

U.S. TRAVELLERS WHO VISITED NORTHERN ONTARIO

A Profile for Marketing Implications

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EXECUTIVE SUMMARY

A PROFILE OF AMERICAN TRAVELLERS WHO VISITED NORTHERN ONTARIO:

- More active than other American travellers
- Seek undiscovered and less built up destinations
- More sensitive to costs than other American travellers
- 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 American travellers
- Are older couples (average age 48.3) without young children
- A majority uses past experience as an important source of information for planning their trips
- Are more educated than other American travellers
- A majority of them make their travel decisions over the Internet (accommodation, air tickets and car rentals)

PRODUCT IMPLICATIONS:

Move away from family-orientation

- Product development could move away from being family-oriented to being specifically designed for adults. 49.2% of US travellers to Northern Ontario indicated that “having lots of things for adults to see and do” was highly important in their considerations for a travel destination, while 58.6% indicated that “having lots of things for children to see and do” was of no importance. In addition, only 27.3% lived with children under 17.

Camping as a popular activity

- Camping is seen to be of significant interest for US travellers who have visited Northern Ontario. In fact, 34% of them have participated in camping activities while on overnight trips compared to only 17% of other US travellers. Supporting this is the fact that 53.3% of US travellers to Northern Ontario indicated that luxury accommodation was of no importance in their travel making decisions and only 11.1% indicated that it was highly important.

A niche market for nature-based activities

- Although dining at restaurants that offer local ingredients and shopping at clothing, shoe and jewellery shops are activities that are common to most US travellers to Northern Ontario, they are also common to most US travellers in general. Of the most frequently mentioned activities by travellers who had visited Northern Ontario, there are a number which relate to the natural environment (fresh water fishing, camping, visiting well known natural wonders and visiting national or provincial/state nature parks).
- There were also a number of specialized nature-based activities (mainly fresh water fishing, viewing flora and fauna, hunting and visiting nature parks) that were listed as main reasons for taking a trip.
 - There exists an opportunity to capitalize on the existence of specialized outdoor activities in the North.
 - The remoteness of the North is also an influential factor as 40% of US visitors to Northern Ontario indicated that they prefer to visit undiscovered places before too many hotels and restaurants are built, compared to 26.1% of all other US travellers.
 - 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 US residents residing in the Near Market within 300 km of the Ontario Border. Although the long-haul market (Tier 3 and Tier 4) generated most of the US travellers visiting Northern Ontario (primarily because of its population size), it had a much lower incidence of Northern Ontario visitation when compared to the Near Market.
- Proximity to Ontario (Tier 1 and 2) is a factor in predicting travel to North Ontario by Americans. Age and participation in fresh water fishing also influenced the probability of traveling to Northern Ontario, but when compared to distance these factors (age and fresh water fishing) are somewhat less important.
- The long-haul regions (Tier 3 and 4) also had a higher percentage of travellers visiting other provinces in Canada. However, travellers in the near market (Tier 1 and 2) had a higher incidence of visiting Ontario than other provinces in Canada.

OPPORTUNITIES FOR GROWTH:

- For the long-haul markets, 2 major urban areas emerged as potential visitor markets for Northern Ontario:
 - Los Angeles, CA
 - Houston, TX
- For the near markets, 2 major urban area emerged as a potential visitor market for Northern Ontario:
 - Chicago, IL.
 - Minneapolis – St. Paul
- These areas had the highest incidence of Americans who did not visit Ontario, rated it highly and indicated that at least 1 of Northern Ontario's intrinsic activities was main reason for taking a trip in the past 2 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 U.S. survey consisted of a mailback survey only as it used an existing mail panel. The panel's response rate for this survey was 71.3%.

The U.S. database consists of 60,649 completes. In this second TAMS survey (the first wave was completed in 2000), the questionnaire was adjusted to better meet the needs expressed by 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 US TAMS survey and visitation to Northern Ontario.

MARKET SIZE

US travellers	Number (000's)	% of total travellers
All travellers to Ontario ¹	14,181	8.0%
Total travellers to Northern Ontario	1,419	0.8%
Travellers to Northern Ontario Only	786	0.4%
Total travellers to Southern Ontario Only	9,103	5.2%
Travellers to Northern and Southern Ontario	633	0.4%
Not stated North/South but visited Ontario	3,660	2.1%
Travellers to other destinations but not Ontario	162,214	92.0%

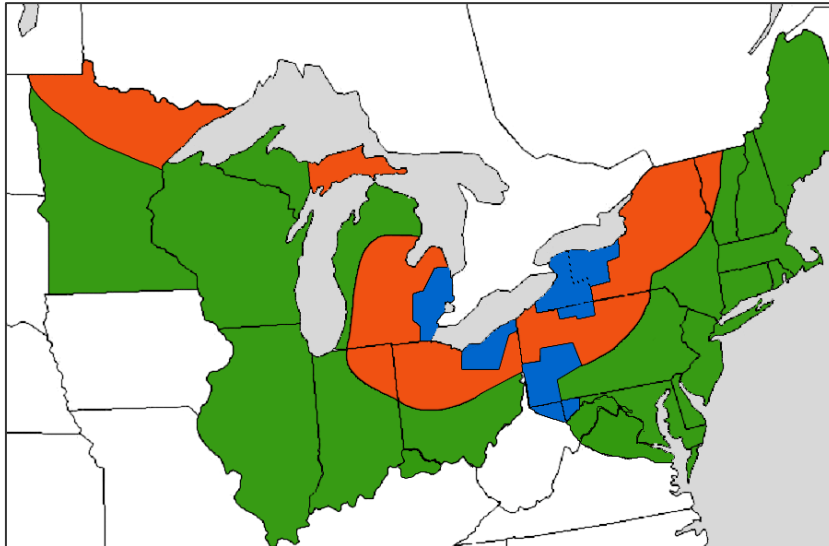
Highlights:

- A total of 1.4 million Americans visited Northern Ontario in 2004-05.
- American travelers visited Southern Ontario approximately 7 times as much as they did Northern Ontario.
- 55% of Americans who travelled to Northern Ontario visited only that region of the province.

¹ Includes all visits to Ontario (i.e. southern, northern and not stated).

PLACE OF RESIDENCE

MAP 1.0 US MARKET TIERS



© TNS Canadian Facts

Tier 1 ■ Tier 2 ■
 Tier 3 ■ Tier 4 – Remainder of US

TIER	% of total U.S. population	Number (000s)	Origin of travellers to Northern Ontario (%)	Number (000s)	Travellers to Northern Ontario as % of each tier's total travellers
Tier 1 ²	5.1%	11,376	18.1%	257	2.3%
Tier 2 ³	4.9%	10,875	18.7%	265	2.4%
Tier 3 ⁴	29.5%	65,802	33.8%	480	0.7%
Tier 4 ⁵	60.5%	134,795	29.5%	418	0.3%

² Near Market DMAs representing advertising focal points for Ontario tourism and exhibiting elevated levels of past visitation to the province (Rochester, Buffalo, Cleveland, Pittsburgh and Detroit). Pittsburgh, however, is not a key advertising market.

