

THE TRAVEL PATTERNS OF ONTARIO'S POPULATION

AND HOW THEY WILL CHANGE OVER THE NEXT 25 YEARS
A DEMOGRAPHIC SEGMENTATION ANALYSIS



ONTARIO MINISTRY OF TOURISM & RECREATION
TOURISM BRANCH
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TAMS
Travel Activities &
Motivation Survey

EXECUTIVE SUMMARY:

- This report presents an analysis of the travel patterns of Ontario's population, segmented into eight life cycle segments, and how these patterns will change in 2026.

The Present:

- Compared to other demographic segments, the senior segments have lower household incomes, lower education and a higher incidence of being born in a country other than Canada, reflecting in a way Canada's immigration history.
- Mature Couples without children have the highest incidence of overnight travel anywhere in the world for any reason over a two-year period, followed by Mature Couples with children, while Senior Singles have the lowest.
- On a person trip basis, Mature Couples with children accounted for 26% of the total leisure trips taken by Ontario residents anywhere in the world, followed by the Young without children segment. As such, although directing advertising campaigns at Mature Couples without children may be successful at finding travellers, directing advertising campaigns at Mature Couples with children and Young without children may be more successful in terms of generating a higher number of leisure trips especially in Ontario.
- Mature Singles with children accounted for the lowest share of leisure trips (3%) and Mature Couples without children accounted for the third largest share of overnight leisure trips (19%), although they had the highest proportion of travellers (83%) – primarily because compared to the other segments they take trips that are longer-haul, more expensive and as such less frequent.
- For the senior segments the most important reasons for not taking overnight trips anywhere in the world were their age or the fact that they were ill. For all other segments, with the exception of the Young with Children, the most important reason was the costs of travel, while for the Young with children the number one issue was the presence of babies or very young children – an issue that was also among the top five for mature singles or couples with children.
- Income, age, education, place of birth, weeks of paid vacations, the presence of a spouse and the presence of children all have a significant impact on the likelihood of taking an overnight trip. For example, other things being equal, households without children are about one third more likely to take a trip than households with children.
- Country of birth and education have the largest impacts on the probability of taking a trip. Ontario residents who were born in Canada, UK, USA or Australia or who had completed a level of education greater than high school or college were almost twice as likely to take overnight trips compared to those who were born in other countries or those with lower education. Changes in income change the likelihood of taking an overnight trip by one and a half times, while those who have a spouse or three weeks or more of paid vacations per year are 1.3 times and 1.2 times, respectively,

more likely to take an overnight trip than those who do not have these attributes. Moving from the younger group to the older age groups reduces the probability of travel by one third for each age group.

- Ontario and Other US States¹ are always the top two destination areas visited for leisure by all demographic segments, with Ontario being first. Mature Couples (with or without children) and Young without children had the highest incidence of travel to Ontario. Among the Mature Couples those who had children less than 18 years of age had a higher incidence of travel to the province (53%) than the segment as a whole – an observation that is related to the fact that for families with young children convenience and minimizing the time spent in a transportation vehicle is important.
- Senior Couples had the highest incidence of travel to Florida and to the UK/Europe. Young without children had the highest incidence of travel to the Caribbean/Mexico and New York State, while Mature Couples without children and Young without children had the highest incidence of travel to Quebec.
- Quebec is the third top destination for Mature Singles without children, Mature Couples with children and Young with or without children, while Florida is the third top destination for the seniors segments. Finally, New York State is the third top destination for the Mature Singles with children.
- Ontario's dominance as a destination becomes even more acute on a person trip basis. For example, although three times as many Young with children visited Ontario for leisure as they did "Other" US states, Ontario received 19 times more leisure trips from this segment than "Other" US states did. Young with children had the highest incidence of visitation to Ontario on a person trip basis, followed by the Young without children. Given that the Young segments will be tomorrow's mature and senior segments, it will be important for Ontario's tourism industry to keep up with their needs and to develop and instil a sense of loyalty for Ontario's tourism products or destinations – after all, pleasant memories, which will eventually be passed on to their children, are the most important determinants of repeat visitation.
- Because of their high frequency of travel to Ontario and their relatively large size, Young without children account for 26% of Ontario's total overnight leisure trips, second only to Mature Couples with children which account for 27% of the provincial leisure trips. However, given that Mature Couples with children account for a larger proportion of Ontario's adult population, Young without children generate, relative to their size, 1.5 times more overnight leisure trips to Ontario than the former segment.
- Irrespective of the demographic segment, Ontarians do not have a great opinion about their province as a destination area. "A Place with Beautiful Scenery" is the only statement where a significant proportion (between 38% and 48%) of those who had travelled over a two-year period agreed completely. "A Great Place to Relax and Get Away from it All" was another statement that had a significant portion (close to 40%) of the senior and mature segments agreeing completely with it.

¹ "Other" US states means other than Florida, Washington State, New York State, Hawaii, California and Las Vegas, which accounts for most of Nevada's visitors.

- There is some concern about the low scores that Ontario received from all demographic segments in areas that are either significant motivators for travellers, or are important in terms of extending Ontario’s tourism season. And although the low scores in areas such as “A great place to see historic sites and important places in history” may not render themselves conducive to remedial action, the low scores in areas such as safety for visitors or value for money may be remedied through improvements in awareness and in the quality of the goods and services sold to travellers.
- Compared to the senior segments, the young and the mature segments have much higher participation rates in all of the experiences sought by travellers primarily because they travel more. Among the top five travel experiences sought by each demographic group during their overnight leisure travels are:
 - Visiting friends and relatives who live in other countries or cities
 - Spending quality time with family away from home
 - Rest, relax and recuperate, and
 - Spending time with a group of good friends.
- Rest and relaxation is a much more important experience for all the mature segments (and the Young without children) when compared to the senior segments, perhaps because the members of the former groups are still in the work force.
- “Visiting historic sites and important places in history” is the fifth most important travel experience for the senior segments. “To see natural wonders and important natural sites” is the fifth travel experience that enters the list of the top five experiences of the mature segments with the exception of the Mature Couples without children who prefer “intimacy and romance”. Finally, “adventure and excitement” enters the top five travel experiences sought by the Young without children segment.

The Future:

- In 2026, Ontario’s older as well as childless segments will account for a larger share of its adult population:

Shares of Ontario’s Adult (18+) Population			
	1999	2026	Rate of Change
Senior Singles	6.9%	14.3%	107%
Senior Couples	12.0%	14.8%	23%
Mature Singles without children	9.5%	13.3%	40%
Mature Singles with children	3.6%	4.3%	19%
Mature Couples without children	15.5%	13.8%	-11%
Mature Couples with children	28.8%	20.4%	-29%
Young without children	18.5%	14.8%	-20%
Young with children	5.2%	4.3%	-17%

- The incidence of overnight travel anywhere in the world and for any reason is expected to decline slightly from 77% in 1999 to 76% in 2026, primarily because of

the aging of the population (and the fact that the older segments do not travel as much as the younger segments) and the change in Ontario's proportion who will be born in countries other than Canada, US or UK.

- The incidence of overnight travel anywhere in the world increases slightly in 2026 for the senior segments (a result of higher education and changes in the age distribution within that group), the Mature Singles or Couples without children and the Young without children. The segments with children are expected to have either the same incidence of overnight travel as they did in 1999 or slightly lower as is the case for the Young with children segment.
- In terms of the destinations visited for overnight leisure trips, all segments will still be drawing their top five destinations from the same list of that they had in 1999. That is, Ontario, Quebec, BC, Florida, New York State, Other US states, Caribbean/Mexico and UK/Europe. However, there will be some slight changes in the rankings and the incidence of travel to each of these destinations.
- The importance to the provincial tourism of the senior segments and the Mature Singles without children will increase substantially in 2026 as these three segments will account for 36% of Ontario's overnight leisure trips (up by 57%). The number of overnight leisure trips to Ontario that the two senior segments will account for will increase by 60% from 14% in 1999 to 23% in 2026.
- Mature Couples with children will see the largest decline in their share of Ontario's overnight leisure trips – a decline of 30% from 27% in 1999 to 19% in 2026, followed by Young without children whose share will decline by 19% from 26% in 1999 to 21% in 2026. However, notwithstanding the declines in their share of Ontario's overnight leisure person trips, the Young without children segment will now account for the largest proportion of Ontario's trips overtaking the Mature Couples with children.
- Compared to other demographic segments, the number of seniors seeking multiple types of travel experiences will increase substantially in 2026 relative to 1999, primarily because the senior groups will experience in 2026 the largest increase in their members and their level of education.
- The travel experiences whose shares will increase substantially within the senior segments in 2026 are:
 - Participate in a hands-on learning experience (archaeological digs, cooking courses, learning another language), an observation that is consistent with their improved educational level.
 - Visit historical sites and important places in history
 - Spend time with a group of good friends
 - For intimacy and romance
 - Rest, relax and recuperate, and for the Senior Couples
 - Visit a popular, trendy place
- Spending time with a group of good friends is a travel experience that will also become more important for both young segments and “visit historical sites and important places in history” for the Young with children segment. Travel for the purpose of experiencing different cultures and ways of life will become significantly

less important for the two young segments and for the Mature Couples with children, while travel to see natural wonders and important natural sites will become less important for the Young with children segment.

- Travel for spiritual or religious reasons will also decline significantly in importance among the young segments and so will gambling at casinos. Finally visiting popular or trendy places will decline considerably in importance for the Mature Singles with children.

INTRODUCTION:

During the fall of 1999 and the winter of 2000, MTR in partnership with tourism organizations across Canada conducted two household surveys to determine the travel behaviour and characteristics of Canadian and US residents aged 18 years or older (Travel Activities and Motivation Survey - TAMS). The Canadian survey consisted of 18,385 and the US of 28,397 telephone interviews.

Subsequently, the Ministry projected the 1999/2000 databases to the year 2026 using population projections from Statistics Canada and the US Bureau of Census².

This report examines the travel patterns of Ontario's residents segmented according to the characteristics of their lifecycle stage and the factors that affect these patterns. The table below provides the sample sizes for each segment as well their weighted numbers and market shares.

