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Ministry of Tourism

Canada 

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Toronto
Toronto Convention & Visitors Association

FedNor 

Travel Intentions Study Wave 9 (Feb. '08)

Northern Ontario *Telephone Survey*



Presented to:

Ontario Tourism Marketing Partnership Corp.
Ontario Ministry of Tourism

May 5, 2008

Background

- This annual study is conducted in Ontario's key US and Canadian source markets with the objective of measuring:
 - Travel intentions for the spring and summer seasons;
 - Destination selection during those seasons;
 - Impressions of Ontario as a possible travel destination;
 - Perceived impediments to selecting travel destinations in Ontario.
- The information is then related to previous waves of tracking in order to put current intentions into context and establish a meaningful trend.
- The findings help forecast market conditions for the peak summer season and lead-in spring shoulder.

Background (cont'd)

- This information that can be used by tourism marketers to:
 - Align the seasonal offering to forecast demand;
 - And, perhaps more importantly, to identify potential impediments to Ontario travel and reduce their impact.
- The study can also assist with messaging and targeting of promotional communications and other marketing initiatives.
- A special Northern Ontario module was included in the 2007 and 2008 questionnaires.
- This will be the focus of the current presentation.

Methodology

- 2008 is a transition year between telephone and online data collection methodologies.
- The current study consists of two separate matched surveys – one in each of the data collection modes.
- The 2008 study therefore maintains continuity with past waves by continuing the time series using telephone data collection, and provides a new benchmark for future waves conducted online.
- This two-phased approach will also allow us to isolate methodology effects and possibly establish a calibration routine for retaining comparability to the historical telephone record on key variables once we switch to an entirely web-based approach in subsequent waves.

Methodology (cont'd)

- The information in this presentation is derived only from the telephone data base to illustrate Travel Intention trends, thereby eliminating methodology effects.
- Statistical variance has been thoroughly checked, and all changes that are statistically significant identified in the following charts.
- Interviewing was conducted among individuals 18 years or older.
- As in previous waves, an exacting methodology was used:
 - Modified random digit dialing (RDD) 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;
 - The **Trohdal-Carter** methodology was used to select a single age-eligible respondent in each household.

Methodology (cont'd)

- The telephone sample was assigned disproportionately by market as follows:

Canada:		
	Assigned	Achieved
Montreal CMA	150	150
Quebec City CMA	100	99
Toronto	200	201
Ottawa CMA	100	100
Ontario 500M+ ex- Toronto/Ottawa	100	102
Ontario 100-499.9 M	100	101
Ontario 30-99.9M	50	51
Ontario 10-29.9M	30	30
Ontario < 10M	30	35
Manitoba	100	100
Total:	960	969

Methodology (cont'd)

US:		
	Assigned	Achieved
Rochester NY P	150	151
Buffalo NY	150	152
Syracuse NY	100	106
New York City NY	100	127
Nass. Suff. NY	30	30
Other NY	45	45
Chicago IL	125	132
Other IL	45	45
Indianapolis IN	45	48
Other Indianapolis	50	50
Boston NECMA	75	75
MASS ex Bost. NECMA	30	32
Detroit MI	150	158
North MI MSA's	40	42
MI Bal	30	30
Minn. St PI MN	100	103
Other MN	25	28