³ Remaining states in the U.S. within 300 km of the Ontario border (e.g. Minneapolis – St. Paul).

⁴ All remaining areas of the following states not falling into Tiers 1 and 2 (MN, WI, MI, IL, IN, OH, NY, ME, VT, NH, MA, CT, RI, DE, PA, MD, Cincinnati and Washington DC).

⁵ Remainder of the U.S.

Highlights:

This section of the report examines the relationship between place of residence of Americans and travel to Northern Ontario. Four regional Tiers were created based on geographic proximity to Ontario and known regional focal points for Ontario's core marketing strategies during the past few years (See Map 1.0 pg.8).

- Tier 1 was based on visitation volume and incidence of travel to Ontario. Most of these markets are key advertising targets, excluding Pittsburgh.
- Tier 2, 3 and 4 were based on proximity to Ontario.
 - Tier 2 includes areas 300 km from Ontario but not those in Tier 1.
 - Tier 3 and 4 are the long-haul markets.

This analysis will enable marketers to better understand US travellers to Northern Ontario and possible opportunities for growth.

- Travellers within each Tier appear to be significantly different from each other in respect to their visitation to Northern Ontario.
- A substantial portion of Northern Ontario's travel market is made up of U.S travellers who reside in Tier 1 and Tier 2.
- Although respondents residing in Tier 3 generated a substantial amount of US travellers visiting Northern Ontario (primarily because of the population size and proximity to Northern Ontario), it had a much lower incidence of Northern Ontario visitation than Tier 1 or 2.
- Tier 3 and Tier 4 also had a higher percentage of travellers visiting all other provinces in Canada as compared to Tier 1 and Tier 2.
- Travellers in Tier 1 and Tier 2 had a higher incidence of visiting Ontario as compared to any other province in Canada.

DESTINATIONS VISITED IN THE PAST 2 YEARS

DESTINATION	U.S. Travellers who visited N Ontario (000's)	% of total Northern Ontario travellers
US		
YOUR OWN STATE	1,246	87.8%
SOME OTHER US STATE	1,358	95.7%
CANADA		
NEWFOUNDLAND & LABRADOR	60	4.2%
PRINCE EDWARD ISLAND	80	5.7%
NEW BRUNSWICK	84	5.9%
NOVA SCOTIA	126	8.9%
QUEBEC	417	29.4%
ONTARIO	1,419	100%
MANITOBA	130	9.2%
SASKATCHEWAN	71	5.0%
ALBERTA	88	6.2%
BRITISH COLUMBIA	168	11.8%
YUKON	37	2.6%
NORTHWEST TERRITORIES	57	4.0%
NUNAVUT	19	1.3%
OTHER COUNTRIES		
MEXICO	327	23.1%
SOUTH / CENTRAL AMERICA	121	8.5%
THE CARIBBEAN	315	22.2%
EUROPE (INCL. UK & RUSSIA)	234	16.5%
AUSTRALIA / NEW ZEALAND	43	3.0%
ASIA	116	8.2%
AFRICA	45	3.1%
SOME OTHER DESTINATION	104	7.3%

Highlights:

- After than Ontario, Quebec was the most popular Canadian province visited by Northern Ontario travellers (29.4%), followed by British Columbia (11.8%).
- Mexico was the most popular international destination (23.1%) after Canada.

ACTIVITIES PARTICIPATED IN DURING THE PAST 2 YEARS WHILE ON A TRIP OF ONE OR MORE NIGHTS⁶

Highlights:

- American travellers who visited Northern Ontario participate in a much wider variety of activities than other US travellers. Two activities recorded above 50% participation:
 - Dining at restaurants that offer local ingredients and recipes (67.0%)
 - Shopping at clothing, shoe and jewellery shops (52.8%)
- Other popular activities included:
 - Going to casinos (48.0%)
 - Shop or browse local arts and crafts studios or exhibitions (45.1%)
 - Shopping at bookstores and music stores (43.4%)
 - Fresh water fishing (42.3%)
 - Camping (public, national/state/provincial/ municipal/ or private campground setting) (42.0%)
 - Strolling around the city to observe its buildings & architecture (42.0%)
 - Visiting well known historic sites and buildings (41.4%)
 - Going to outdoor cafes (41.0%)
 - Going to amusement parks (40.4%)
 - Visiting well know natural wonders (39.4%)
 - Visiting national or provincial/state nature parks (37.8%)
- Interestingly, 26.7% of American travelers who visited Northern Ontario indicated that participating in a fresh water fishing activity 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:
 - Viewing flora and fauna (24.6%)
 - Hunting (big game, small game and birds) (20.8%)
 - Visiting nature parks (18.4%)These activities had the highest percentages indicating these particular activities were main reasons for taking an overnight trip.
- Over one third of American travelers who visited Northern Ontario (34.5%) indicated that they have access to a vacation home. Of these travellers, 6.4% indicated that the vacation home was in Ontario.

⁶ 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	593	42.3%
FISHING - SALT WATER	185	13.2%
FISHING - TROPHY FISHING	63	4.5%
KAYAKING OR CANOEING – FRESHWATER	210	15.0%
KAYAKING OR CANOEING – OCEAN	66	4.7%
KITE SURFING	26	1.9%
MOTOR BOATING	303	21.6%
PARASAILING	57	4.1%
SAILING	116	8.3%
SCUBA DIVING IN LAKES / RIVERS	16	1.1%
SCUBA DIVING IN SEA / OCEAN	68	4.9%
SNORKELING IN LAKES OR RIVERS	32	2.3%
SNORKELING IN SEA / OCEAN	187	13.3%
SUNBATHING OR SITTING ON A BEACH	446	31.8%
SWIMMING IN LAKES	442	31.5%
SWIMMING IN OCEANS	409	29.2%
WATER SKIING	90	6.5%
WHITE WATER RAFTING	90	6.4%
WIND SURFING	23	1.7%
DOG SLEDDING	25	1.8%
FISHING - ICE FISHING	146	10.4%
ICE-SKATING	95	6.8%
SKIING - CROSS COUNTRY	90	6.4%
SKIING - CROSS/BACK COUNTRY AS AN OVERNIGHT TOURING TRIP	13	1.0%
SKIING - DOWNHILL	145	10.3%
SKIING - HELI-SKIING	6	0.5%
SKIING - SKI JOURING	6	0.4%
SNOWBOARDING	84	6.0%
SNOWMOBILING - DAY USE ON ORGANIZED TRAIL	97	7.0%
SNOWMOBILING - AS AN OVERNIGHT TOURING TRIP	44	3.1%
SNOWSHOEING	44	3.1%