	Sample Size	Weighted to Ontario's Population of 18 year olds	Market Share
Senior Singles	918	611,773	6.9%
Senior Couples	837	1,067,993	12.0%
Mature Singles no Kids	1,350	847,797	9.5%
Mature Singles with Kids	463	322,107	3.6%
Mature Couples No Kids	1,225	1,377,907	15.5%
Mature Couples with Kids	2,224	2,561,869	28.8%
Young Singles or Couples, No Kids	1,567	1,647,977	18.5%
Young Singles or Couples with Kids	487	463,192	5.2%
Total	9,071	8,900,616	100%

The following table shows the age categories that were used to define "Young", "Mature" and "Senior" and the distribution of ages within each segment:

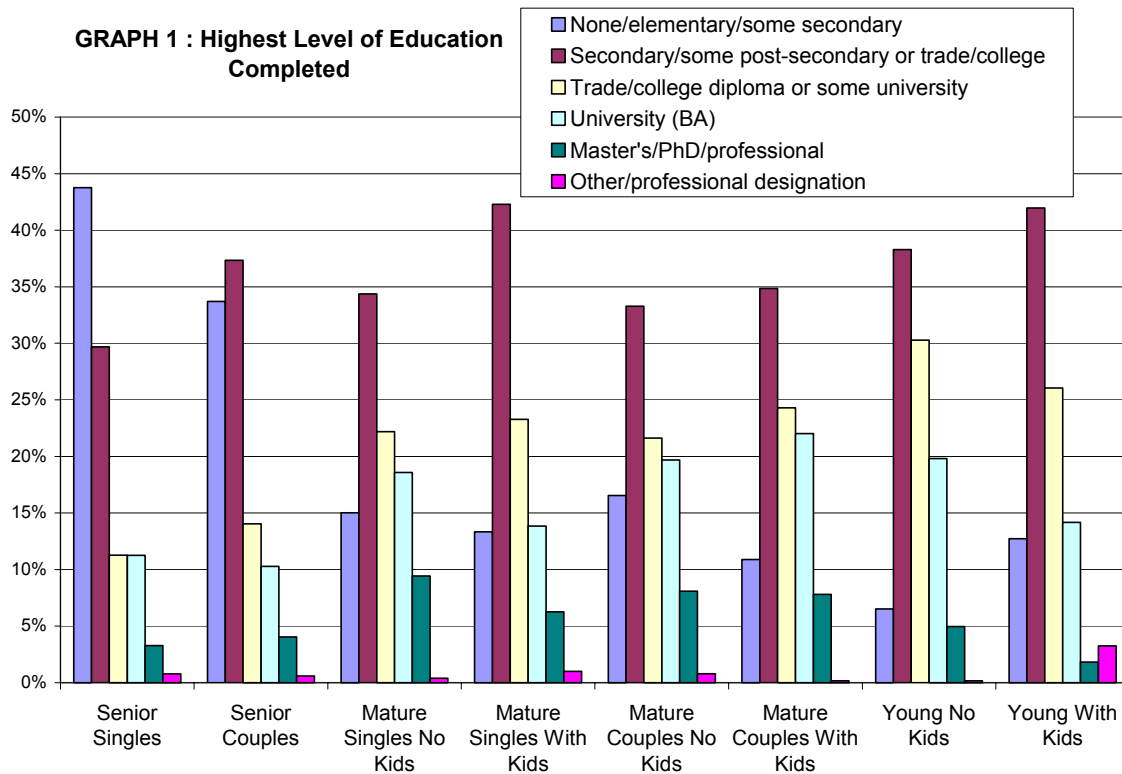
² For details on the methodology as well as an overview of how the total US and Canadian markets will look like in 2026 please visit our web site at: www.tourism.gov.on.ca and click on the link entitled Travel Activities and Motivation Survey. The two reports are entitled "Aging the Canadian Market" and "Aging the US market".

	Senior Singles	Senior Couples	Mature Singles, no kids	Mature Singles with kids	Mature Couples, no kids	Mature Couples with kids	Young Singles or Couples, no kids	Young Singles or Couples with kids
18-20 Years	-	-	-	-	-	-	27%	4%
21-25 Years	-	-	-	-	-	-	38%	24%
26-30 Years	-	-	-	-	-	-	34%	72%
31-35 Years	-	-	26%	13%	14%	19%	-	-
36-40 Years	-	-	21%	30%	13%	26%	-	-
41-45 Years	-	-	15%	24%	12%	21%	-	-
46-50 Years	-	-	16%	19%	14%	18%	-	-
51-55 Years	-	-	10%	7%	20%	10%	-	-
56-60 Years	-	-	12%	7%	26%	6%	-	-
61-65 Years	21%	29%	-	-	-	-	-	-
66-70 Years	20%	28%	-	-	-	-	-	-
71-75 Years	21%	22%	-	-	-	-	-	-
76-80 Years	20%	14%	-	-	-	-	-	-
81-85 Years	11%	6%	-	-	-	-	-	-
86 and over	7%	1%	-	-	-	-	-	-

A. THE PRESENT

A.1. EDUCATION, INCOME, PLACE OF RESIDENCE & PLACE OF BIRTH

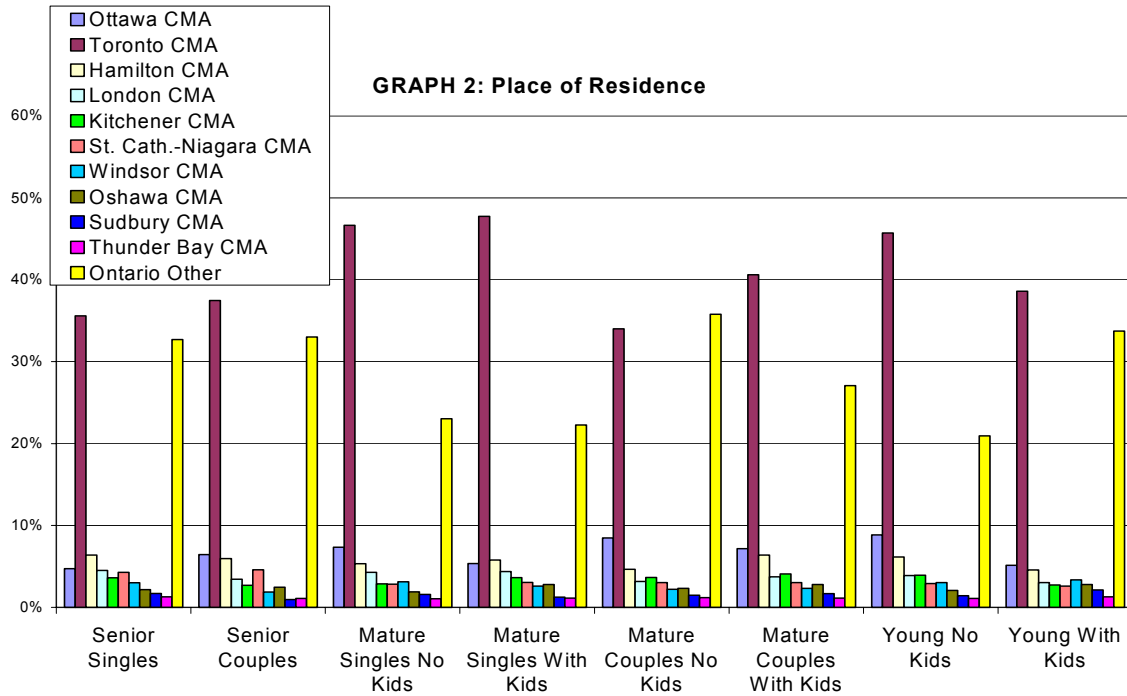
As Graph 1 demonstrates, Mature Couples and Young without children have the highest incidence of university education, while the senior segments have the highest proportion of members with elementary or no education than any other segment – an observation that is explained by the fact that since membership in the senior segments starts at age 61, the members of these segments would have finished elementary school in 1950 or earlier.



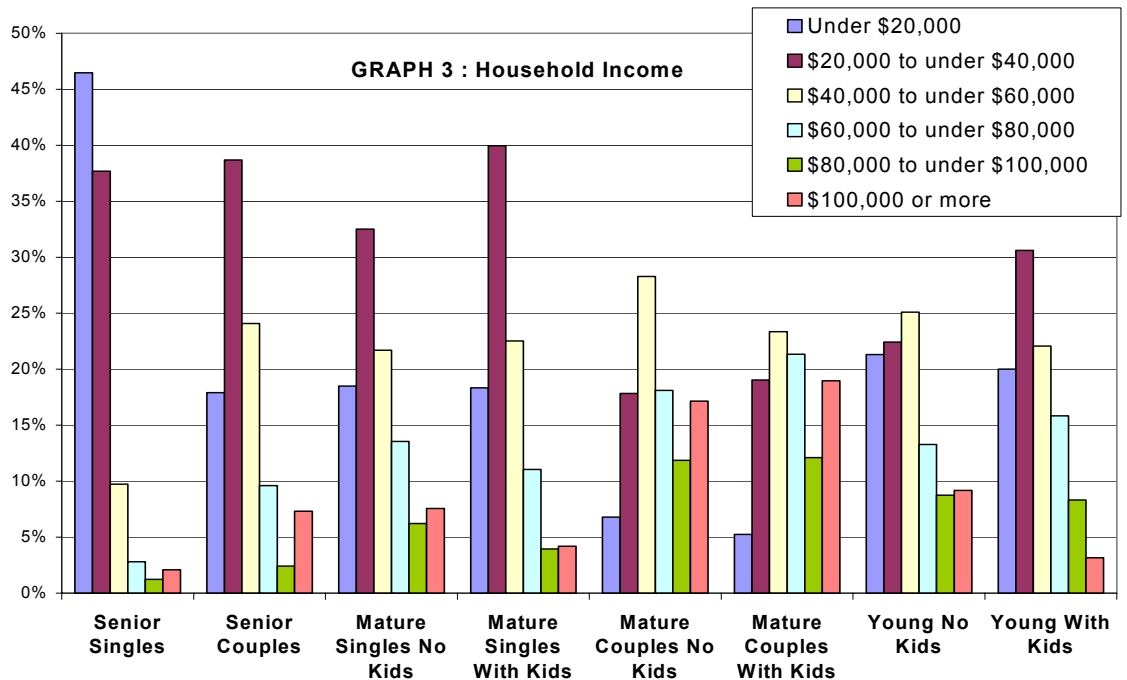
With the exception of Mature Couples without children, the highest proportion of the members of all demographic segments live in the Toronto Census Metropolitan Area - an area that accounts for 41% of Ontario's adult population (i.e., 18 years of age or older). However, as it can be seen in Graph 2, the proportions of Mature Singles (with or without children) and Young without children who live in Toronto are well above the provincial average (41%), while the proportions of the senior segments and the Mature Couples without children who live in Toronto are below the provincial average of adults who live in Toronto.

Senior Singles have the highest proportion of members with household incomes less than \$20,000 and Mature Couples with children have the lowest. The latter group also has the highest proportion of households with incomes over \$100,000.

