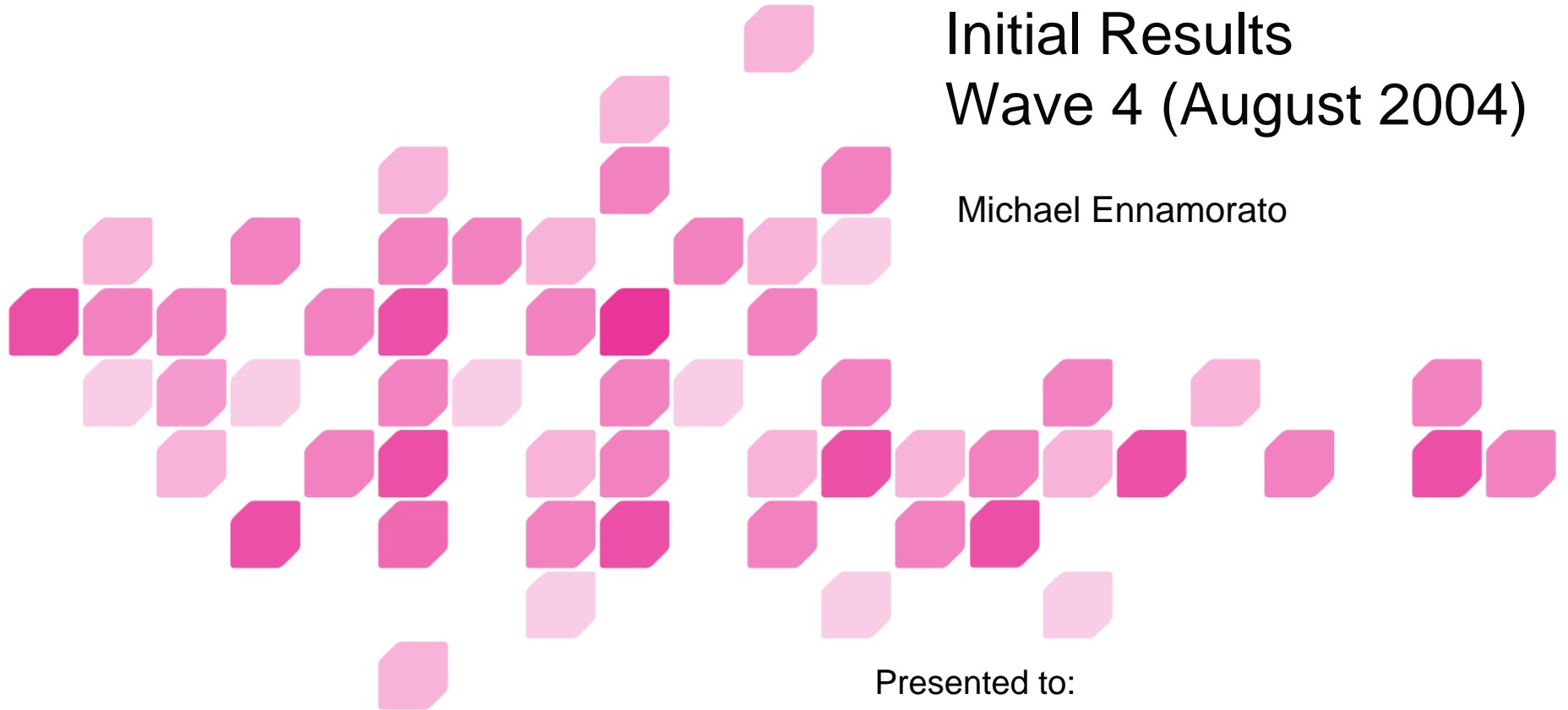


Travel Intentions Study Initial Results Wave 4 (August 2004)

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Travel Intentions - August Topline Summary

- With the August results, we see the normal slide in travel intentions that one would expect going into the Fall season, but a number of observations can be made when Fall intentions are compared August versus May.
 - It would appear that in some of the near US markets, particularly those within close proximity of the Niagara region, there is a somewhat greater appetite for Fall travel to Ontario as we approach the season itself.
 - This observation does not hold for the more distant markets however, and we see some slippage in Chicago and Pittsburgh.
 - Among Canadians, it would appear that Fall travel intentions have seen some improvement in Quebec City and, to a lesser degree, Ottawa and Toronto.

Travel Intentions - August Topline Summary (cont'd)

- Although the figures do not appear on these charts, travel intentions for the following Winter season appear to be quite constrained in both Canada and the US, with very low incidence levels noted. (By this, we mean low in the absolute and in relation to Winter intentions reported in November of 2003.)
- These patterns of response suggest a number of possibilities.
 - There is some pent up demand for travel to, or within, Ontario among those most familiar with the region (residents and Americans in the Niagara Frontier). This follows a fairly poor Summer travel environment, at least for Ontario (reduced SARS effects, but poor weather, and a tendency for more Americans to question travelling outside the country).

Travel Intentions - August Topline Summary (cont'd)

- The low intention levels reported for the Winter suggest that potential travellers are not going to commit themselves early in today's environment, particularly when considering off-peak seasonal travel. This is consistent with growth in the tendency to make travel plans close to the departure date.

Ontario Travel Intention Incidence By US Market

Percent Of Adults In Each Case Stating...
Intend To Travel To/Within Ontario

		As Of Nov. '03	As of Feb. '04	As Of May '04	As of Aug. '04
		During Dec/Feb	During Mar/May	During June/Aug	During Sept/Nov
Buffalo	%	25	29	35	23
Rochester	%	22	23	36	22
Syracuse	%	10	17	22	16
New York City	%	6	9	12	10
Pittsburgh	%	8	8	9	13
Detroit	%	15	20	23	18
Cleveland	%	6	18	18	3
Boston	%	2	3	6	4
Washington DC	%	2	9	6	6
Cincinnati	%	2	6	7	3
Milwaukee	%	3	3	3	4
Indianapolis	%	2	6	4	2
Chicago	%	3	2	6	11
Philadelphia	%	5	9	11	5
Minneapolis	%	2	5	5	2

Ontario Travel Intention Incidence By Canadian Market

Percent Of Adults In Each Case Stating...
Intend To Travel To/Within Ontario

	<u>As Of Nov. '03</u>	<u>As Of Feb. '04</u>	<u>As Of May '04</u>	<u>As of Aug. '04</u>
	<u>During Dec/Feb</u>	<u>During Mar/May</u>	<u>During June/Aug</u>	<u>During Sept/Nov</u>
Quebec City	12	9	12	14
Montreal	14	18	22	13
Ottawa	33	44	46	43
Toronto	29	28	43	29
Winnipeg	11	17	29	20



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