

# Travel Intentions Study Report Wave 4 (August 2004)

Michael Ennamorato And  
John Mohler

Presented to:

Ontario Ministry Of Tourism And Recreation

September 24, 2004

# Background

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- This study is intended to measure intent to travel to Ontario and specific Ontario destinations within key US and domestic markets.
- Information will be used to:
  - forecast demand to assist with industry planning;
  - gauge the impact of negative events on travel to Ontario;
  - provide information to assist with messaging and targeting of promotional communications and other marketing initiatives.
- This presentation focuses on findings in two key areas:
  - understanding the factors placing pressure on Fall travel to Ontario in the main US source markets;
  - measuring the travel dynamic in the domestic market.

# Methodology

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- Interviewing was conducted by telephone among individuals 18 years or older.
- The survey for this fourth wave was essentially confined to the month of August, 2004. This follows waves conducted in May and February 2004, and in November of last year.
- The focus was on travel intentions for the coming season (September/November) and, secondarily the following season (December 2004/February 2005).
- A stringent methodology was used:
  - modified random digit dialing using a seed sample drawn from up-to-date telephone listings;
  - Multiple callbacks (up to 8 calls to achieve a completion once contact is made with the household);
  - One additional callback to “soft” refusals.

# Methodology (Cont'd)

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- The Trodahl-Carder methodology was used to select a single age-eligible respondent to interview in each household.
- The sample was assigned disproportionately by market as follows:

	<u>Assigned</u>	<u>Achieved In Wave 4</u>
<b>Canada:</b>		
Toronto CMA	400	399
Ottawa CMA	200	202
Hamilton CMA	80	75
Ontario 100 – 499M	180	191
Ontario 30 – 99M	80	78
Ontario 10 – 29M	60	60
Ontario under 10M	100	95
Montreal CMA	300	310
Quebec City CMA	200	199
Winnipeg CMA	300	302

# Methodology (Cont'd)

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	<u>Assigned</u>	<u>Achieved In Wave 4</u>
<b>United States:</b>		
Rochester MSA	300	300
Buffalo — Niagara Falls MSA	300	292
Syracuse MSA	200	203
New York City PMSA	181	172
Nassau — Suffolk PMSA	43	38
Other NY State	67	66
Chicago PMSA	230	237
Other Illinois	70	68
Indianapolis MSA	90	90
Other Indiana	55	58
Boston NECMA	150	152
Mass. Ex-Boston	31	26

# Methodology (Cont'd)

	<u>Assigned</u>	<u>Achieved In Wave 4</u>
<b>United States: (Cont'd)</b>		
Detroit PMSA	300	289
Northern Michigan PMSAs/MSAs	84	85
Other Michigan	64	68
Minneapolis—St. Paul UA	200	204
Other Minnesota	41	37
Cleveland—Lorain—Elyria PMSA	200	204
Cincinnati PMSA	100	103
Columbus MSA	104	103
Other Ohio	60	62
Pittsburgh MSA	300	306
Philadelphia PMSA	150	145
Other Pennsylvania	77	78
Milwaukee—Waukesha PMSA	200	190
Other Wisconsin	67	72
Washington DC PMSA	100	101
Maryland Ex. Washington DC	118	116

# Methodology (Cont'd)

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- In total, 5,776 interviews were completed:
  - 1,911 in Canada;
  - 3,865 in the United States.
- As part of data processing, the sample was weighted in three stages using the most recently available census information from each country:
  - household size within market;
  - household conversion weight (to correct for differential selection probabilities within household due to variations in number of age-qualified individuals within each);
  - age within gender within market.

# Presentation outline

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- The U.S.
  - Travel Interest
  - Impediments To Travel
  - Destination Perceptions
- Canada
  - Travel Interest
  - Impediments To Travel
  - Destination Perceptions
- Ideal Destination

# Key Findings — U.S.

# Key Findings — U.S.

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- Compared with the previous three waves of research, subtle shifts in key measures for Wave Four indicate a degree of stability with regard to American travel patterns.
  - A slight lift in travel intentions for the coming year is coupled with a comparable dip in the tendency to take fewer and shorter overnight trips.
- Any hints of optimism with regard to increased travel activity, however, are tempered by signs that Americans remain cautious when planning trips.
  - The pattern of making travel plans closer to the departure date is somewhat dynamic from wave to wave, and Wave Four suggests a rise in this trend.
  - Roughly 50% of longer trips and 75% of shorter trips are booked within one month of the departure date.

## Key Findings — U.S. (Cont'd)

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- Relative to other locations, and compared with previous waves, Americans' travel intentions to Canada are favourable for the coming months. In fact, they are higher than were reported for any of the previous waves.
- The pattern for Ontario, however, does not mirror the trend in intentions to other Canadian destinations.
  - Intentions for Toronto and Niagara Falls are in-line with intentions for the previous spring season (March/May).
  - Intentions for 'Elsewhere In Ontario' are at levels as low as reported for any of the previous three waves.

## Key Findings — U.S. (Cont'd)

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- Certainly there is a seasonal effect at work here, and there is some sense that the fall travel intentions expressed last May with regard to Ontario are holding up fairly well in most major US markets.
  - This is particularly true in those in the Niagara Frontier, closest to Ontario's main destinations.
- When considering the American markets as a whole, one could say that there is pent up demand for out-of-country travel, but a “cocooning” effect is still in place.
- This acts as a drag on foreign travel and possibly has a greater negative impact on the nearest Canadian destinations (Ontario) than on those that are more distant, or “exotic”.

# Key Findings — U.S. (Cont'd)

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- Looking forward to the winter season, evidence suggests that intentions are constrained.
  - This suggests that US travellers are not going to commit themselves early in today's environment, particularly when considering off-peak seasonal travel.
- When considering specific Ontario destinations, a general lack of interest inhibits travel to Toronto, and to a lesser degree Niagara Falls and other Ontario destinations.
  - Travel to Niagara Falls is also limited by perceptions of 'been there done that'.
  - A general lack of awareness limits travel to Ontario destinations other than Toronto and Niagara Falls.

## Key Findings — U.S. (Cont'd)

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- The reported impact of specific, monitored issues and events, including SARS, is decreasing.
- Issues broadly related to perceptions of terrorist activity and the associated political climate, however, do not show signs of diminishing and negatively impact travel intentions to Ontario.

## Key Findings — U.S. (Cont'd)

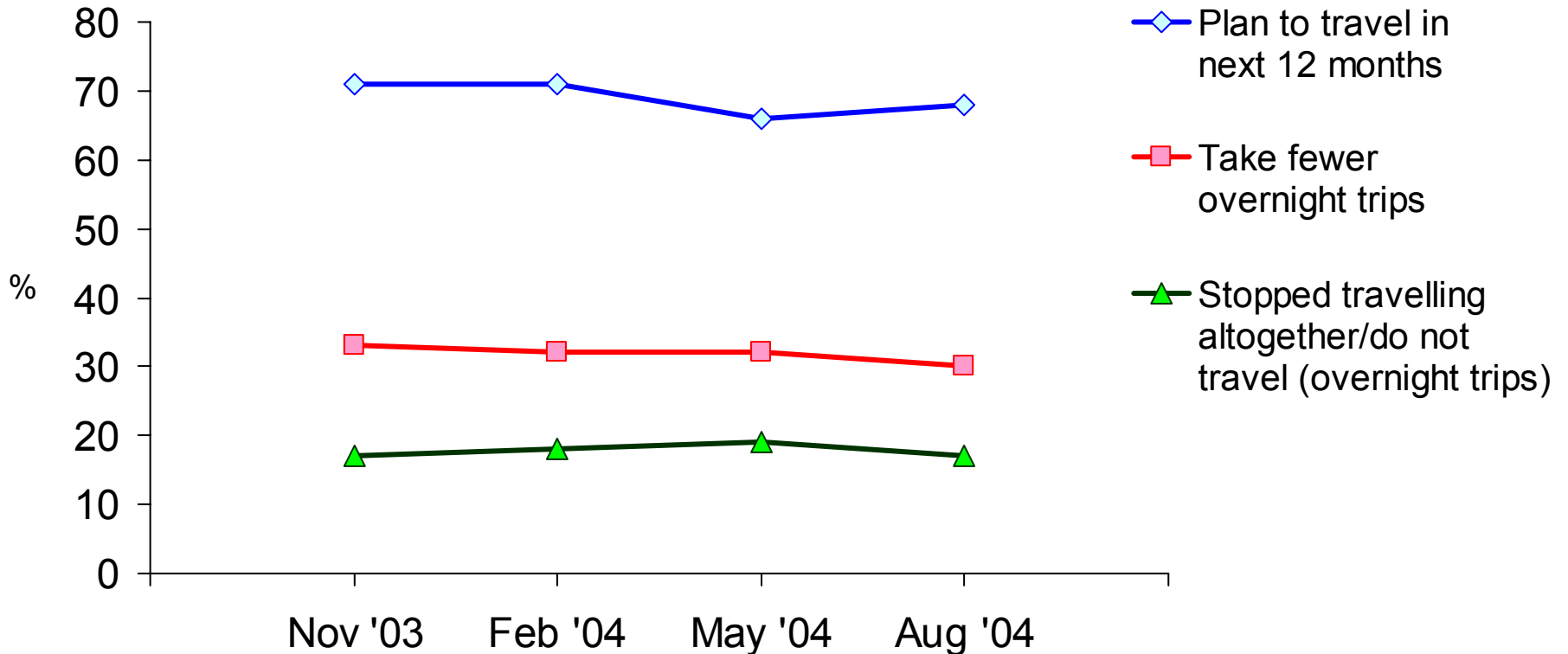
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- Through four waves of research, Ontario destinations have maintained consistent overall ratings as travel destinations, at the 7.5 out of 10 level.
- Ratings for specific characteristics have also held moderate levels wave over wave.
- It should be noted though, that no single characteristic stands out as exceptionally strong.
- Beyond that, Ontario's positive image does not directly translate into positive perceptions as a travel destination.
  - Perhaps a nice place to visit occasionally, and safe relative to other "foreign" alternatives...but not particularly exciting or alluring relative to other options (even within the US).

# Propensity To Travel & Trip Planning

# Trend in general travel intentions and propensity to travel

Percent of Americans

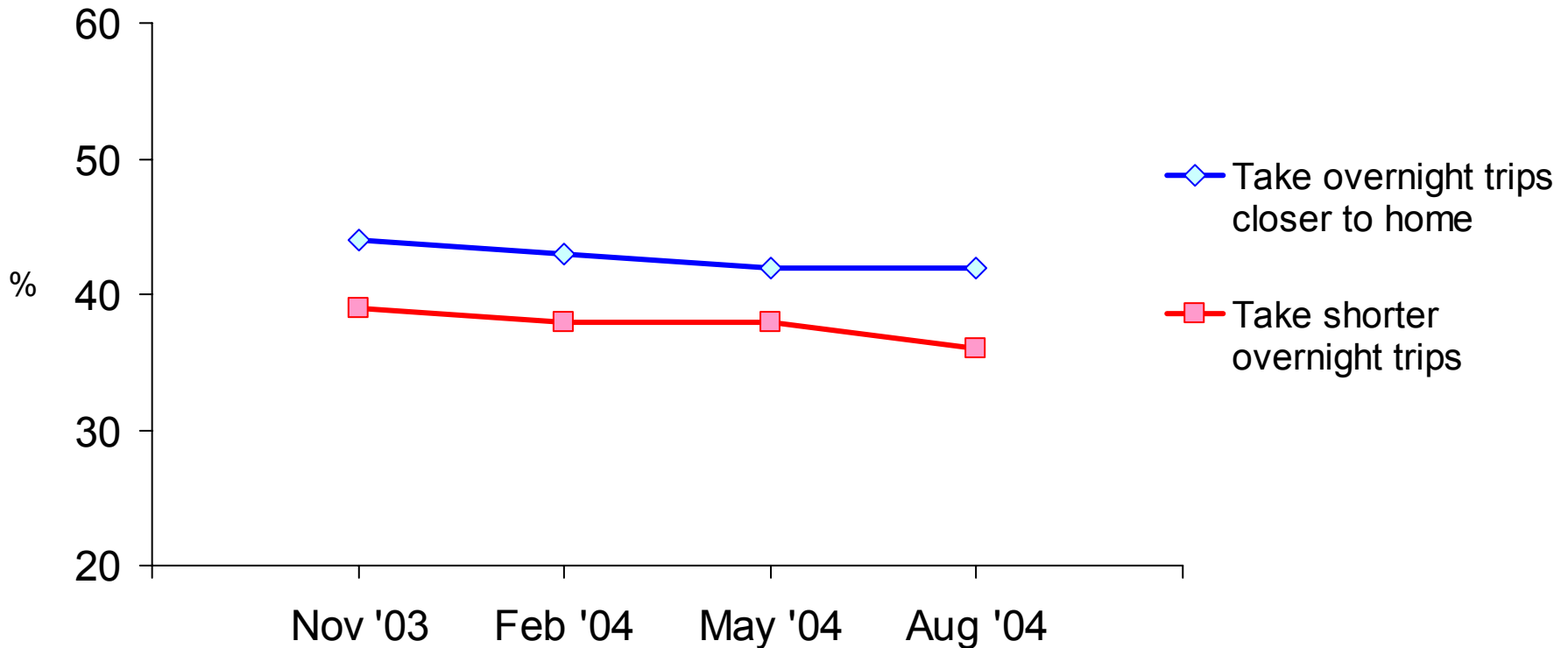


Q. Are you considering taking an out-of-town trip of one or more nights away from home in the next 12 months?

Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in duration and distance of overnight trips

Percent of American travellers\*

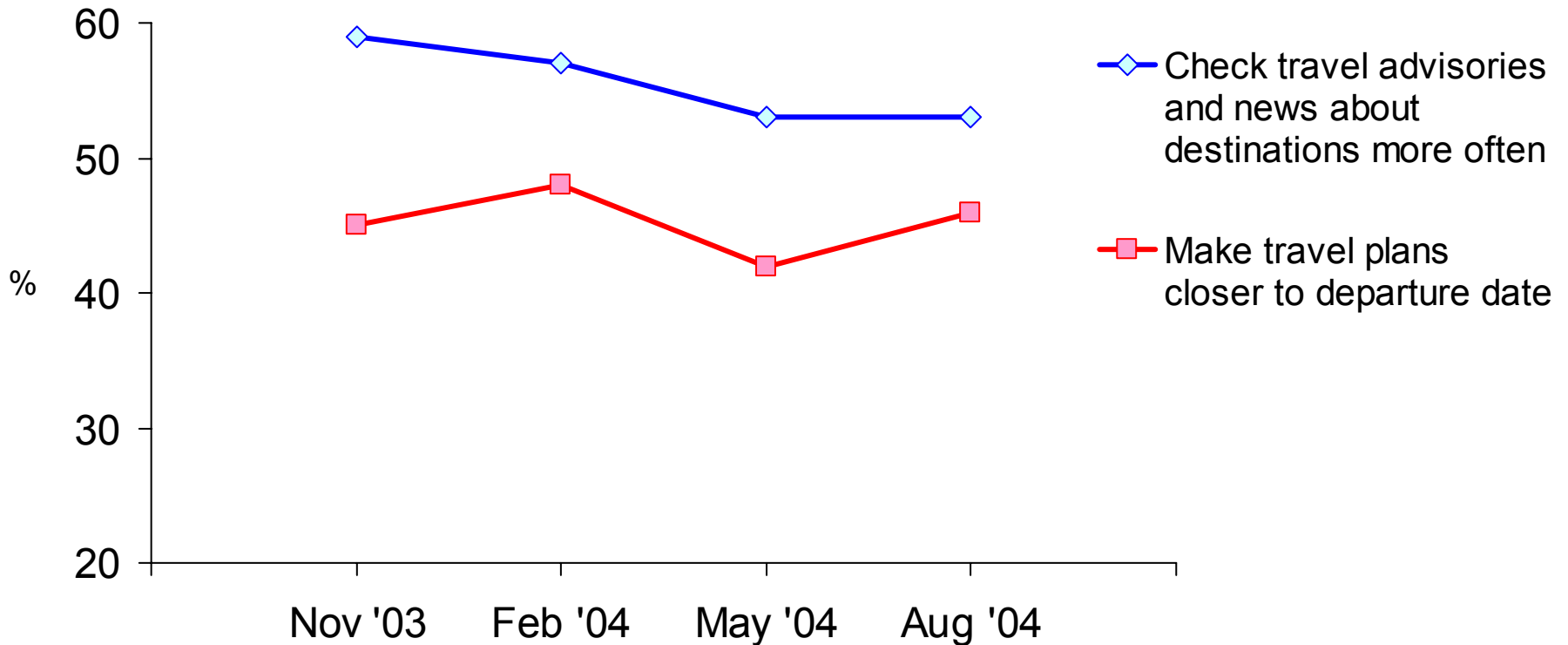


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in overnight trip planning

Percent of American travellers\*



\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

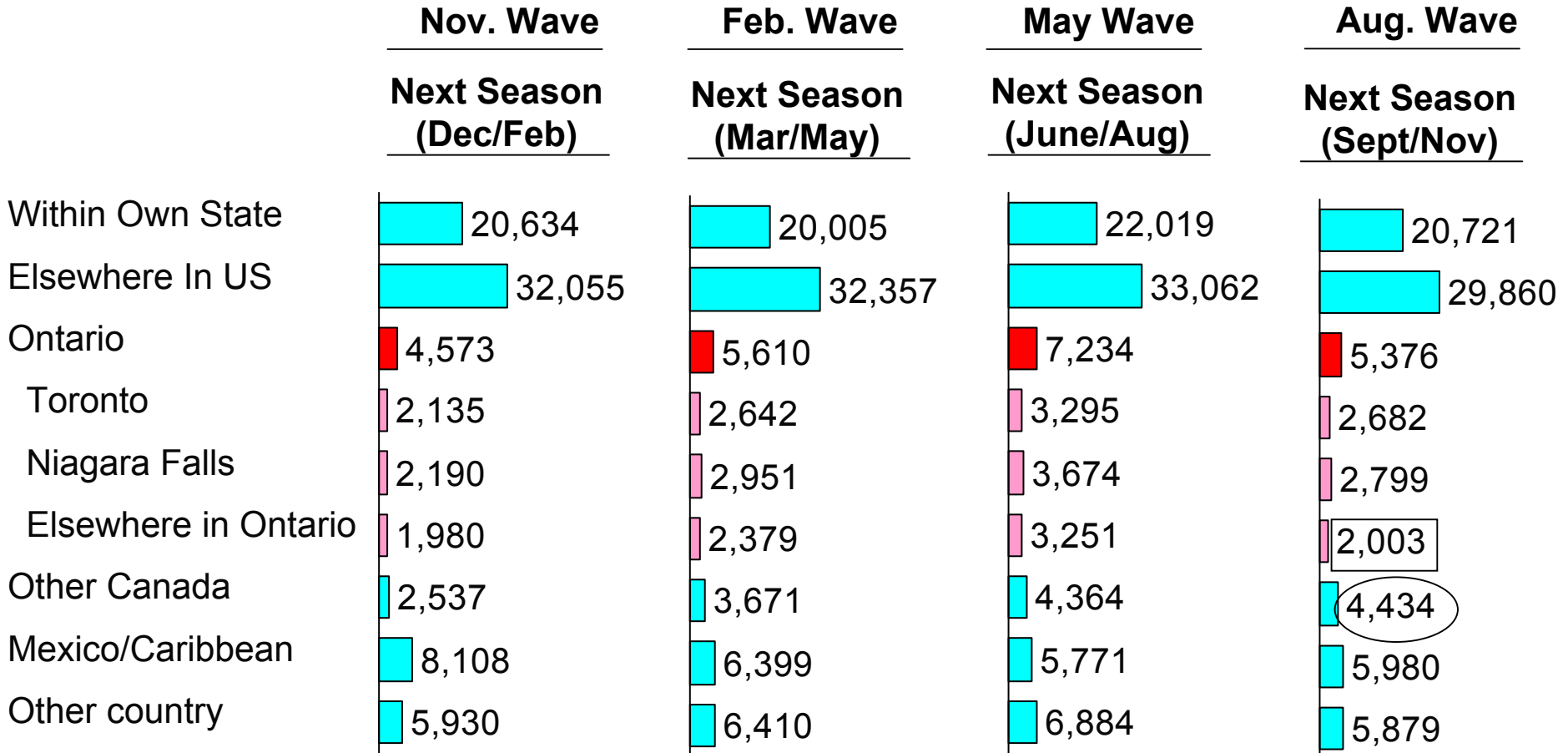
Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Travel Intention Details

# Intended travel patterns of US residents

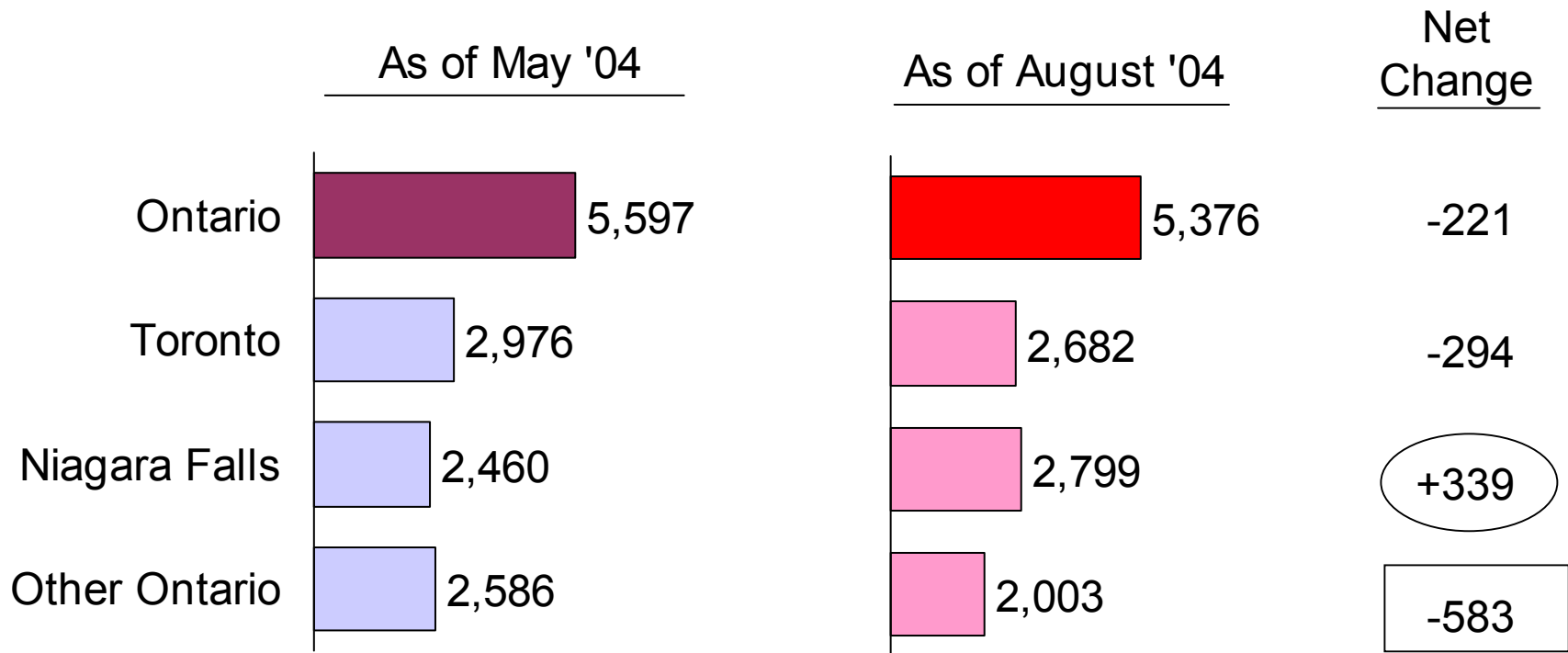
Number of adults claiming will take overnight trip (thousands)

— not seasonally adjusted



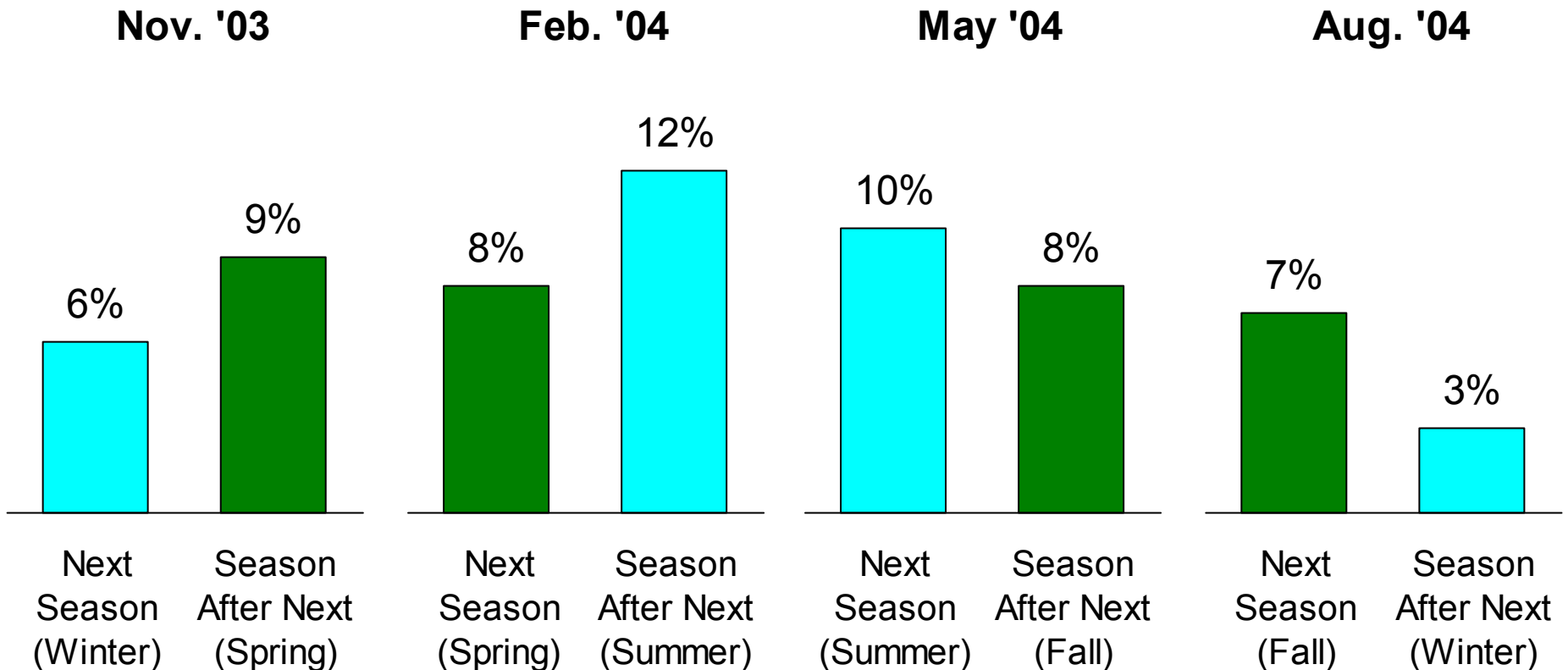
# Travel intentions for Fall '04 (Sept/Nov)

Projected number of Americans intending to travel to each destination (in thousands)



# Ontario travel intention incidence

Percent of American adults stating intend to travel to Ontario as of....