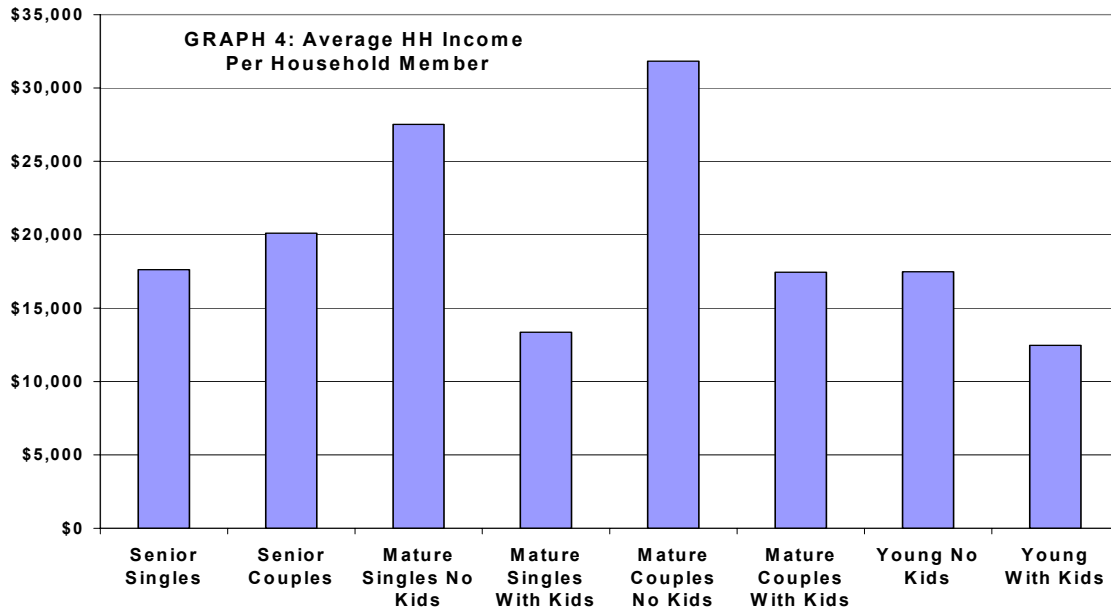
However, when one examines not just the total household income, but also the number of individuals that this income supports the picture changes as Graph 4 demonstrates.



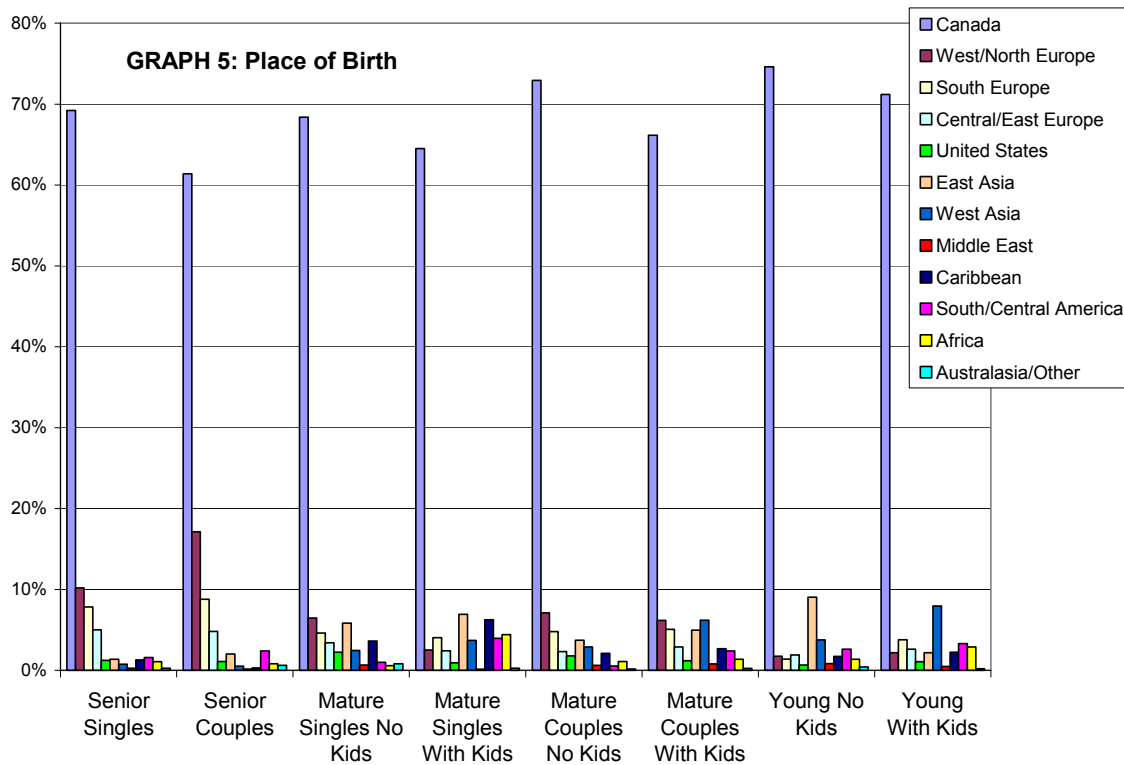
It is now the Mature Couples without children that have the highest average income, followed by Mature Singles without children. The position of the lowest average per person income is shared by the Mature Singles with children and the Young with children.



Senior Couples have the lowest proportion of members who were born in Canada and the highest proportion of members who were born in Europe, reflecting in a way



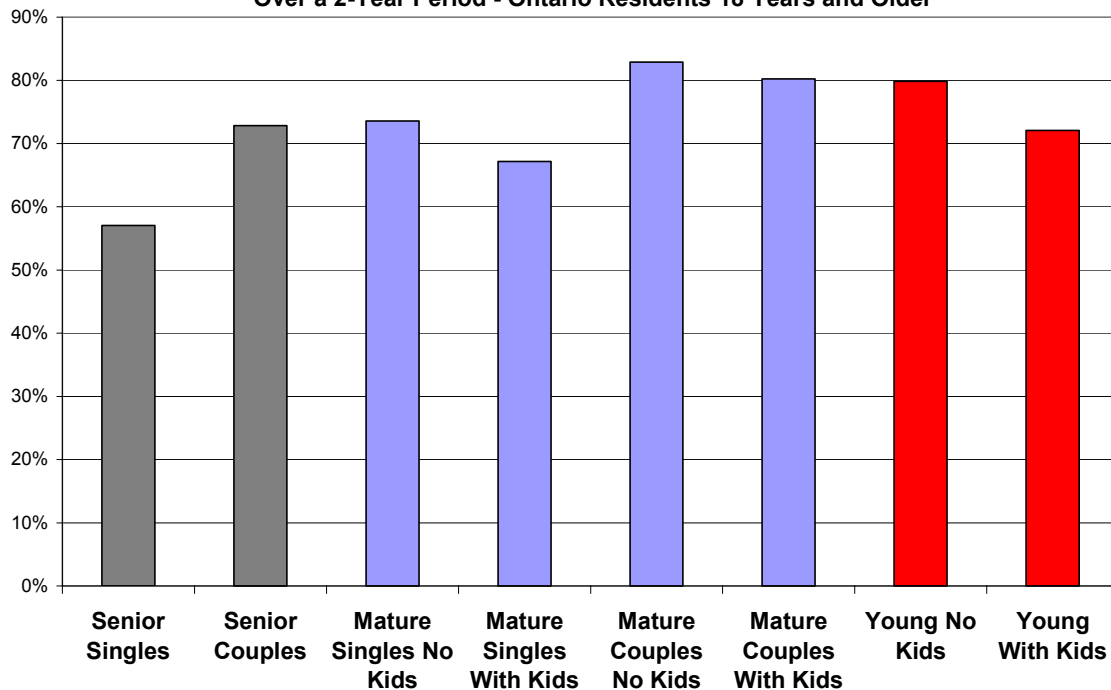
Canada's immigration patterns after the war. In general, older demographic segments have a lower proportion of members born in Canada and a higher proportion born in Europe, while younger segments have a higher proportion born in Canada and with respect to those born outside Canada, a higher proportion of members born in Asia, reflecting again Canada's immigration patterns over the last 15 years.



A.2. INCIDENCE OF OVERNIGHT TRAVEL AND FACTORS AFFECTING IT

Mature Couples without children had the highest incidence of overnight travel anywhere in the world for any reason over a two-year period, followed by Mature Couples with children. As can be seen from the graph below, the presence of children in the household lowers the incidence of overnight travel, irrespective of the age group. As well, within each market segment the presence of a partner increases the incidence of travel. For the senior segments, it is the presence of a partner that influences the propensity to travel rather than the presence of children.

GRAPH 6: Incidence of Overnight Travel Anywhere in the World for Any Reason Over a 2-Year Period - Ontario Residents 18 Years and Older



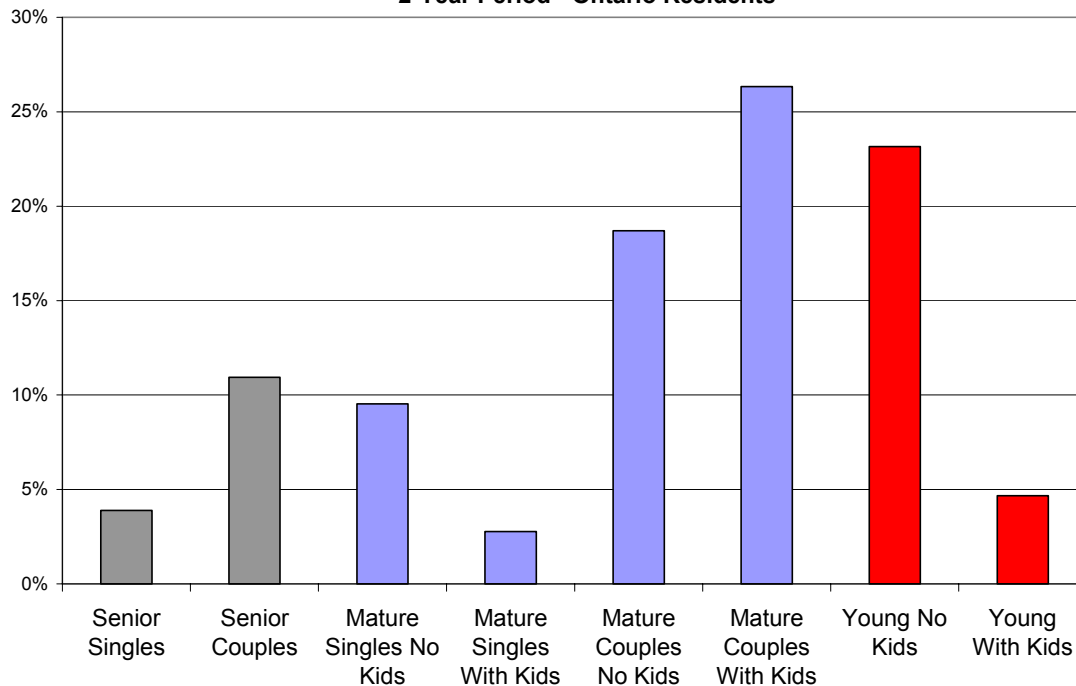
Although Mature Couples without children had the highest incidence of travel to any destination in the world, i.e., they had the highest proportion of members who travelled, the picture changes when one examines not only how many members of a particular demographic group travelled, but also how frequently they did so.