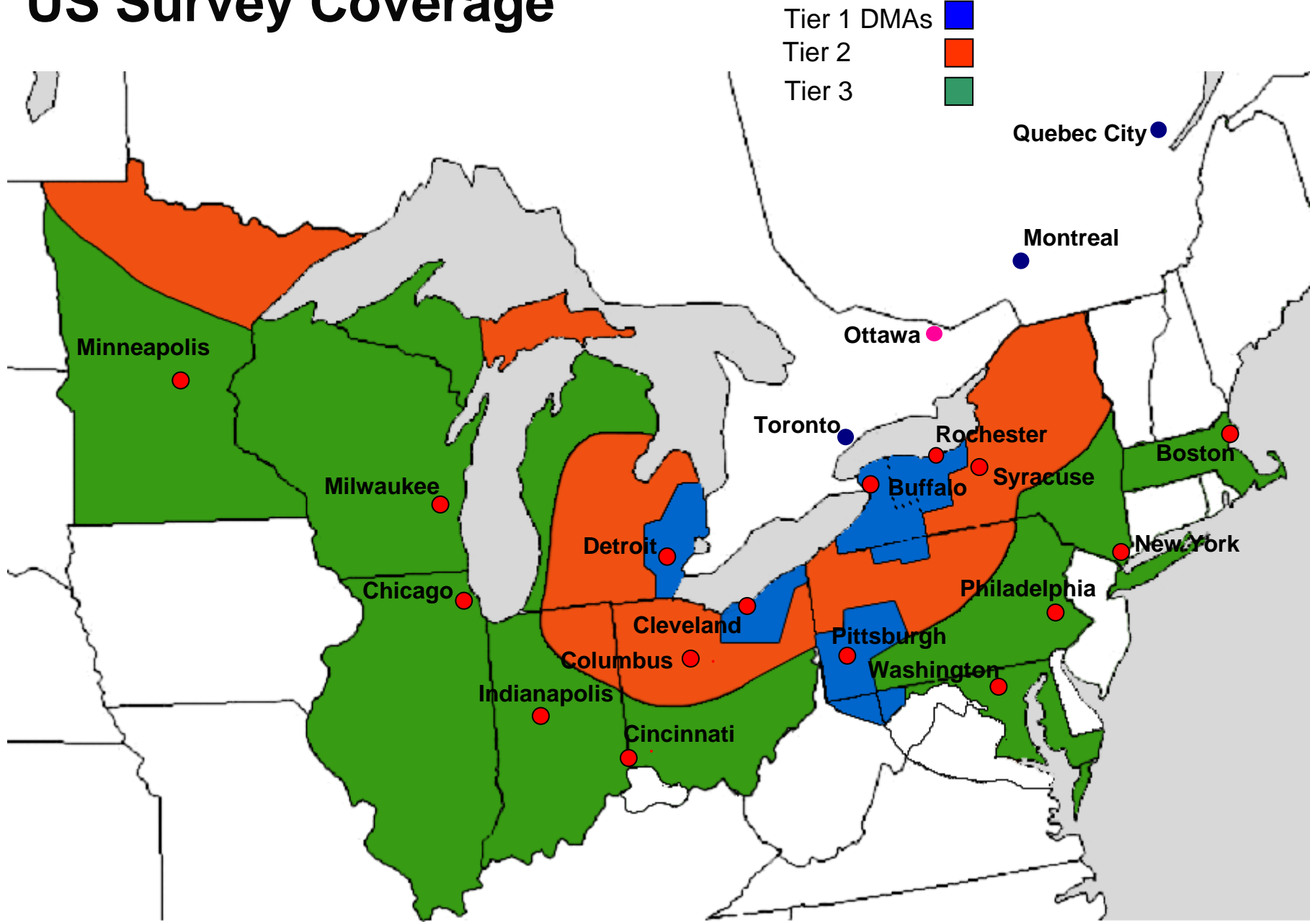
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Methodology (cont'd)

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previous page

US:		
	Assigned	Achieved
Clev. Lorn. Elyr. OH	100	101
Cincinnati OH	50	51
Columbus OH	50	76
Other OH	70	70
Pittsburgh PA	150	153
Philadelphia PA	85	85
Other PA	70	70
Milw. Waukesha WI	100	105
Other WI	45	46
Washington DC	60	63
MD ex Washington	50	52
Total:	2,120	2,226

US Survey Coverage



Canadian Survey Coverage



Methodology (cont'd)