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	166	11.9%
ATV - USED ONE AS PART OF AN OVERNIGHT TOURING TRIP	29	2.1%
BUNGEE JUMPING	24	1.7%
CLIMBING - ICE CLIMBING	13	0.9%
CLIMBING - ROCK CLIMBING	47	3.4%
CLIMBING - MOUNTAIN CLIMBING / TREKKING	69	4.9%
CYCLING - SAME DAY EXCURSION	180	12.8%
CYCLING - MOUNTAINING BIKING	83	5.9%
CYCLING - AS AN OVERNIGHT TOURING TRIP	34	2.4%
FITNESS - WORKING OUT IN A FITNESS CENTRE	237	16.9%
FITNESS - JOGGING OR EXERCISING OUTDOORS	198	14.1%
GOLFING - PLAYED AN OCCASIONAL GAME	230	16.4%
GOLFING - PLAYED DURING A STAY AT A GOLF RESORT	85	6.1%
GOLFING - TOOK PACKAGE GOLF TOUR TO PLAY ON VARIOUS COURSES	55	3.9%
HIKING - SAME DAY EXCURSION WHILE ON OVERNIGHT TRIP	382	27.3%
HIKING/BACPACKING IN WILDERNESS SETTINGS WITH OVERNIGHT CAMPING OR LODGING	92	6.6%
HORSEBACK RIDING - SAME DAY HORSEBACK RIDING EXCURSION	153	10.9%
HORSEBACK RIDING - TRAVELED BY HORSE WITH OVERNIGHT STOPS	10	0.7%
HUNTING - BIG GAME	162	11.6%
HUNTING - SMALL GAME	115	8.2%
HUNTING - BIRDS	100	7.2%
IN-LINE / ROLLER BLADING	28	2.0%
MINI-GOLF	246	17.5%
MOTORCYCLING - DAY EXCURSION WHILE ON OVERNIGHT TRIP	50	3.5%
MOTORCYCLING - AS AN OVERNIGHT TOURING TRIP	35	2.5%
NATURE PARK - VISITED NATIONAL, PROVINCIAL, STATE PARK	530	37.8%
SKATEBOARDING	11	0.8%
VIEWING NORTHERN LIGHTS	191	13.6%
WILDFLOWERS / FLORA VIEWING	279	19.9%
WILDLIFE VIEWING - BIRD WATCHING	218	15.6%
WILDLIFE VIEWING - WHALE WATCHING AND OTHER MARINE LIFE	246	17.6%
WILDLIFE VIEWING - LAND BASED ANIMALS	364	26.0%

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	566	40.4%
AQUARIUMS	378	27.0%
BOTANICAL GARDENS	318	22.7%
GARDEN THEME PARK	159	11.4%
MUSICAL ATTRACTIONS	141	10.0%
MOVIE THEME PARK	170	12.1%
PLANETARIUM	129	9.2%
SCIENCE & TECHNOLOGY THEME PARK	143	10.2%
WATER THEME PARK	252	18.0%
WAX MUSEUMS	108	7.7%
ZOOS	443	31.6%
ENTERTAINMENT FARMS (e.g., CORN MAZE, PETTING BARNYARD)	204	14.6%
ART GALLERIES	326	23.3%
HISTORICAL REPLICAS OF CITIES/TOWNS WITH HISTORIC RE-ENACTMENTS	251	17.9%
MUSEUM - CHILDREN'S MUSEUMS	150	10.7%
MUSEUM - GENERAL HISTORY OR HERITAGE MUSEUMS	430	30.7%
MUSEUM - SCIENCE OR TECHNOLOGY MUSEUMS	319	22.8%
MUSEUM - MILITARY / WAR MUSEUMS	243	17.4%
PALEONTOLOGICAL / ARCHAEOLOGICAL SITES	112	8.0%
STROLLING AROUND A CITY TO OBSERVE ITS BUILDINGS & ARCHITECTURE	588	42.0%
WELL KNOWN HISTORIC SITES OR BUILDINGS	580	41.4%
OTHER HISTORIC SITES MONUMENTS AND BUILDINGS	528	37.7%
WELL KNOWN NATURAL "WONDERS"	552	39.4%
ARCHAEOLOGICAL DIGS	97	6.9%
COOKING / WINE TASTING COURSES	155	11.0%
COURSES TO LEARN ANOTHER LANGUAGE	38	2.7%
CURATORIAL TOURS	55	3.9%
HARVESTING AND / OR OTHER FARM OPERATIONS	72	5.1%
HISTORICAL RE-ENACTMENTS (AS AN ACTOR)	38	2.7%
INTERPRETIVE PROGRAM AT A HISTORIC SITE OR PARK	115	8.2%
WILDERNESS SKILLS COURSES	35	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	196	14.0%
AMATEUR TOURNAMENTS AND COMPETITIONS OTHER THAN SPORTS	34	2.4%
AUTO RACES	122	8.7%
PROFESSIONAL BASEBALL GAMES	214	15.3%
PROFESSIONAL BASKETBALL GAMES	92	6.5%
PROFESSIONAL FIGURE SKATING	36	2.6%
PROFESSIONAL FOOTBALL GAMES	127	9.1%
PROFESSIONAL GOLF TOURNAMENTS	22	1.6%
PROFESSIONAL ICE HOCKEY GAMES	96	6.9%
PROFESSIONAL SOCCER GAMES	24	1.7%
HORSE RACES	95	6.8%
EQUINE (HORSE) COMPETITIONS	45	3.2%
CURLING BONSPIEL	11	0.8%
NATIONAL/INTERNATIONAL SPORTING EVENTS, e.g. THE OLYMPICS GAMES	20	1.4%
HANG GLIDING	9	0.6%
HOT AIR BALLOONING	23	1.6%
PARACHUTING	18	1.3%
DAY VISIT TO A HEALTH AND WELLNESS SPA	154	11.0%
PHOTOGRAPHY	354	25.3%
RECREATIONAL DANCING	144	10.3%
WENT TO CASINO(S)	673	48.0%
WENT TO THE MOVIES / CINEMA	453	32.3%
WENT TO IMAX MOVIE THEATRES	248	17.7%