Graph 7 shows the shares of the total overnight leisure trips accounted for by each demographic group. Mature Couples with children accounted for 26% of the total person trips³ taken by Ontario residents, followed by Young without children. Mature Singles with children accounted for the lowest share of person trips (3%), which is even lower than their population share (4%). Mature Couples without children accounted for the

³ TAMS captured the destinations visited and the number of trips to each destination. However, since a respondent may have visited more than one destination on the same trip, the potential exists that TAMS may overestimate the actual person trips taken. But, since the destinations captured by TAMS are quite large geographic areas, this overestimation may not be significant. In addition, for the purposes of this paper this potential overestimation is not likely to affect the results since it impacts all groups the same way. That is, there is no reason to believe that one group may visit multiple destinations on the same trip more frequently than another group.

third largest share of overnight leisure trips (19%), although they had the highest proportion of travellers (83%). As such, although directing advertising campaigns at Mature Couples without children may be successful at finding travellers, directing advertising campaigns at Mature Couples with children and Young without children may be more successful in terms of generating a higher number of leisure trips especially in Ontario.

GRAPH 7: Shares of total Overnight Leisure Person Trips Anywhere in the World over 2-Year Period - Ontario Residents

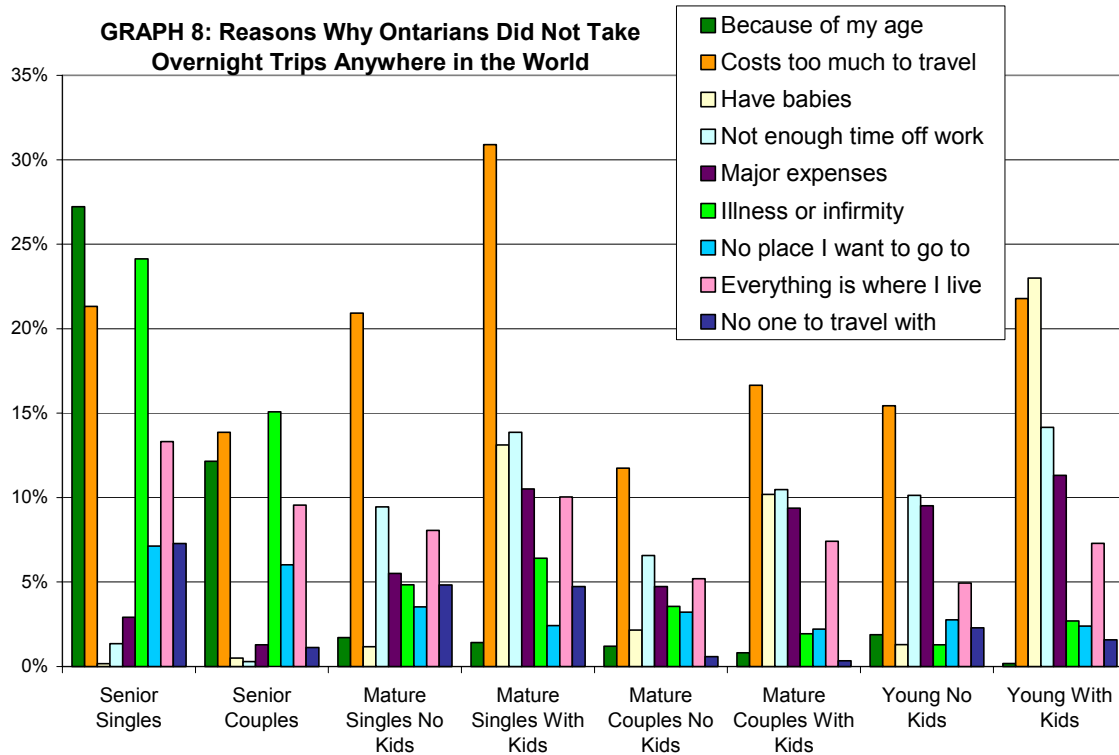


As we will see below, part of the reason for the differences shown in graphs 6 and 7 is the fact that Mature Couples without children take more out of country trips, which are in general longer lasting and more expensive, while those with children take trips within Canada and in particular within Ontario.

Graph 8 shows the reasons why Ontarians did not take any overnight trips anywhere in the world over a two-year period. For the senior segments the most important issues were their age or the fact that they were ill. For all other segments, with the exception of Young with children whose number one issue was the presence of babies or very young children, the most important reason was the costs of travel. The presence of babies in the household was also an important issue ranking among the top 5 reasons for mature singles or couples with children.

Another issue that appears to be of significance for all segments except the senior segments is that of not having enough time off work to devote to travel.

Table 1 shows the impact of various factors on the probability of taking an overnight trip anywhere in the world. For example, holding income, age, education, place of birth, weeks of paid vacations and presence of a spouse constant, the presence of children in



the household reduces the probability of taking an overnight trip by 0.656 times. Or, in other words, other things being equal, households without children are about one third more likely to take a trip than households with children.

Country of birth and education have the largest impacts on the probability of taking a trip. Ontario residents who were born in Canada, UK, USA or Australia or who have completed a level of education greater than high school or college are almost twice as likely of taking overnight trips compared to those who were born in other countries or those with lower education. Income changes the likelihood of taking an overnight trip by one and a half times, while those who have a spouse or three weeks or more of paid vacations per year are 1.3 times and 1.2

TABLE 1: FACTORS AFFECTING THE PROBABILITY OF TAKING AN OVERNIGHT TRIP ANYWHERE IN THE WORLD

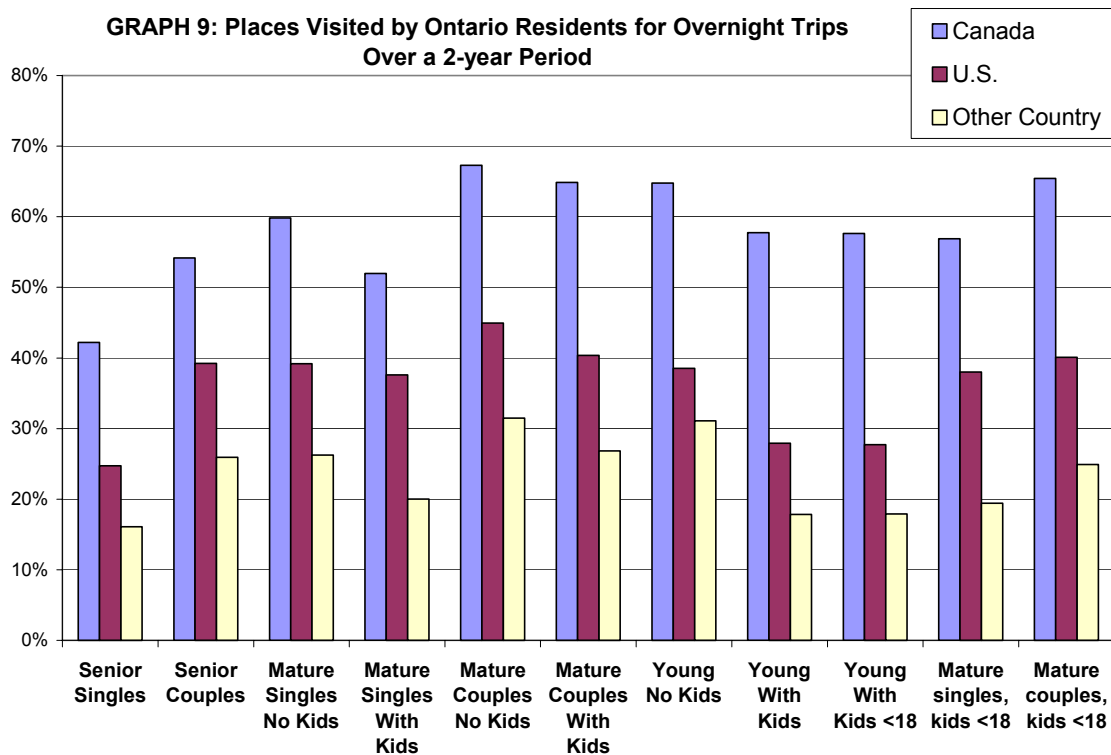
Factor	Change in the probability of taking a trip ⁴
Presence of children	0.656
Presence of spouse/partner	1.288
Born in Canada/US/UK/Australia	1.791
Income	1.511
Education	1.772
Age (by segment)	0.716
Weeks of paid vacations ≥ 3	1.230

⁴ This table presents the results of a logistic regression. A value less than one means that the probability of taking an overnight trip decreases as the value of the factor increases and vice-a-versa for a value greater than 1. A total of 6 income groups, 3 age groups and two groups of educational achievement were used.

times, respectively, more likely to take an overnight trip than those who do not have these attributes. Moving from the younger group to the older age groups reduces the probability of travel by one third for each age group.

A.3. PLACES VISITED

Mature Couples without children have the highest incidence of travel in Canada, followed by Mature Couples with children and Young without children. Senior Singles, Mature Singles with children and Senior Couples have the lowest incidence of travel in Canada.



The presence of children less than 18 years old increases slightly the incidence of travel in Canada as the last three bars on the right-hand side of Graph 9 indicate.

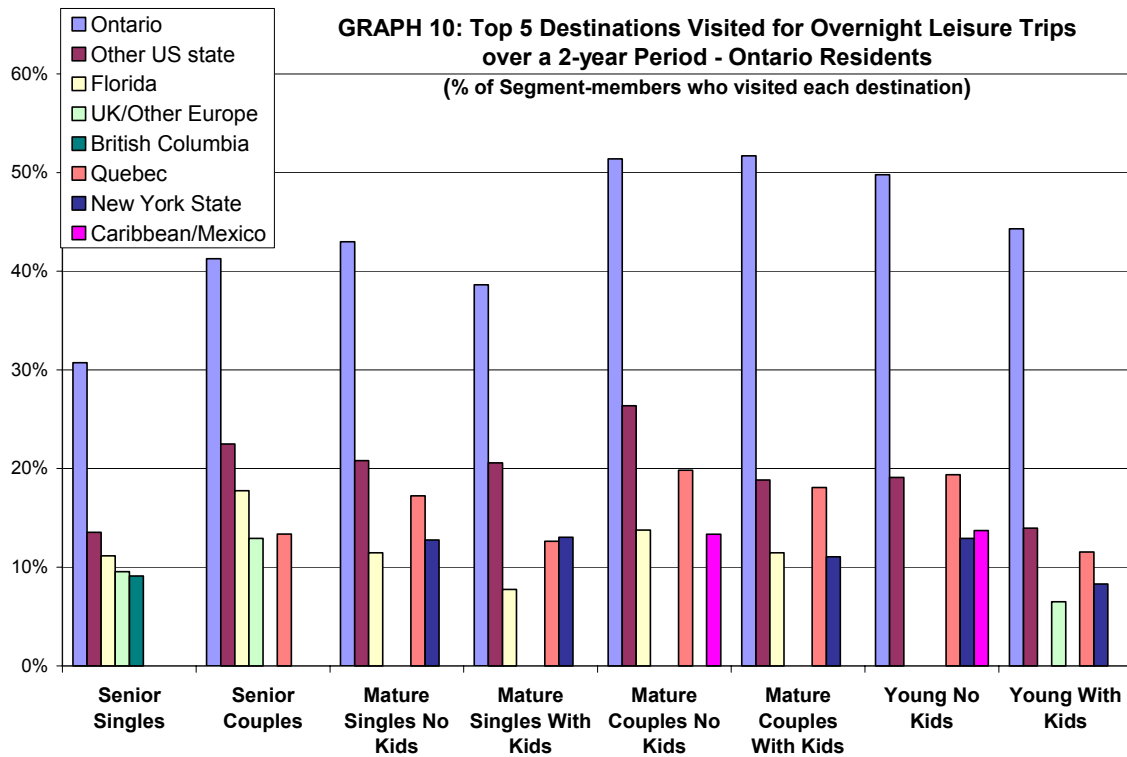
Mature Couples without children have the highest incidence of travel to the US and, along with the Young without children, to overseas countries.

