWFOUNDLAND AND LABRADOR	18.5%	28.0%	53.4%
NOVA SCOTIA	9.4%	26.1%	64.5%
NEW BRUNSWICK	9.5%	26.3%	64.2%
PRINCE EDWARD ISLAND	11.6%	34.2%	54.2%
QUEBEC	14.3%	21.1%	64.6%
MANITOBA	32.1%	43.9%	24.0%
SASKATCHEWAN	35.0%	42.2%	22.8%
ALBERTA	11.5%	26.8%	61.7%
BRITISH COLUMBIA	3.7%	9.5%	86.9%
YUKON	29.0%	26.9%	44.1%
NORTHWEST TERRITORIES	35.6%	29.2%	35.2%

- British Columbia has a high incidence of travellers who rated Ontario as very appealing. However, most of the travellers who rated Ontario as an appealing destination reside in Ontario.

REGION	Canadian Travellers who did not visit Northern Ontario and find Ontario very appealing	
	Distribution over Regions (%)	Number (000s)
ONTARIO	42.0%	3,948
ATLANTIC PROVINCES	8.1%	758
QUEBEC	22.1%	2,081
MANITOBA	2.8%	263
SASKATCHEWAN	2.5%	234
ALBERTA	10.0%	936
BRITISH COLUMBIA	12.5%	1,173
Total	100%	9,393

- Next, the travellers within the segment that rated Ontario as very appealing and who indicated that there are many good reasons to visit Ontario were isolated. The reason for this further sub-segmentation lies in the fact that travellers may find a destination very appealing but may find no good reasons to visit it. There may be other destinations that are also very appealing, but cheaper or more convenient to reach.
- As was the case previously, most of the Canadian travellers who did not visit Northern Ontario and rated Ontario highly (very appealing plus many good reasons to visit it) reside in Ontario. Quebec had the second highest proportion of travellers in this segment.

Canadian Travellers who did not visit Northern Ontario, find Ontario very appealing and said that there were many good reasons to visit Ontario		
REGION	Distribution over Regions (%)	Number (000s)
ONTARIO	48.9	2,856
ATLANTIC PROVINCES	7.6	442
QUEBEC	19.2	1,119
MANITOBA	2.5	145
SASKATCHEWAN	1.9	110
ALBERTA	8.9	518
BRITISH COLUMBIA	11.1	650
Total	100%	5,840

- In examining opportunities for tourism growth, this report sub-segments Canadians who did not visit Northern Ontario, rated it highly and indicated that there are many good reasons to visit the province by further examining the relationship between the activities intrinsic to Northern Ontario.
- Respondents must have selected at least one of the following activities as a main reason for taking a trip in the past two years.
 - Activities intrinsic to Northern Ontario include:
 - Fresh water fishing
 - Kayaking or canoeing in fresh water
 - Dog sledding
 - Ice fishing
 - Snowmobiling (same-day and over night)
 - All terrain (ATV) (same-day and over night)
 - Hunting (big game, small game and birds)
 - Viewing northern lights

- All aboriginal activities
- Stayed in remote fly-in wilderness lodge or outpost
- Stayed in a wilderness lodge access by car
- Camping (public, private or wilderness)²

Place of Residence (Regional)	Canadian travellers who: a) had not visited Northern Ontario and b) rated the province very appealing and c) indicated that are many good reasons to visit Ontario, and d) took at least some trips where the main reason for taking those trips was any of the activities described above (= 928 thousand)		
	These travellers as % of the regions total travellers	% of these travellers	Number (000s)
Atlantic Provinces	4%	6%	64
Quebec	5%	25%	234
Ontario	5%	42%	396
Manitoba	4%	3%	27
Saskatchewan	4%	2%	26
Alberta	4%	9%	87
British Columbia	3%	10%	93

Highlights:

- The above tables show that the main opportunity in the Canadian market for Northern Ontario is predominately in Toronto and to a lesser degree in other Ontario.
- Other secondary prospective markets include:
 - Montreal
 - Other British Columbia
 - Vancouver and Calgary, but to a lesser degree

² Because of their proximity to Northern Ontario, only residents from Ontario, Manitoba and Quebec who participated in camping were included in the analysis.