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	939	67.0%
DINING - AT HIGH-END RESTAURANTS OF INTERNATIONAL REPUTATION	369	26.3%
DINING - AT OTHER HIGH-END RESTAURANTS	496	35.4%
DINING - AT A FARM	142	10.1%
SHOP/BROWSE - BOOKSTORES OR MUSIC STORES	607	43.4%
SHOP/BROWSE - ANTIQUES	426	30.4%
SHOP/BROWSE - GOURMET FOODS IN RETAIL STORES	381	27.2%
SHOP/BROWSE - LOCAL ARTS & CRAFTS STUDIOS/EXHIBITS	632	45.1%
SHOP/BROWSE - CLOTHING, SHOES AND JEWELRY	739	52.8%
SHOP/BROWSE - GREENHOUSE OR GARDEN CENTRE	312	22.3%
WENT TO LOCAL OUTDOOR CAFES	575	41.0%
WENT TO WINERIES FOR DAY VISITS AND TASTING	473	33.8%
WENT TO BREWERIES FOR DAY VISITS AND TASTING	244	17.4%
WENT TO FRUIT PICKING AT FARMS OR OPEN FIELDS	209	14.9%
VISITED FOOD PROCESSING PLANTS SUCH AS CHEESE FACTORY	247	17.6%
LAKESIDE / RIVERSIDE RESORT	410	29.3%
SKI RESORT OR MOUNTAIN RESORT	174	12.4%
SEASIDE RESORT	334	23.8%
REMOTE OR FLY-IN WILDERNESS LODGE	99	7.1%
REMOTE OR FLY-IN WILDERNESS OUTPOST	94	6.7%
WILDERNESS LODGE YOU CAN DRIVE TO BY CAR	179	12.8%
COOKING SCHOOL	42	3.0%
WINE TASTING SCHOOL	31	2.2%
COUNTRY INN OR RESORT BECAUSE IT HAD A GOURMET RESTAURANT ON THE PREMISES	91	6.5%
HEALTH SPA	70	5.0%
FARM OR GUEST RANCH	103	7.4%
ON A HOUSEBOAT	84	6.0%
A PUBLIC CAMPGROUND IN A NATURE PARK	349	24.9%
A PRIVATE CAMPGROUND	255	18.2%
A CAMP SITE IN A WILDERNESS SETTING (NOT A CAMPGROUND)	121	8.6%
A MOTOR HOME OR RV WHILE TRAVELING OR TOURING (NOT A CAMPING TRIP)	141	10.1%

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	143	10.2%
ABORIGINAL HERITAGE ATTRACTIONS (E.G. MUSEUMS, INTERPRETIVE CENTRES).	188	13.4%
ABORIGINAL FESTIVALS (E.G. POW WOWS)	102	7.3%
ABORIGINAL CUISINE	103	7.3%
ABORIGINAL ARTS AND CRAFTS SHOWS	147	10.5%
ABORIGINAL OUTDOOR ADVENTURE AND/OR SPORTS	85	6.1%
BALLET OR OTHER PERFORMANCES	138	9.8%
CLASSICAL OR SYMPHONY CONCERTS	149	10.6%
COUNTRY/WESTERN MUSIC CONCERTS	196	14.0%
FREE OUTDOOR PERFORMANCES	315	22.5%
JAZZ CONCERT	129	9.2%
LIVE THEATRE	327	23.3%
LIVE THEATRE WITH DINNER	149	10.7%
OPERA	81	5.8%
ROCK&ROLL CONCERTS	233	16.7%
STAND UP COMEDY CLUBS AND OTHER VARIETY SHOWS	253	18.0%
CIRCUS	119	8.5%
CARNIVALS	219	15.6%
INTERNATIONAL FILM FESTIVALS	65	4.6%
LITERARY FESTIVALS	50	3.5%
MUSIC FESTIVALS	149	10.6%
THEATRE FESTIVALS	80	5.7%
FARMERS MARKETS	432	30.9%
OR COUNTRY FAIRS	216	15.4%
EXHIBITION OR FAIRS	90	6.4%
RELIGIOUS FESTIVALS	284	20.3%
FOOD/DRINK FESTIVALS	163	11.6%
ETHNIC FESTIVALS	96	6.9%
WESTERN THEMES SUCH AS RODEOS	36	2.6%
GAY PRIDE	397	28.4%
FIREWORKS FESTIVALS	92	6.6%
HOT AIR BALLOON FESTIVALS	64	4.6%

CAMPING

CAMPING RELATED TRAVEL	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
A PUBLIC CAMPGROUND IN A NATURE PARK	349	24.9%
A PRIVATE CAMPGROUND	255	18.2%
A CAMP SITE IN A WILDERNESS SETTING (NOT A CAMPGROUND)	121	8.6%

TYPE OF SHELTER MOST OFTEN USED ON CAMPING TRIPS

TYPES OF SHELTERS USED BY CAMPERS	Number of Northern Ontario Travellers (000's)	% of Northern Ontario Travellers
TENT	311	47.7%
TENT TRAILER	31	4.7%
TRUCK CAMPER OR VAN	54	8.3%
TRAVEL TRAILER/ FIFTH WHEEL	88	13.5%
MOTOR HOME OR RV	97	14.9%
NOT STATED	92	14.2%

Highlights:

- 31.2% of Americans who visited Northern Ontario indicated that they camped in either a nature park or private campground during their overnight trips.
- 8.6% of Americans who visited Northern Ontario camped in a wilderness setting (not a campground).
- Of the Americans who visited Northern Ontario and went camping over the last 2 years, 47.7% used a tent for shelter. A motor home or RV was the second most popular choice accounting for 14.9% of these American campers.

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	236	16.6%
AN ORGANIZED OR GUIDED GROUP TOUR WHERE YOU STAYED FOR ONE OR MORE NIGHTS AT A SINGLE LOCATION (e.g., CASINO, SPA, etc.)	194	13.7%
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	403	28.4%
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	441	31.1%
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	303	21.3%
NONE OF THE ABOVE	392	27.6%
NOT STATED	173	12.2%
"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	318	49.3%
AROUND THE CITY	343	53.2%
AS A PILOT OR PASSENGER OF AIRPLANE OR HELICOPTER	63	9.8%
ON THE WATER (SIGHTSEEING CRUISE)	225	34.9%
TO A WINERY / WINERIES	182	28.2%
TO A FACTORY / FACTORIES	94	14.6%
TO A CASINO	168	26.1%
WILDERNESS / OUTDOOR TOUR	193	29.8%
SOME OTHER TYPE OF TOUR	215	33.4%
NOT STATED	12	1.9%

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	70	4.9%
OCEAN CRUISE - CARIBBEAN	185	13.0%
OCEAN CRUISE - OTHER	97	6.8%
GREAT LAKES CRUISE	30	2.1%
CRUISE ON THE ST. LAWRENCE RIVER	27	1.9%
CRUISE ON ANOTHER LAKE OR RIVER	76	5.4%
SUBMARINE CRUISE	13	0.9%
SOME OTHER TYPE OF CRUISE	61	4.3%
DO NOT TAKE A CRUISE	877	61.8%
NOT STATED	197	13.9%

Highlights:

- 31.1% of American 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 (28.4%) was almost of equal importance as the self guided same-day tours for this group of 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	325	25.7%
TRADE SHOWS	131	9.2%
BUSINESS CONVENTIONS	213	15.0%
CONFERENCES OR SEMINARS	306	21.5%
EMPLOYER-PAID TRAINING	185	13.1%
SOME OTHER BUSINESS REASON	260	18.3%
I HAVE NOT TAKEN ANY OUT-OF-TOWN JOB-RELATED TRIPS OF 1+ NIGHTS IN THE PAST 2 YEARS	697	49.1%
NOT STATED	92	6.5%

Highlights:

- Almost half of the adult American 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, 25.7% 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	350	27.6%
AN INTERNET WEBSITE	1,006	79.2%
AN ELECTRONIC NEWSLETTER OR MAGAZINE RECEIVED BY E-MAIL	146	11.5%
AN AUTO CLUB SUCH AS AAA	433	34.1%
ARTICLES IN NEWSPAPERS/MAGAZINES	372	29.3%
ADVERTISEMENTS IN NEWSPAPERS/MAGAZINES	237	18.7%
VISITOR INFORMATION CENTRES	457	36.0%
TRAVEL GUIDE BOOKS SUCH AS FODOR'S OR MICHELIN	237	18.7%
ADVICE OF FRIENDS OR RELATIVES/WORD-OF-MOUTH	674	53.1%
VISITS TO TRADE, TRAVEL OR SPORTSMEN'S SHOWS	139	11.0%
PROGRAMS ON TELEVISION	209	16.4%
ADVERTISEMENTS ON TELEVISION	113	8.9%
TRAVEL INFORMATION RECEIVED IN THE MAIL	376	29.6%
PAST EXPERIENCE/BEEN THERE BEFORE	762	60.0%
MAPS	628	49.5%
OFFICIAL TRAVEL GUIDES OR BROCHURES FROM STATE / PROVINCIAL / NATIONAL ORGANIZATIONS	429	33.8%
NONE OF THE ABOVE	29	2.3%
NOT STATED	15	1.2%

Highlights:

- The majority (79.2%) of adult American 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, American travellers who had visited Northern Ontario also used their own past experience (60.0%), the advice of their friends/relatives (53.1%), or maps (49.5%).
- 33.8% of the adult Americans 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)	602	59.8%
AN AIRLINE'S WEBSITE	549	54.6%
THE WEBSITE OF A COUNTRY/STATE/PROVINCE/OR CITY TOURISM AUTHORITY	521	51.8%
THE WEBSITE OF A HOTEL OR RESORT	558	55.5%
A MOTORCOACH WEBSITE	44	4.4%
A CRUISE LINE WEBSITE	171	17.0%
THE WEBSITE OF AN ATTRACTION (MUSEUM, THEATRE, AMUSEMENT PARK)	421	41.8%
SOME OTHER WEBSITE	378	37.6%
NOT STATED	31	3.1%

Highlights:

- The most common websites used by American travellers who visited Northern Ontario for planning their overnight pleasure trips were travel booking sites such as Expedia and Travelocity (59.8%), websites of hotels or resorts (55.5%) and an airline's website (54.6%).
- Slightly more than 50% of this group of travellers also used the website of a government tourism authority to plan their trips.
- It is also interesting to note that websites of attractions such as museums and theatres were used by 41.8% of these American visitors.

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	709	50.4%
NO	602	42.8%
DON'T KNOW/NOT SURE	55	3.9%
NOT STATED	42	3.0%

Highlight:

- Half of the American travellers who visited Northern Ontario had purchased travel services over the Internet in the past 2 years for their overnight pleasure or vacation trips (50.4%)

“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	541	76.2%
TICKETS FOR RAIL, BUS OR BOAT/SHIP FARES	165	23.3%
ACCOMMODATION	552	77.9%
TICKETS OR FEES FOR SPECIFIC ACTIVITIES OR ATTRACTIONS	245	34.5%
CAR RENTAL	354	49.9%
A PACKAGE CONTAINING AT LEAST TWO OF THE ABOVE ITEMS	175	24.7%
OTHER	28	3.9%
NOT STATED	5	0.7%

Highlight:

- Of those who had purchased travel services over the Internet, the vast majority purchased accommodation services (77.9%) and air tickets (76.2%). Almost 50% Americans traveling to Northern Ontario also booked car rentals over the internet.

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	735	60.1%	552	57.0%
STARTED BY CONSIDERING CERTAIN SPECIFIC ACTIVITIES YOU WANTED TO DO (SHOP, HIKE, GOLF, VISIT AMUSEMENT PARK, etc.)	175	14.3%	146	15.1%
STARTED WITH THE IDEA OF A CERTAIN TYPE OF VACATION EXPERIENCE (FAMILY VACATION, ROMANCE, SOCIALIZING WITH FRIENDS, etc.)	182	14.9%	130	13.4%
LOOKED FOR PACKAGED DEALS WITHOUT CONSIDERING SPECIFIC DESTINATIONS, ACTIVITIES OR TRAVEL EXPERIENCES	12	0.9%	30	3.0%
CONSIDERED SOMETHING ELSE FIRST	37	3.0%	35	3.6%
DON'T KNOW/NOT SURE	13	1.1%	11	1.1%
SOMEONE ELSE PLANNED THE TRIP	22	1.8%	36	3.7%
NOT STATED	47	3.8%	30	3.1%

Highlights:

- The survey investigated the decision-making process that Americans go through when planning their trips and tested whether this process is different when it comes to summer trips as opposed to winter trips.
- The majority of Americans 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.

OVERNIGHT PLEASURE OR VACATION TRIPS – BENEFITS SOUGHT

BENEFITS SOUGHT FROM PLEASURE OR VACATION TRAVEL IN PAST 2 YEARS (Percentages Based on Number of American Travellers to N. ONT)	Of No Importance	Somewhat Important	Highly Important	Not Stated
TO SEE OR DO SOMETHING NEW AND DIFFERENT	4.2%	37.2%	57.0%	1.5%
TO SEEK SOLITUDE AND ISOLATION	37.6%	40.6%	17.8%	4.1%
TO GAIN KNOWLEDGE OF HISTORY, OTHER CULTURES OR OTHER PLACES	9.9%	59.7%	27.3%	3.1%
TO ENRICH YOUR PERSPECTIVE ON LIFE	14.7%	49.0%	31.5%	4.8%
TO GET A BREAK FROM YOUR DAY-TO-DAY ENVIRONMENT	4.5%	24.0%	68.3%	3.2%
TO STIMULATE YOUR MIND/BE INTELLECTUALLY CHALLENGED	21.1%	47.1%	28.0%	3.8%
TO RELAX AND RELIEVE STRESS	1.9%	22.0%	73.3%	2.7%
TO HAVE A LIFE WITH NO FIXED SCHEDULE (TO DO WHAT YOU WANT, WHEN YOU WANT)	11.0%	34.4%	52.2%	2.4%
TO KEEP FAMILY TIES ALIVE	14.7%	36.0%	45.1%	4.2%
TO RENEW PERSONAL CONNECTIONS WITH PEOPLE (OTHER THAN FAMILY)	25.4%	47.8%	22.1%	4.6%
TO HAVE STORIES TO SHARE BACK AT HOME OR SOMETHING INTERESTING TO TALK ABOUT	35.3%	46.1%	14.4%	4.2%
TO ENRICH YOUR RELATIONSHIP WITH YOUR SPOUSE/PARTNER/CHILDREN	12.1%	29.3%	54.4%	4.1%
TO CREATE LASTING MEMORIES	4.1%	32.1%	60.7%	3.1%
TO BE CHALLENGED PHYSICALLY/TO FEEL PHYSICALLY ENERGIZED	32.2%	44.0%	19.5%	4.4%
TO BE PAMPERED	44.5%	34.7%	16.9%	3.9%

Highlights:

- There are six categories of benefits that 50% or more of American travellers who visited Northern Ontario seek when they take overnight pleasure or vacation trips.
 - Relax and relieve stress (73.3%)
 - Get a break from the day-to-day environment (68.3%)
 - Create lasting memories (60.7%)
 - See and do something new and different (57.0%)
 - Enrich relationships with spouse/partner/children (54.4%)
 - Have a life with no fixed schedule (52.2%)
- There were no significant differences between travellers to Northern Ontario and all other American travellers with respect to benefits sought.
- “To be pampered” had the highest percentage of American travellers to Northern Ontario indicating that this benefit was of no importance (44.5%).