The presence of children less than 18 years of age does not appear to affect the incidence of travel to the US for the Young and Mature market segments, but it does lower a bit the incidence of travel to overseas countries for the Mature Couples segment.

A bit over 16% of the Senior Singles visited overseas countries over a two-year period and 25% of them visited the US. On the other hand, the presence of a partner among the Senior Couples increased the incidence of visitation to the US to 39% – a fact that renders them the group with the third highest incidence of travel to the US.

Ontario was the number one destination visited by all demographic segments for leisure. Mature Couples (with or without children) and Young without children had the highest incidence of travel to Ontario. Within the Mature Couples, those who had children less than 18 years of age had the highest incidence of leisure travel to the province (53%).

Senior Couples had the highest incidence of leisure travel to Florida and to the UK/Europe. Young (couples or singles) without children had the highest incidence of leisure travel to the Caribbean/Mexico and New York State, while Mature Couples without children and Young without children had the highest incidence of leisure travel to Quebec.

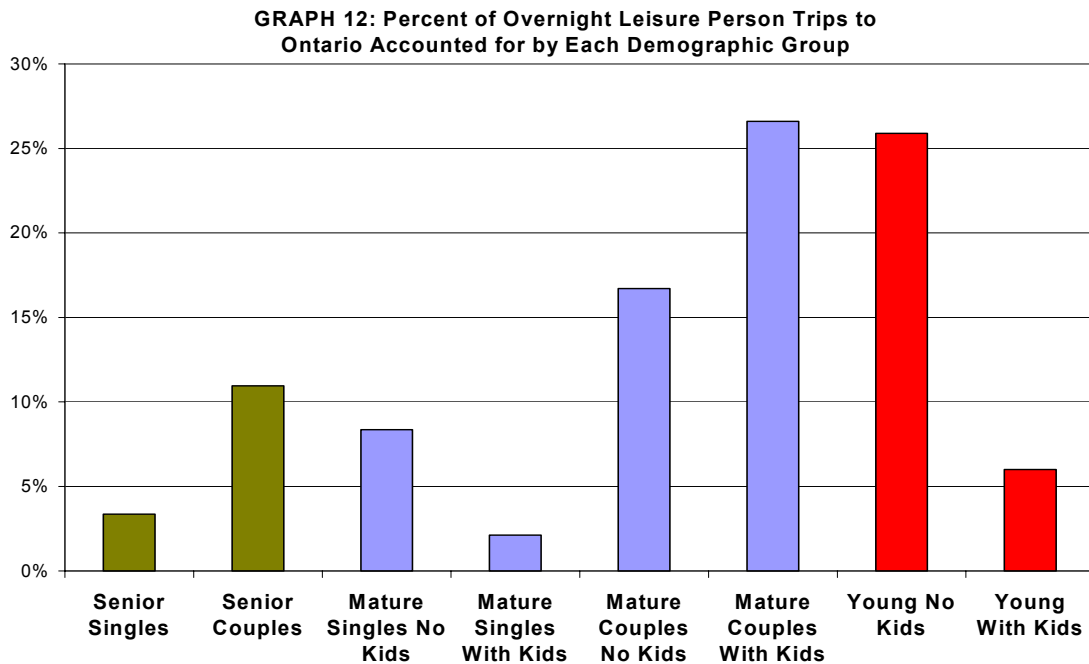
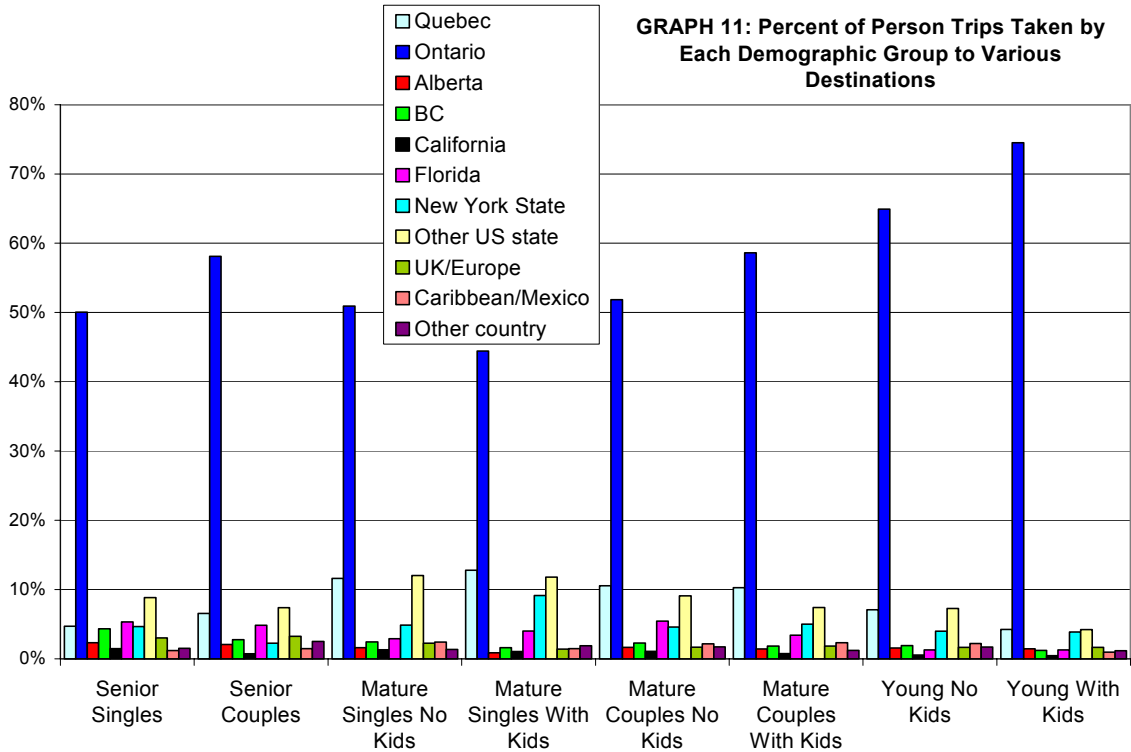


The top five destination areas for leisure for all market segments come from a list of 8 destinations. Ontario and Other US States⁵ are always the top two destination areas. Quebec is the third top destination for Mature Singles without children, Mature Couples with children and young with or without children, while Florida is the third top destination for the seniors segments. Finally, New York State is the third top destination for the Mature Singles with children.

On a person trip basis, although the ranking of the destinations visited does not change considerably, there are two changes that are worth noting. First, Ontario's dominance as a destination becomes even more acute as Graph 11 demonstrates. For example, although three times as many Young with children visited Ontario for leisure than they did "Other" US states, Ontario received 19 times more person trips from this segment than "Other" US states did.

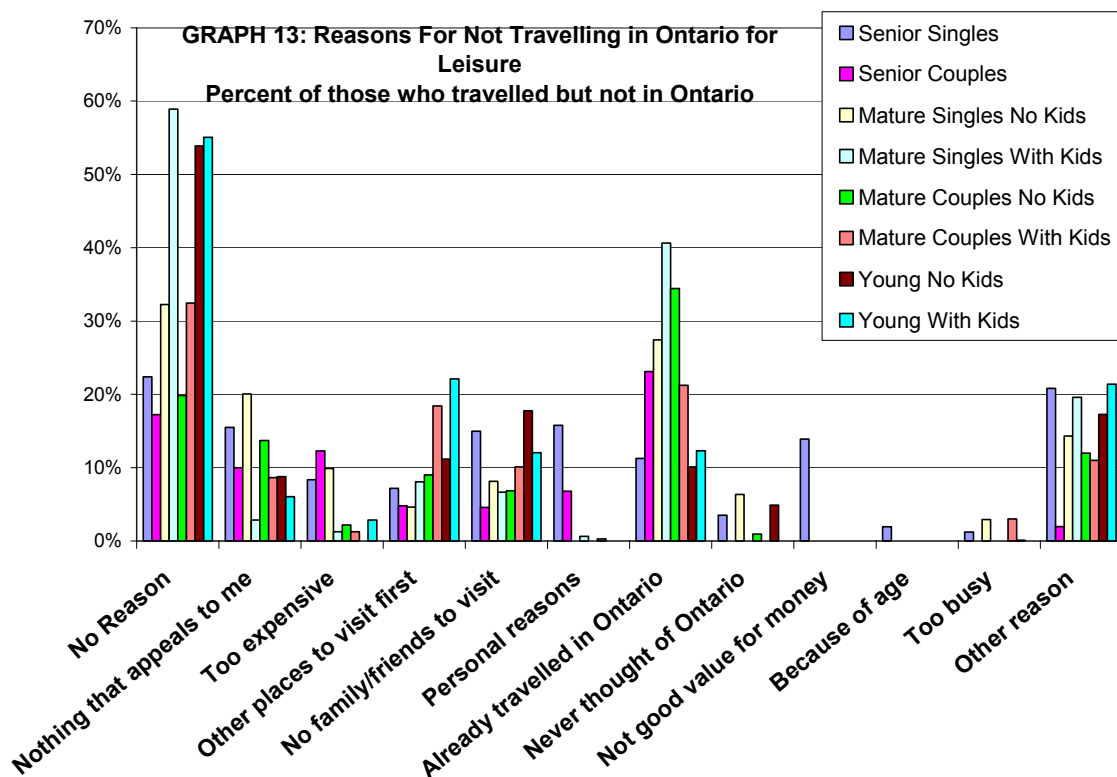
⁵ "Other" US states means other than Florida, Washington State, New York State, Hawaii, California and Las Vegas.

The second thing worth mentioning is that on a person trip basis the ranking of the demographic segments vis-à-vis their importance to Ontario's leisure market changes. It is now the Young with children that have the highest incidence of visitation to Ontario, followed by the Young without children.



Because of their high frequency of leisure travel to Ontario and their relatively large size, the Young without children segment accounts for 26% of Ontario's total overnight leisure trips, second only to the Mature Couples with children segment which accounts for 27% of the provincial trips. However, given that Mature Couples with children account for 29% of Ontario's adult population, while Young without children account for 19%, that implies that the latter segment generates, relative to its population size, 1.5 times more overnight leisure trips to Ontario than the former segment.