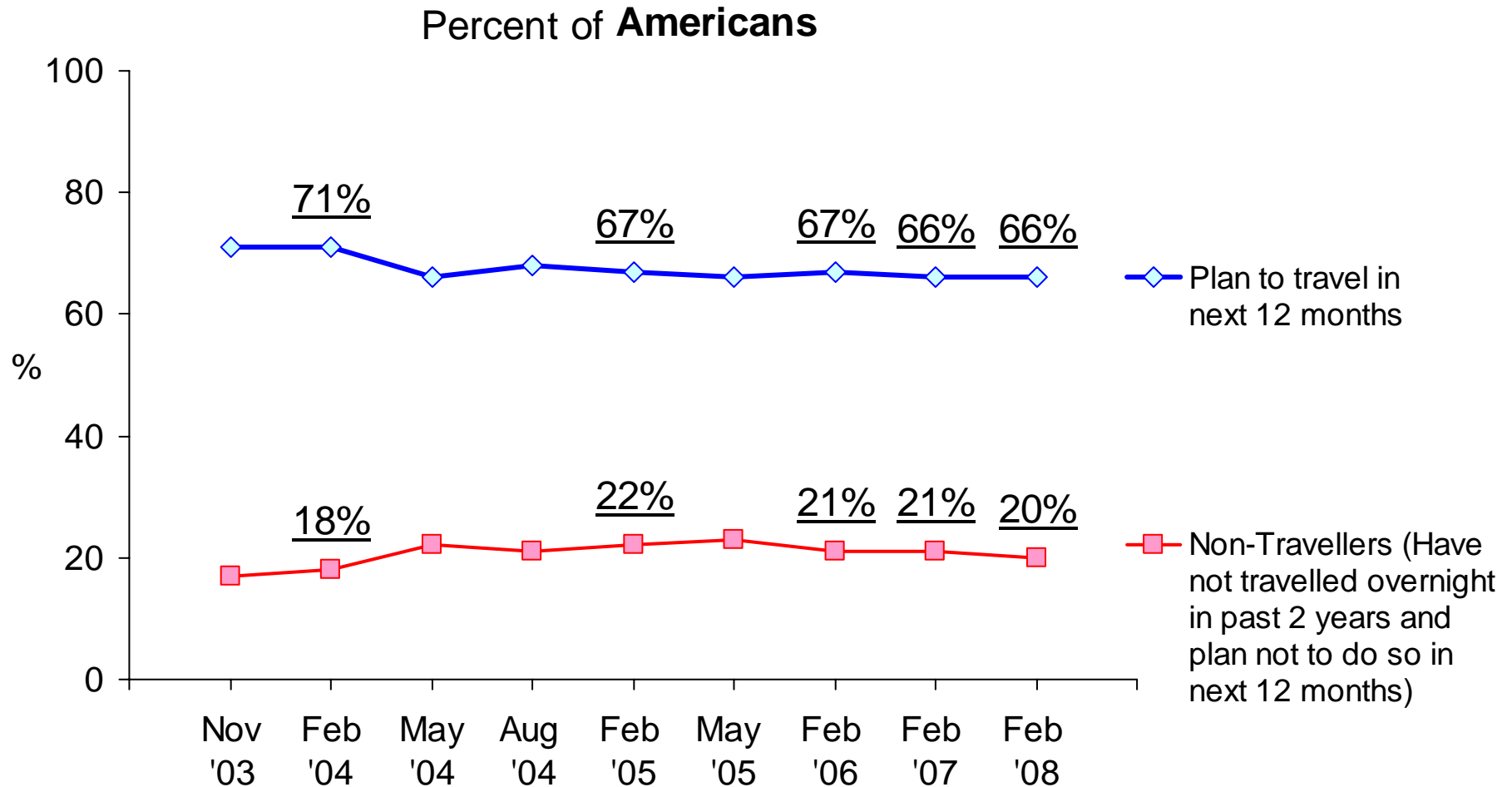
- In total, 3,195 interviews were completed:
 - 969 in Canada;
 - 2,226 in the United States.
- As part of data processing, the RDD sample was weighted in three stages using the most recently available census information from each country:
 - Household size within market;
 - Household conversion weight (to correct for differential selection probabilities within household due to variations in number of age-qualified individuals within each);
 - Age within gender within market.

Propensity To Travel & Trip Planning



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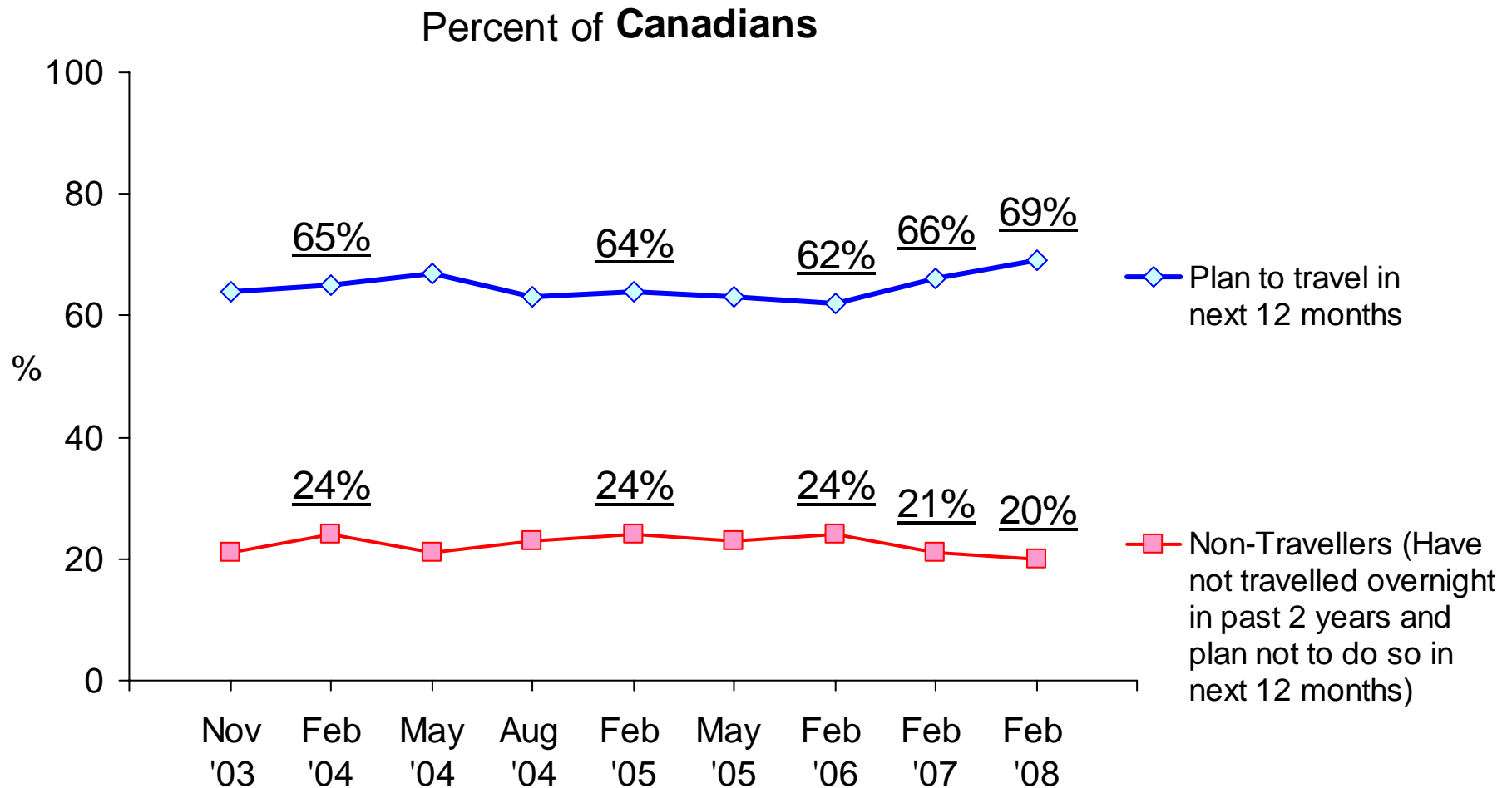
Trend in General Travel Intentions and Propensity to Travel



