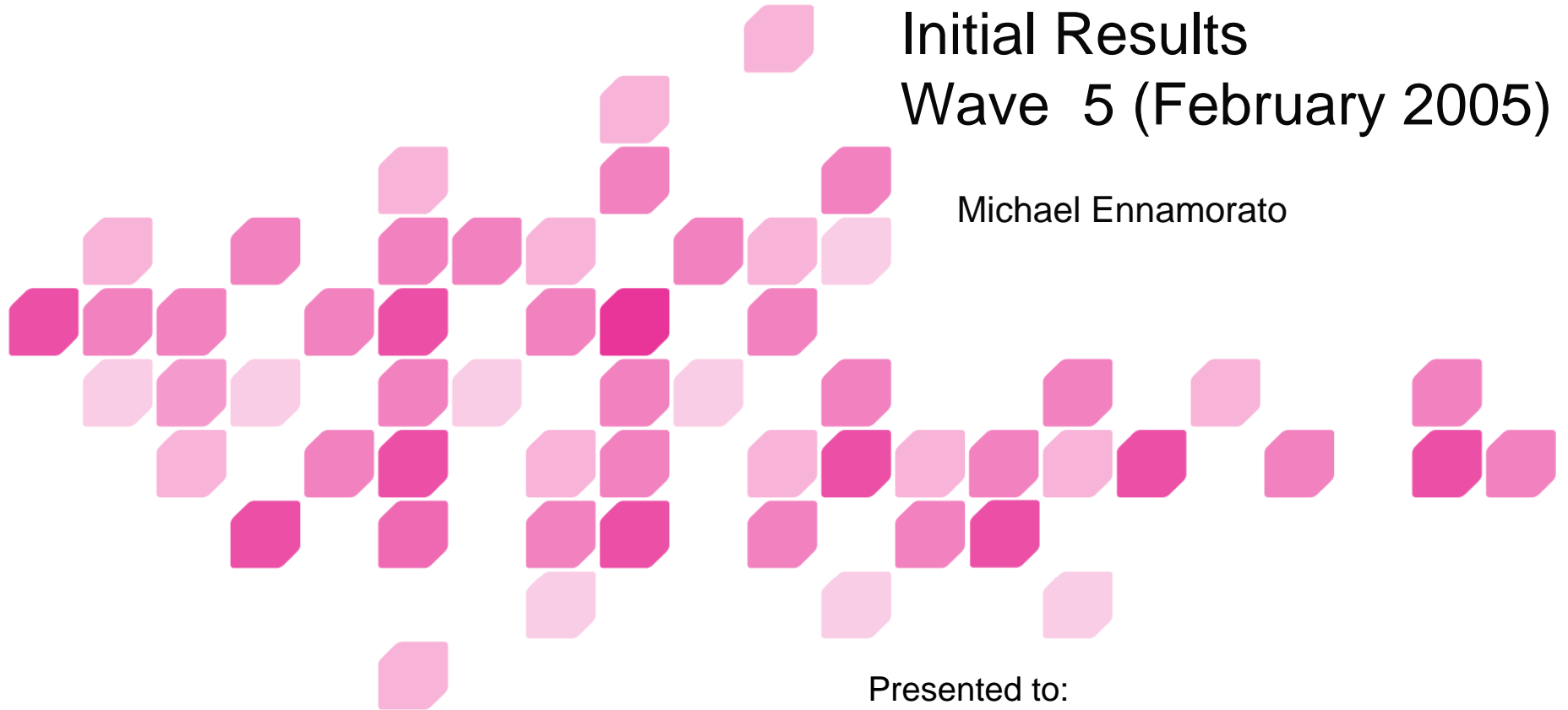


# Travel Intentions Study Initial Results Wave 5 (February 2005)

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Presented to:

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# Travel Intentions — February Topline Summary

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- Results of the February 2005 wave of Travel Intentions Tracking suggest that Ontario has limited momentum going into the Spring tourism season.
- Intent to travel to the province is generally flat relative to the same time last year. Given that the Spring 2004 season lacked buoyancy, this is not an encouraging sign.
- Moreover, there is some indication that Ontario travel intentions have actually eroded in a few key markets – namely, Syracuse, Detroit, Philadelphia, Minneapolis and possibly Ottawa.
- Obviously, then, it will be important to review diagnostic information, motivation data and destination perceptions in some detail when the full database from February 2005 becomes available. It is critical to determine whether the lackluster response is a function of general market trends, or an outcome of factors specific to Ontario.

# Travel Intentions — February Topline Summary

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- Topline ratings data provide some initial perspectives on the state of current consumer perceptions of the province.
- In the US, there is evidence of improvement in the area of safety (crime, terrorism **and** health). However, this might be deemed quite predictable given the distance in time from negative health events, such as SARS, and the absence of significant North American terrorism activity in the recent past. In other respects, Ontario's image among Americans is static.
- In Canada, findings suggest that perceptions of Ontario's image may have undergone mild deterioration. The pattern of responses lead one to suspect that more domestic travelers are questioning the quality of the tourism product and, related to this, the value offered for the money.