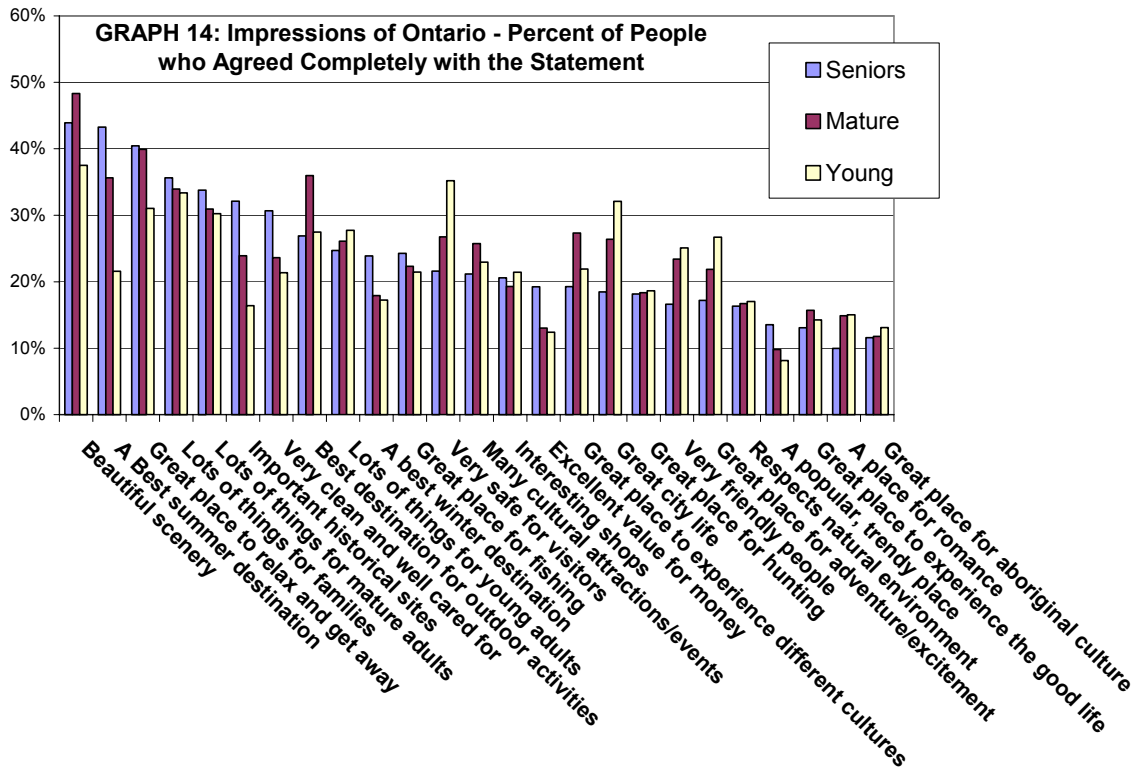
Overall, close to 4% of Ontario's adults who took leisure trips over a two-year period did not take any of them in Ontario. Graph 13 shows the reasons why these Ontarians chose not to travel in Ontario.



For all demographic segments, with the exception of Mature Couples without children and Senior Couples, the number one reason for not taking overnight leisure trips in Ontario, when they did so somewhere else, was “No Reason” - a response that seems to indicate that Ontario is not very high in their mind as a destination. For Mature Couples without children and Senior Couples the number one reason was that they had already been in Ontario prior to the two-year period that the study covered.

Of importance in Graph 13 is the fact that the Senior Singles have the impression that Ontario does not offer good value for money. This is important because in the future the seniors will increase significantly.

Graph 14 shows how Ontarians who travelled over a two-year period view the province. Irrespective of the demographic segment, Ontarians do not have a great opinion about



their province as a destination area. “A Place with Beautiful Scenery” is the only statement where a significant proportion (between 38% and 48%) of those who had travelled over a two-year period agreed completely. “A Great Place to Relax and Get Away from it All” was another statement that had a significant portion (close to 40%) of the seniors and mature segments agreeing completely with it.

Of concern are the low scores that Ontario received from all demographic segments in the following areas:

- A great place to experience aboriginal culture, since development of aboriginal tourism has been a major driver for the province for some time.
- A place that offers excellent value for money
- A popular, trendy place
- A place you go to for romance
- A place that respects the natural environment
- A great place to go for hunting
- A place with interesting shops
- A great place to experience the good life – fine cuisine, good wine, being pampered

Also of concern is the low score that Ontario received from the young segments in the following areas (this is a concern since the young segments will be tomorrow’s mature segments):

- One of the best destinations to visit in the summer (the summer is Ontario’s main travel season)
- One of the best places to visit in the winter (which minimizes any hopes of developing the province into a year-around destination)

Finally, of concern are the low scores Ontario received from the senior segments in the following areas since this segment is going to increase in size over the next 20 years:

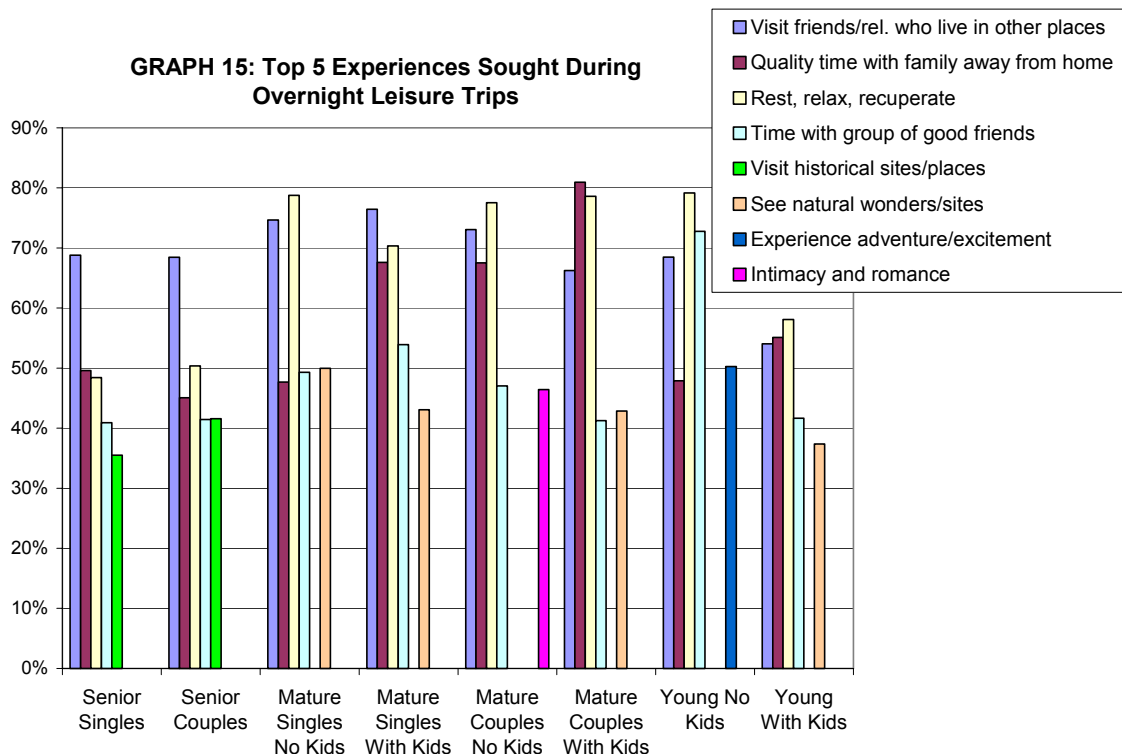
- A place with very friendly people
- A place that is very safe for visitors
- A great place to experience adventure and excitement

A.4. WHY DO ONTARIANS TAKE OVERNIGHT LEISURE TRIPS

Graph 15 depicts the top five travel experiences sought by each demographic group during their overnight leisure travels. “Visiting Friends and Relatives Who Live in Other Countries or Cities”, “Spending Quality Time with Family Away from Home”, “Rest, Relax and Recuperate” and “Spending Time with a Group of Good Friends” are among the top five experiences sought by all demographic groups. This is why the low scores that Ontario received in some of these categories (as shown earlier) is of concern.

The two senior groups are very similar to each other in terms of experiences sought when they travel. Visiting Historic Sites and Important Places in History is their fifth most important travel experience.

The two mature singles segments are also very similar to each other, although the Mature Singles without children have a higher tendency of seeking rest and relaxation. Rest and relaxation is a much more important experience for all the mature segments (and the Young without children) when compared to the senior segments, perhaps because the members of these groups are still in the work force.



Compared to the senior segments and the Young with children segment, all the mature segments and the Young without children segment have much higher participation rates in all of these experiences primarily because they travel more.

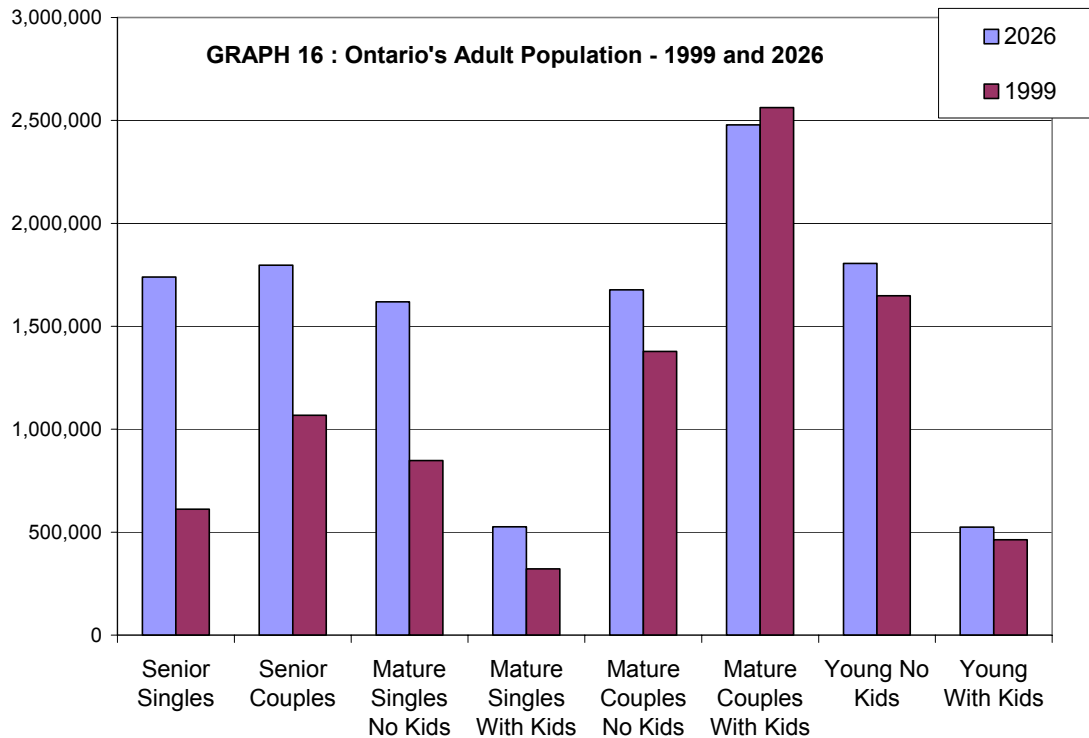
To See Natural Wonders and Important Natural Sites is the fifth travel experience that enters the top five list of the mature segments with the exception of the Mature Couples without children who prefer intimacy and romance, while Adventure and Excitement enters the top five travel experiences of the Young without children segment.