# Ontario travel intention incidence by US market (selected cities)

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

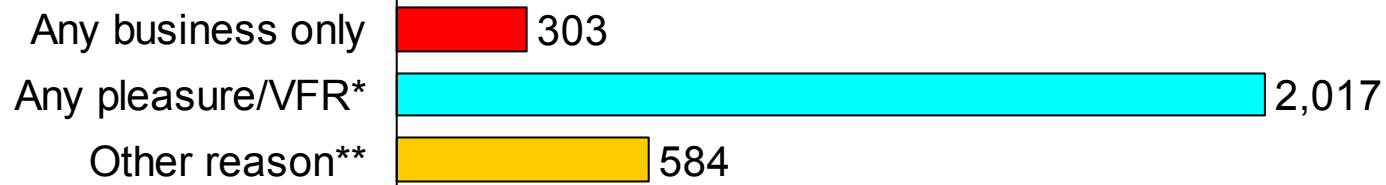
		As Of Feb. '04		As Of May '04		As Of Aug. '04	
		During Mar/May	During June/Aug	During June/Aug	During Sept/Nov	During Sept/Nov	During Dec/Feb
Buffalo	%	29	36	35	23	27	14
Rochester	%	23	37	36	22	30	11
Syracuse	%	17	26	22	16	18	7
New York City	%	9	14	12	10	8	1
Pittsburgh	%	8	18	9	13	7	3
Detroit	%	20	27	23	18	16	5
Cleveland	%	18	26	18	3	12	4
Boston	%	3	9	6	4	6	2
Washington DC	%	9	10	6	6	8	2
Cincinnati	%	6	14	7	3	5	1
Milwaukee	%	3	6	3	4	1	1
Indianapolis	%	6	14	4	2	4	2
Chicago	%	2	10	6	11	7	4
Philadelphia	%	9	11	11	5	4	2
Minneapolis	%	5	9	5	2	2	2
<b>TOTAL US</b>	<b>%</b>	<b>8</b>	<b>12</b>	<b>10</b>	<b>8</b>	<b>7</b>	<b>3</b>

# Main purpose of trips planned to Ontario — Sept./Nov. '04

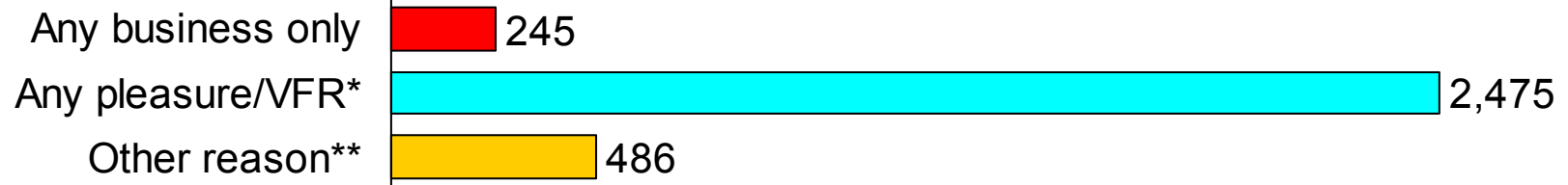
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Projected number of Americans intending  
to travel to each destination as of August '04 (thousands)

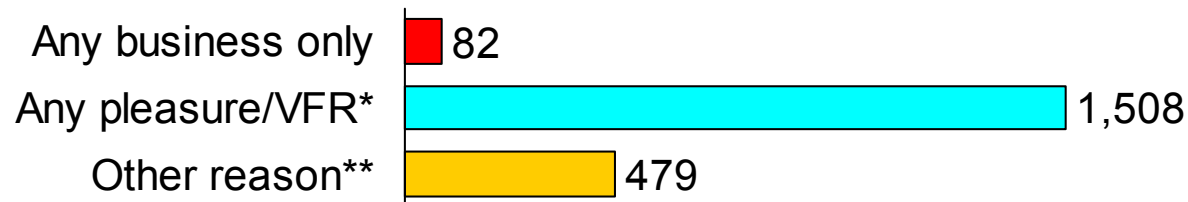
## To Toronto



## To Niagara Falls, Ontario



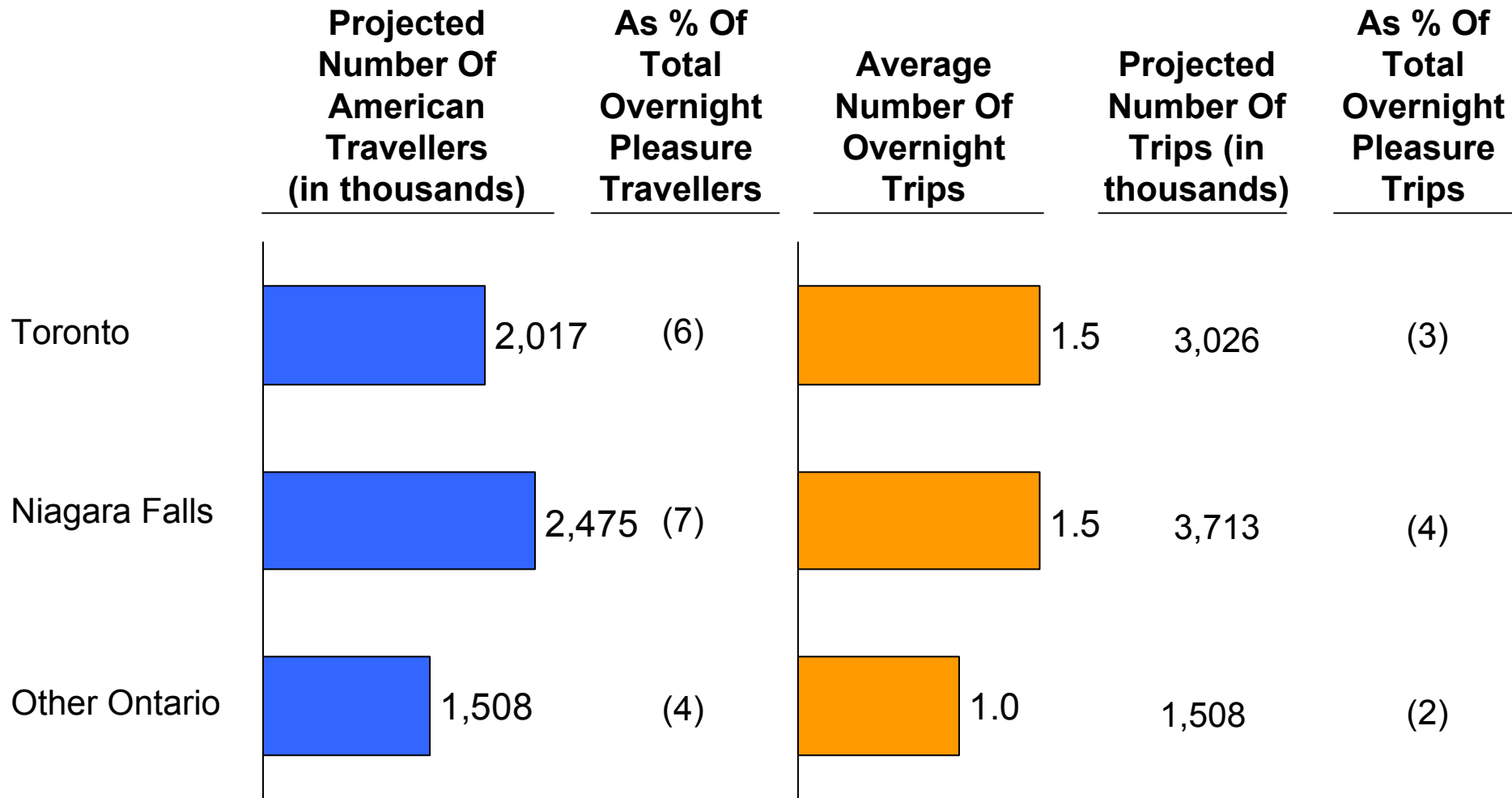
## To Other Destinations In Ontario



\* Excluding cottage/country home.

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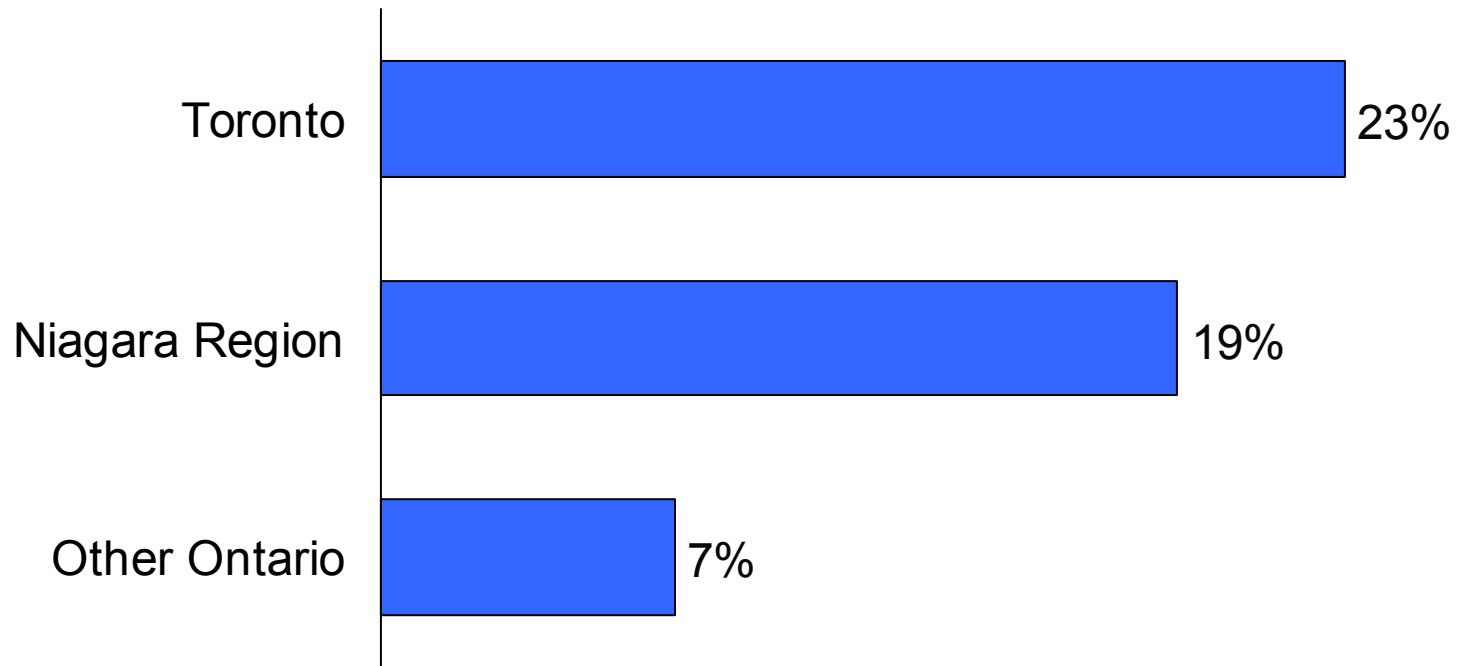
# Pleasure travel intentions for Fall '04 (Sept/Nov) as of August '04



# Pleasure travel booking for Fall '04 (Sept/Nov) as of August '04

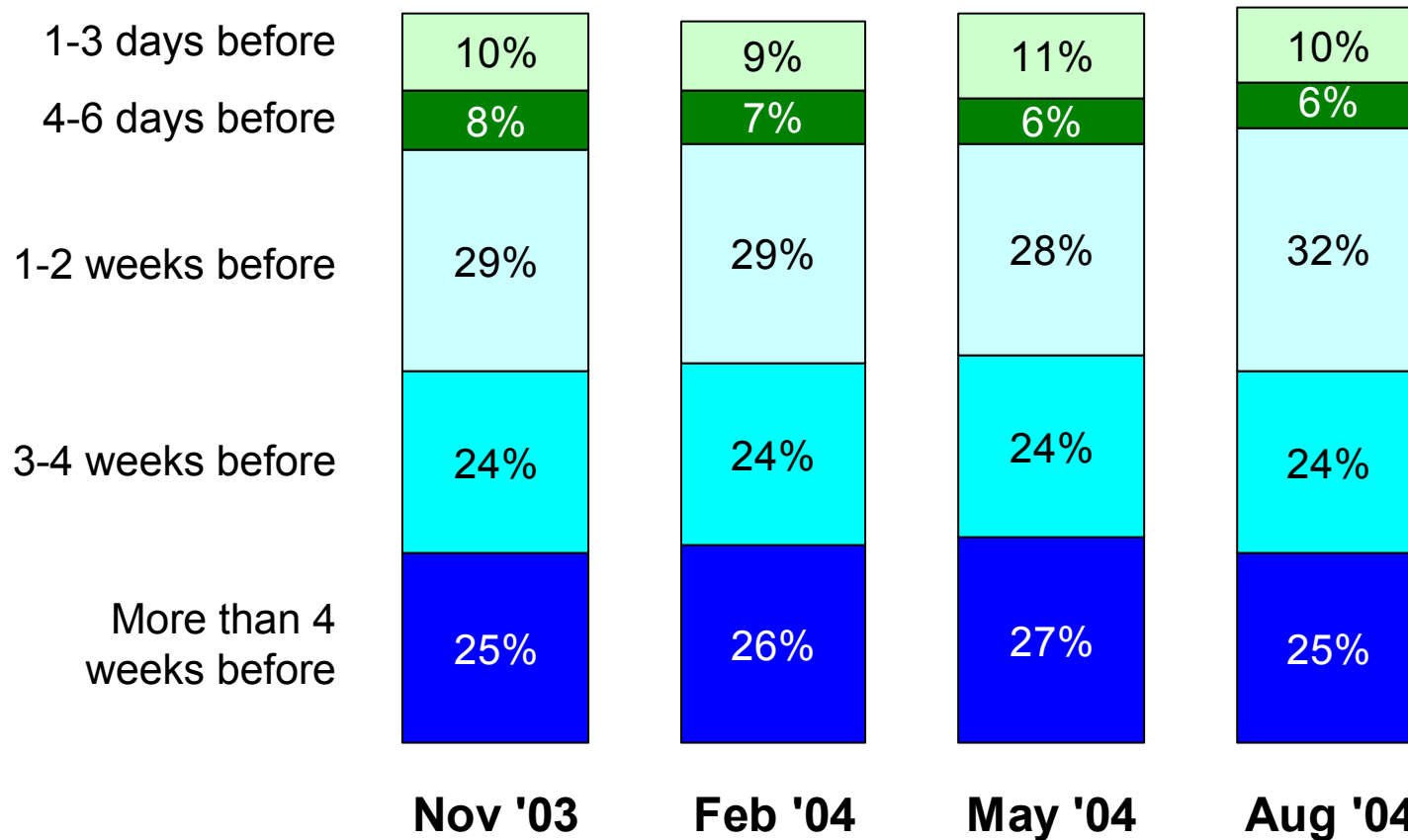
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Percentage of Americans intending to travel to each destination  
who have already booked any aspect of trip



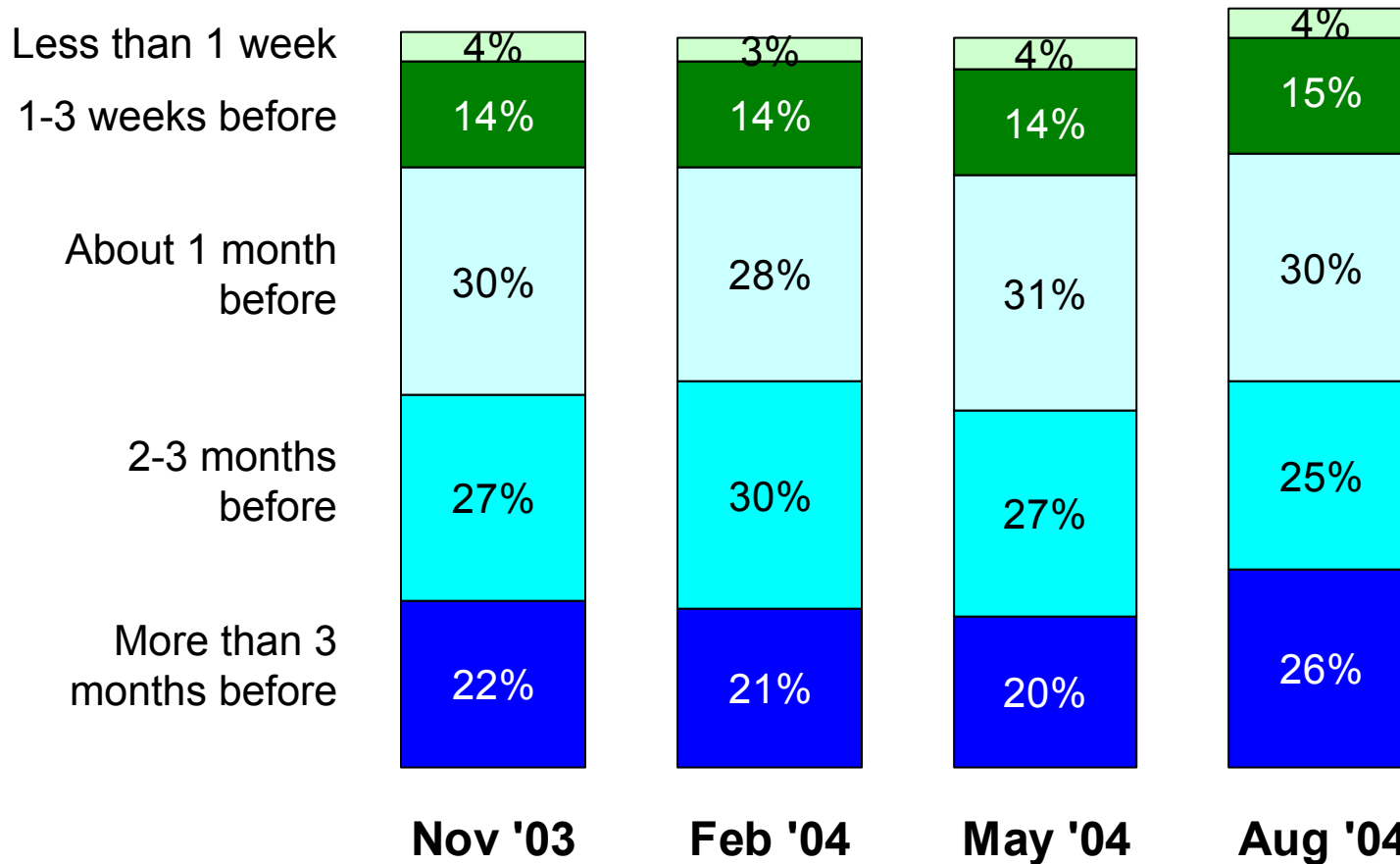
# Planning cycle for overnight trips of short duration — 1 to 3 nights

Percent of Americans who have booked short trips



# Planning cycle for overnight trips of long duration — 4 nights+

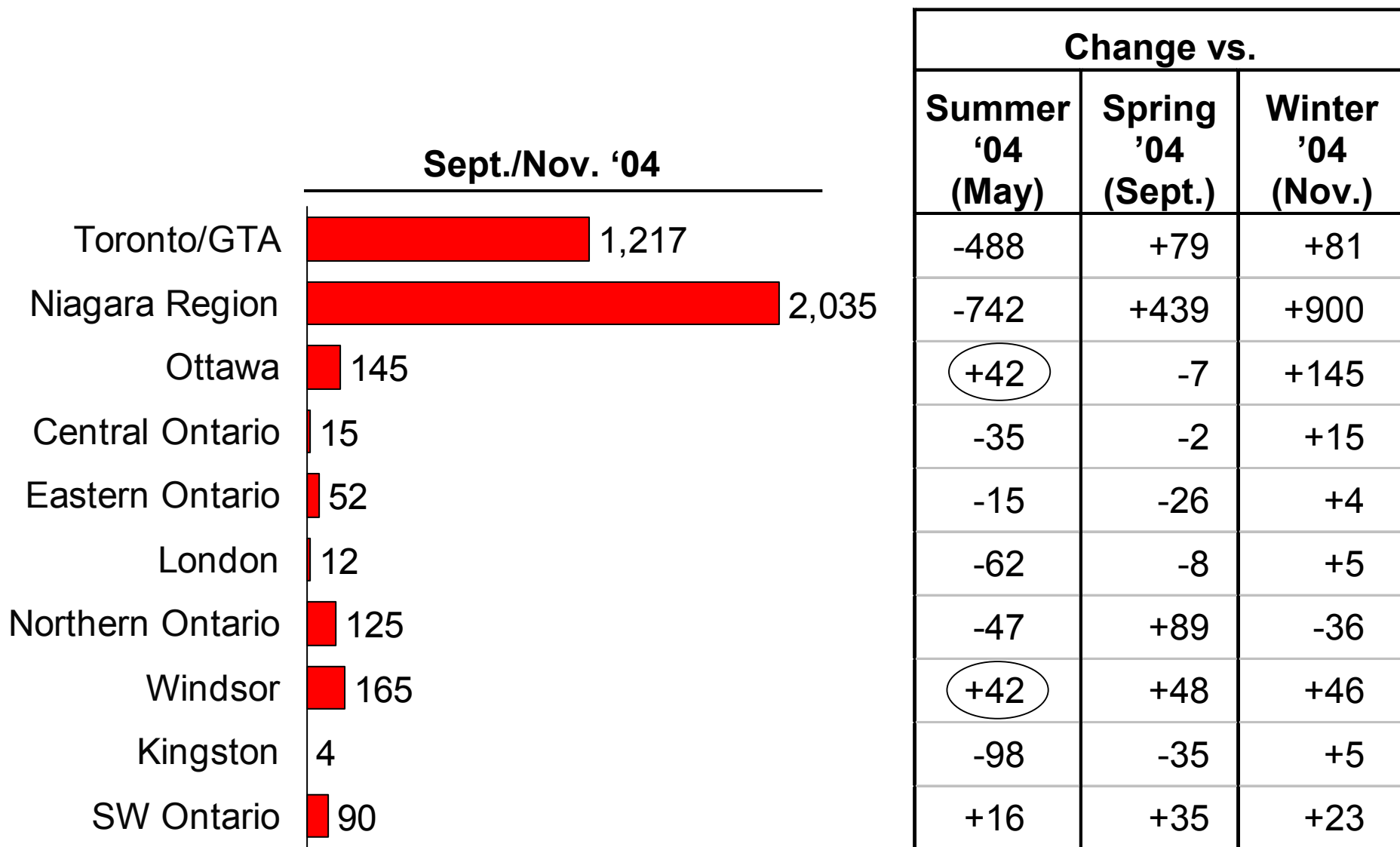
Percent of Americans who have booked long trips



# Intended Ontario Pleasure Travel Among Americans

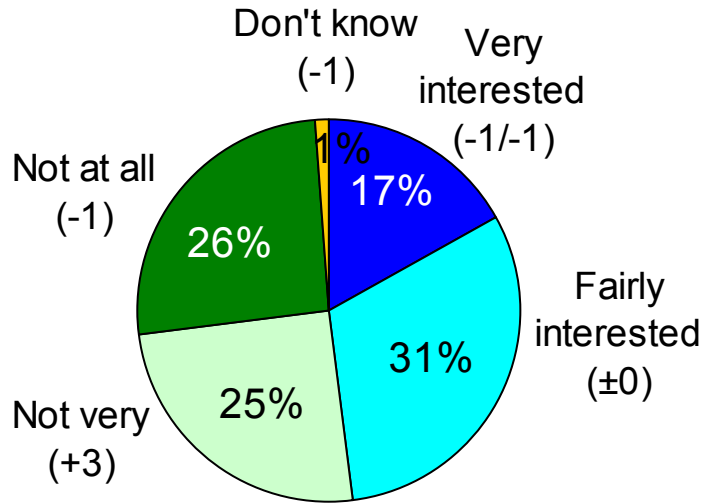
# Destination of next overnight pleasure trip to/within Ontario (as of Aug. '04)

Number of Americans who intend to travel to each destination (thousands)