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)	Of No Importance	Somewhat Important	Highly Important	Not Stated
NO HEALTH CONCERNS AT THE DESTINATION	13.2%	46.7%	37.8%	2.4%
FEELING SAFE AT THE DESTINATION	1.9%	27.3%	68.7%	2.1%
BEING FAMILIAR WITH THE CULTURE AND LANGUAGE OF THE DESTINATION	21.0%	59.9%	16.8%	2.3%
BEING AT A PLACE THAT IS VERY DIFFERENT, CULTURALLY, THAN YOURS	37.6%	49.8%	10.0%	2.6%
HAVING FRIENDS OR RELATIVES LIVING THERE	62.3%	26.0%	9.9%	1.8%
LOW COST PACKAGE DEALS AVAILABLE FOR THE DESTINATION	20.6%	49.4%	28.5%	1.5%
DESTINATION IS DISABLED-PERSON FRIENDLY	72.8%	17.0%	8.9%	1.2%
LOTS OF THINGS FOR CHILDREN TO SEE & DO	58.6%	20.5%	18.2%	2.7%
LOTS OF THINGS FOR ADULTS TO SEE & DO	8.6%	40.1%	49.2%	2.2%
INFORMATION ABOUT THE DESTINATION AVAILABLE ON THE INTERNET	25.2%	44.3%	28.0%	2.4%
GREAT SHOPPING OPPORTUNITIES	46.1%	37.5%	15.2%	1.3%
AVAILABILITY OF LUXURY ACCOMMODATION	53.3%	28.9%	11.1%	6.7%
AVAILABILITY OF MID-RANGE ACCOMMODATION	12.3%	47.8%	34.5%	5.4%
AVAILABILITY OF BUDGET ACCOMMODATION	20.9%	43.0%	29.2%	6.8%
AVAILABILITY OF CAMPING	58.4%	22.5%	12.0%	7.0%
CONVENIENT ACCESS BY CAR	11.0%	42.0%	44.5%	2.5%
DIRECT ACCESS BY AIR	23.4%	41.5%	30.0%	5.0%
CONVENIENT ACCESS BY TRAIN/BUS	49.3%	32.1%	10.3%	8.2%

Highlights:

- There were two conditions that were highly important to American travellers who visited Northern Ontario: feeling safe at the destination (68.7%) and having lots of things for adults to see and do (49.2%). Conversely, (58.6%) indicated that “having lots of things for children to see and do” was not important.
- Interestingly, although shopping was listed as a popular activity, 46.1% of American visitors to Northern Ontario indicate that “great shopping opportunities” is not an important consideration for an overnight pleasure trip.
- Almost half of Americans 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.

- 53.3% of Americans who travelled to Northern Ontario indicated that the availability of luxury accommodation had no importance on selecting travel destinations, and 58.4% indicated that the availability of camping was of no importance. However, camping was one of the more popular activities (42.0%) participated in. Interestingly, of those that said camping was not important in their decision to choose a destination, 19.2% did participate in it while on an overnight trip.
- Americans who travelled to Northern Ontario were significantly different than all other travellers on two considerations: destinations being disabled person friendly (72.9% indicated this was not important) and convenient access by train or bus (49.3% indicated that this was not important). This emphasizes the non-urban focus of these travellers. It is important to note that the percentage of those who indicated that it was highly important that destinations be disabled person friendly was similar (8.9%) to that of the entire sample of Americans who travelled in the past 2 years (9.2%).

IMPRESSIONS & RATINGS OF DESTINATION

Destination Ratings on a 10-Point Scale 1= Very Unappealing; 10=Very Appealing	Very Unappealing (scores of 1, 2 or 3)	Very Appealing (scores of 8, 9 or 10)	No impression/Can t' Rate
	Percentages Based on N.Ont American travellers		
NEWFOUNDLAND & LABRADOR	15.6%	23.5%	31.4%
NOVA SCOTIA	10.4%	33.7%	24.1%
NEW BRUNSWICK	13.2%	25.3%	29.5%
PRINCE EDWARD ISLAND	10.5%	35.1%	24.2%
QUEBEC	11.8%	40.5%	13.1%
ONTARIO	3.2%	67.8%	3.0%
MANITOBA	13.4%	24.2%	24.3%
SASKATCHEWAN	16.9%	21.6%	27.2%
ALBERTA	14.8%	32.7%	23.8%
BRITISH COLUMBIA	9.9%	46.4%	20.7%
YUKON	16.7%	27.9%	25.9%
NORTHWEST TERRITORIES	17.4%	30.5%	23.5%
NEW YORK STATE	17.9%	38.7%	6.7%
COLORADO	6.8%	49.3%	8.3%
FLORIDA	12.9%	51.3%	3.4%
CALIFORNIA	14.5%	48.0%	4.7%
HAWAII	8.0%	68.2%	6.9%
ARIZONA	12.2%	44.1%	8.1%

Highlights:

- American visitors to Northern Ontario rated Ontario as a very appealing Canadian destination, followed by British Columbia and Quebec. Interestingly, Hawaii's rating is almost identical to Ontario's.
- Close to one-third of American travellers were unable to rate Newfoundland & Labrador or New Brunswick because they had no impressions of them. Among Canadian jurisdictions, Ontario and Quebec had the lowest proportion of these Americans who stated that they could not rate them.
- There were significant differences found in the appeal-ratings of Ontario between US travellers who visited Northern Ontario and those who did not. The average rating for Ontario from those who did visit Northern Ontario was 8.3 as compared to 5.7 from those who did not visit Northern Ontario.

GENERAL ATTITUDES

GENERAL ATTITUDES ON A 5-POINT SCALE (US 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	18.4%	12.8%	28.5%	19.0%	20.2%	1.1%
I AM ACTIVELY INVOLVED IN A REGULAR RIGOROUS FITNESS PROGRAM	33.4%	20.5%	19.9%	13.8%	11.3%	1.1%
I BELIEVE CHANCE HAS LITTLE TO DO WITH SUCCESS IN LIFE	7.8%	19.3%	42.9%	17.7%	11.0%	1.3%
I HAVE MUCH MORE ENERGY THAN MOST PEOPLE MY AGE	10.1%	15.4%	34.2%	24.7%	14.5%	1.1%
I OFTEN BUY PRODUCTS BEFORE THEY GO DOWN IN PRICE	30.3%	25.5%	22.8%	14.7%	5.5%	1.1%
I MAKE DECISIONS QUICKLY AND EASILY	8.5%	16.9%	34.6%	27.4%	11.8%	0.8%

Highlights:

- It appears that US travellers to Northern Ontario are significantly different than the other US travellers on three of the five general attitudes. US travellers to northern Ontario are more active than other US travellers, seek undiscovered and less built up destinations and are more sensitive to cost than all other US travellers.