# Ontario Travel Intention Incidence By US Market

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

|               |   | As Of<br>Feb. '04 | As Of<br>May '04   | As Of<br>Aug. '04  | As of<br>Feb. '05 | Change<br>Feb '04<br>To<br>Feb. '05 |
|---------------|---|-------------------|--------------------|--------------------|-------------------|-------------------------------------|
|               |   | During<br>Mar/May | During<br>June/Aug | During<br>Sept/Nov | During<br>Mar/May |                                     |
| Buffalo       | % | 29                | 35                 | 27                 | 31                | +2                                  |
| Rochester     | % | 23                | 36                 | 30                 | 20                | -3                                  |
| Syracuse      | % | 17                | 22                 | 18                 | 8                 | (-9)                                |
| New York City | % | 9                 | 12                 | 8                  | 10                | +1                                  |
| Pittsburgh    | % | 8                 | 9                  | 7                  | 8                 | ±0                                  |
| Detroit       | % | 20                | 23                 | 16                 | 13                | (-7)                                |
| Cleveland     | % | 18                | 18                 | 12                 | 12                | -6                                  |
| Boston        | % | 3                 | 6                  | 6                  | 6                 | +3                                  |
| Washington DC | % | 9                 | 6                  | 8                  | 4                 | -5                                  |
| Cincinnati    | % | 6                 | 7                  | 5                  | 5                 | -1                                  |
| Milwaukee     | % | 3                 | 3                  | 1                  | 2                 | -1                                  |
| Indianapolis  | % | 6                 | 4                  | 4                  | 2                 | -4                                  |
| Chicago       | % | 2                 | 6                  | 7                  | 2                 | ±0                                  |
| Philadelphia  | % | 9                 | 11                 | 4                  | 2                 | (-7)                                |
| Minneapolis   | % | 5                 | 5                  | 2                  | 1                 | (-4)                                |

○ Significant at  $\alpha .05$

# Ontario Travel Intention Incidence By Canadian Market

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

|             |   | As Of<br>Feb. '04<br>During<br>Mar/May | As Of<br>May '04<br>During<br>June/Aug | As Of<br>Aug. '04<br>During<br>Sept/Nov | As of<br>Feb. '05<br>During<br>Mar/May | Change<br>Feb '04<br>To<br>Feb. '05 |
|-------------|---|--|--|---|--|-------------------------------------|
| Quebec City | % | 9                                      | 12                                     | 14                                      | 11                                     | +2                                  |
| Montreal    | % | 18                                     | 22                                     | 13                                      | 18                                     | ±0                                  |
| Ottawa      | % | 44                                     | 46                                     | 43                                      | 35                                     | -9                                  |
| Toronto     | % | 28                                     | 43                                     | 29                                      | 28                                     | ±0                                  |
| Winnipeg    | % | 17                                     | 29                                     | 20                                      | 18                                     | +1                                  |

○ Significant at  $\alpha .10$

# Rating Ontario For Specific Imagery Characteristics

Average score\* among travelers in each case

|   | U.S.       |            |             | Canada     |            |             |
|---|------------|------------|-------------|------------|------------|-------------|
|   | Feb. '04   | Feb. '05   | Difference  | Feb. '04   | Feb. '05   | Difference  |
| Safe from criminals/terrorists            | 7.9        | 8.2        | +0.3        | 8.5        | 8.5        | ±0.0        |
| Good value for money                      | 7.4        | 7.3        | -0.1        | 7.5        | 7.3        | -0.2        |
| Lots to see and do                        | 7.8        | 7.9        | +0.1        | 8.3        | 8.0        | -0.3        |
| Friendly                                  | 7.9        | 7.9        | ±0.0        | 8.2        | 7.9        | -0.3        |
| Don't have to worry about health          | 7.8        | 8.1        | +0.3        | 8.5        | 8.5        | ±0.0        |
| Destinations you can drive to             | 7.5        | 7.4        | -0.1        | 8.6        | 8.4        | -0.2        |
| Good health services for visitors         | 7.2        | 7.3        | +0.1        | 8.0        | 8.1        | +0.1        |
| Offers different or unique experience     | N/A        | 7.4        | N/A         | N/A        | 6.8        | N/A         |
| <b>Overall rating for pleasure travel</b> | <b>7.2</b> | <b>7.3</b> | <b>+0.1</b> | <b>7.8</b> | <b>7.6</b> | <b>-0.2</b> |

\* Average rating on 10-point scale.

○ Statistically significant at  $\alpha$  .01

# Rating Ontario For Specific Trip Types

Average score\* among travelers in each case

|                           | U.S.     |          |            | Canada   |          |            |
|---------------------------|----------|----------|------------|----------|----------|------------|
|                           | Feb. '04 | Feb. '05 | Difference | Feb. '04 | Feb. '05 | Difference |
| Enjoy nature/outdoors     | 7.6      | 7.7      | +0.1       | 8.1      | 7.8      | -0.3       |
| Arts, culture and history | 6.8      | 6.8      | ±0.0       | 7.3      | 7.1      | -0.2       |
| Resort trip               | 6.6      | 6.5      | -0.1       | 6.9      | 6.5      | -0.4       |
| Touring trip              | 7.1      | 7.0      | -0.1       | 7.4      | 7.2      | -0.2       |
| Big city trip             | 6.7      | 6.7      | ±0.0       | 7.4      | 7.1      | -0.3       |

\* Average rating on 10-point scale.

○ Statistically significant at  $\alpha$  .01



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