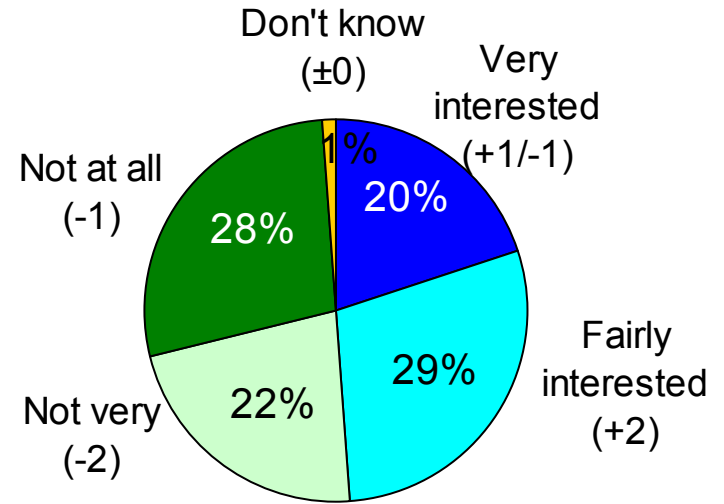


# General interest in travelling to Ontario destinations (within next two years)

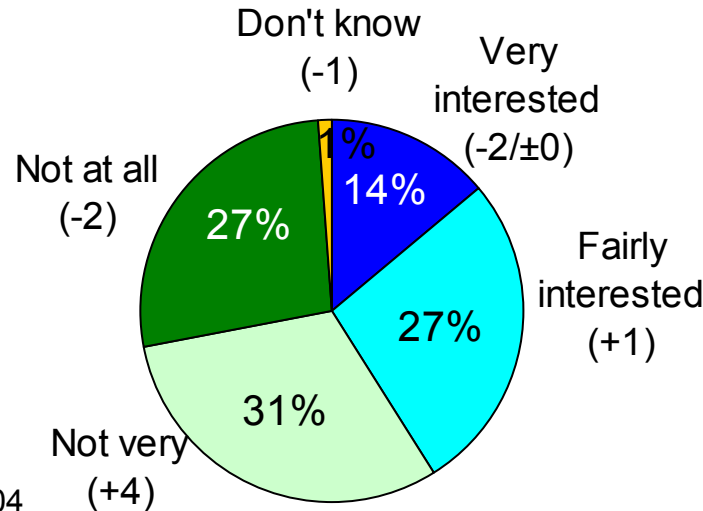
## To Toronto



## To Niagara Falls



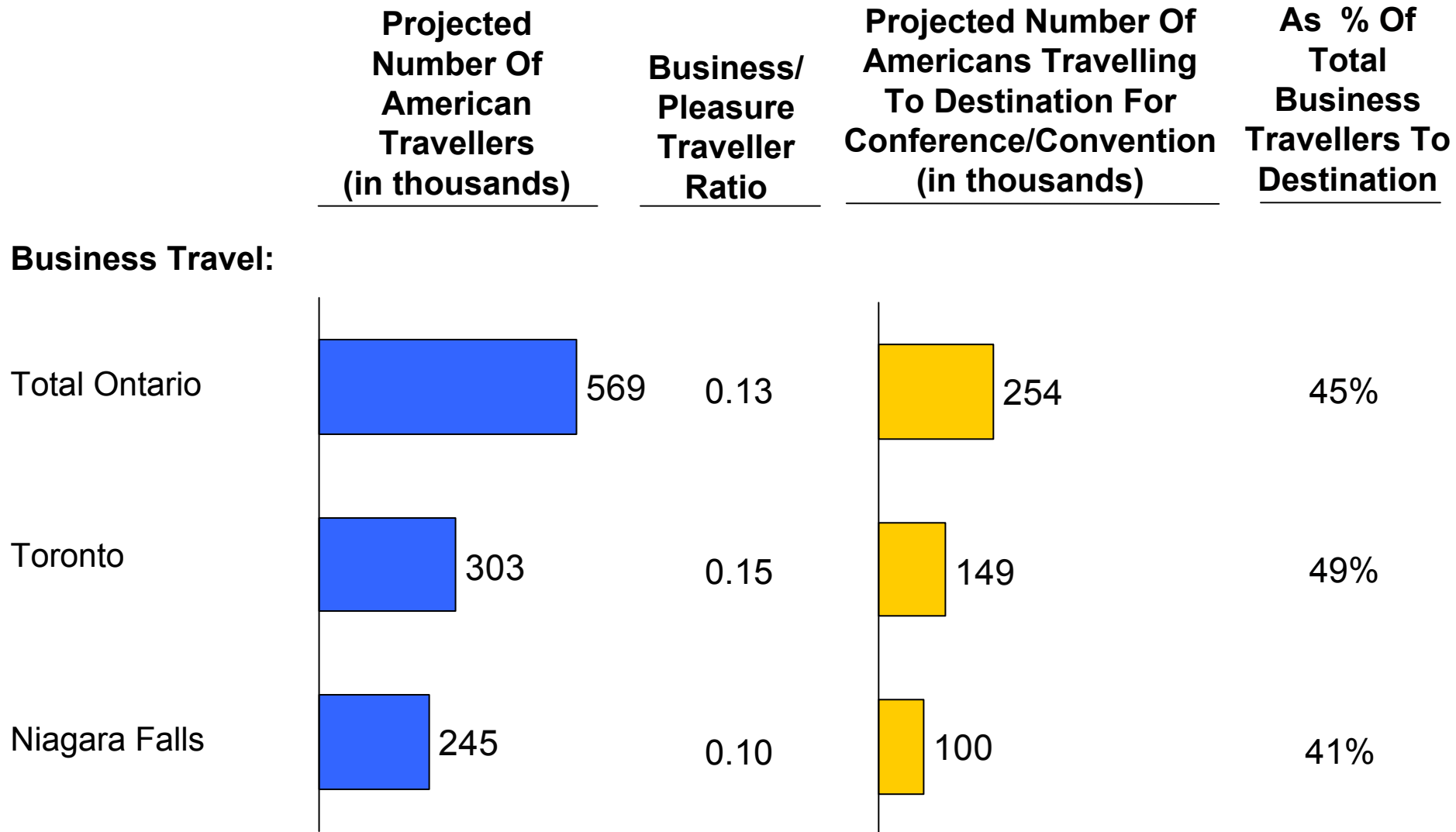
## To Elsewhere In Ontario



( ) Change versus May '04/Feb. '04

# Intended Ontario Business Travel Among Americans

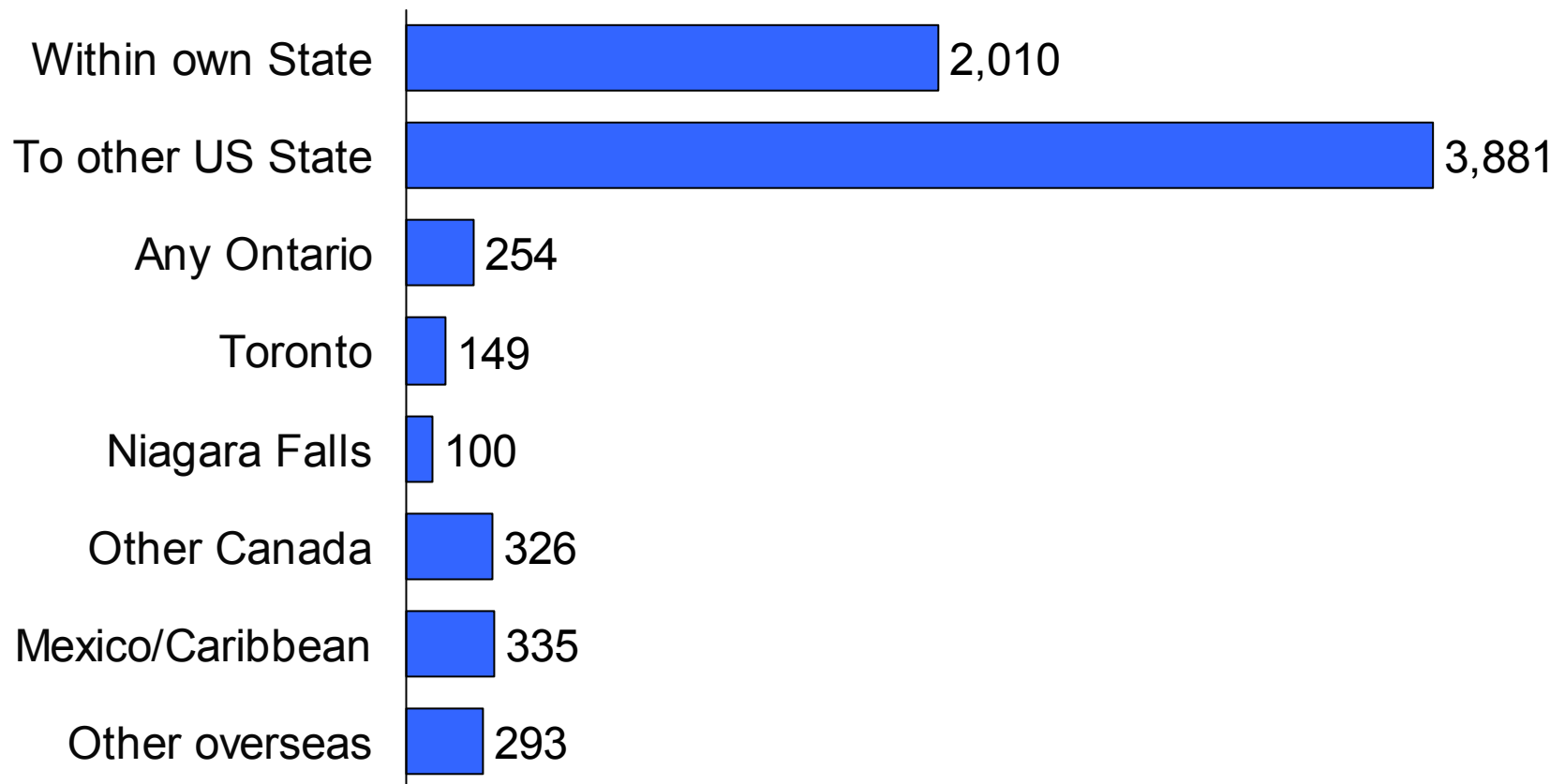
# Nature Of Ontario Business Travel Intentions Sept./Nov.



# The competitive for Business Conferences, Conventions & Trade Show

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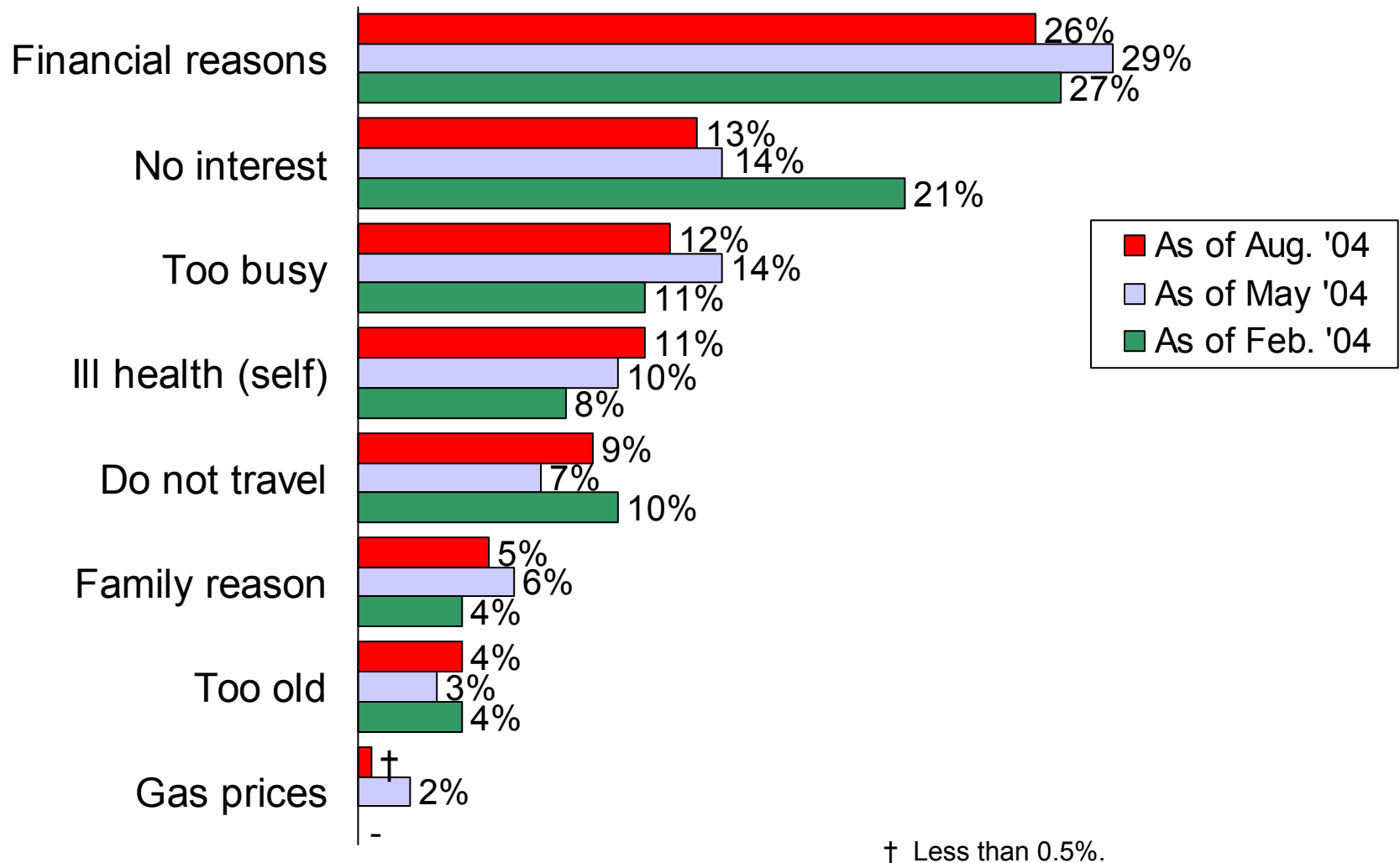
Number of Americans intending to travel to each destination for conference, convention or trade show in Sept./Nov. '04 (in thousands)



# Volunteered Impediments To Travel (as of August '04)

# Expressed reasons for not considering travel for any purpose in next 12 months

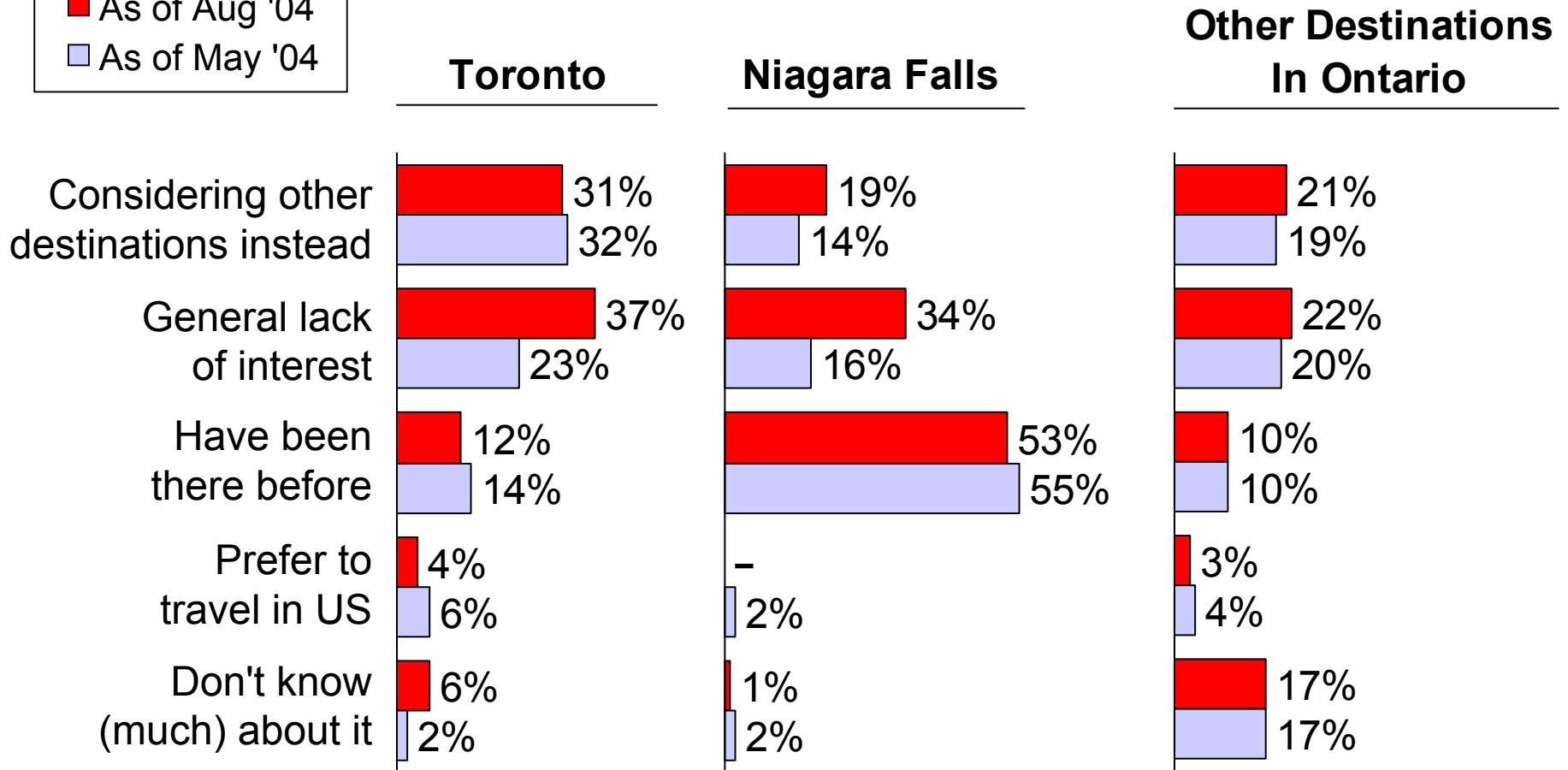
Percent of Americans who do not intend to travel



# Reasons for lack of interest in visiting specific Canadian destinations

Percent of Americans who are “not very/not at all interested” in visiting each destination within the next 2 years and have visited Ontario in the past

■ As of Aug '04  
 ■ As of May '04

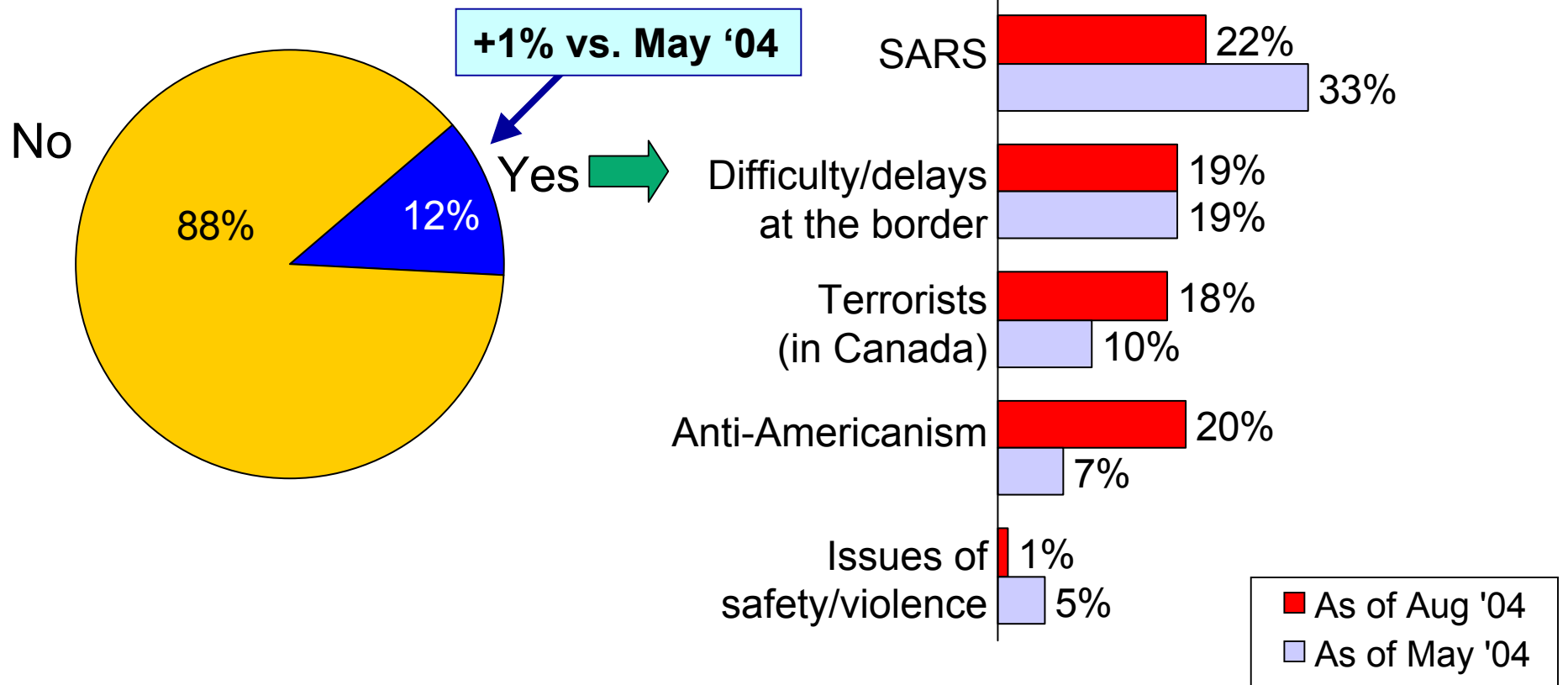


# Are there any specific events or issues that you have heard about that make you less inclined to travel to Toronto, Niagara Falls or other places in Ontario?

Percent of Americans who have ever visited Ontario

**August '04**

**What are these specifically?**

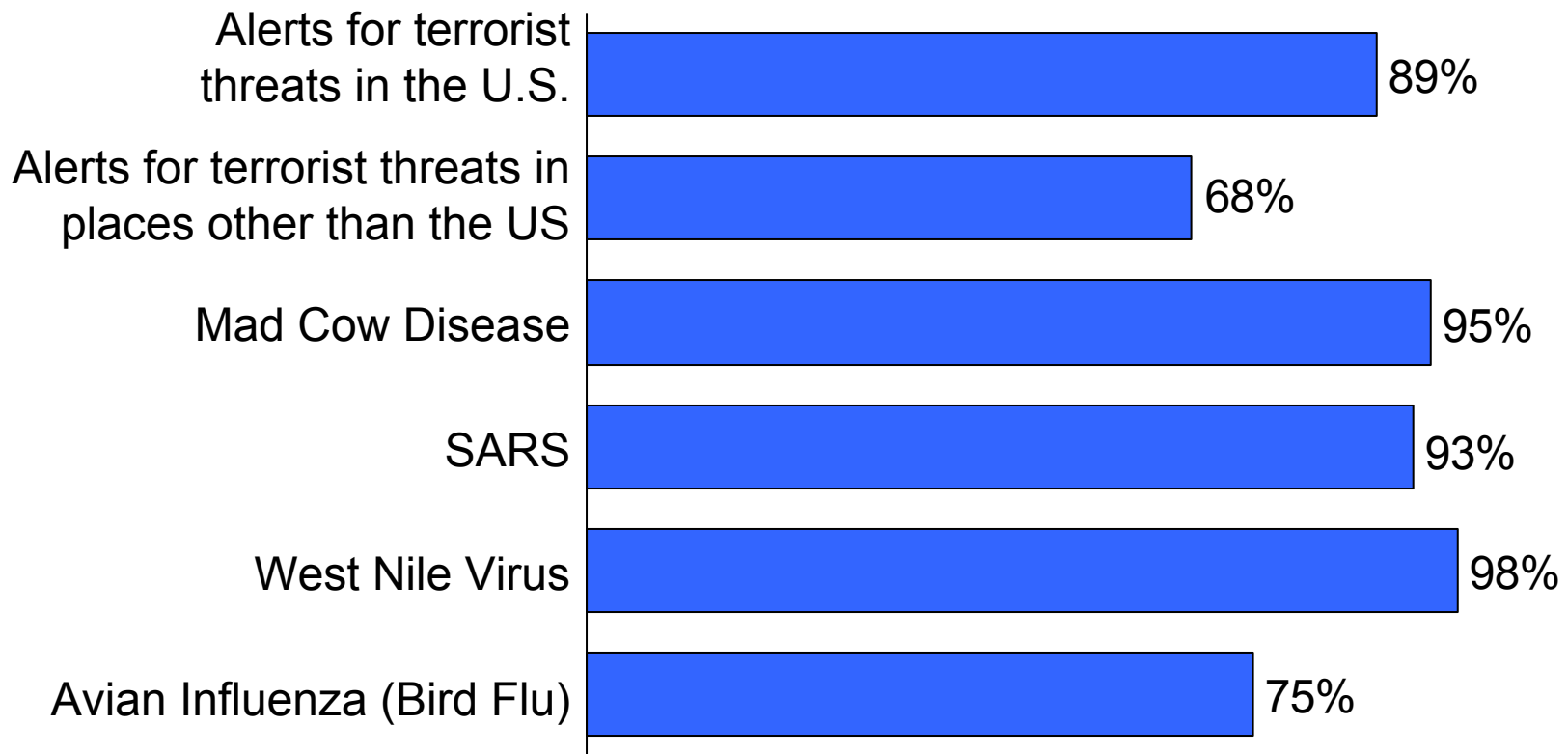


# Prompted Awareness And Response To Specific Negative Events

# Prompted awareness of negative events (as of August '04)

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Percent of American travellers\*



\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

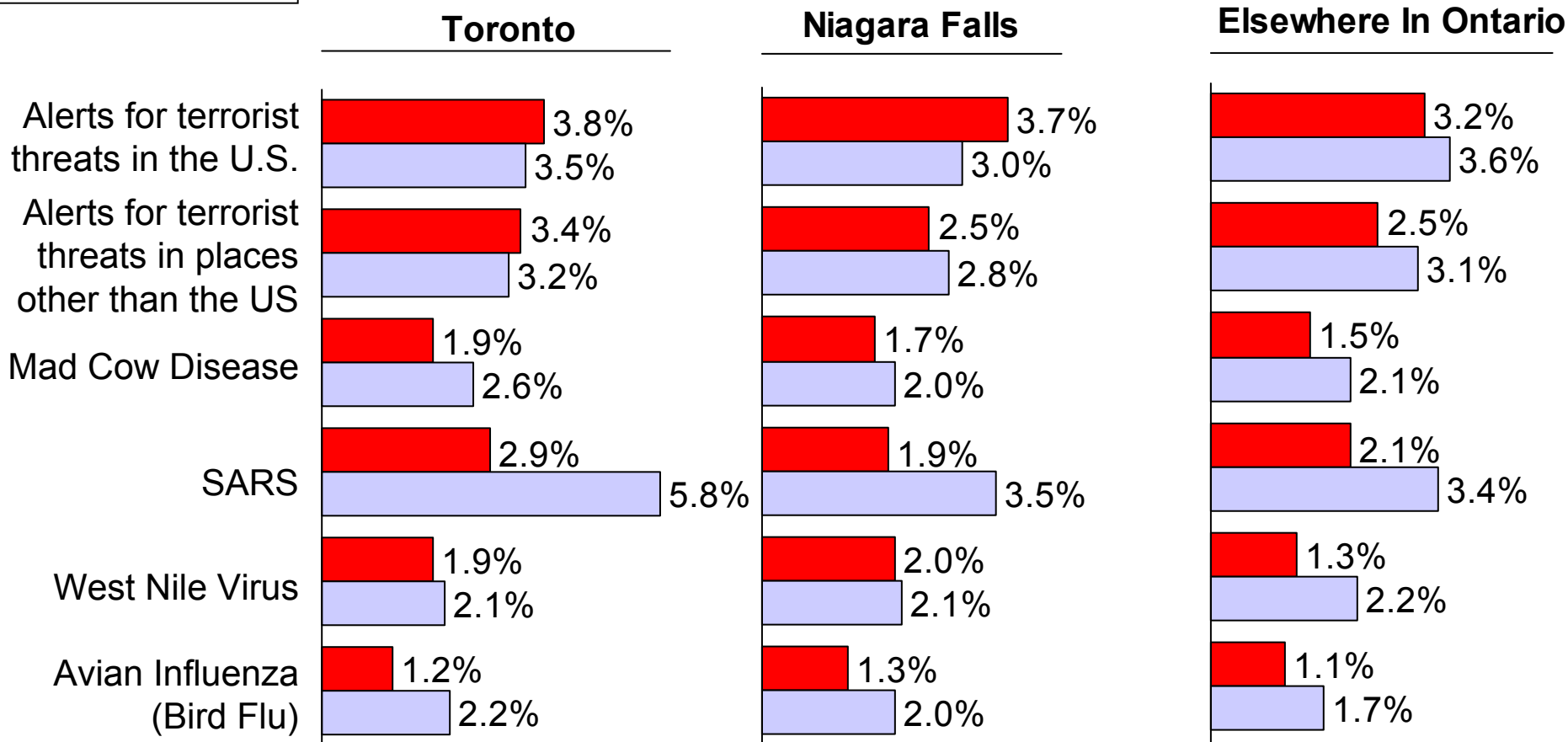
Q. Now I'd like to ask you about some specific events that have taken place in the recent past. Have you heard of... ?