OPPORTUNITIES FOR GROWTH

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

US REGIONAL SEGMENT	US TRAVELLERS NOT VISITING ONTARIO			
	LOW APPEAL	MID-APPEAL	HIGH APPEAL	NO IMPRESSION
Tier 1	15.5%	35.3%	30.5%	18.7%
Tier 2	19.0%	34.5%	24.9%	21.6%
Tier 3	18.0%	34.9%	23.1%	24.0%
Tier 4	20.2%	32.4%	20.6%	26.7%

- Although Tier 1 has a high incidence of travellers who rate the province as very appealing, most travellers reside in Tiers 3 and 4 partly because these two tiers are the most populous.

US REGIONAL SEGMENT	US travellers who did not visit Ontario and find Ontario very appealing	
	Distribution over Tiers (%)	Number (000s)
Tier 1	4.8	1,653
Tier 2	4.7	1,596
Tier 3	30.9	10,560
Tier 4	59.6	20,403
Total	100%	34,212

- Next, the travellers within the segment that rated Ontario as very appealing 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 since there maybe other destinations that are also very appealing, but, say, cheaper or more convenient to reach.
- As was the case previously, most of the U.S. travellers who did not visit Ontario and rated the province highly (very appealing plus many good reasons to visit it) reside in tiers 3 and 4.

US REGIONAL SEGMENT	Us travellers who did not visit Ontario and rated Ontario as very appealing and said that there are many good reasons to visit the province	
	Distribution over Tiers	Number (000s)
Tier 1	5.8%	1,043
Tier 2	4.7%	841
Tier 3	30.8%	5,519
Tier 4	58.7%	10,535
Total	100%	17,938

- In examining opportunities for tourism growth, this report sub-segments Americans who did not visit 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 1 of the following activities as a main reason for taking a trip in the past 2 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)⁷

⁷ Due to their proximity to Northern Ontario, only residents from Wisconsin and Minnesota who participated in camping were included in the analysis.

Place of Residence	US travellers who: a) did not visit 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 (=2.6 million)		
	These travellers as % of a city's total travellers	% of these travellers	Number (000s)
Chicago (PMSA)	2.0%	3.3%	87.9
Minneapolis – St. Paul	4.0%	2.9%	76.0
Los Angeles – Long Beach (PSMA)	2.0%	4.0%	107.5
Houston (PMSA)	2.0%	2.4%	63.2

- The above table shows that the opportunity markets for Northern Ontario are:
 - Los Angeles, CA
 - Minneapolis – St. Paul
 - Chicago, IL
 - Houston, TX

<p>Other popular activities participated in while on an overnight trip</p> <p>-Activities having at least one-third or more participation among this group of US travellers</p>	<p>US travellers who:</p> <p>a) did not visit 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</p> <p>(=2.6 million)</p>	
	% of these travellers	Number (000s)
Dining – Restaurants that offer local ingredients	67.0%	1,770
Shopping – Clothing, Shoes and Jewellery	57.0%	1,519
Shop- Local Arts and Crafts	47.0%	1,243
Stroll around the city to see buildings	45.0%	1,208
Visiting Nature Parks	45.0%	1,208
Well known historical sites/buildings	44.0%	1,169
Casino	43.0%	1,144
Amusement Parks	42.0%	1,125
Shop- Books/ Music	41.0%	1,090
Sunbathing/ sitting on the beach	41.0%	1,084
Well known natural wonders	40.0%	1,063
Local outdoor cafes	39.0%	1,041
Shop - Antiques	38.0%	1,004
Other historic sites	37.0%	977
Movies-cinema	37.0%	975
zoos	35.0%	923
Aquariums	33.0%	886
Viewing Wildlife (Land-based)	32.0%	844
Hiking-same day excursions	32.0%	857

- Nonetheless, these American travellers are still interested in a variety of other activities.

THE MEDIA BEHAVIOUR OF AMERICAN TRAVELLERS WHO VISITED NORTHERN ONTARIO

Newspapers:

“Which of the following newspapers do you normally read in a typical week?”	% of Northern Ontario Travellers
Daily Newspaper - Weekday Edition	70.3%
Weekend Edition of a Newspaper	62.0%
Local Community Newspaper	59.3%
Other Newspapers	18.1%
Don't Read The Newspaper	8.9%
Read Daily Newspapers Occasionally/Rarely	20.7%
Read Weekend Newspapers Occasionally/Rarely	28.8%
Not Stated	.0%
“How Often do you read the travel section of a daily newspaper?”	% of Northern Ontario Travellers
Frequently	31.7%
Occasionally	32.0%
Rarely	22.8%
Never	12.7%
Not Stated	0.8%
“How often do you read the travel section of a weekend edition of a newspaper?”	% of Northern Ontario Travellers
Frequently	40.1%
Occasionally	28.3%
Rarely	19.8%
Never	11.0%
Not Stated	0.8%

Highlights:

- More than 70% of American travellers to Northern Ontario read the weekday edition of a newspaper and 62% read the weekend edition in a typical week.
- Close to 32% of American travellers to Northern Ontario read the travel section of a daily newspaper frequently or occasionally and 40.1% 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
Automobile & Cycle Magazines (e.g. Motor Trends)	21.7%
Business, Finance & Investing (e.g., Forbes)	23.6%
Computer, Electronics & Technology	14.1%
Crafts, Antiques & Collectibles	19.6%
Entertainment & Music (e.g., People, TV Guide)	31.8%
Family & Parenting (e.g., Today’s Parent)	12.3%
Fashion & Beauty(e.g., Vogue)	13.8%
Food & Cooking(e.g., Gourmet)	24.9%
General Interest(e.g., Harper’s, Reader’s Digest)	27.2%
Health, Fitness, & Well Living	25.9%
Home & Garden	27.4%
Magazines About Your City(e.g., Chicago Magazine)	12.9%
News Magazine(e.g., Time, Newsweek)	28.7%
Outdoor Activities/Sports(e.g., Backpacker, Sail)	22.9%
Photography & Video	8.5%
Professional Sports(e.g., Sports Illustrated)	17.3%
Regional Magazines	9.6%
Science & Geography(e.g., National Geographic)	22.2%
Travel(e.g., Conde Nast)	24.1%
Other Magazines	44.2%
Don't read magazines in a typical month	7.9%
Not Stated	0.3%

Highlights:

- Entertainment and music magazines (31.8%), such as People and TV Guide, had the highest incidence of regular readership among American travellers who visited Northern Ontario.
- News magazines and Home and Garden magazines were also relatively widely read amongst this market of American travellers.
- 24.1% of these American travellers read travel magazines regularly, such as Conde Nast and Travel & Leisure.

