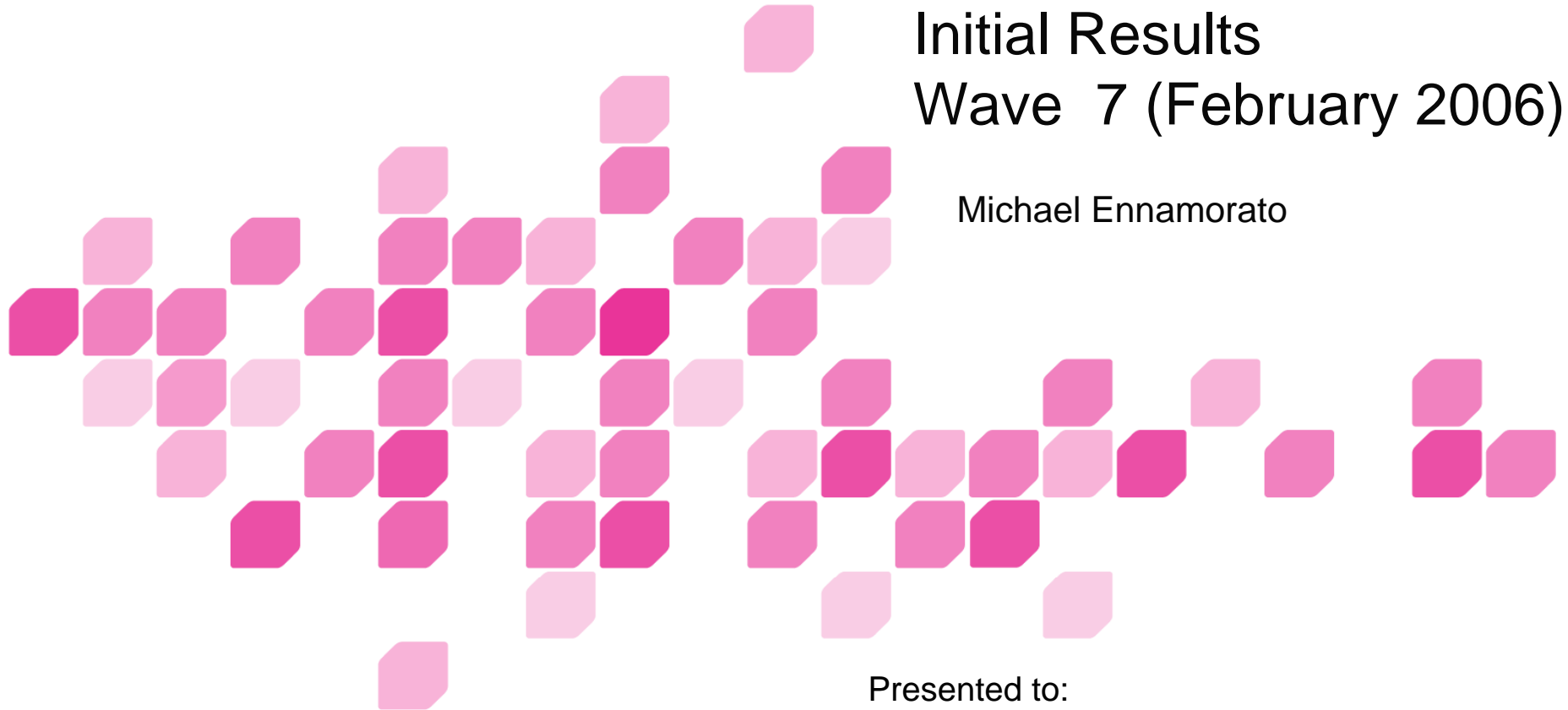


Travel Intentions Study Initial Results Wave 7 (February 2006)

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Presented to:

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Travel Intentions — February '06 Topline Summary

- Results of the February 2006 wave of Travel Intentions Tracking suggest that Ontario, for the most part, has not succeeded in gaining ground as a potential Spring tourism destination over the last two years.
- There is evidence of directional improvement in intent to travel to Ontario among residents of two American urban markets (Boston and Cincinnati), and signs of recovery over the past 12 months in Minneapolis, Philadelphia and, to some degree, Syracuse.
- Apart from this, intentions expressed by Americans have been fairly flat. More concerning, however, is the significant decline in interest evident in the Buffalo region, a key source market for destinations in South-Central Ontario and the Niagara Peninsula.
- Among Canadians, anticipated Spring travel to or within Ontario may have slipped marginally in Toronto, and does not appear to have recovered from the loss registered one year ago in Ottawa. In other domestic origin markets, interest in the province has remained virtually unchanged over the past two years.