# Impact of negative events on intent to travel to specific destinations during coming season (as of Aug. '04)

Percentage of American travellers\* who are less likely to visit each destination in Sept./Nov. because of .....

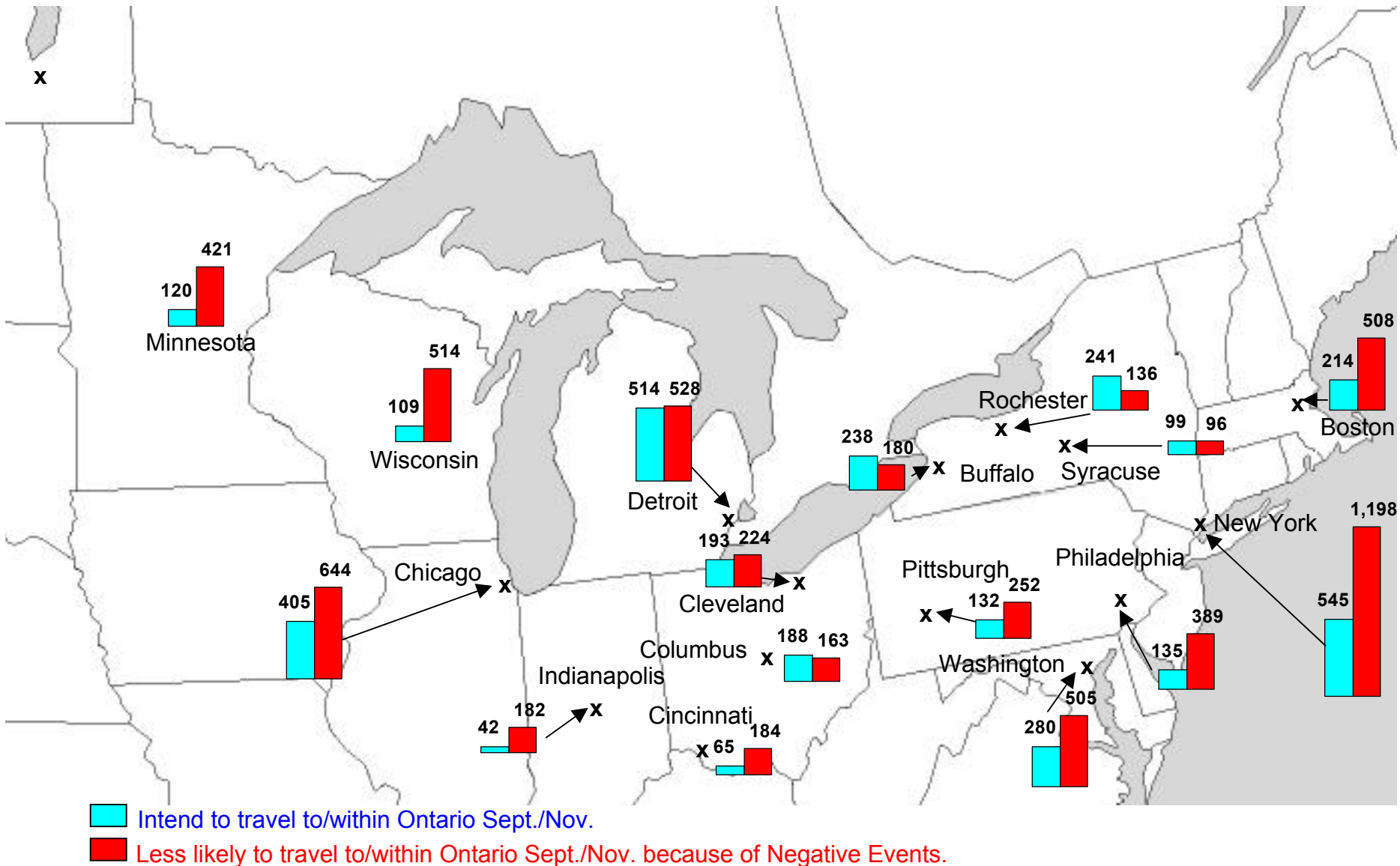
■ As Of Aug '04

■ As of May '04

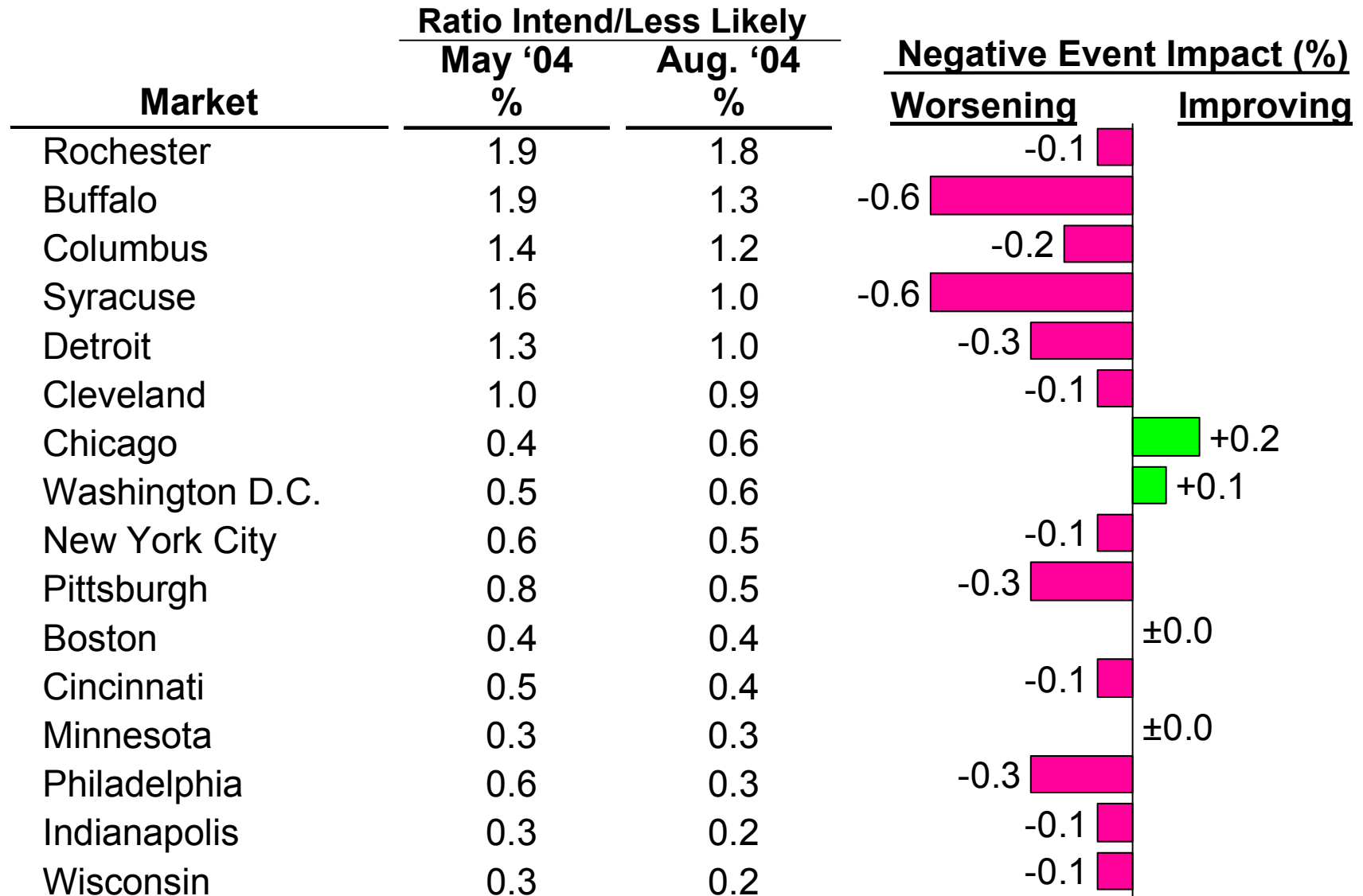


# Geographic Variation In Relationship Between Travel Intentions And Negative Events

# Ontario travel intention volume — Sept./Nov. '04 (thousands)



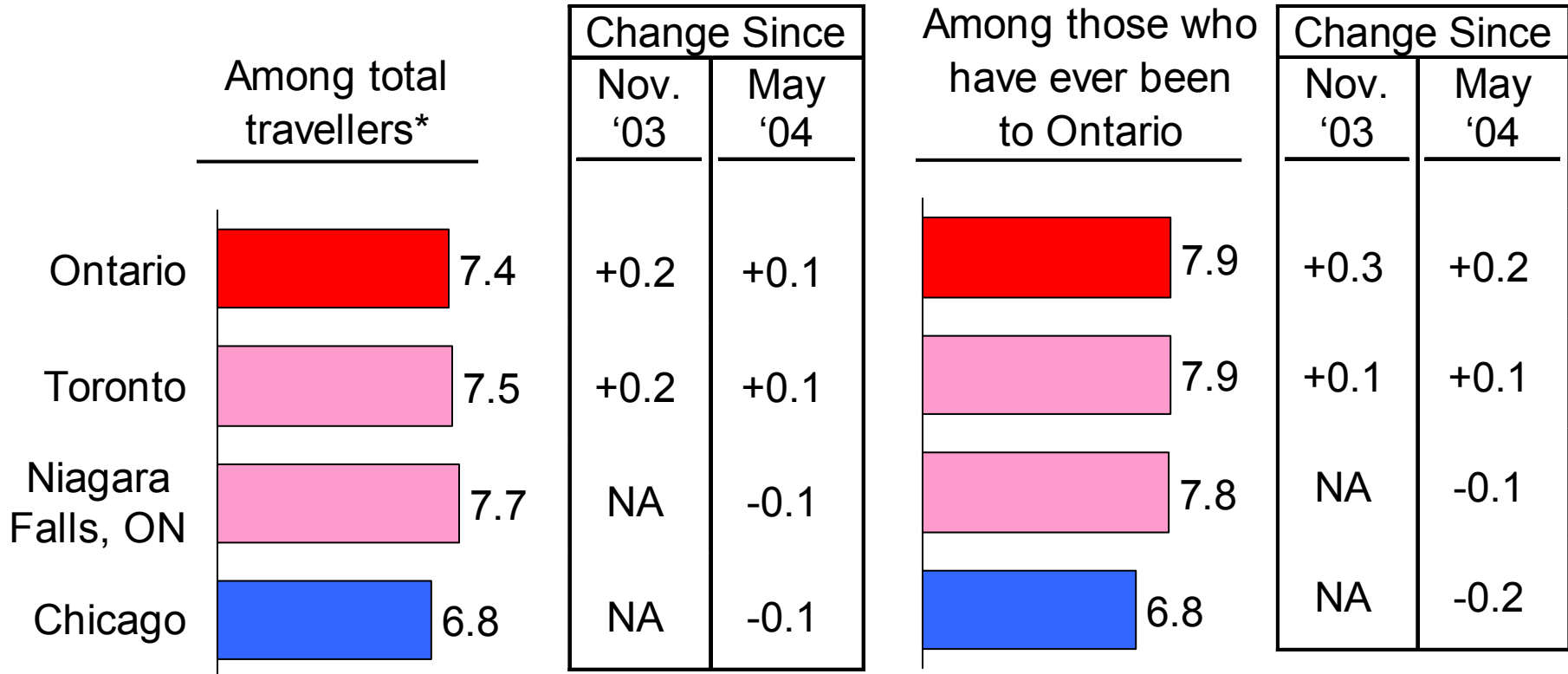
# Negative event impact on Ontario travel relative to intentions



# Destination Perceptions

# Overall rating as travel destination (as of Aug. '04)

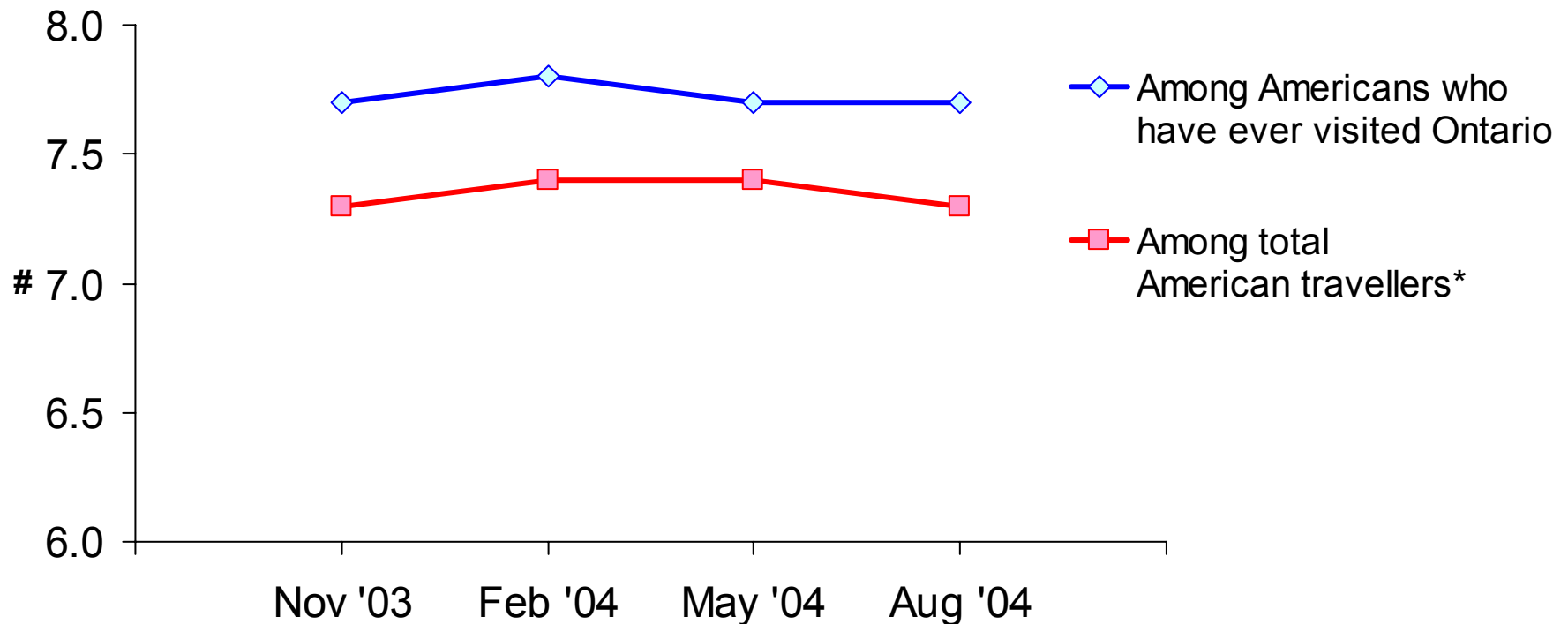
Average on 10-point scale among Americans



\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

# Trend in value for the money impressions of Ontario

Average on 10-point scale

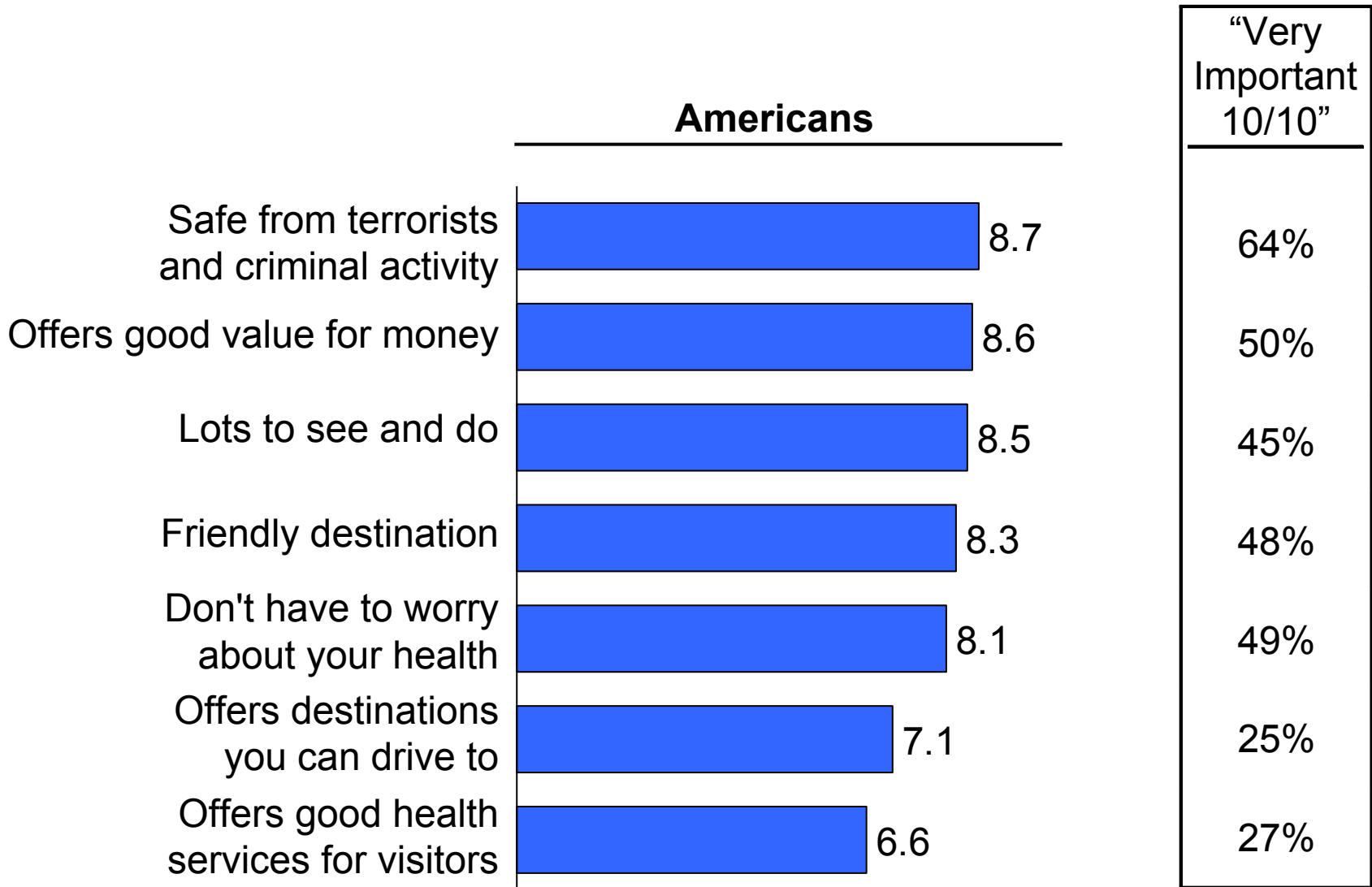


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

# Pleasure Destination Selection Criteria

# Importance of various factors in selecting a pleasure travel destination

Average score on 10-point scale among past 2 year/next 12-month American travellers



# Ratings For Specific Characteristics

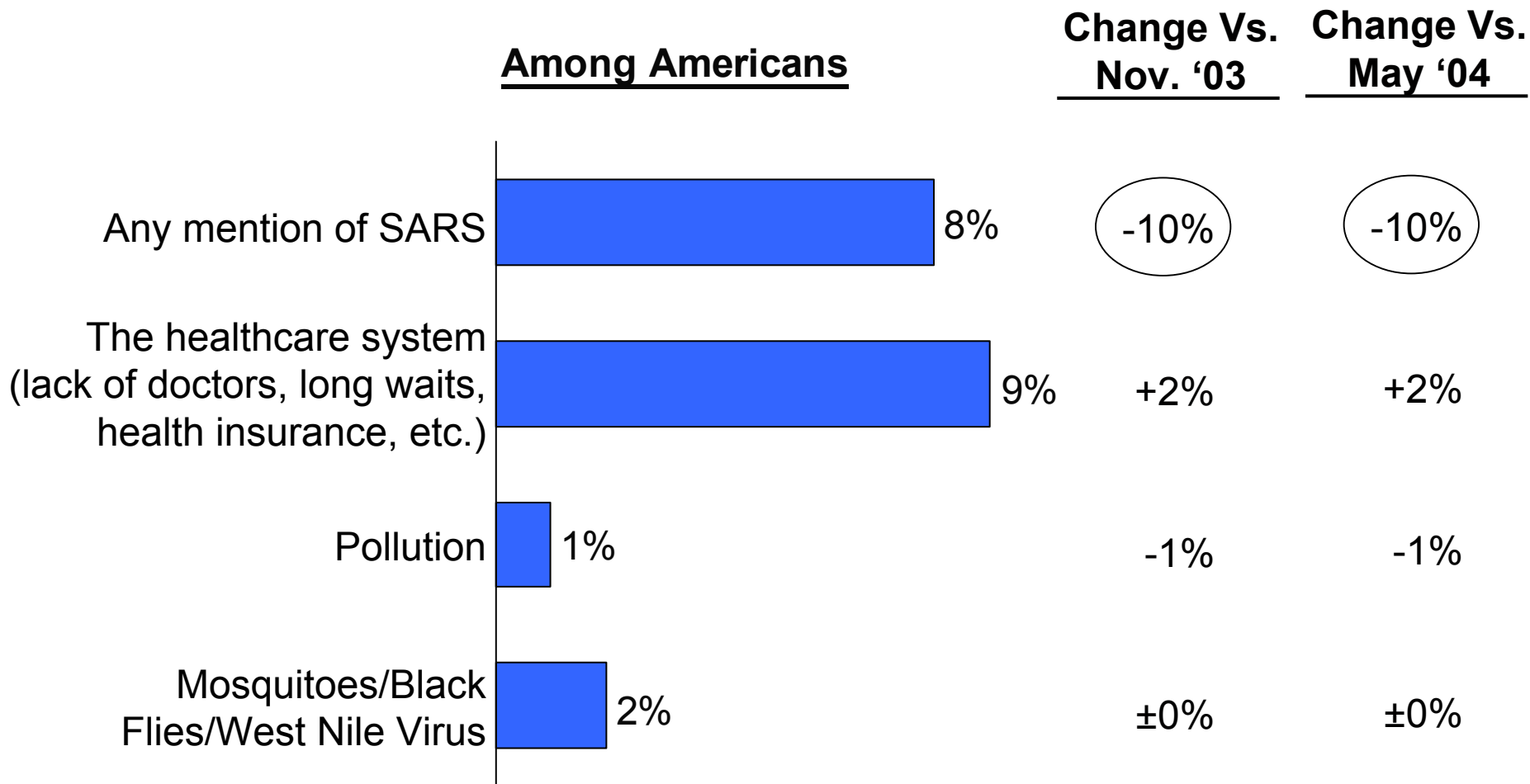
# Ontario imagery ratings

Average on 10-point scale among American travellers

	Among Americans				Change Since Nov '03	
	Nov. '03	Feb. '04	May '04	Aug. '04	-	+
Safe from terrorists & criminals	7.8	7.9	8.0	8.0		+0.2
Good value for the money	7.3	7.4	7.4	7.3		±0.0
Lots to see and do	7.7	7.8	7.8	8.0		+0.2
Friendly destination	7.9	7.9	8.1	7.9		±0.0
Don't have to worry about your health	7.6	7.8	8.0	8.0		+0.4
Offers destinations you can drive to	7.5	7.5	7.5	7.5		±0.0
Good health services for visitors	7.3	7.2	7.3	7.2	-0.1	

# Volunteered health issues associated with Ontario

Percent of those who rate Ontario 7 or lower as a destination where you don't have to worry about your health






# Ontario ratings for trip types

Average on 10-point scale among American travellers

	Among Americans				Change Since Nov '03	
	Nov. '03	Feb. '04	May '04	Aug. '04	-	+
Nature & outdoors	7.4	7.6	7.6	7.6		+0.2
Touring trip	6.9	7.1	7.0	7.1		+0.2
Big city trip	6.6	6.7	6.7	6.7		+0.1
Arts, culture & history	6.6	6.8	6.8	6.8		+0.2
Resort trip	6.4	6.7	6.4	6.5		+0.1

# Toronto ratings for trip types

Average on 10-point scale among American travellers

	Among Americans				Change Since Nov '03	
	Nov. '03	Feb. '04	May '04	Aug. '04	-	+
Shopping, restaurants, nightlife	7.5	7.6	7.5	7.5		±0.0
Arts, culture & history	7.3	7.4	7.3	7.4		+0.1
Strolling around to see buildings/sights	7.1	7.2	7.3	7.2		+0.1
Family vacation	7.0	7.1	7.1	7.0		±0.0
Overall rating	7.3	7.5	7.4	7.4		+0.1
"Must See" destination	6.8	6.9	6.8	6.8		±0.0

# Key Findings — Canada

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- Key measures of Canadian travel behaviour indicate a pattern of overt caution with respect to travel planning, and a degree of uncertainty in terms of future travel intentions for the longer term.
  - A slight drop in next-12-month travel intentions is compounded by an increased tendency to take shorter trips that are closer to home.
  - In addition, a higher proportion of Canadians are planning trips closer to the departure date, and most book both shorter and longer trips within one month of travel.