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 General Travel Intentions and Propensity to Travel



○ Significant change versus Feb. '04 at α .05

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... ?

Travel Intention Details

Intended Travel Patterns Of US Residents — Next Season

Destinations:	Percent Of Total US Adults Stating Intend To Travel To ... March/May					Change 04 - 08 (Projected Number In Thousands)		△ As % Of Feb. '04 Projection
	Feb. '04 %	Feb. '05 %	Feb. '06 %	Feb. '07 %	Feb. '08 %	-	+	
Within Own State	28	24	23	21	24	-1,745		-9%
Elsewhere In US	44	42	41	40	41	-1,375		-4%
Ontario	8	6	6	7	4	-2,340		-42%
Toronto	4	3	3	3	2	-978		-37%
Niagara Falls	4	3	3	3	2	-1,647		-56%
Elsewhere in Ont.	3	3	3	4	2	-737		-31%
Other Canada	5	3	3	5	5	-131		-4%
Mexico/Caribbean	9	8	7	8	8	-473		-7%
Other Country	9	8	8	9	8	-282		-4%

□ Significant decrease versus Feb.
'04 at α .05

Figures in **blue** are significantly higher versus Feb '07.
Those in **red** are significantly lower

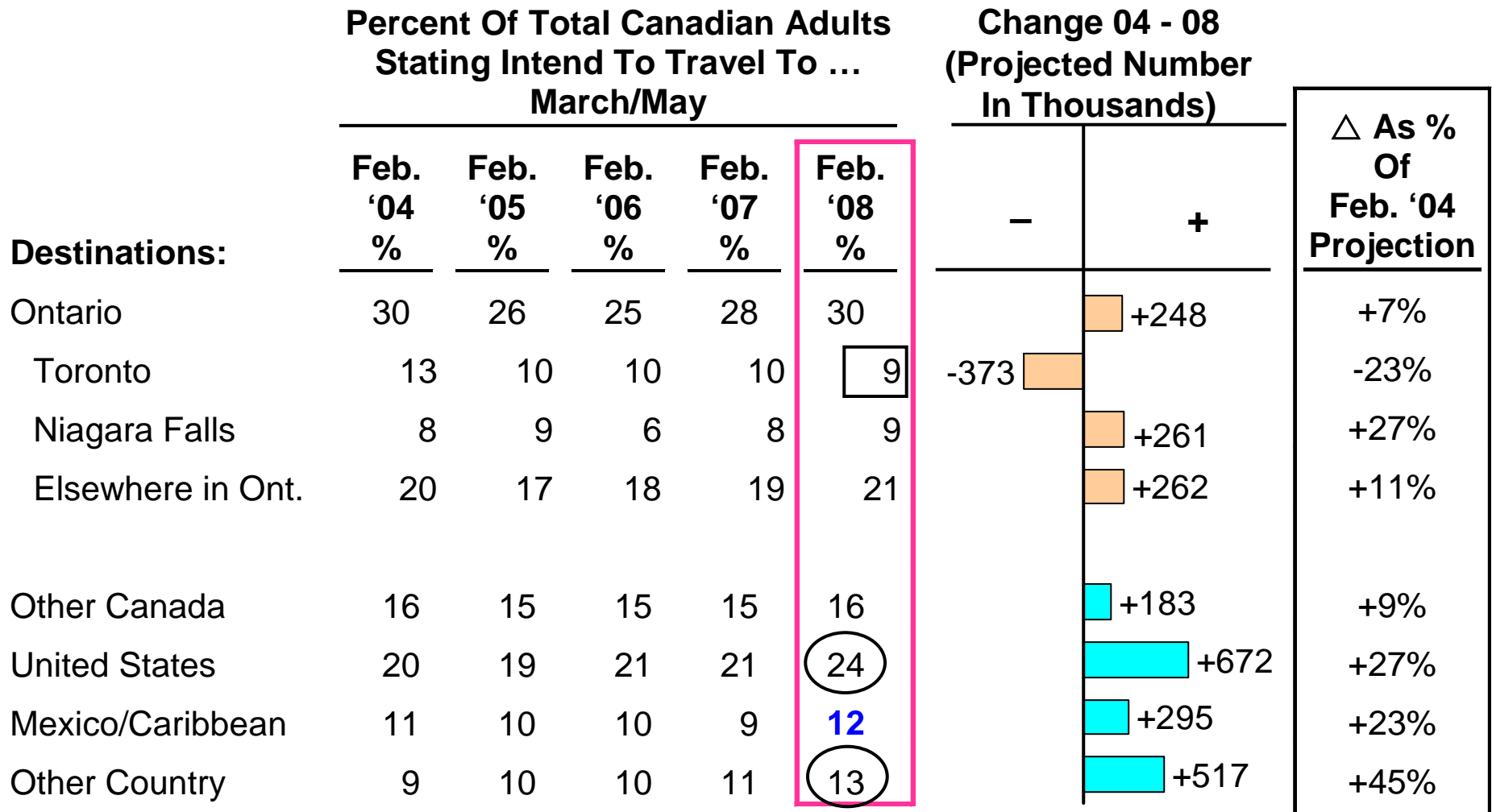
Ontario Travel Intention Incidence By Specific US Market

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

		March/May					June/August				
		Feb '04	Feb '05	Feb '06	Feb '07	Feb '08	Feb '04	Feb '05	Feb '06	Feb '07	Feb '08
Buffalo	%	29	31	21	20	27	36	27	24	25	31
Rochester	%	23	20	20	16	13	37	19	21	19	17
Syracuse	%	17	8	12	10	18	26	14	16	12	32
Cleveland	%	18	12	10	14	6	26	13	15	11	15
Detroit	%	20	13	12	14	16	27	20	16	14	12
Boston	%	3	6	7	3	5	9	8	9	4	5
New York City	%	9	10	9	8	3	14	9	10	4	5
Pittsburgh	%	8	8	6	6	6	18	9	10	8	7
Philadelphia	%	9	2	5	6	2	11	9	9	7	7
Washington DC	%	9	4	4	2	3	10	6	5	1	7
Cincinnati	%	6	5	10	7	2	14	6	10	9	8
Chicago	%	2	2	4	6	8	10	6	7	12	11
Indianapolis	%	6	2	2	2	*	14	5	7	7	0
Milwaukee	%	3	2	4	1	2	6	7	4	2	3
Minneapolis	%	5	1	4	4	2	9	6	4	6	6
TOTAL US	%	8	6	6	7	4	12	8	8	8	8

○ Significant increase versus Feb. '04 at α .10 □ Significant decrease versus Feb. '04 at α .05 * Less than 0.5%.

Intended Travel Patterns Of Canadian Residents — Next Season



○ Significant increase versus Feb. '04 at α .05
 □ Significant decrease versus Feb. '04 at α .05

Figures in **blue** are significantly higher versus Feb '07.
 Those in **red** are significantly lower

Change In Volume Among Canadians Adjusted For Source Market Pop. Growth — **Next Season**

Destinations:	Percent Of Total Canadian Adults Stating Intend To Travel To ... March/May					Change 04 - 08 (Projected Number In Thousands)*		△ As % Of Feb. '04 Projection
	Feb. '04 %	Feb. '05 %	Feb. '06 %	Feb. '07 %	Feb. '08 %	-	+	
Ontario	30	26	25	28	30		+14	±0%
Toronto	13	10	10	10	9	-443		-29%
Niagara Falls	8	9	6	8	9		+191	+21%
Elsewhere in Ont.	20	17	18	19	21		+98	+4%
Other Canada	16	15	15	15	16		+58	+3%
United States	20	19	21	21	24		+483	+20%
Mexico/Caribbean	11	10	10	9	12		+115	+4%
Other Country	9	10	10	11	13		+416	+35%

- Significant increase versus Feb. '04 at α .05
- Significant decrease versus Feb. '04 at α .05