Travel Intentions — February '06 Topline Summary

- Given these trends, it will be critical to examine shifts in attitudes and travel motivation within each key market, in order to uncover the nature of resistance or ambivalence to Ontario.
- Although this investigation can not be completed until the full database for the most recent wave is made available, topline ratings data provide some initial perspectives on perceptual trends.
- In both the US and Canada, Ontario's image as a Spring tourism destination has shown signs of softening over the past two years, with deterioration noted on the large majority of specific attributes examined. Of particular significance, in this regard, are the fairly large losses posted on dimensions critical to establishing Ontario as a locale that is welcoming to tourists (safe and friendly) and capable of delivering good value for the money. Especially in today's climate, each of these dimensions plays a central role in defining the traveler's destination consideration-set.

Travel Intentions — February '06 Topline Summary

- There are also signs of decline when attention is turned to consumer impressions of Ontario's suitability for specific types of pleasure travel (outdoors, urban, resort, cultural or touring trip). Although the magnitude of losses recorded are fairly minor in the absolute, they are statistically significant. If they are indicative of a gradual long-term trend, ameliorative action may be warranted at the present time.

Ontario Travel Intention Incidence By US Market

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

		As Of Feb. '04	As of Feb. '05	As of Feb. '06	Change Feb '04 To Feb. '06	Change Feb '05 To Feb. '06
		<u>During Mar/May</u>	<u>During Mar/May</u>	<u>During Mar/May</u>		
Buffalo	%	29	31	21	-8	-10
Rochester	%	23	20	20	-3	0
Syracuse	%	17	8	12	-5	+4
New York City	%	9	10	9	0	-1
Pittsburgh	%	8	8	6	-2	-2
Detroit	%	20	13	12	-8	-1
Cleveland	%	18	12	10	-8	-2
Boston	%	3	6	7	+4	+1
Washington DC	%	9	4	4	-5	0
Cincinnati	%	6	5	10	+4	+5
Milwaukee	%	3	2	4	+1	+2
Indianapolis	%	6	2	2	-4	0
Chicago	%	2	2	4	+2	+2
Philadelphia	%	9	2	5	-4	+3
Minneapolis	%	5	1	4	-1	+3

○ 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 Feb. '04	As of Feb. '05	As of Feb. '06	Change Feb '04 To Feb. '06	Change Feb '05 To Feb. '06
		During Mar/May	During Mar/May	During Mar/May		
Quebec City	%	9	11	10	+1	-1
Montreal	%	18	18	17	-1	-1
Ottawa	%	44	35	34	-10	-1
Toronto	%	28	28	23	-5	-5
Winnipeg	%	17	18	16	-1	-2

○ Significant at α .05

Rating Ontario For Specific Imagery Characteristics

Average score* among travelers in each case

	U.S.			Canada		
	Feb. '04	Feb. '06	Difference	Feb. '04	Feb. '06	Difference
Safe from criminals/terrorists	7.9	7.5	-0.4	8.5	7.8	-0.7
Good value for money	7.4	6.9	-0.5	7.5	7.2	-0.3
Lots to see and do	7.8	7.6	-0.2	8.3	7.9	-0.4
Friendly	7.9	7.5	-0.4	8.2	7.8	-0.4
Don't have to worry about health	7.8	7.6	-0.2	8.5	8.3	-0.2
Destinations you can drive to	7.5	7.3	-0.2	8.6	8.2	-0.4
Good health services for visitors	7.2	6.7	-0.5	8.0	7.7	-0.3
Offers different or unique experience	N/A	7.2	-0.2**	N/A	6.8	±0.0**
Overall rating for pleasure travel	7.2	7.1	-0.1	7.8	7.5	-0.3*

* Average rating on 10-point scale.

** Change versus February, 2005

○ Statistically significant at α .01

Rating Ontario For Specific Trip Types

Average score* among travelers in each case

	U.S.			Canada		
	Feb. '04	Feb. '06	Difference	Feb. '04	Feb. '06	Difference
Enjoy nature/outdoors	7.6	7.4	-0.2	8.1	8.0	-0.1
Arts, culture and history	6.8	6.7	-0.1	7.3	7.2	-0.1
Resort trip	6.6	6.4	-0.2	6.9	6.6	-0.3
Touring trip	7.1	6.9	-0.2	7.4	7.2	-0.2
Big city trip	6.7	6.5	-0.2	7.4	7.2	-0.2

* Average rating on 10-point scale.

○ Statistically significant at α .01



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