# Key Findings — Canada (Cont'd)

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- Looking toward the coming months, Canadian travel intentions are lower for most destinations than was reported during all previous waves.
- This is not the case, however, with respect to travel intentions to Ontario.
  - Intentions for the fall are quite robust and seem to have firmed up with the approach of the season itself.

# Key Findings — Canada (Cont'd)

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- Of course, this trend is largely fueled by Ontario residents.
  - In a sense, we are observing the same geographic constraints to travel evident in the US, but from a different perspective.
  - Currency exchange rate moderation does not seem to have left Canadians more open to US travel (in relation to domestic).
  - Canadians are likely affected by the complex of security/safety/inconvenience concerns when considering longer-haul international trips, though possibly to a lesser degree than Americans.

# Key Findings — Canada (Cont'd)

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- With respect to specific destinations in Ontario, Niagara Falls is challenged to show previous visitors something new: To provide a strong rationale for repeat visitation.
  - Still, Niagara travel intentions have declined more gradually as we move into the fall shoulder season than is the case for Toronto.
- Other Ontario destinations, including Toronto, are hampered by a lack of initial interest, perhaps indicating that the destination simply isn't enticing enough when compared to alternatives (such as Ottawa or destinations outside of the province).

# Key Findings — Canada (Cont'd)

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- Concerns over specific, monitored events appear to be waning.
  - The reported impact of SARS, in particular, is decreasing in relation to previous waves.
- Nonetheless, cautiousness is still exhibited.
  - Like their American counterparts, Canadians are unwilling to project their travel intentions into the winter season.

# Key Findings — Canada (Cont'd)

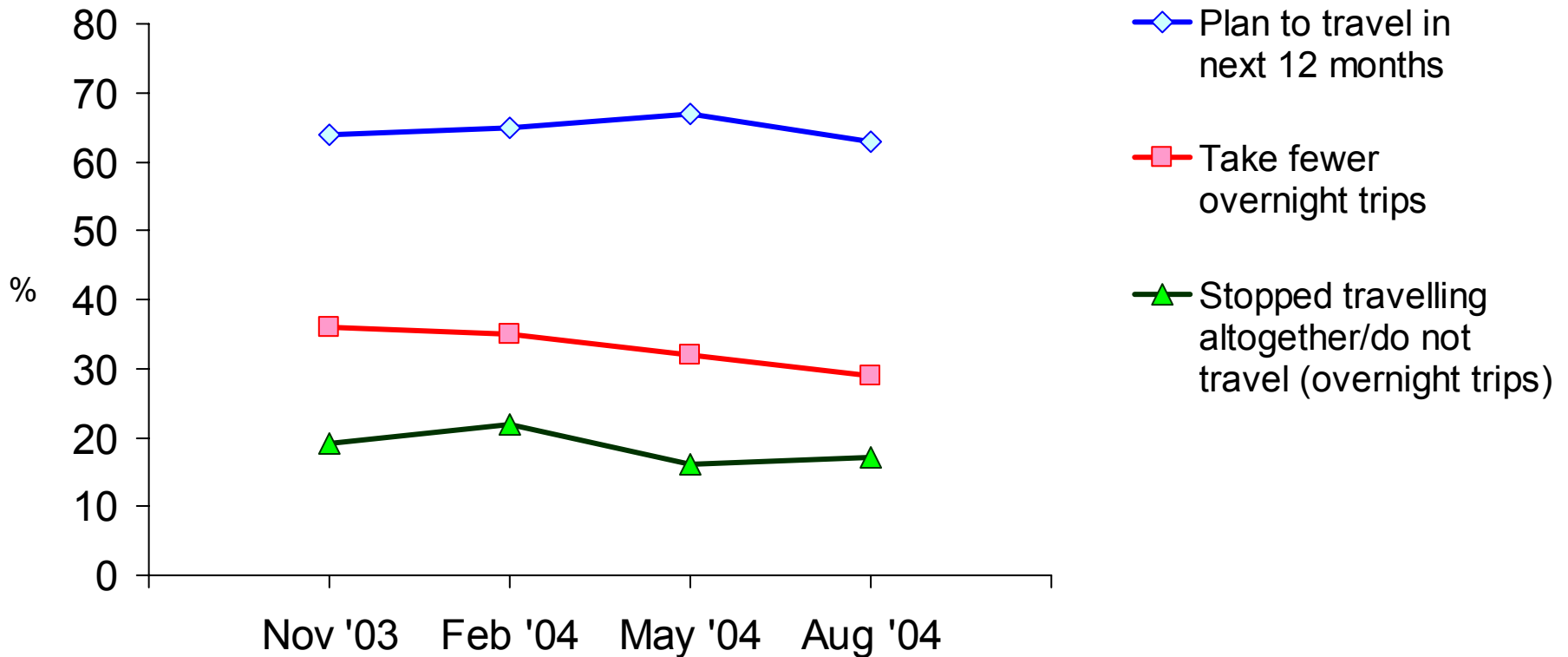
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- Overall ratings for Ontario as a pleasure travel destination are favourable and consistent wave over wave.
- Ratings for specific characteristics are strong, and have improved slightly since November, '03.
- To some extent, Ontario's generally positive image can be credited with supporting interest in Ontario travel.
- Perceptions of specific types of travel in Ontario, however, do not keep pace with attribute ratings. As in the US, this may indicate that while impressions of Ontario are generally favourable, this is not directly translated into Ontario's image as a travel destination, from the point of either distinctiveness or 'excitement'.

# Propensity To Travel & Trip Planning

# Trend in general travel intentions and propensity to travel

Percent of Canadians

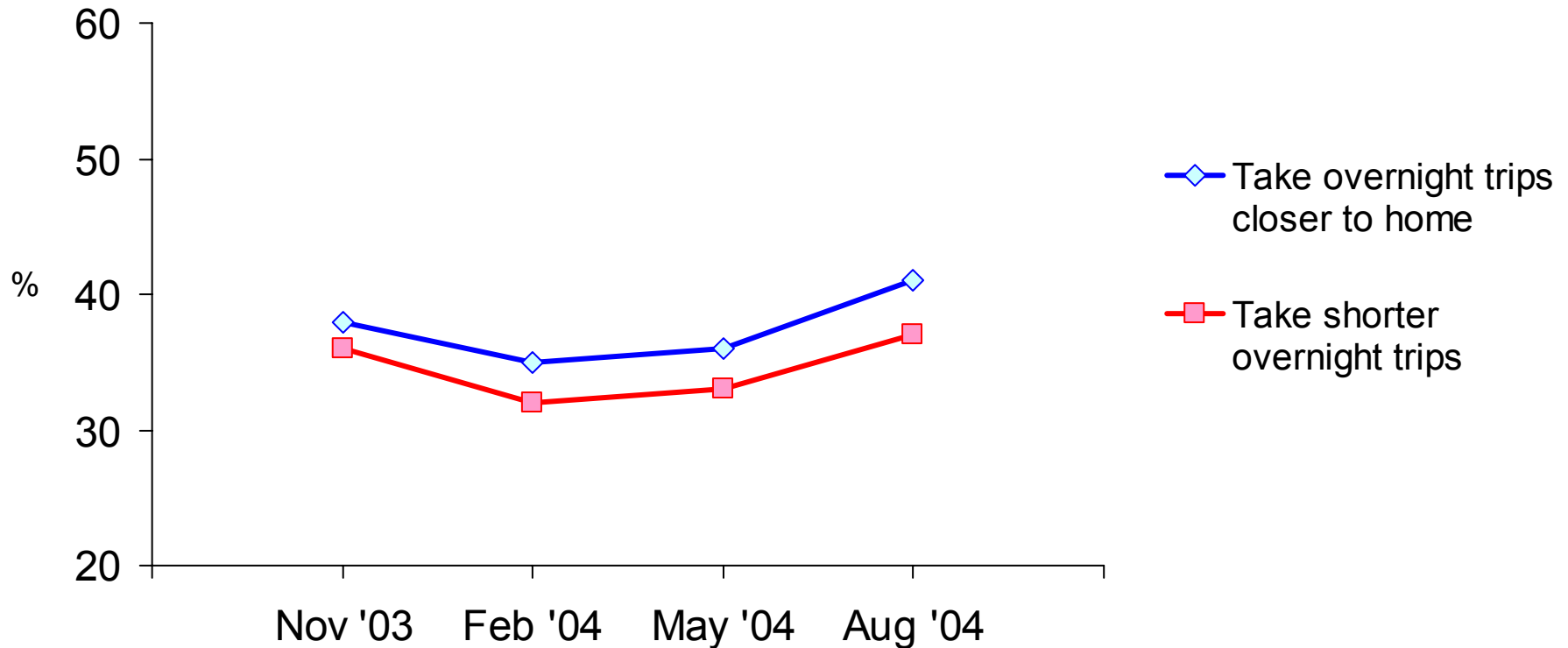


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Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in duration and distance of overnight trips

Percent of Canadian travellers\*

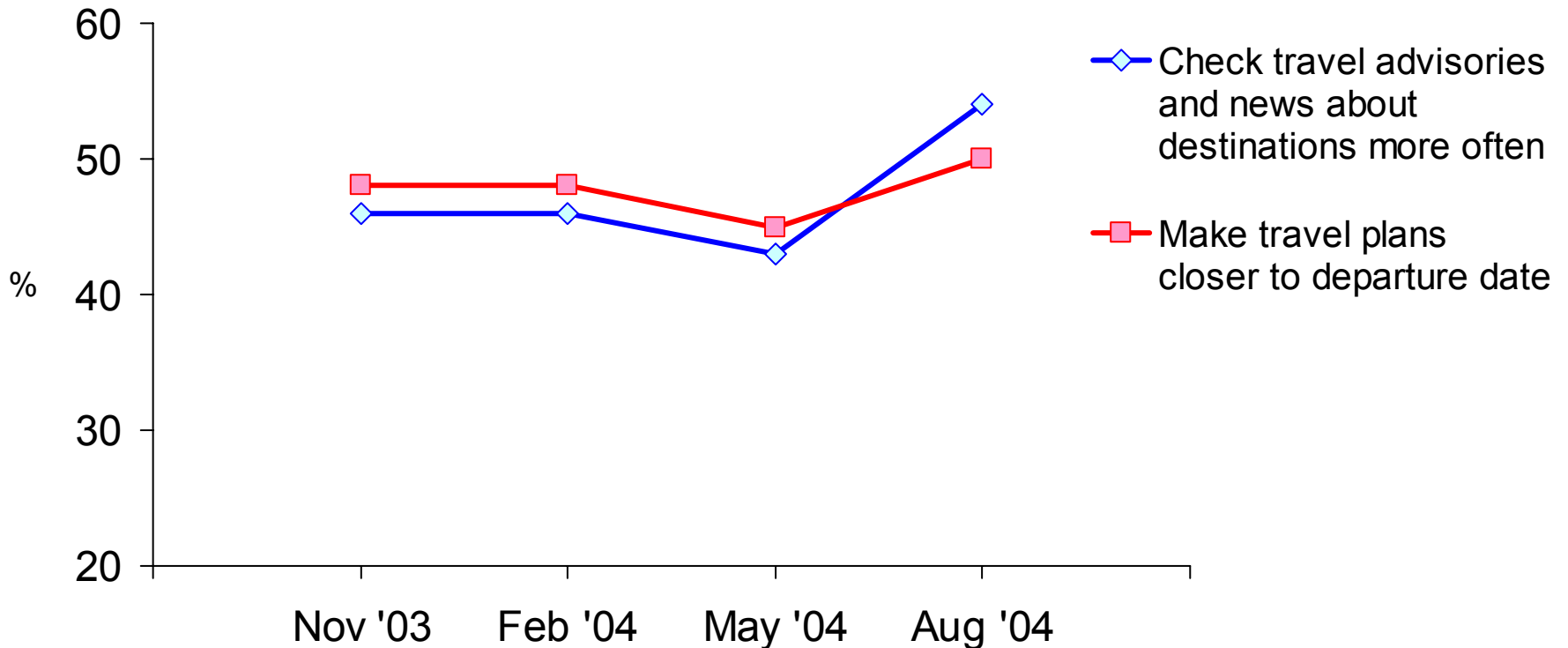


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Trend in overnight trip planning

Percent of Canadian travellers\*



\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

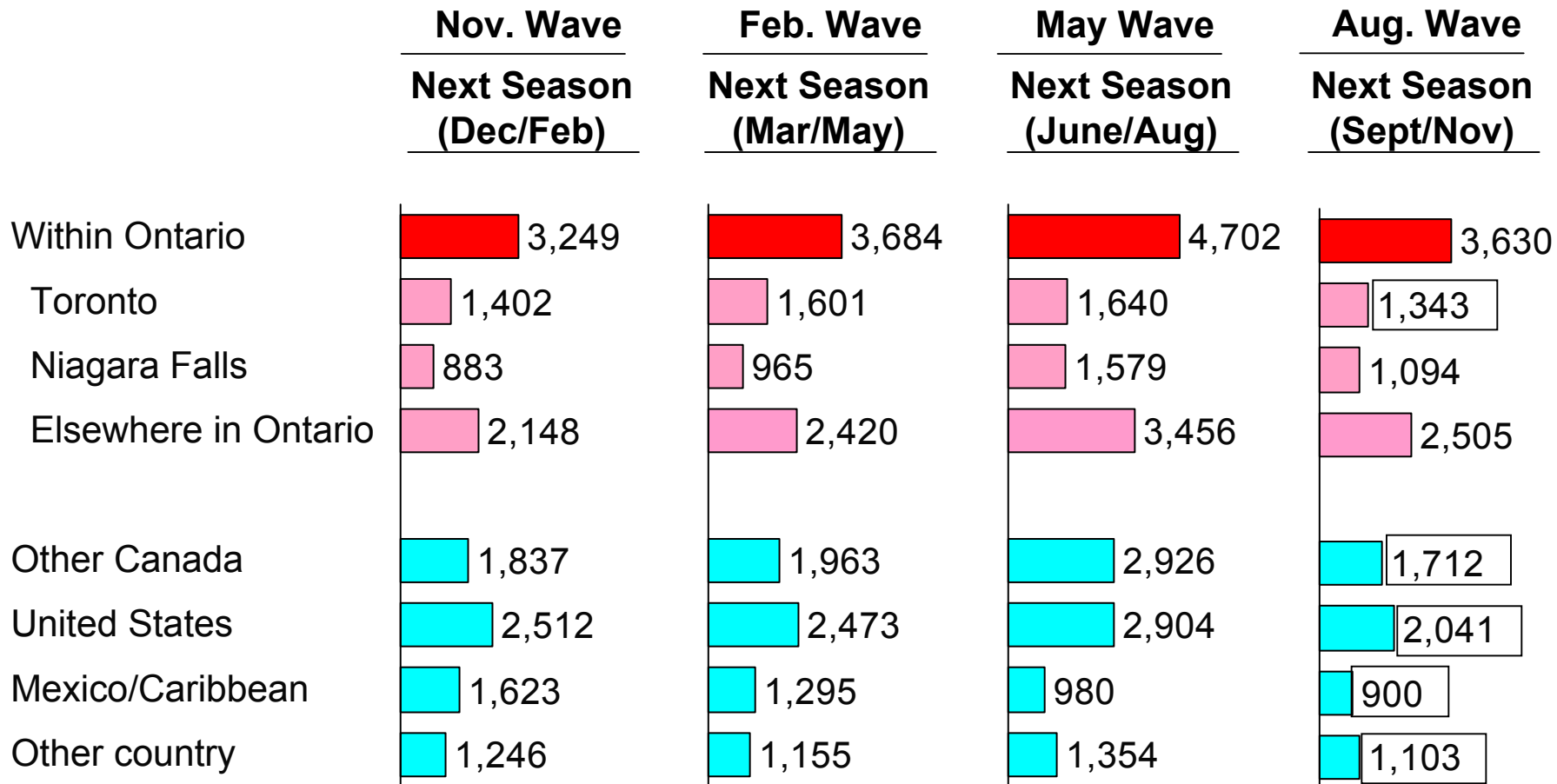
Q. How, if at all, have your travel plans changed over the past two years? Are you inclined to... ?

# Travel Intention Details

# Intended travel patterns of Canadian residents

Number of adults claiming will take overnight trip (thousands)

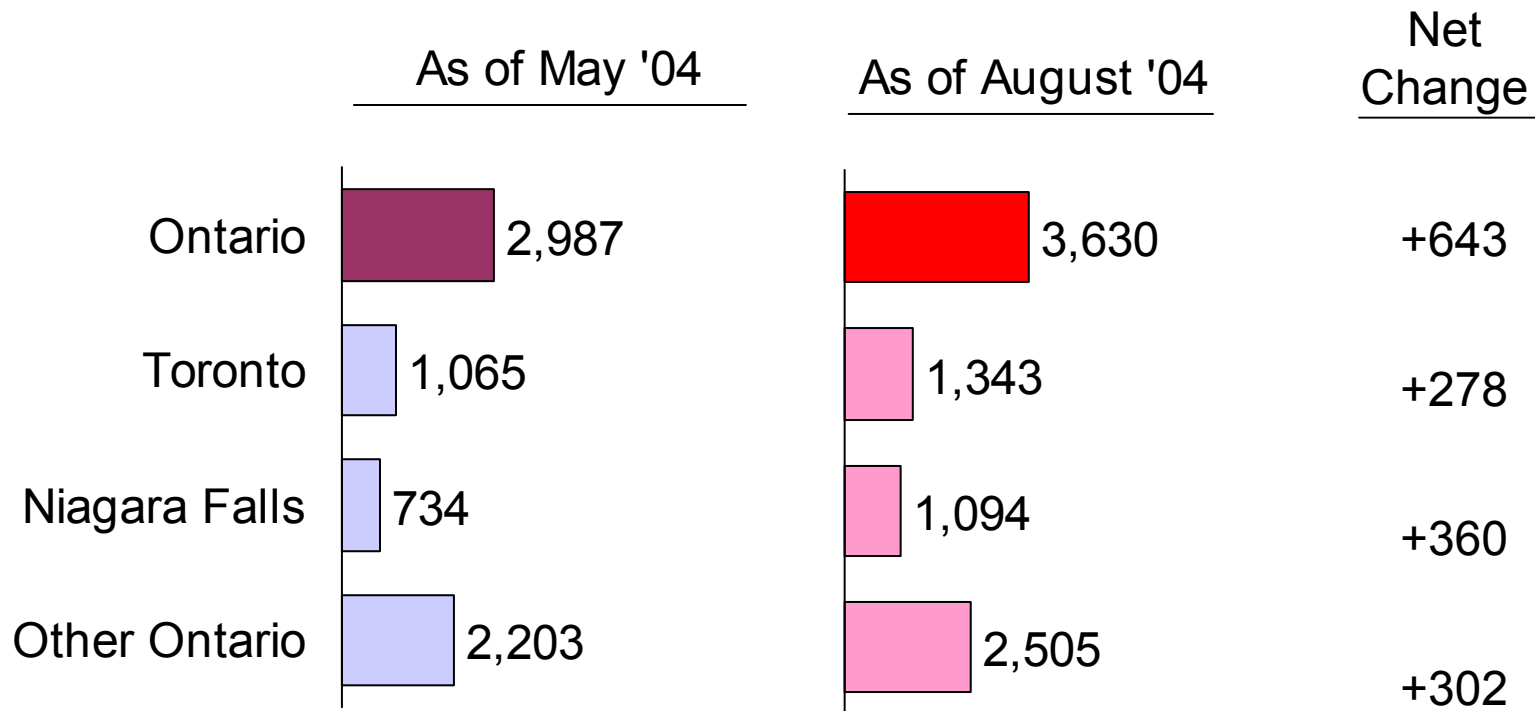
— not seasonally adjusted



# Travel intentions for Fall '04 (Sept./Nov.)

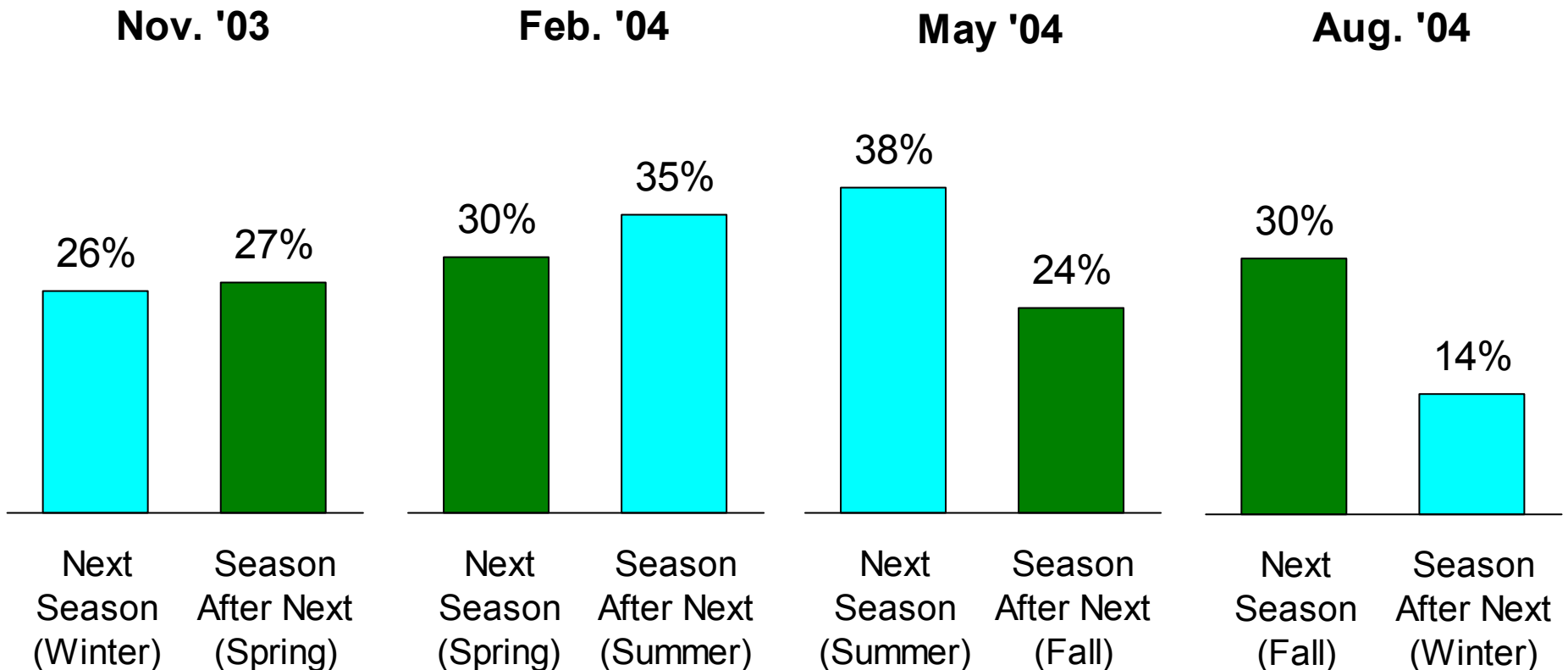
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Projected number of Canadians intending to travel to each destination (in thousands)



# Ontario travel intention incidence

Percent of Canadian adults stating intend to travel to/within Ontario as of....