Other popular activities participated in while on an overnight trip -Activities having at least one-third or more participation among this group of Canadian travellers	Canadian travellers who: a) had not visited Northern Ontario and b) rated the province very appealing and c) indicated that are many good reasons to visit Ontario, and d) took at least some trips where the main reason for taking those trips was any of the activities described above (= 928 thousand)	
	% of these travellers	Number (000s)
Dining – Restaurants that offer local ingredients	57.6%	534
Shopping – Clothing, Shoes and Jewellery	54.9%	509
Swimming in Lakes	49.9%	462
Sunbathing/ sitting on the beach	48.2%	447
Shop- Books/ Music	46.5%	430
Stroll around the city to see buildings	43.8%	406
Local outdoor cafes	42.6%	395
Visiting Nature Parks	40.4%	374
Shop- Local Arts and Crafts	38.2%	354
Well known historical sites/buildings	34.8%	322
Movies-cinema	32.3%	299

Highlight:

- Although outdoor recreation activities, such as fishing, are what drives these travellers, they are also interested in a variety of other activities.

THE MEDIA BEHAVIOUR OF CANADIAN TRAVELLERS WHO VISITED NORTHERN ONTARIO

Newspapers:

	% of Northern Ontario Travellers
"Which of the following newspapers do you normally read in a typical week?"	
Daily newspaper	88.6%
Weekend edition	88.7%
Local/community	64.5%
Other	18.3%
Don't read the newspaper	10.4%
	% of Northern Ontario Travellers
"How Often do you read the travel section of a daily newspaper?"	
Frequently	18.9%
Occasionally	33.3%
Rarely	30.8%
Never	16.4%
Not Stated	0.7%
	% of Northern Ontario Travellers
"How often do you read the travel section of a weekend edition of a newspaper?"	
Frequently	25.1%
Occasionally	29.4%
Rarely	28.5%
Never	16.4%
Not Stated	0.6%

Highlights:

- More than 88.6% of Canadian travellers to Northern Ontario read the weekday edition of a newspaper and 88.7% read the weekend edition in a typical week.
- Close to 18.9% of Canadian travellers to Northern Ontario read the travel section of a daily newspaper frequently and 25.1% read the travel section of a weekend edition frequently.

Magazines

“Which of the following magazines do you read in a typical month?”	% of Northern Ontario Travellers
Automobiles and cycles	15.3%
Business/finance/invest.	17.0%
Computers/electr./techno.	12.1%
Crafts/antiques	13.2%
Entertainment and music	35.9%
Family and parenting	9.3%
Fashion and beauty	24.6%
Food and cooking	30.8%
General interest	31.5%
Health/fitness/living	21.5%
Home and garden	25.9%
Magazines on your city	13.4%
News magazine	24.7%
Outdoor activity/sports	17.2%
Photography and video	4.3%
Professional sports	10.8%
Regional magazines	5.2%
Science and geography	18.2%
Travel	11.2%
Other	29.8%
Don't read magazines	9.7%

Highlights:

- Entertainment and music magazines (35.9%), such as People and TV Guide, had the highest incidence of regular readership among Canadian travellers who visited Northern Ontario.
- General interest and food and cooking magazines were also relatively widely read amongst this market of American travellers.
- 11.2% of these Canadian travellers read travel magazines regularly.

Television

“Which of the following types of television programs do you normally watch?”	% of Northern Ontario Travellers
Biography	45.8%
Cooking Shows	31.6%
Dramas	60.7%
History	44.6%
Home & Garden Shows	34.7%
Late Night Talk Shows	23.4%
Movies On TV	72.1%
Music/Music Video Shows/Channels	27.1%
News/Current Affairs	61.3%
Reality Shows	40.9%
Science & Nature Shows	45.8%
Science Fiction/Fantasy Shows	20.1%
Shopping Channels	5.9%
Situation Comedies	54.4%
Soap Operas/Daytime Dramas	18.3%
Sports/Sports Shows	46.4%
Travel Shows	28.0%
Other Television Shows	31.7%
Don't Normally Watch TV	3.2%
Not Stated	45.8%

Highlights:

- Movies on TV had the highest incidence of viewer-ship among this group of Canadian travellers, followed by news/current affairs programs and dramas.
- Only 3.2% of these Canadian travellers stated that they do not watch TV on a regular basis.