*Adjusted for population growth

Ontario Travel Intention Incidence By Specific Canadian Market

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

		March/May					June/August				
		Feb '04	Feb '05	Feb '06	Feb '07	Feb '08	Feb '04	Feb '05	Feb '06	Feb '07	Feb '08
Quebec City	%	9	11	10	7	6	14	14	8	7	9
Montreal	%	18	18	17	13	15	22	16	18	10	17
Ottawa	%	44	35	34	32	47	48	32	32	41	43
Toronto	%	28	28	23	25	37	37	26	29	32	39
Other Ontario	%	40	31	33	41	36	43	31	29	38	31
Winnipeg	%	17	18	16	17	10	29	21	21	18	25
TOTAL CANADA	%	30	26	26	28	30	35	26	26	29	30

- Significant increase versus Feb. '04 at α .10
- Significant decrease versus Feb. '04 at α .10

Figures in **blue** are significantly higher versus Feb '07.
Those in **red** are significantly lower

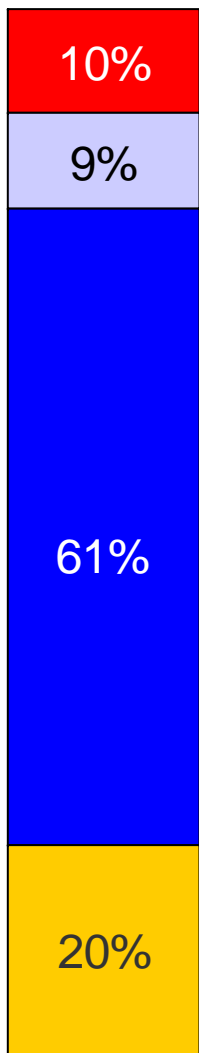
General Experience With And Interest In Ontario

Latent Interest In Ontario Travel Among Americans (Feb '08)