# Ontario travel intention incidence by Canadian market

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

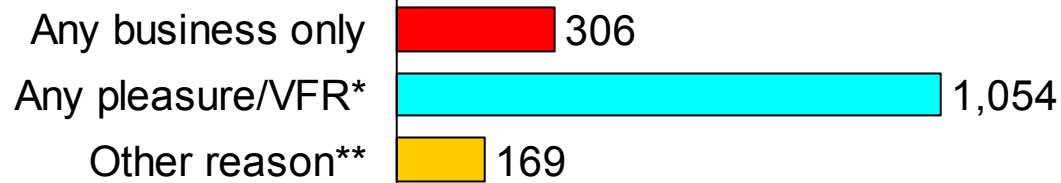
		As Of Feb. '04		As Of May '04		As Of Aug. '04	
		During Mar/May	During June/Aug	During June/Aug	During Sept/Nov	During Sept/Nov	During Dec/Feb
Quebec City	%	9	14	12	5	14	4
Montreal	%	18	22	22	16	13	6
Ottawa	%	44	48	46	35	43	20
Toronto	%	28	37	43	26	29	15
Other Ontario	%	40	43	46	29	40	20
Winnipeg	%	17	29	29	19	20	8
<b>TOTAL CANADA</b>	<b>%</b>	<b>30</b>	<b>35</b>	<b>38</b>	<b>24</b>	<b>30</b>	<b>14</b>

# Main purpose of trips planned to Ontario — Sept./Nov. '04

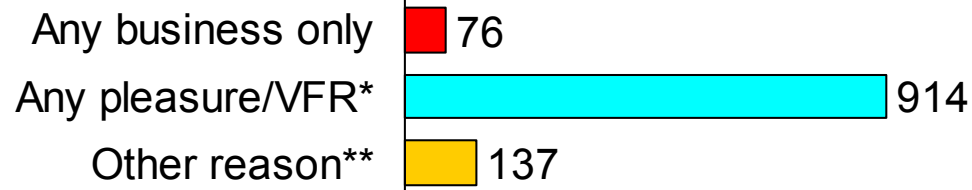
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Projected number of Canadians intending  
to travel to each destination as of August '04 (thousands)

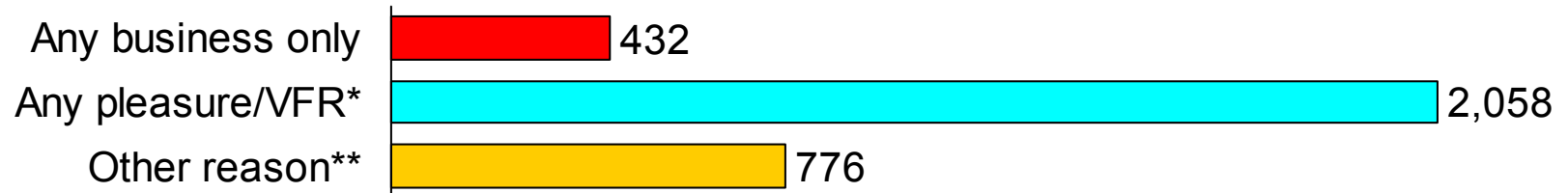
## To Toronto



## To Niagara Falls, Ontario



## To Other Destinations In Ontario

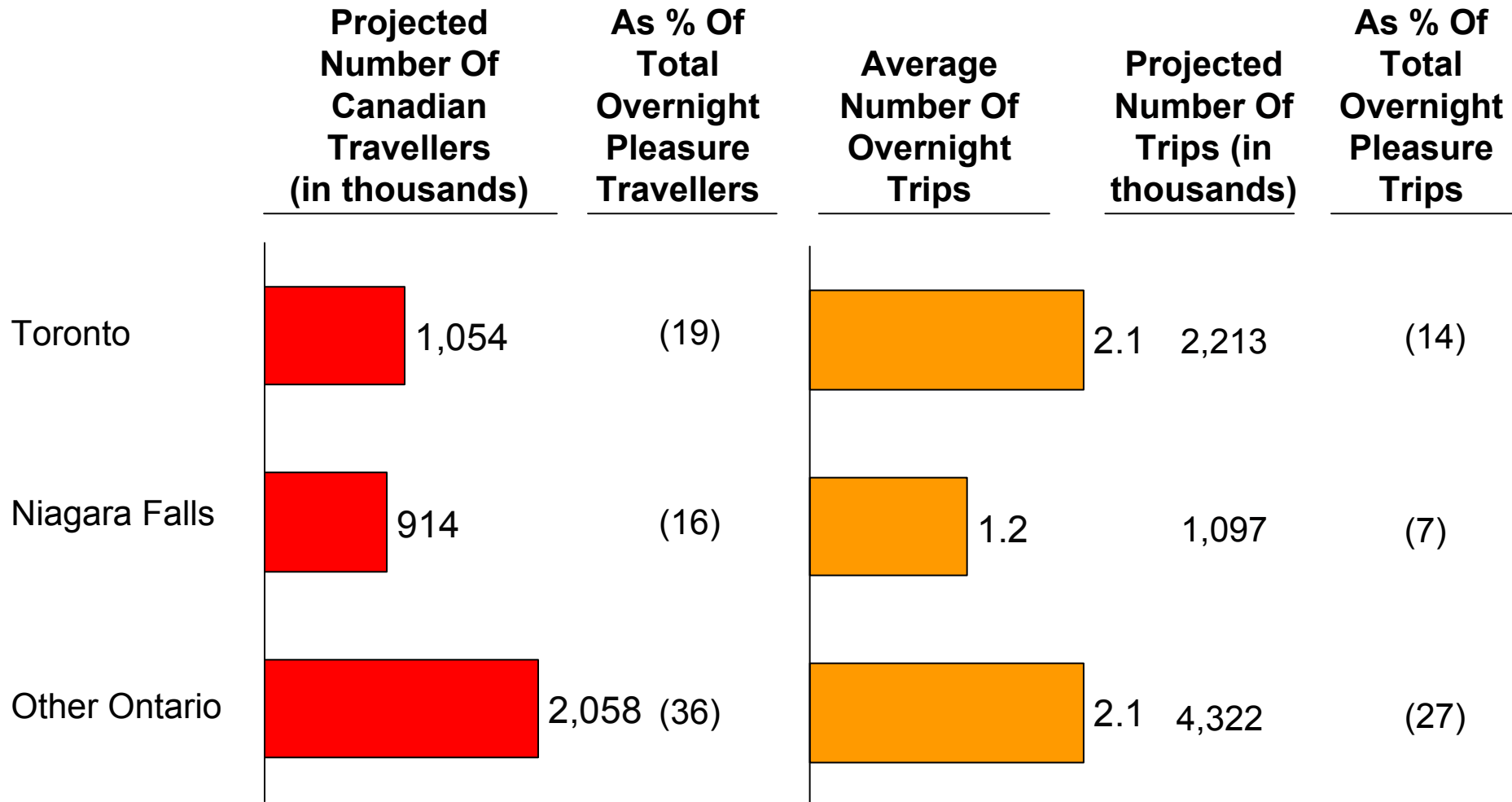


\* Excluding cottage/country home.

\*\* Including cottage/country home.

# Intended Ontario Pleasure Travel Among Canadians

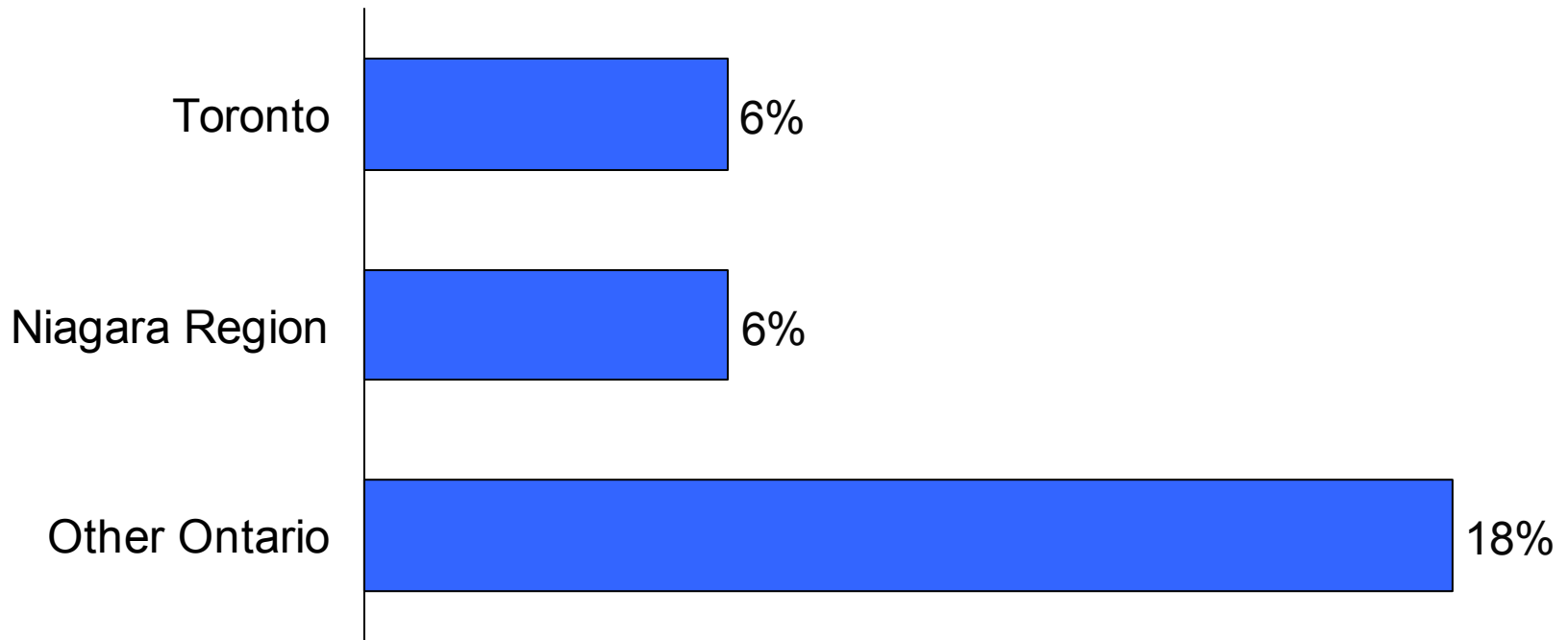
# Pleasure travel intentions for Fall '04 (Sept/Nov) as of August '04



# Pleasure travel booking for Fall '04 (Sept/Nov) as of August '04

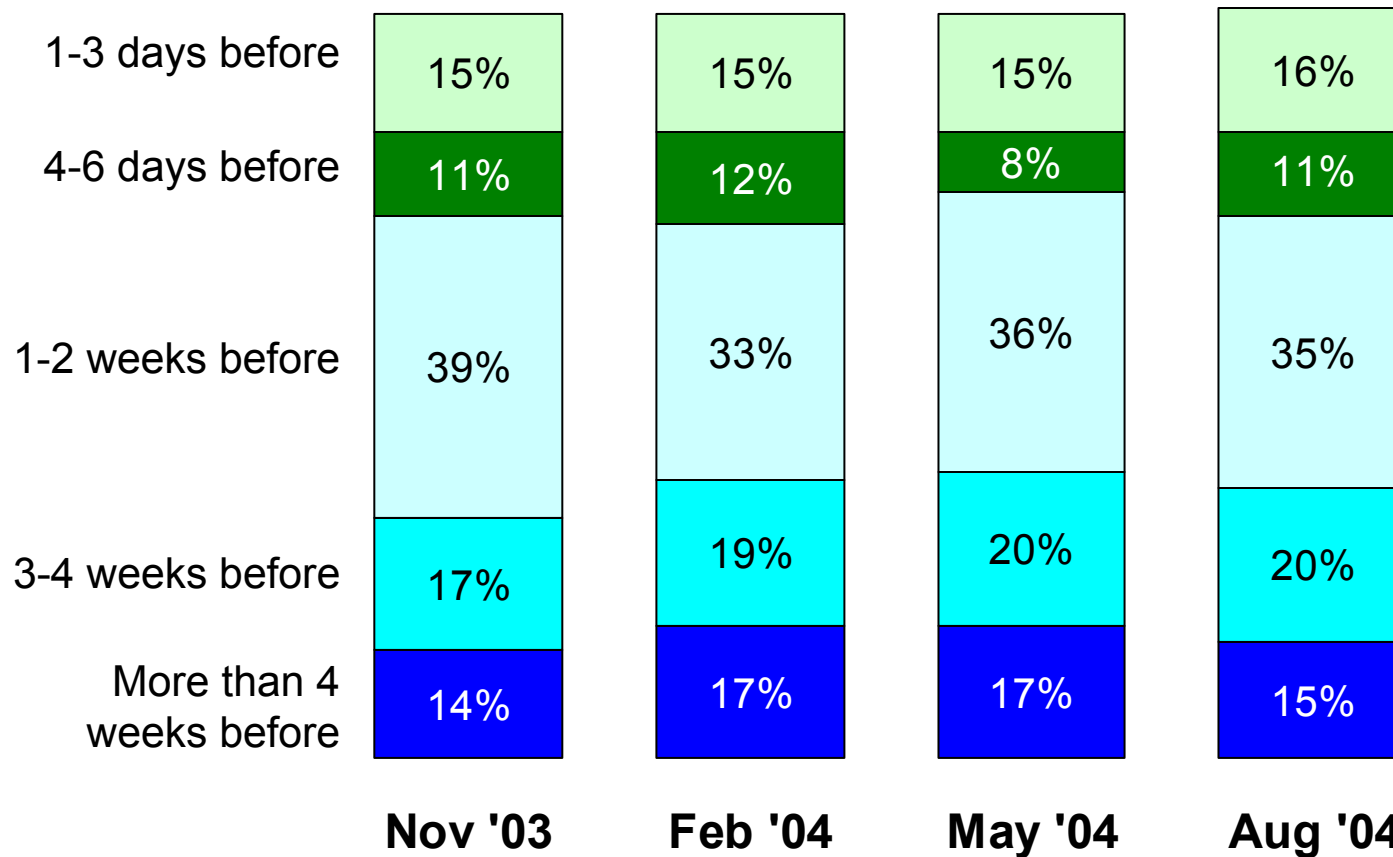
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Percentage of Canadians intending to travel to each destination  
who have already booked any aspect of trip



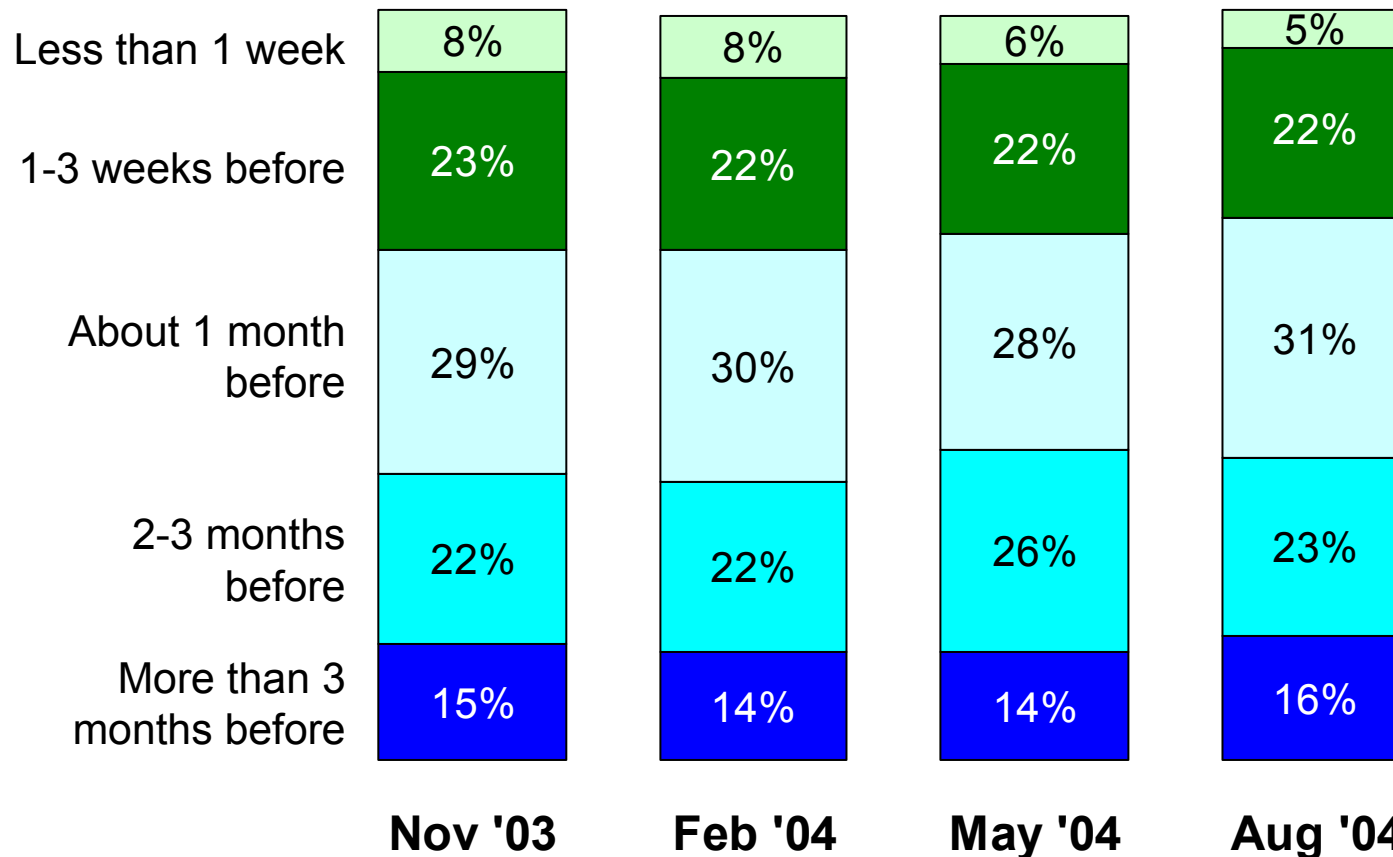
# Planning cycle for overnight trips of short duration — 1 to 3 nights

Percent of Canadians who have booked short trips



# Planning cycle for overnight trips of long duration — 4 nights+

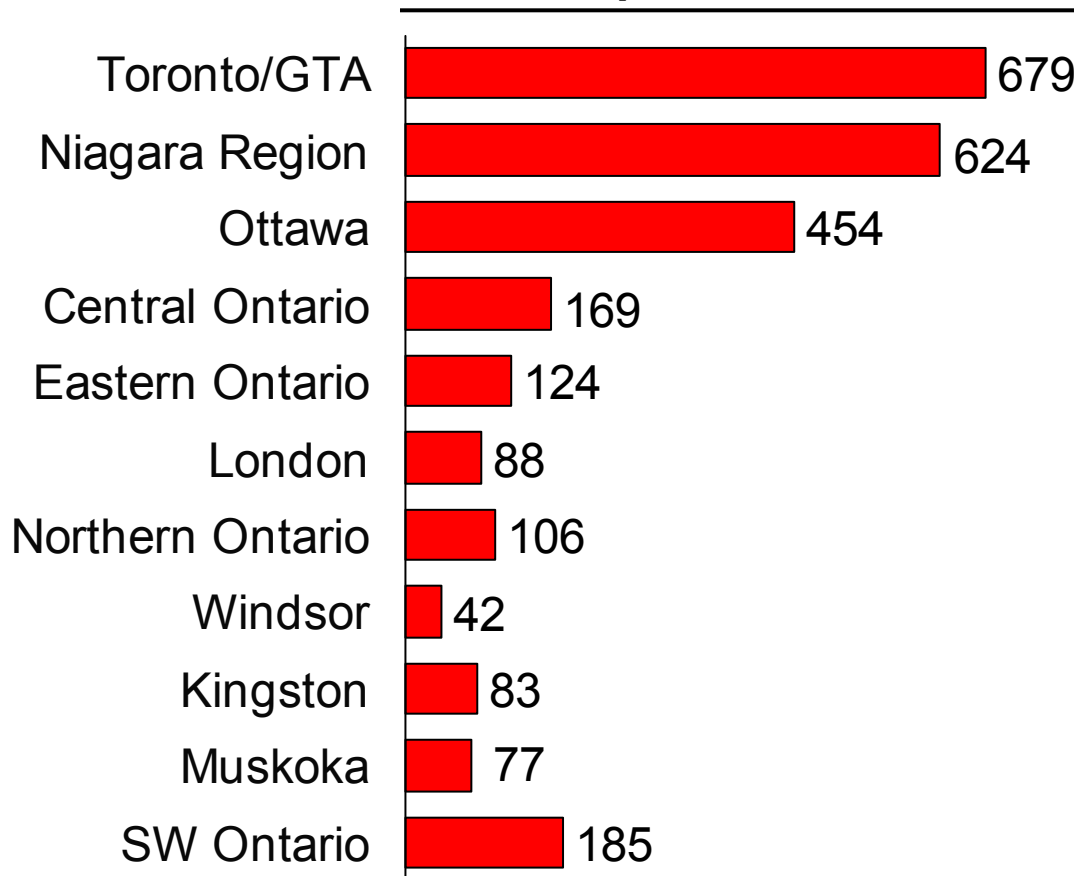
Percent of Canadians who have booked long trips



# Destination of next overnight pleasure trip to/within Ontario (as of August '04)

Number of Canadians who intend to travel to each destination (thousands)

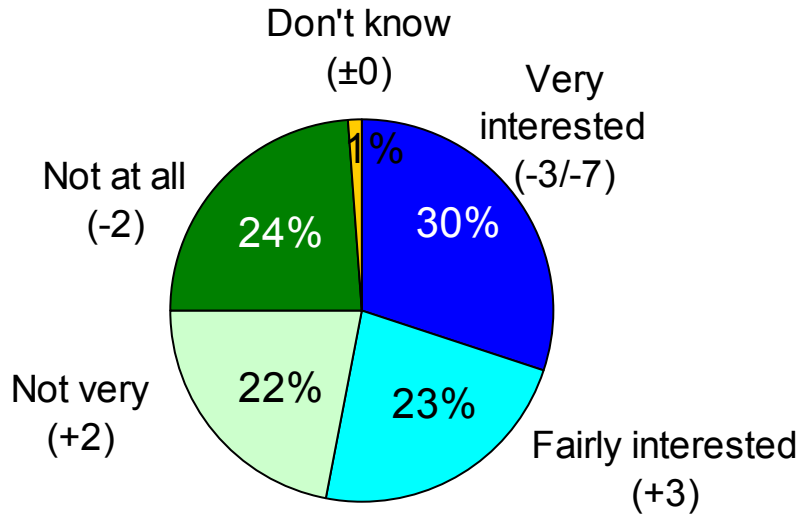
Sept./Nov. '04



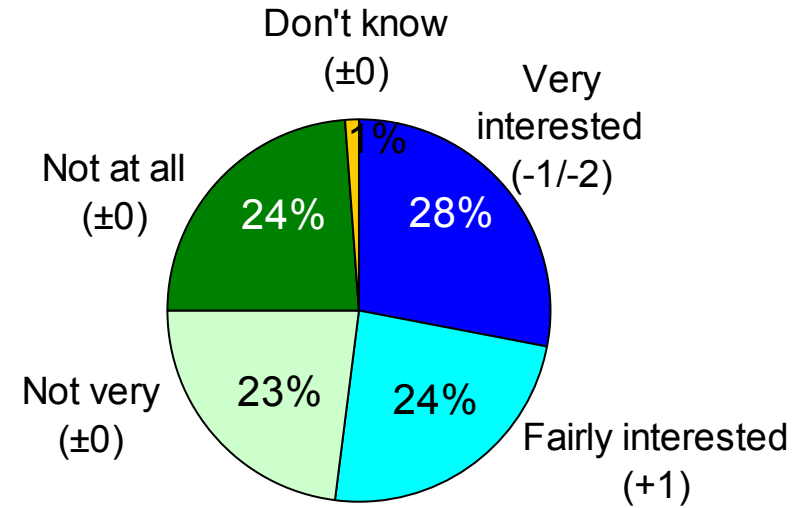
Change vs.		
Summer '04 (May)	Spring '04 (Sept.)	Winter '04 (Nov.)
-341	-284	-123
-227	+85	+94
+100	+187	+286
-18	+60	+86
+4	-6	-65
-22	-32	-36
-4	+9	-6
-53	-6	+42
-5	+7	+1
-4	+31	+40
+122	-21	+100