B. THE FUTURE

B.1. INCIDENCE OF OVERNIGHT TRAVEL AND PLACES VISITED

As Graph 16 shows, all demographic segments, with the exception of Mature Couples with children, increase their size in 2026. Mature Couples with children will decline in absolute numbers by 3% and as such its population share will decline from 29% in 1999 to 20% in 2026.

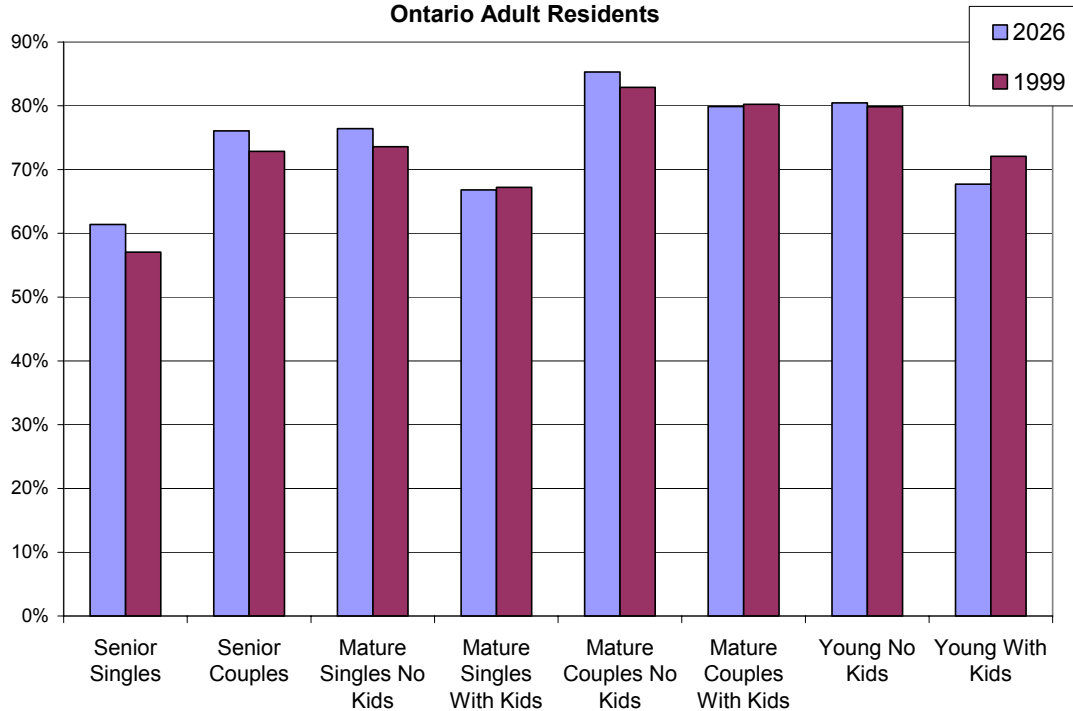
Senior Singles will experience the largest growth (up by 184%), followed by Mature Singles without children (up by 91%) and Senior Couples (up by 68%). Young with children will increase by 13%, while Young without children by 10%. As a result of all these differential growth rates the senior segments will increase their population share from 19% in 1999 to 29% in 2026.



The overall incidence of overnight travel anywhere in the world and for any reason is expected to decline slightly from 77% in 1999 to 76% in 2026, primarily because of the aging of the population and the fact that the older segments do not travel as much as the younger segments.

The incidence of overnight travel anywhere in the world increases slightly in 2026 for the senior segments (a result of higher education and changes in the age distribution within that group), the mature singles or couples without children and the Young without children. The segments with children are expected to have either the same incidence of overnight travel as they did in 1999 or slightly lower as is the case for the Young with children segment.

**GRAPH 17 : Incidence of Travel Anywhere in the World and for any Reason
Ontario Adult Residents**



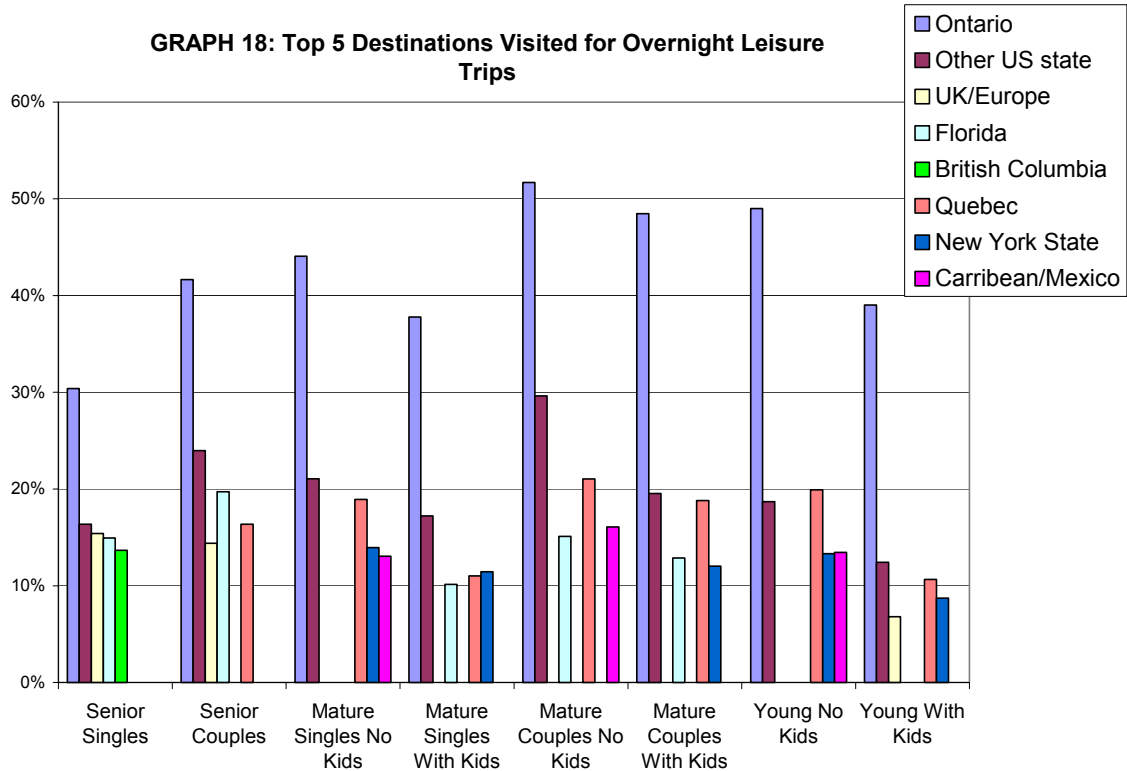
In terms of the destinations visited for overnight leisure trips, all segments will still be drawing their top five destinations from the same list of eight that they had in 1999. That is, Ontario, Quebec, BC, Florida, New York State, Other US states, Caribbean/Mexico and UK/Europe. However, as Graph 18 shows there will be some slight changes in the rankings and the incidence of travel to each of these destinations.

For the **Senior Singles**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decline by 1%
- “Other” US states will increase by 21%
- Florida will increase by 33%
- UK/Europe will increase by 62%, and
- BC will increase by 51%.

For the **Senior Couples**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will increase by 1%
- “Other” US states will increase by 7%
- Florida will increase by 11%
- UK/Europe will increase by 12%, and
- Quebec will increase by 22%.



For the **Mature Singles without children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will increase by 3%
- “Other” US states will increase by 1%
- Quebec will increase by 10%
- New York State will increase by 9%
- Florida will not be in the top 5 destinations travelled to by this group for leisure, but rather the Caribbean/Mexico will take its place as the incidence of visitation to this destination is expected to increase by 30%.

For the **Mature Singles with children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decrease by 2%
- Other US states will decrease by 17%
- Florida will increase by 31%
- Quebec will decrease by 13%
- New York State down by 13%

For the **Mature Couples without children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will increase by a bit less than 1%
- “Other” US states will increase by 12%
- Quebec will increase by 6%
- Caribbean/Mexico will increase by 20%
- Florida will increase by 9%

For the **Mature Couples with children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decrease by 6%
- “Other” US states will increase by 4%
- Quebec will increase by 4
- New York State will increase by 8%
- Florida will increase by 12%

For the **Young without children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decrease by 2%
- “Other” US states will decrease by 2%
- Quebec will increase by 3%
- New York State will increase by 3%
- Caribbean/Mexico will decrease by 1%

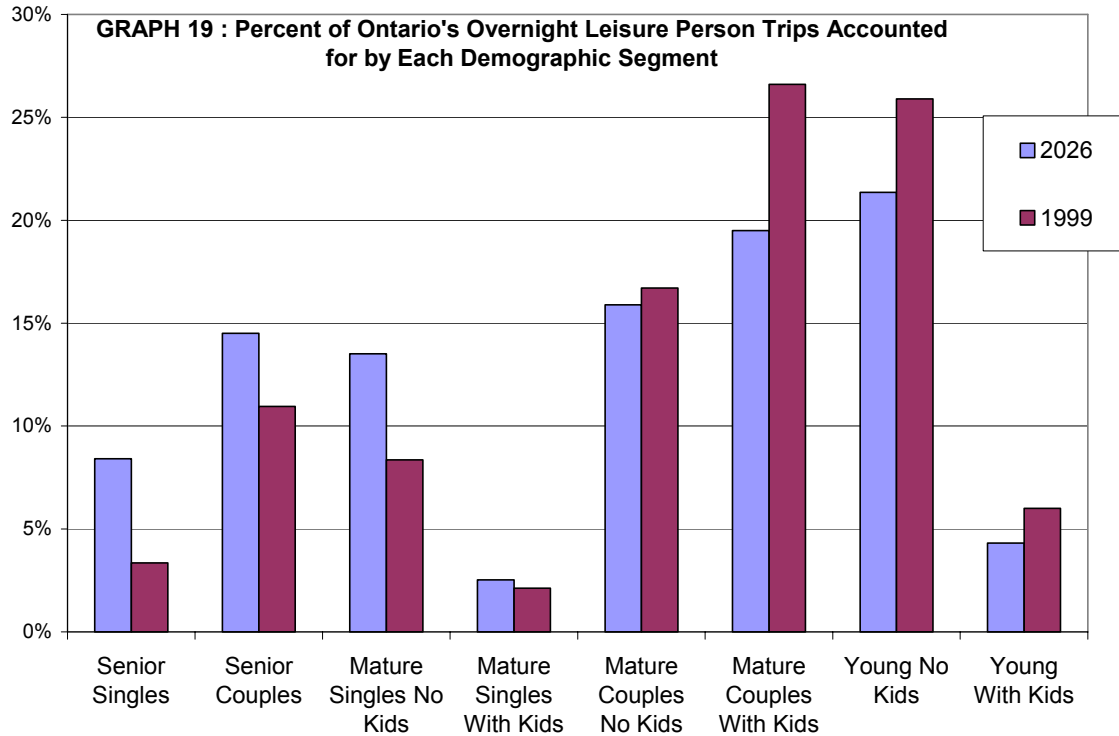
For the **Young with children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decrease by 12%
- Other US states will decrease by 11%
- UK/Europe will increase by 5%
- Quebec will decrease by 8%
- New York State will increase by 5%

These changes are driven mainly by the increased education of Ontario’s adult population in 2026, the aging of its population (seeking more sun destinations) and the fact that there will be more first generation Canadians (visiting friends and relatives back home).