Percent of US Residents

Plan to take overnight trip to Ontario in next 6 months

Not in next 6 months but have been to Ontario in past 2 years

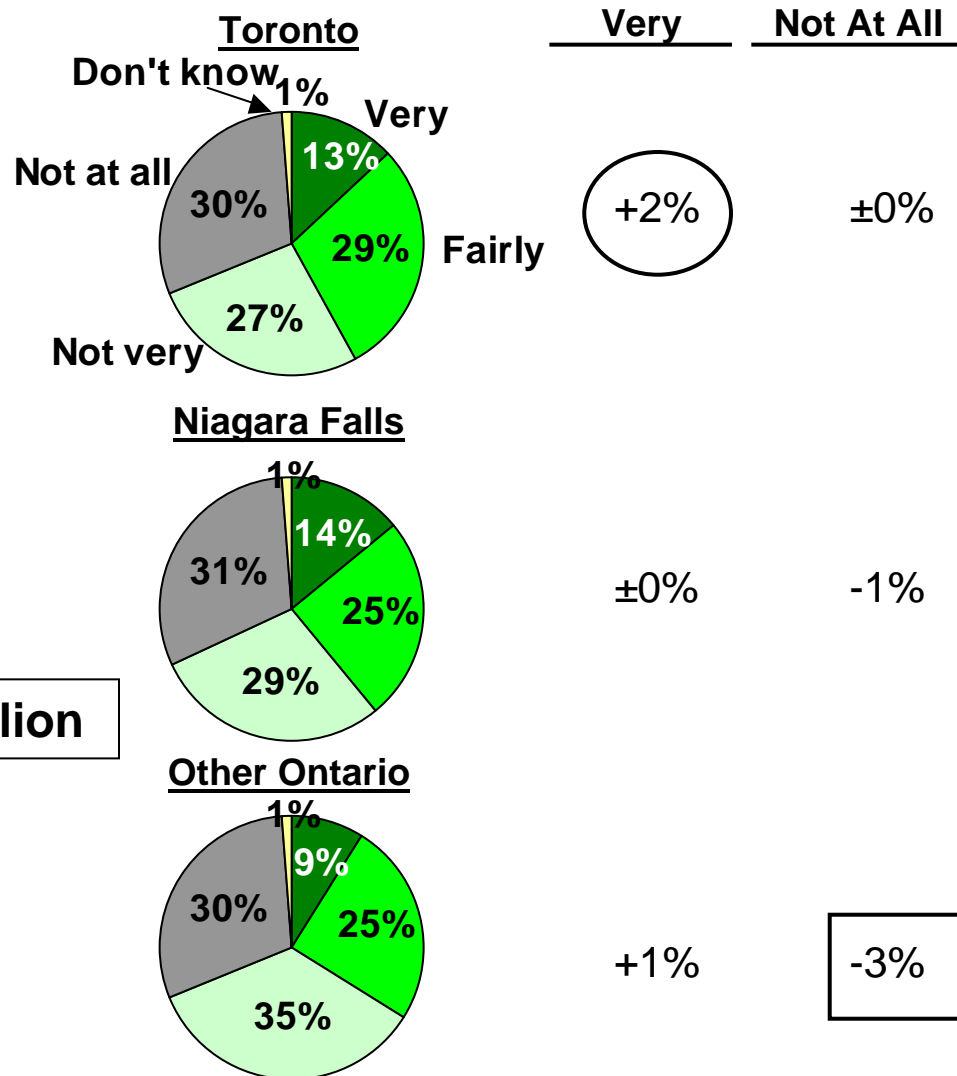


Not in next 6 months and haven't been there in past 2 years

= 68 million

Interest In Visiting in next 2 years

Change In Interest vs. Feb. '04



○ Significant increase versus Feb. '04 at α .05 □ Significant decrease versus Feb. '04 at α .05

Northern Ontario Details



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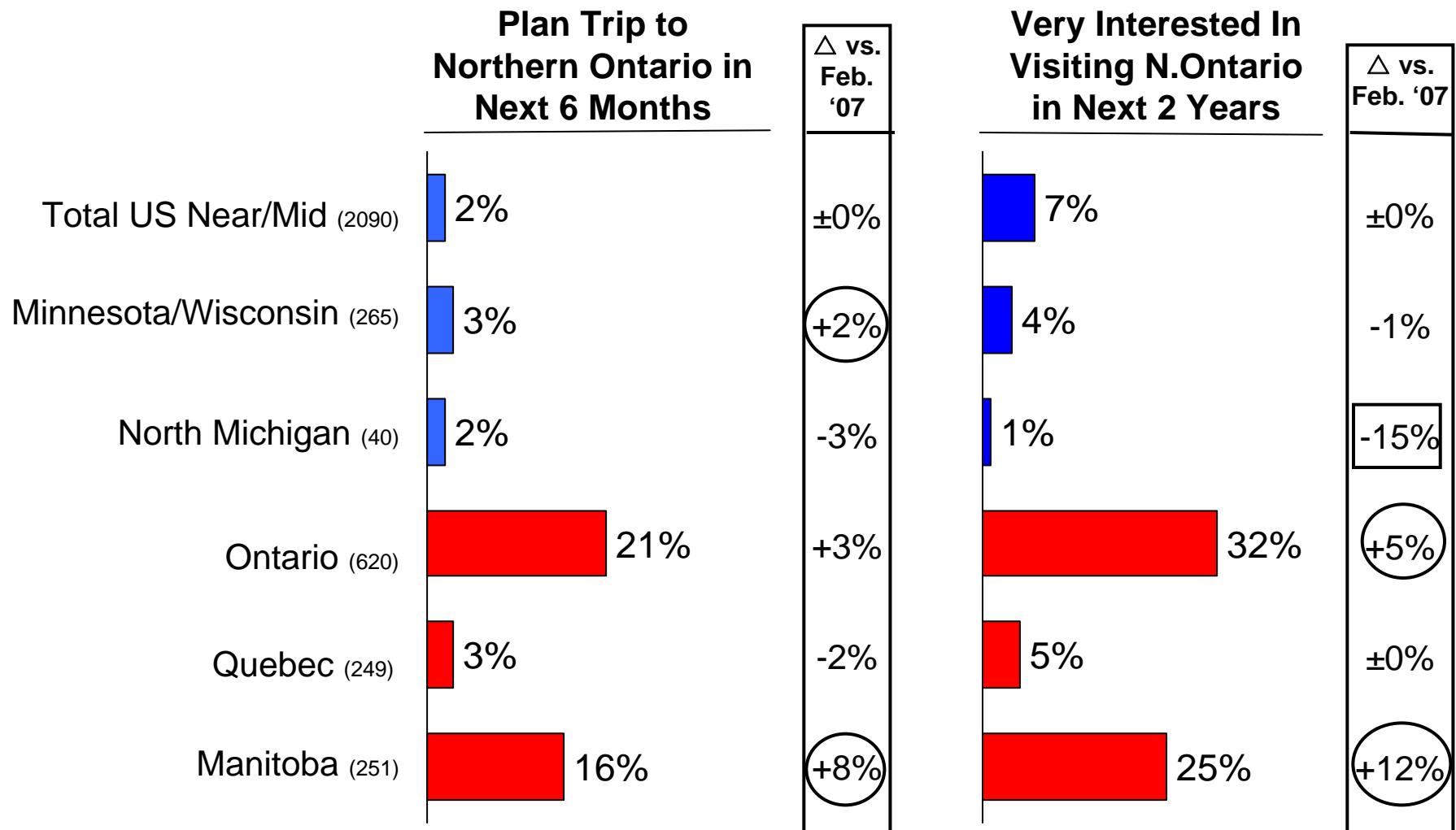
Incidence Of Visiting Northern Ontario — Past & Future

Percent of ... residents						
Total US Near/Mid %	Minn/ Wisc %	North Michigan %	Ontario %	Quebec %	Manitoba %	
Past:						
Ever been to Northern Ontario	9	8	27	62	12	38
Been to Northern Ontario in past 2 years	1	1	—	34	3	18
Future:						
Plan for Northern Ontario trip in next six months	2	3	2	21	3	16
Very interested in next 2 years	7	4	1	32	5	25
	(n=2,090)	(n=265)	(n=40) ^{^^}	(n=620)	(n=249)	(n=251)

^{^^}Very small base - extreme caution.