Television

“Which of the following types of television programs do you normally watch?”	% of Northern Ontario Travellers
Biography	39.5%
Cooking Shows	35.4%
Dramas	62.6%
History	53.4%
Home & Garden Shows	35.9%
Late Night Talk Shows	29.8%
Movies On TV	72%
Music/Music Video Shows/Channels	27.3%
News/Current Affairs	64.9%
Reality Shows	33.5%
Science & Nature Shows	41.6%
Science Fiction/Fantasy Shows	23.1%
Shopping Channels	7.0%
Situation Comedies	50.7%
Soap Operas/Daytime Dramas	12.8%
Sports/Sports Shows	50.9%
Travel Shows	42.6%
Other Television Shows	40.4%
Don't Normally Watch TV	1.6%
Not Stated	0.1%

Highlights:

- News/current affairs programs and dramas had the highest incidence of viewer-ship among this group of American travellers.
- Only 1.6% of these American 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	17.5%
Classical Music	22.4%
Country Music	35.6%
Jazz/Big Band	13.2%
Modern Rock/Alternative Rock	30.3%
Multicultural	7.5%
News/Talk/Information	46.4%
Oldies (50s, 60s, 70s, 80s)	47.1%
Soft Music/Adult Contemporary	29.7%
Top 40/Current Hits	24.4%
Some Other Program	20.3%
Don't Normally Listen To Radio	0.5%
Not Stated	4.7%
“Which of the following types of radio stations do you listen to?”	
Public Stations	48.8%
Commercial Stations	79.3%
Not Stated	4.6%

Highlights:

- It would appear that almost all of these American travellers listen to the radio on a regular basis, which makes this medium very important from a marketing perspective.
- Radio stations that play “Oldies” music and news/talk/information stations were the more popular stations among this market of American 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	50.5%
Sports Club	21.3%
Book/Reading Club	13.2%
Community Service Club	17.8%
Nature/Environment Club/Group	12.9%
Travel Club	8.7%
Hobby Club	7.2%
Frequent Flyer Program	38.9%
Hotel/Car Rent Loyalty Program	32.1%
Other	23.8%
None Of The Above	15.4%
Not Stated	1.9%

Highlights:

- Half of these American travellers (50.5%) are members of an automobile club such as AAA and 38.9% of them are part of a frequent flyer program.

DEMOGRAPHICS

Age & Income

Age of Respondent	% of Northern Ontario travellers	% of other US travellers
18-24	6.9%	11.0%
25-44	32.7%	36.1%
45-64	44.6%	36.3%
65+	15.7%	16.6%
Average Age	48.3 years	46.4 years
Household Income	% of Northern Ontario travellers	% of other US travellers
Under \$20,000	5.5%	13.1%
\$20,000 to \$39,999	11.3%	18.3%
\$40,000 to \$59,999	14.2%	16.1%
\$60,000 to \$79,999	15.9%	12.9%
\$80,000 to \$99,999	14.2%	9.8%
\$100,000 to \$149,999	15.6%	11.9%
\$150,000 to \$249,999	7.8%	4.0%
\$250,000 Or More	4.8%	1.4%
Don't Know	6.4%	7.2%
Not Stated	4.3%	5.3%

Highlights:

- On average, this group of American travellers are older than the rest of the American travellers (average age: 48.3 years vs. 46.4 years) and have a higher household income (28.2% have an income of \$100,000 or more as opposed to 17.3% of other American travellers).
- US travellers to Northern Ontario are significantly different from the rest of the travellers with respect to age and income.

Household Composition

Household Composition	% of Northern Ontario travellers	% of other US travellers
Alone	9.6%	12.9%
Spouse/Partner	73.2%	64.9%
Birth/Step/Adopted Children 18 years and over	18.9%	16.1%
Birth/Step/Adopted Children 17 years and under	27.3%	27.9%
Son-In-Law Or Daughter-In-Law	0.2%	1.2%
Grandchildren	3.6%	3.4%
Mother/Step-Mother	7.7%	11.5%
Father/Step-Father	4.3%	8.1%
Siblings	6.9%	7.8%
Brother-In-Law Or Sister-In-Law	0.2%	0.8%
Grandfather Or Grandmother	-	0.9%
Relative Not Listed Above	4.5%	2.8%
Lodger Or Boarder	0.8%	0.9%
Roommates Not Listed Above	3.2%	3.6%
Not Stated	2.0%	2.0%

Highlights:

- The vast majority of American travellers who visited Northern Ontario lived with a spouse or partner and slightly over one-quarter of them have children 17 years of age and under.

Place of Birth

Respondent's Place of Birth	% of Northern Ontario travellers	% of other US travellers
AUSTRALIA	-	0.0%
BELGIUM	-	0.0%
CANADA	2.9%	0.3%
CHINA/HONG KONG	0.9%	0.3%
FRANCE	-	0.1%
GERMANY	0.3%	0.5%
GREAT BRITAIN/UNITED KINGDOM	0.8%	0.2%
INDIA	-	0.2%
ITALY	-	0.1%
IRELAND	-	0.0%
MEXICO	-	0.1%
PHILIPPINES	0.1%	0.2%
POLAND	0.2%	0.1%
RUSSIA	-	0.1%
SOUTH KOREA	0.1%	0.1%
UKRAINE	-	0.1%
UNITED STATES	90.8%	92.7%
VIETNAM	0.2%	0.2%
OTHER	2.0%	1.5%
NOT STATED	1.0%	2.6%

Highlights:

- 90.8% of this group of American travellers were born in the US as compared to 92.7% of the other American travellers.
- Canada was the top country of origin for American travellers who visited Northern Ontario and were born outside the United States.

Education

Education	% of Northern Ontario travellers	% of other US travellers
No Schooling	0.0%	0.0%
Some elementary or less	0.9%	0.3%
Completed elementary school	0.4%	0.5%
Some high school	1.0%	4.8%
High school diploma	14.8%	20.4%
Some trade, technical or vocational school or community, business or nursing college	8.0%	11.1%
Some university/state college	15.4%	17.5%
Diploma or certificate from trade, technical or vocational school	10.6%	10.3%
Bachelor or undergraduate degree or teacher's college (B.A., B.Sc, B.Ed)	20.3%	19.0%
Degree in medicine, dentistry, veterinary medicine, optometry	0.1%	0.7%
Earned Doctorate or Masters (PhD, MBA, M.A., M.Sc., M.Ed.)	21.1%	10.4%
Some Post-graduate work but no degree	5.7%	3.0%
Other	0.3%	0.6%
Not Stated	1.3%	1.3%

Highlights:

- Interestingly, American travellers who visited Northern Ontario are more educated than the other American travellers. Close to half (41.5%) of this group of American travellers had at least a bachelor's or higher degree received from a university as compared to the other travellers (30.1%).