# General interest in travelling to Ontario destinations (within next two years)

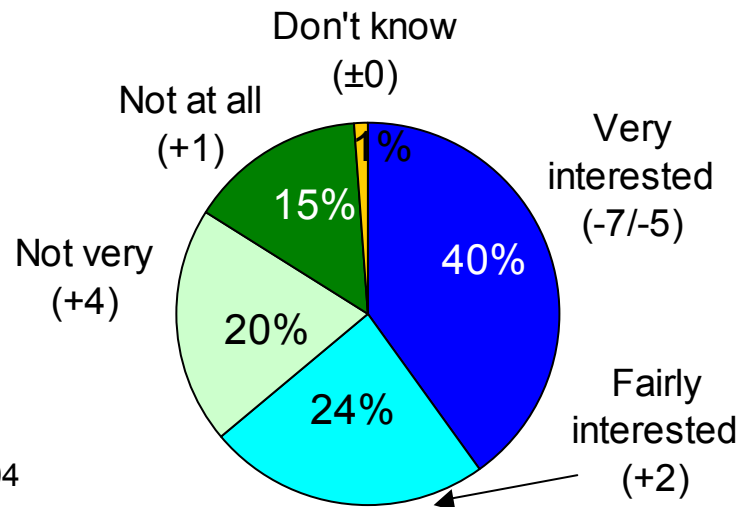
## To Toronto\*



## To Niagara Falls



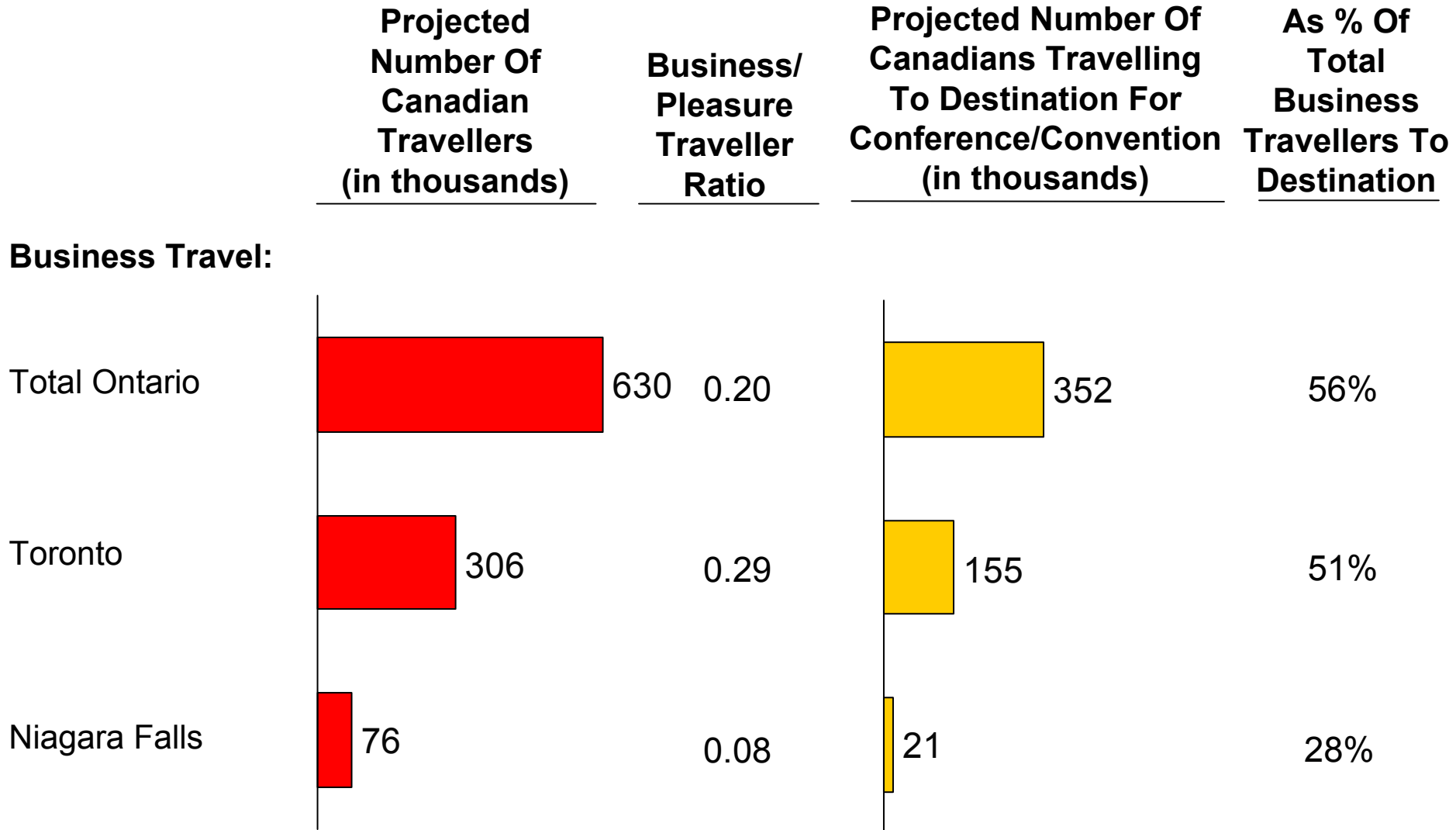
## To Elsewhere In Ontario



\* Among non-residents of Toronto  
( ) Change versus May '04/Feb. '04

# Intended Ontario Business Travel Among Canadians

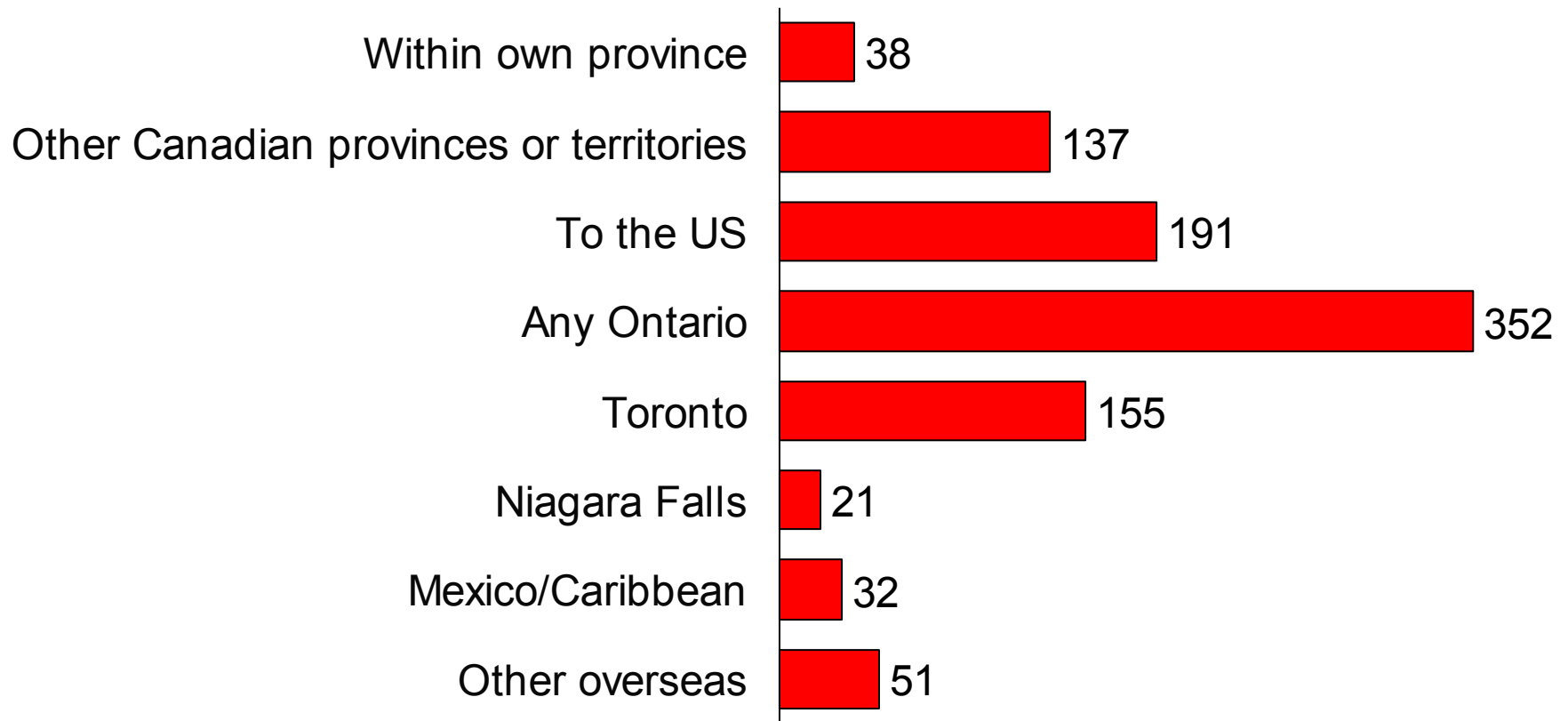
# Nature Of Ontario Business Travel Intentions Sept./Nov.



# The competitive for Business Conferences, Conventions & Trade Show

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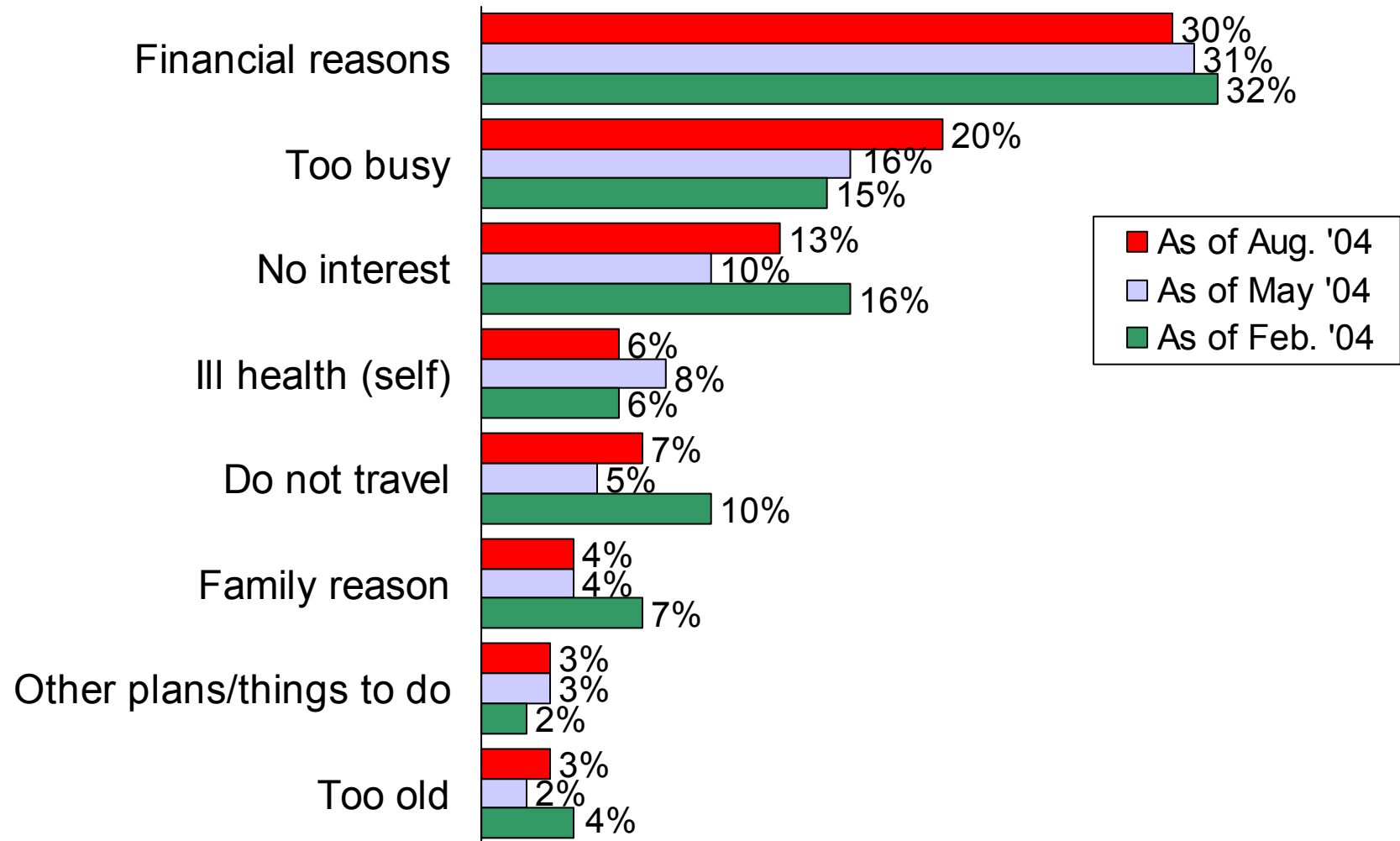
Number of Canadians intending to travel to each destination for conference, convention or trade show in Sept./Nov. '04 (in thousands)



# Volunteered Impediments To Travel (as of August '04)

# Expressed reasons for not considering travel for any purpose in next 12 months

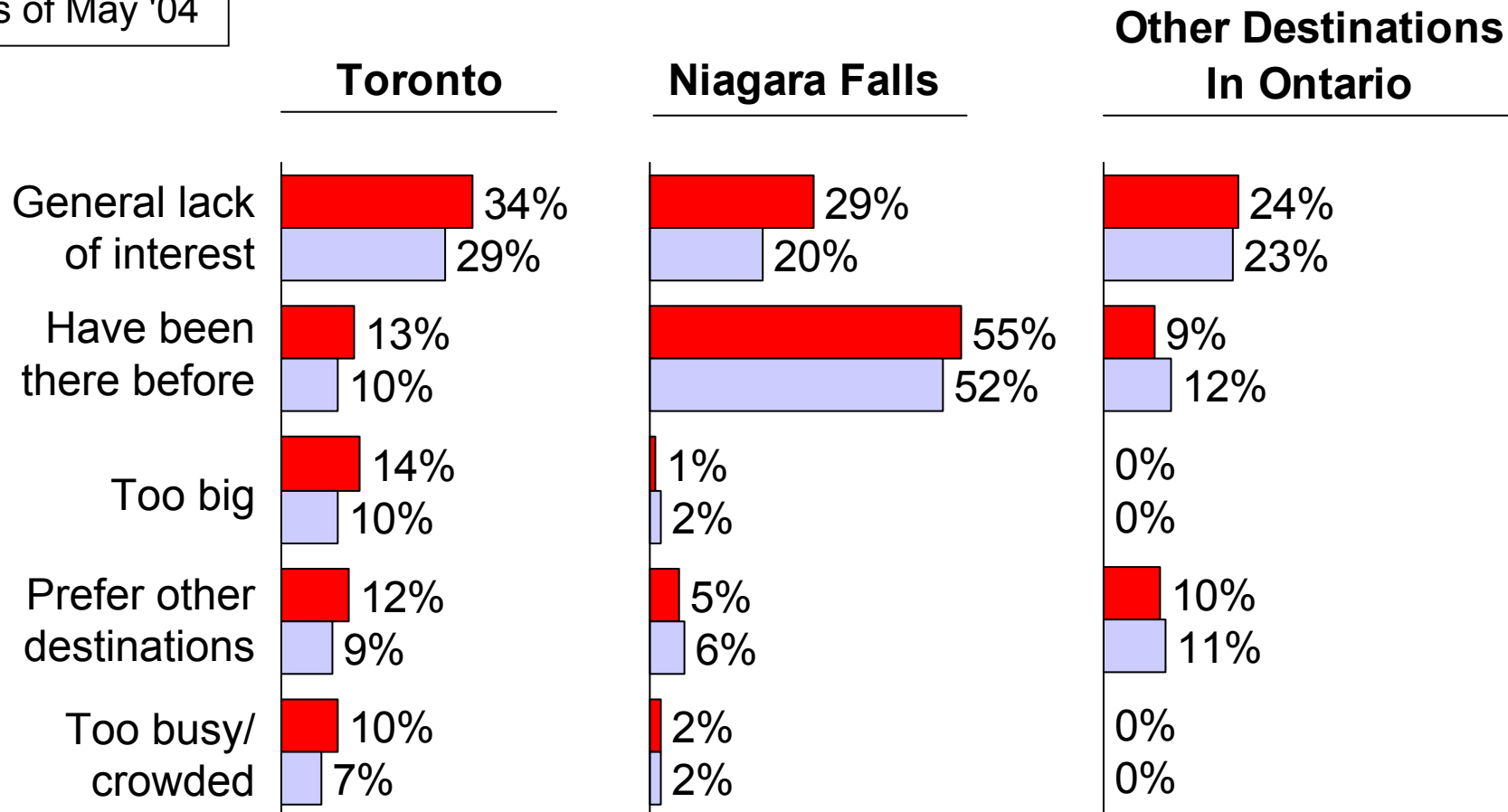
Percent of Canadians who do not intend to travel



# Reasons for lack of interest in visiting specific Canadian destinations

Percent of Canadians who are “not very/not at all interested” in visiting each destination within the next 2 years

■ As of Aug '04  
■ As of May '04

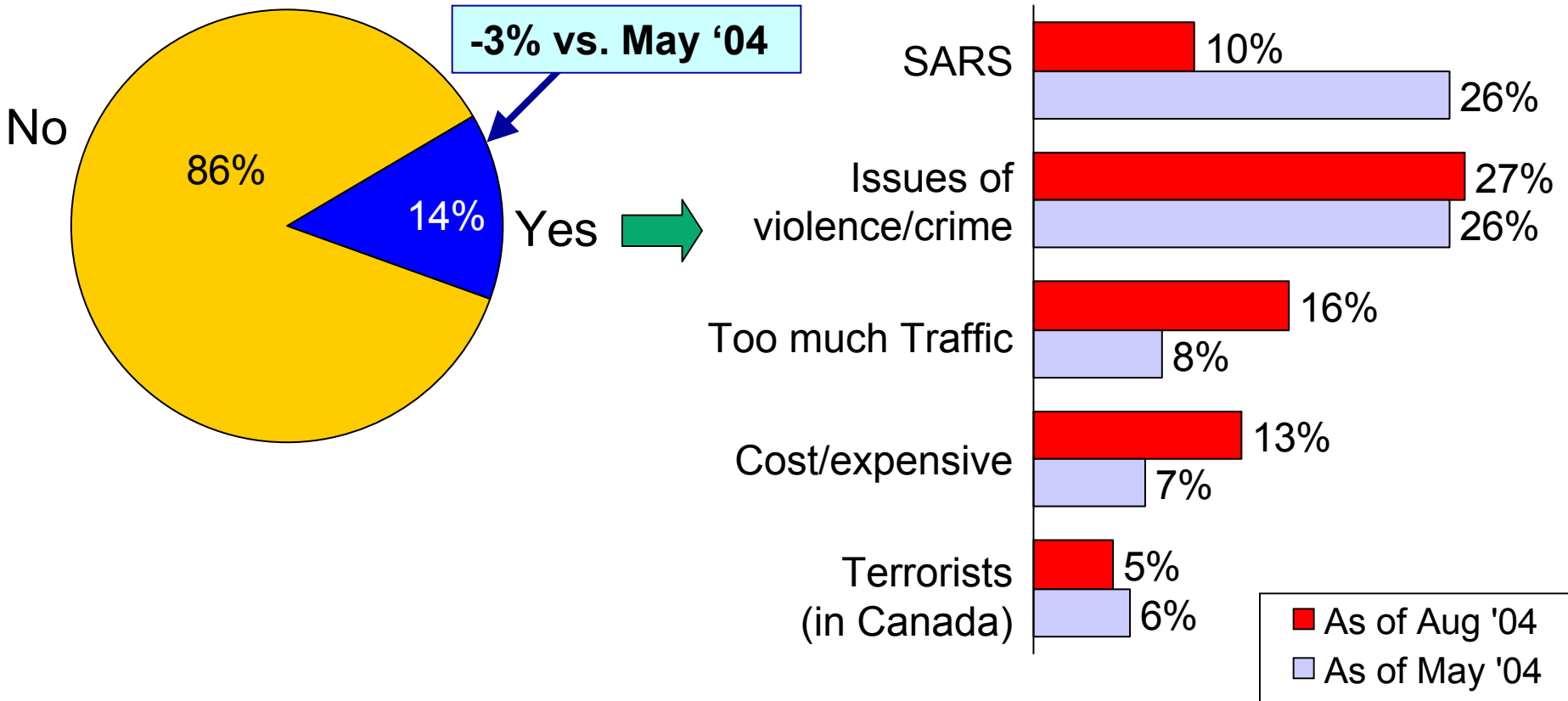


# Are there any specific events or issues that you have heard about that make you less inclined to travel to Toronto, Niagara Falls or other places in Ontario?

Percent of Canadians

**August '04**

**What are these specifically?**

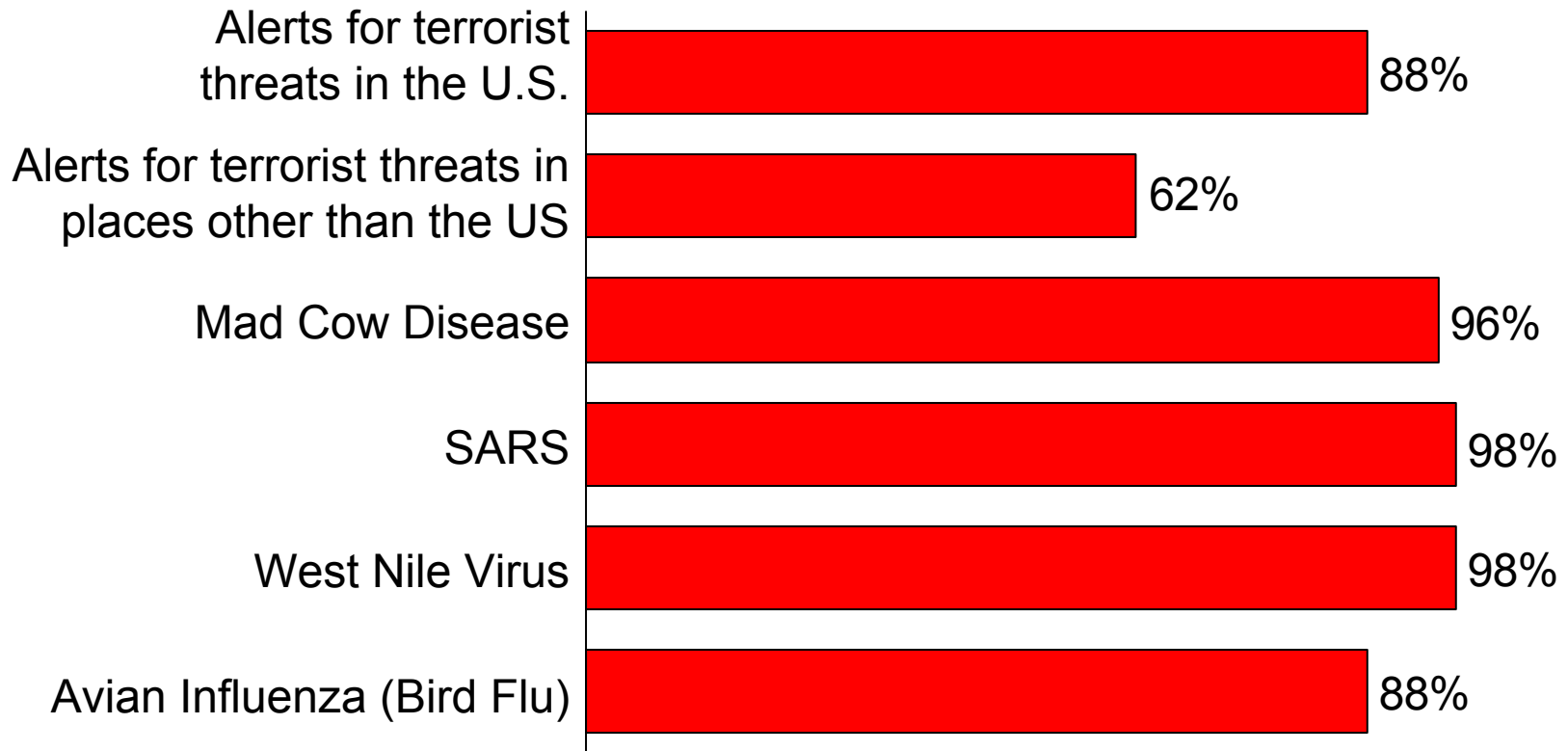


# Prompted Awareness And Response To Specific Negative Events

# Prompted awareness of negative events (as of August '04)

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Percent of Canadian travellers\*



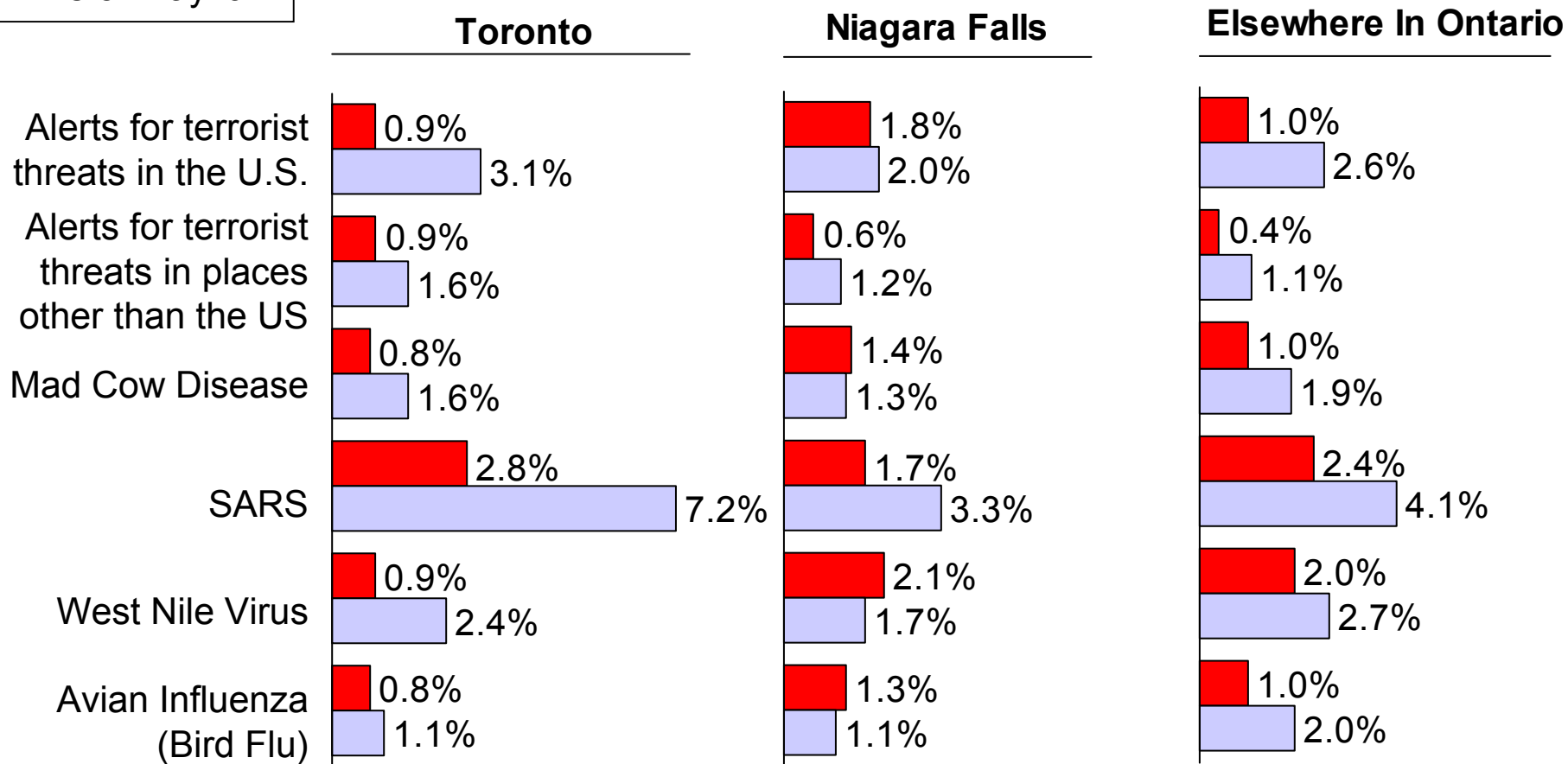
\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

Q. Now I'd like to ask you about some specific events that have taken place in the recent past. Have you heard of... ?

# Impact of negative events on intent to travel to specific destinations during coming season (as of August '04)

Percent of Canadian travellers\* who are less likely to visit each destination in Sept./Nov.