Radio

	% of Northern Ontario Travellers
“Which of the following types of radio programs do you listen to?”	
All Sports	12.2%
Classical Music	17.0%
Country Music	25.4%
Jazz/Big Band	9.2%
Modern Rock/Alternative Rock	43.6%
Multicultural	7.5%
News/Talk/Information	39.5%
Oldies (50s, 60s, 70s, 80s)	38.8%
Soft Music/Adult Contemporary	27.0%
Top 40/Current Hits	26.2%
Some Other Program	15.8%
Don't Normally Listen To Radio	5.2%
“Which of the following types of radio stations do you listen to?”	
Public Stations	54.6%
Commercial Stations	73.7%

Highlight:

- Modern rock/Alternative rock music, news/talk/information and oldies were the more popular stations among this market of Canadian travellers.

MEMBERSHIP IN ORGANIZATIONS/PROGRAMS

“Are you a member of any of the following organizations or programs?”	% of Northern Ontario Travellers
Automobile Club like AAA	43.6%
Sports Club	26.2%
Book/Reading Club	5.3%
Community Service Club	11.5%
Nature/Environment Club/Group	4.9%
Travel Club	3.0%
Hobby Club	6.0%
Frequent Flyer Program	29.5%
Hotel/Car Rent Loyalty Program	10.9%
Other	18.3%
None Of The Above	24.5%

Highlights:

- Almost half of these Canadian travellers (43.6%) are members of an automobile club such as AAA and 29.5% of them are part of a frequent flyer program.

DEMOGRAPHICS

Age & Income

Age of Respondent	% of Northern Ontario travellers (3.7M)	% of other Canadian travellers (17.1M)
18-24 years old	14.6%	12.4%
25-34 years old	18.5%	18.5%
35-44 years old	22.9%	19.9%
45-54 years old	20.3%	20.2%
55-64 years old	12.2%	14.8%
65 and over	11.4%	14.2%

Household Income	% of Northern Ontario travellers (3.7M)	% of other Canadian travellers (17.1M)
Less than \$20,000	4.5%	6.9%
\$20,000 - \$39,999	10.9%	15.7%
\$40,000 - \$59,999	15.6%	17.3%
\$60,000 - \$79,999	14.6%	14.8%
\$80,000 - \$99,999	14.4%	11.4%
\$100,000 or more	28.0%	20.4%
Not stated	12.1%	13.6%

Highlights:

- The largest age group among the Canadians who travelled to Northern Ontario was the 35-44 years old.
- 28.0% of Canadian travellers to Northern Ontario have an income of \$100,000 or more, significantly higher than other Canadian travellers.

Household Composition

Household Composition	% of Northern Ontario travellers (3.7M)	% of other Canadian travellers (17.1 M)
Alone	9.2%	11.2%
With spouse, no children 17 or under, possibly someone else	36.0%	38.3%
With partner/children 17 years under/possibly someone else	24.6%	21.2%
With partner/children 18+/possibly someone else/no child<18	8.2%	7.6%
With children, and no spouse/partner, possibly someone else	6.2%	7.0%
With someone other than spouse/partner or children	14.6%	13.5%
Not stated	1.4%	1.2%

Highlight:

- More Canadian travellers who visited Northern Ontario lived with a spouse or partner with no children 17 years of age and under.

Place of Birth

Respondent's Place of Birth	% of Northern Ontario travellers (3.7M)	% of other Canadian travellers (17.1)
Canada	82.1%	79.1%
Western/Northern Europe, Australia, New Zealand, US	6.4%	7.6%
Asia (Toronto, Vancouver CMAs)	3.1%	4.1%
Other (Toronto, Vancouver CMAs)	4.2%	3.6%
Asia/Other (rest of Canada)	4.1%	5.5%
Not Stated	0.1%	0.1%

Highlight:

- A majority (82.1%) of this group of Canadian travellers were born in Canada. For those born outside of Canada, the largest group came from Western/Northern Europe, Australia, New Zealand and the US.

Education

Education	% of Northern Ontario travellers (3.7)	% of other Canadian travellers (17.1 M)
Less than high school	10.0%	11.3%
High school diploma	26.5%	26.7%
Some post-secondary	12.1%	10.5%
Post-secondary diploma or certificate	21.0%	21.5%
University degree	29.8%	29.2%
Not stated	0.6%	0.8%

Highlight:

- 29.8% of this group of Canadian travellers had a university degree. No significant differences in the education of Northern Ontario travellers are observed when compared to other Canadian travellers.