As Graph 19 shows, the importance of the senior segments and the Mature Singles without children for Ontario’s tourism will increase substantially in 2026. The number of overnight leisure person trips to Ontario that the two senior segments will account for in 2026 will increase by 60% from 14% in 1999 to 23% in 2026. These three segments will account for 36% of Ontario’s overnight leisure trips in 2026.

Mature Couples with children will see the largest decline in their share of Ontario’s overnight leisure trips – a decline of 30% from 27% in 1999 to 19% in 2026, followed by Young without children whose share will decline by 19% from 26% in 1999 to 21% in 2026. However, notwithstanding the declines in their share of Ontario’s overnight leisure person trips, the Young without children segment will now account for the largest proportion of Ontario’s trips overtaking the Mature Couples with children.

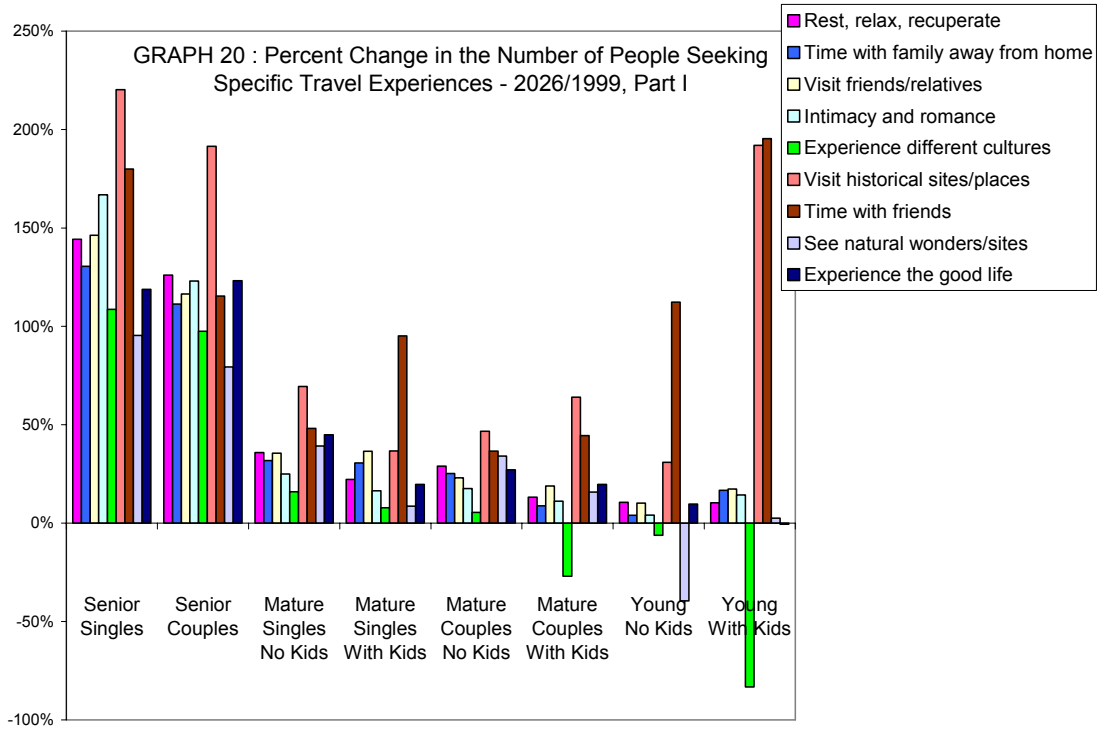


B.2. WHAT TRAVEL EXPERIENCES WILL THEY BE SEEKING IN 2026?

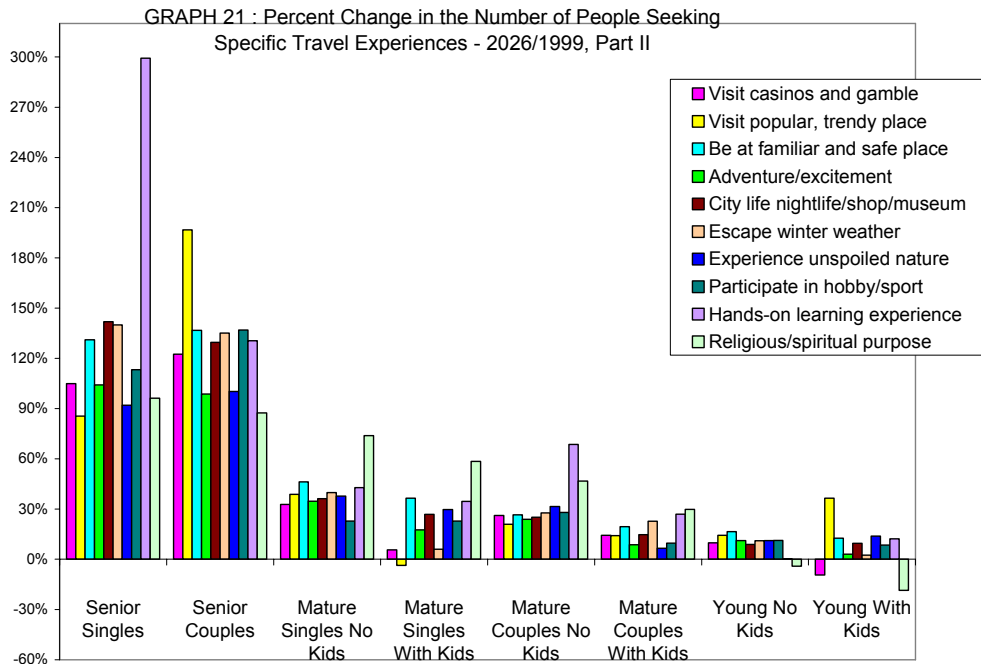
Compared to other demographic segments, the number of seniors seeking multiple types of travel experiences will increase substantially in 2026 relative to 1999 (Graph 20). The reason for this is twofold: first, compared to other segments, the seniors groups will experience in 2026 the largest increase in their members and second their education, and as such income, levels will improve – factors that influence, as we saw earlier, the probability of taking overnight trips.

The travel experiences whose shares will improve substantially within the senior segments in 2026 are:

- Participate in a hands-on learning experience (archaeological digs, cooking courses, learning another language), an observation that is consistent with their improved educational level.
- Visit historical sites and important places in history
- Spend time with a group of good friends
- For intimacy and romance
- Rest, relax and recuperate, and for the Senior Couples
- Visit a popular, trendy place



“Spending time with a group of good friends” is a travel experience that will also become more important for both of the young segments and “Visit historical sites and important places in history” for the Young with children segment. Travel for the purpose of experiencing different cultures and ways of life will become significantly less important for the two young segments and for the Mature Couples with children, while travel to see natural wonders and important natural sites will become less important for the Young with children segment.



Travel for spiritual or religious reasons will also decline significantly in importance among the young segments and so will gambling at casinos. Finally visiting popular or trendy places will decline considerably in importance for the Mature Singles with children.

TABLE 2: Travel Experiences Sought by Ontario Adult Residents – 2026
Percent of travellers that will seek a particular experience

	Senior Singles	Senior Couples	Mature Singles No Kids	Mature Singles With Kids	Mature Couples No Kids	Mature Couples With Kids	Young No Kids	Young With Kids
Rest, relax, recuperate	52.6%	54.1%	78.0%	67.1%	80.4%	77.9%	79.8%	58.4%
Time with family away from home	50.9%	45.3%	45.8%	68.9%	68.0%	77.2%	45.4%	58.6%
Visit friends/relatives	75.4%	70.5%	73.7%	81.4%	72.3%	69.0%	68.7%	57.8%
Intimacy and romance	3.6%	12.5%	32.0%	33.8%	43.9%	35.6%	41.2%	32.4%
Experience different cultures	32.0%	32.9%	42.2%	36.2%	38.9%	27.4%	33.1%	5.7%
Visit historical sites/places	40.9%	43.5%	49.8%	39.7%	45.0%	34.6%	37.8%	15.9%
Time with good friends	44.2%	42.6%	48.7%	52.9%	46.2%	41.4%	72.8%	41.3%
See natural wonders/sites	35.6%	35.4%	50.0%	45.7%	50.7%	41.8%	40.1%	38.9%
Experience the good life	19.2%	23.8%	28.6%	26.5%	43.7%	31.8%	32.3%	12.4%
Visit casinos and gamble	14.4%	20.2%	17.7%	18.7%	20.1%	21.7%	20.7%	13.9%
Visit popular, trendy place	5.4%	11.3%	17.9%	16.0%	18.9%	19.2%	31.6%	16.0%
Be at familiar and safe place	27.8%	35.5%	26.7%	24.2%	35.2%	32.6%	25.3%	16.1%
Adventure/excitement	13.7%	13.5%	43.4%	34.8%	32.4%	26.8%	50.9%	26.9%
City life	17.3%	23.9%	35.2%	26.1%	34.0%	27.9%	41.9%	26.2%
Escape winter weather	26.6%	39.4%	34.1%	18.6%	37.3%	31.3%	26.3%	13.4%
Experience unspoiled nature	18.9%	20.3%	38.2%	38.9%	41.0%	28.2%	39.4%	26.2%
Participate in hobby/sport	11.6%	22.5%	34.8%	30.3%	39.3%	34.4%	33.8%	31.2%
Hands-on learning experience	6.5%	3.6%	7.5%	8.3%	3.6%	8.0%	6.4%	3.3%
Religious/spiritual purpose	4.2%	3.4%	9.4%	12.9%	5.1%	6.7%	6.4%	3.6%

Note: Red colour represents experiences that are among the top five for a segment in 2026. Green colour represents experiences that are among the top five in 1999 and blue colour represents those experiences that are among the top five in both years.