■ As of Aug '04  
 ■ As of May '04

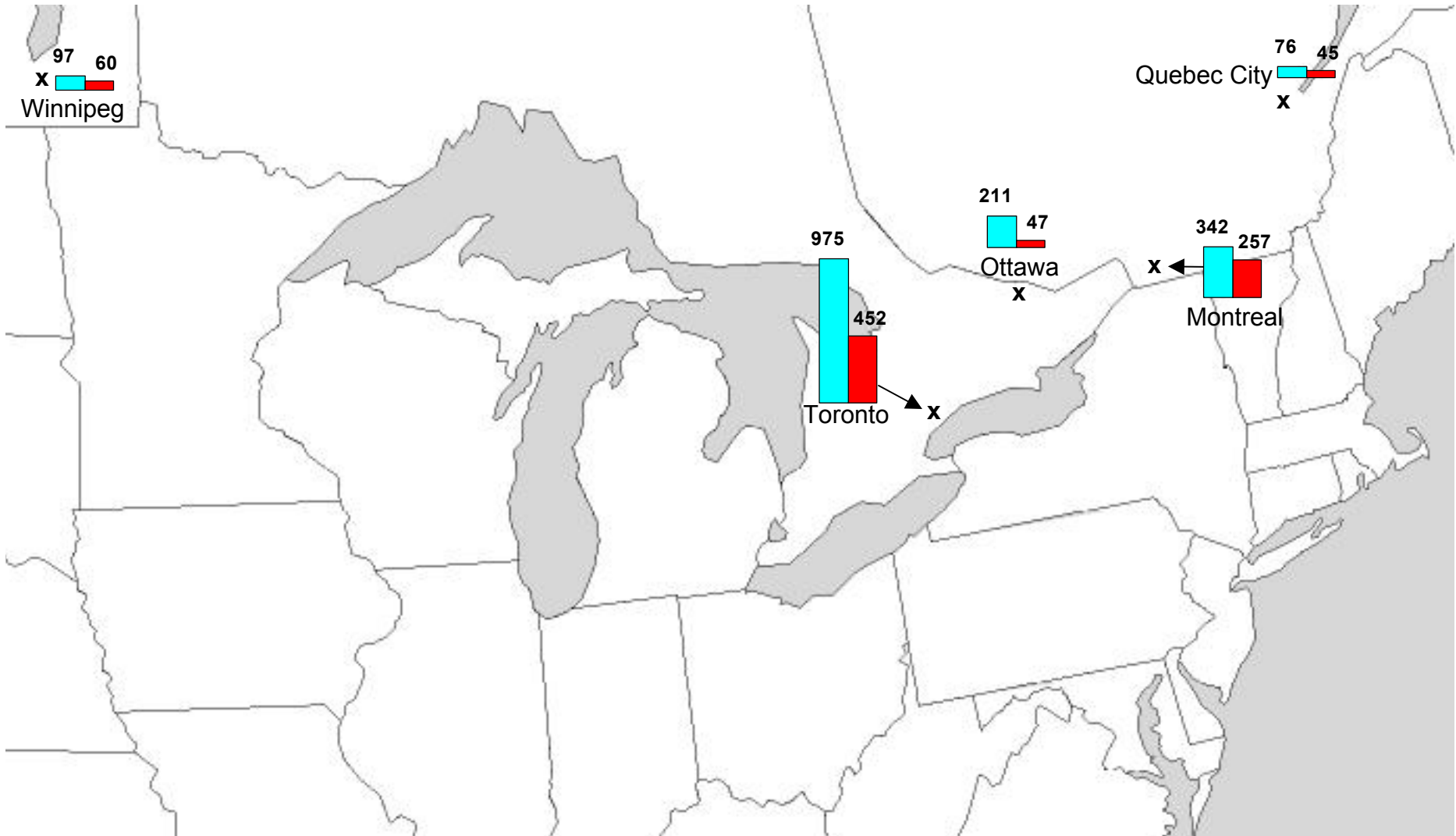


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

\*\* Excluding Toronto residents

# Geographic Variation In Relationship Between Travel Intentions And Negative Events

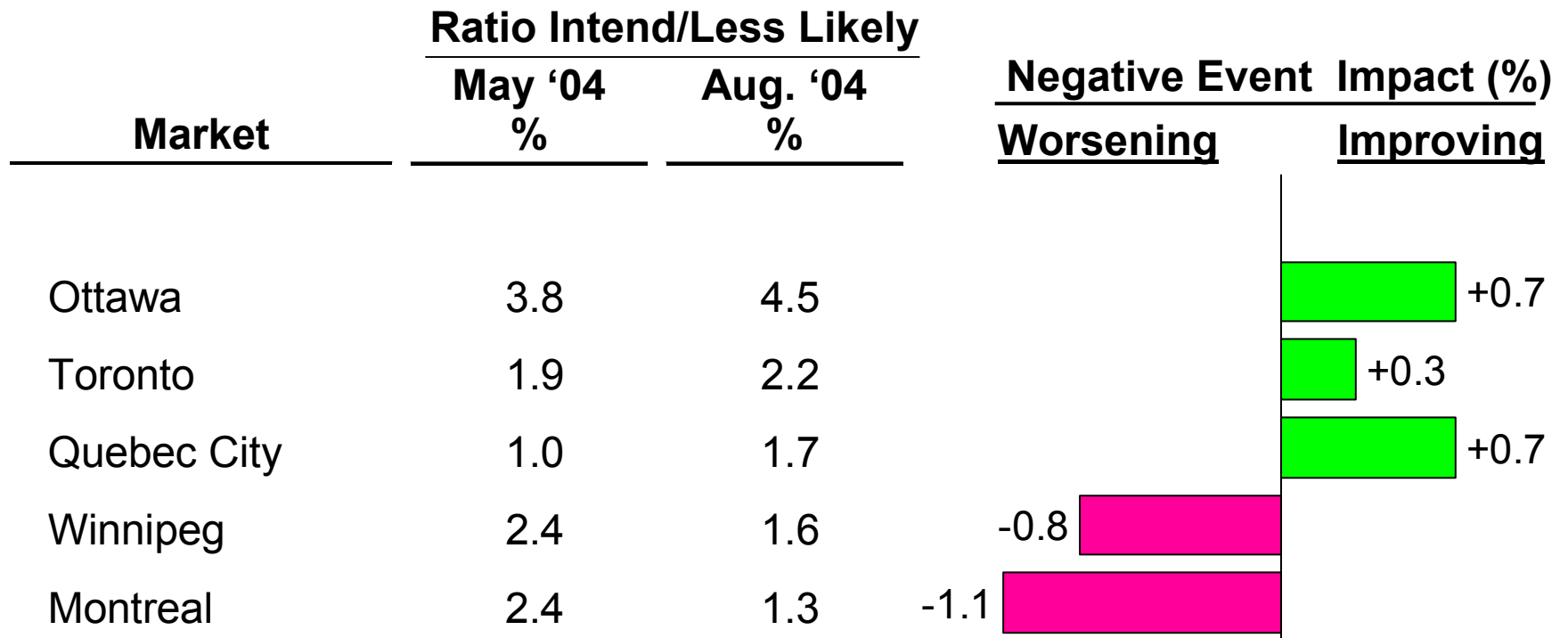
# Ontario travel intention volume — Sept./Nov. '04 (Thousands)



 Intend to travel to/within Ontario Sept./Nov.

 Less likely to travel to/within Ontario Sept./Nov. because of Negative Events.

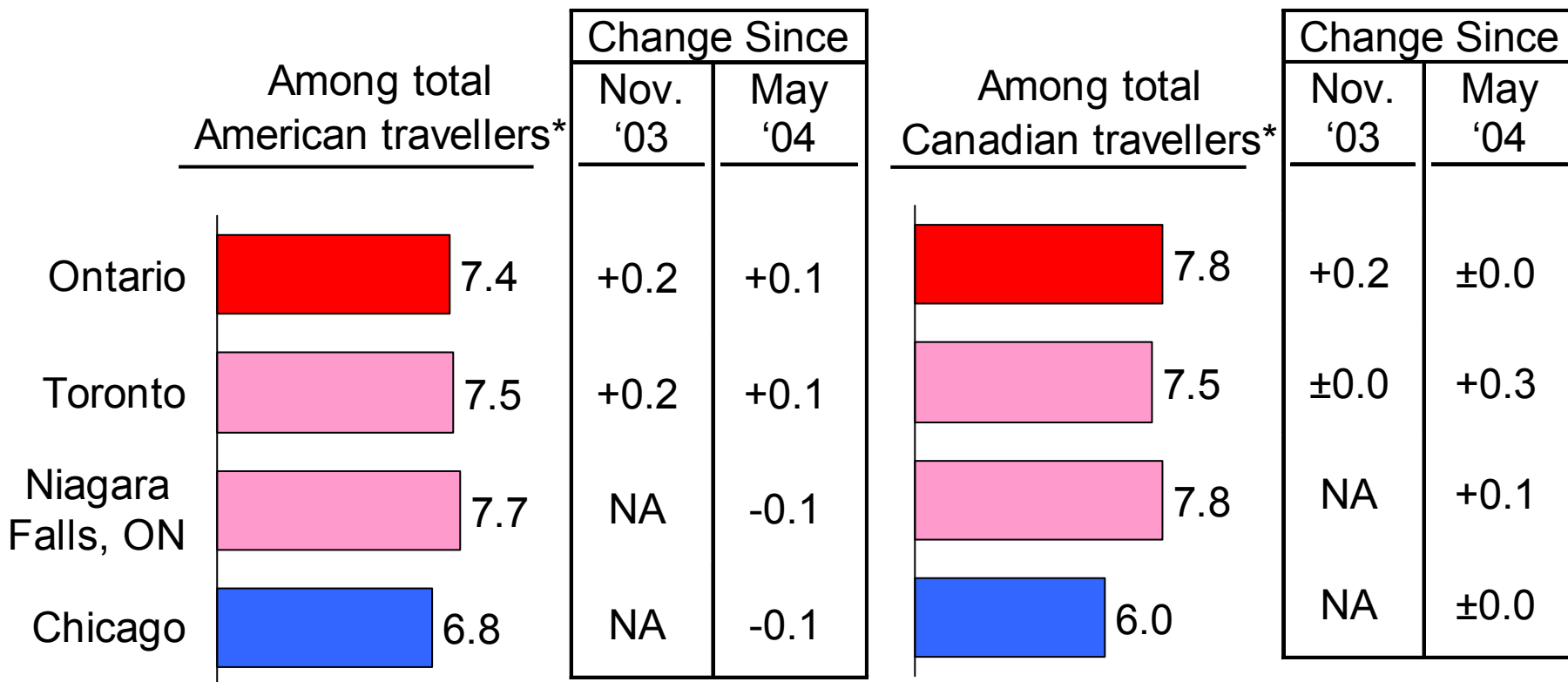
# Negative event impact on Ontario travel relative to intentions



# Destination Perceptions

# Overall rating as travel destination (as of Aug. '04)

Average on 10-point scale

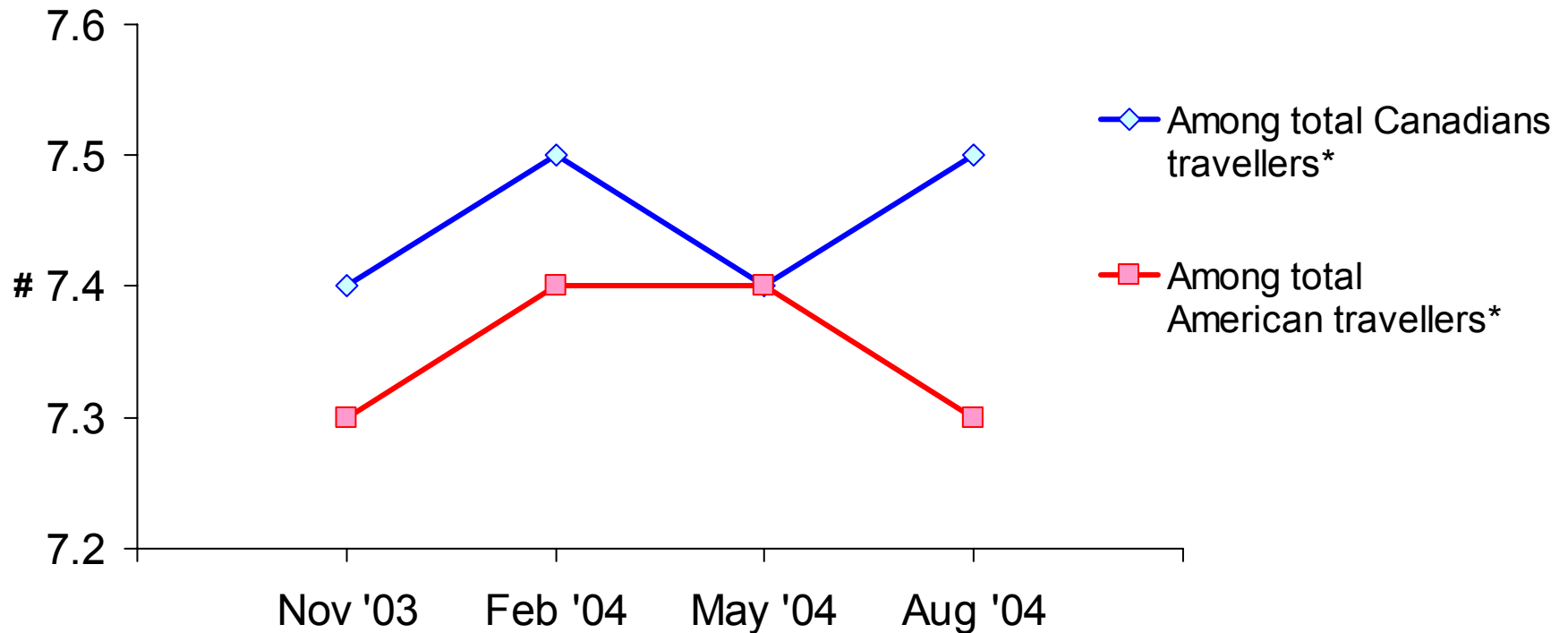


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

\*\* Excluding Toronto residents

# Trend in value for the money impressions of Ontario

Average on 10-point scale

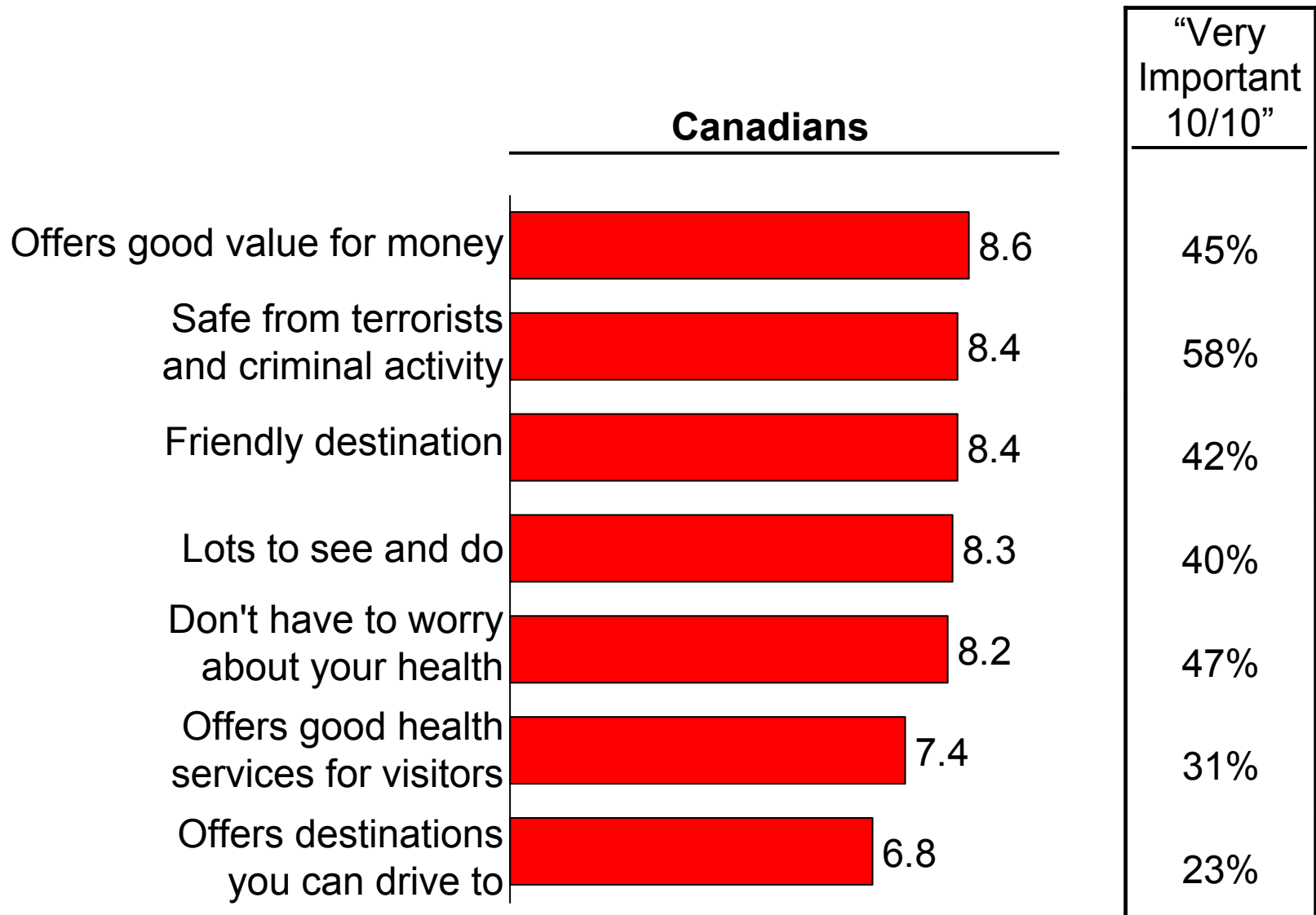


\* Have taken an overnight trip in the past two years or will take one in the next 12 months.

# Pleasure Destination Selection Criteria

# Importance of various factors in selecting a pleasure travel destination








Average score on 10-point scale among past 2 year/next 12-month Canadian travellers



# Ratings For Specific Characteristics

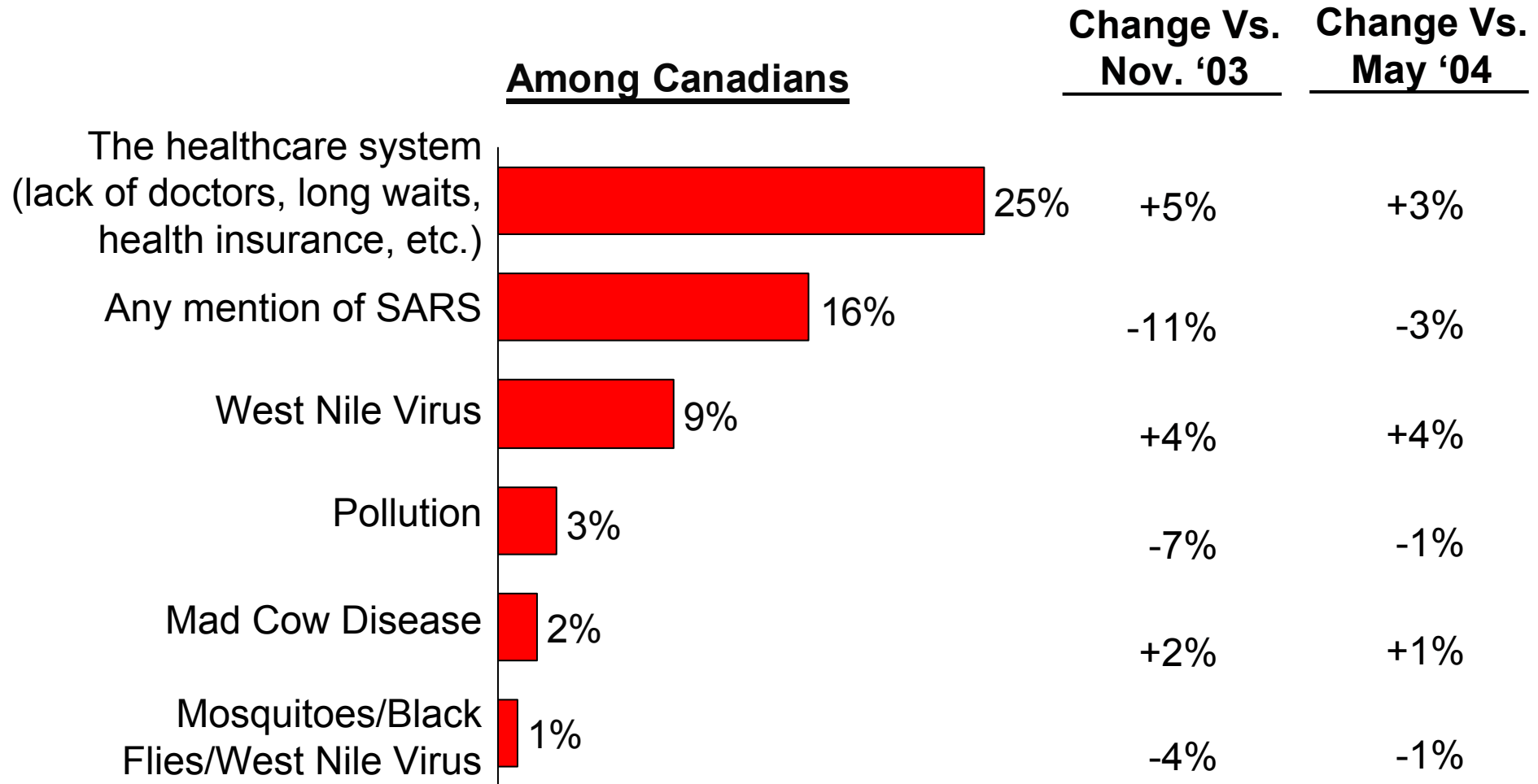
# Ontario imagery ratings

Average on 10-point scale among Canadian travellers

Attributes In Order Of Importance:	Among Canadians				Change Since Nov '03	
	Nov. '03	Feb. '04	May '04	Aug. '04	-	+
Good value for the money	7.4	7.5	7.4	7.5		+0.1
Safe from terrorists & criminals	8.4	8.5	8.4	8.5		+0.1
Friendly destination	8.0	8.2	7.9	8.2		+0.2
Lots to see and do	8.1	8.3	8.2	8.2		+0.1
Don't have to worry about your health	8.3	8.5	8.4	8.6		+0.3
Offers destinations you can drive to	8.5	8.6	8.5	8.7		+0.2
Good health services for visitors	8.1	8.0	8.1	8.2		+0.1

# Volunteered health issues associated with Ontario

Percent of those who rate Ontario 7 or lower as a destination where you don't have to worry about your health





# Ontario ratings for trip types

Average on 10-point scale among Canadians travellers

	Among Canadians				Change Since Nov '03	
	Nov. '03	Feb. '04	May '04	Aug. '04	-	+
Nature & outdoors	8.0	8.1	8.0	8.2		+0.2
Touring trip	7.3	7.4	7.3	7.4		+0.1
Big city trip	7.2	7.4	7.2	7.4		+0.2
Arts, culture & history	7.2	7.3	7.2	7.4		+0.2
Resort trip	6.7	6.9	6.6	6.7		±0.0

# Toronto ratings for trip types

Average on 10-point scale among Canadians travellers

	Among Canadians				Change Since Nov '03	
	Nov. '03	Feb. '04	May '04	Aug. '04	-	+
Shopping, restaurants, nightlife	8.1	8.1	8.0	8.1		±0.0
Arts, culture & history	7.7	7.8	7.6	7.8		+0.1
Strolling around to see buildings/sights	7.3	7.4	7.2	7.4		+0.1
Family vacation	6.7	6.9	6.4	6.7		±0.0
Overall rating	7.5	7.5	7.2	7.5		±0.0
"Must See" destination	7.3	7.5	7.0	7.3		±0.0

# Comparison With The Ideal

# Overall rating of Ontario relative to ideal

## TOP 10 "IDEAL" TRAVEL DESTINATIONS

### Among Ontarians

### Among Quebecers

### Among Americans

## Overall Rating Of Ontario (Average On 10-Point Scale)

Among Ontarians	Among Quebecers	Among Americans
Australia 13%	Italy 11%	Hawaii 13%
Hawaii 9%	France 9%	Australia 7%
France 7%	Australia 8%	Italy 7%
Italy 5%	Hawaii 6%	Alaska 4%
Egypt 3%	Greece 3%	France 4%
Britain 3%	"Europe" 3%	Ireland 3%
"Europe" 3%	Thailand 2%	Greece 3%
Greece 2%	Spain 2%	Caribbean 2%
China 2%	Fiji Islands 2%	Grand Canyon 2%
Mexico 2%	Caribbean 2%	Jamaica 1%

	Comparison To Ideal "Must See" Destination*		Overall Rating For Pleasure Travel	
	Aug. '04	Aug. '04	Aug. '04	△ Nov. '03
<b>Among Past/Intended Travellers:</b>				
Americans	5.4	7.4		+0.2
Ontario Residents	6.2	8.2		+0.2
Quebec Residents	4.2	6.9		+0.5
Winnipeg Residents	5.0	7.4		+0.3

\* Among those with an "ideal" destination

# Implications

# Implications

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- Negative tourism impacts that are unique to the Ontario have dissipated over the past several months.
- However, Ontario is still facing a challenging tourism environment characterized by macro-level impacts:
  - traditional constraints imposed by economics and personal finances...
  - coupled with realities and perceptions as they exist within a turbulent post 9/11 world:
    - resistance to long-term travel planning;
    - anxiety about safety and security, particularly in the U.S.;
    - greater perceived inconvenience associated with travel, particularly to foreign destinations.

# Implications (cont'd)

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- Taken together, these factors have likely caused travellers to think twice about longer cross-border trips and have, perhaps, favoured domestic travel fairly close to home.
- For Ontario and its destinations, this means operating within a much more competitive tourism market, particularly with respect to attracting “higher value” travellers with the capacity for extended stays within the region.
- As with any brand or product, facing such challenges there is a need to define a meaningful and relevant point of difference capable of overcoming impediments to selecting Ontario’s “brands”.
- Safety, friendliness and value for the money are “cost of entry” benefits.

# Implications (cont'd)

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- As emphasized in previous reports, there is a need to go beyond these elements of the offer with the objective of establishing a profile as an exciting travel destination providing a unique combination of tourism experiences.
  - The message must have resonance among both first time visitors and potential repeat visitors.
  - It must be strong enough to break through the competitive “clutter”.
  - It must, in the end, move Ontario and its destinations closer to the top of potential travellers’ consideration set.

# Implications (cont'd)

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- Toronto is possibly the most vulnerable of Ontario's major destinations.
  - It has just emerged from the SARS crisis.
  - It is the least robust with respect to riding out seasonal tourism fluctuations.
  - Its “urban tourism image” remains fairly mediocre, especially in the eyes of Americans.
- As a consequence, Toronto may continue to require special attention.
- With respect to the business market, one can argue that Toronto is not performing to its optimal level in terms of attracting conferences, conventions and trade shows from across North America.

# Implications (cont'd)

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- When it comes to managing the “brands”, a holistic approach would likely be beneficial.
  - Present “Ontario” as the umbrella brand embodying the generic positioning and imagery elements common to the region as a whole?
  - Align specific destinations and attractions under this positioning in a manner that is consistent with the overall strategic message while emphasizing the unique features of the individual tourism entity.



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