Change In Northern Ontario Travel Intentions Feb. 2007 to Feb. 2008

Percent of residents in each case

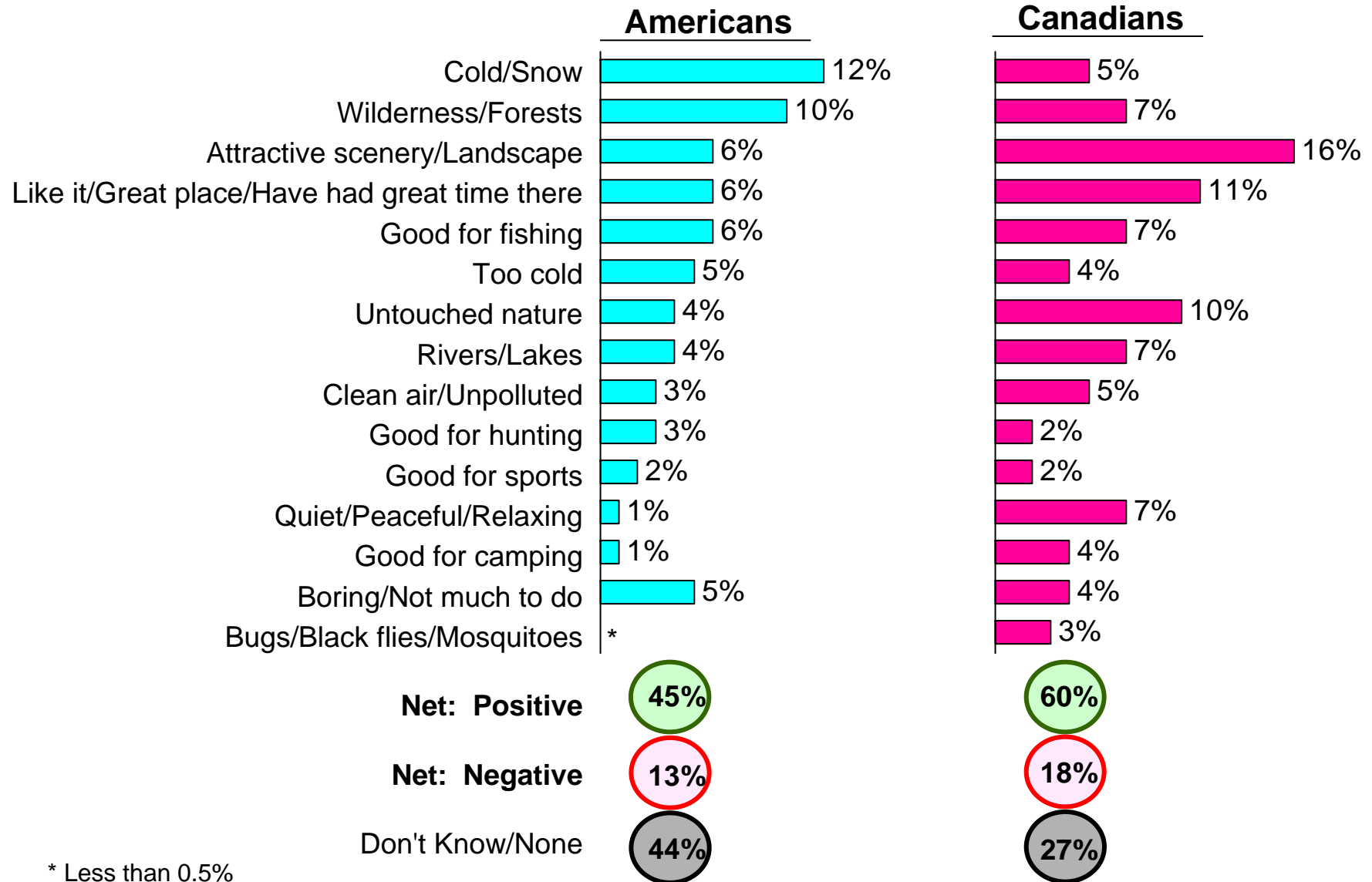


○ Statistically significant increase at 95% level of confidence.

□ Statistically significant decrease at 95% level of confidence.

Volunteered Impressions Of Northern Ontario

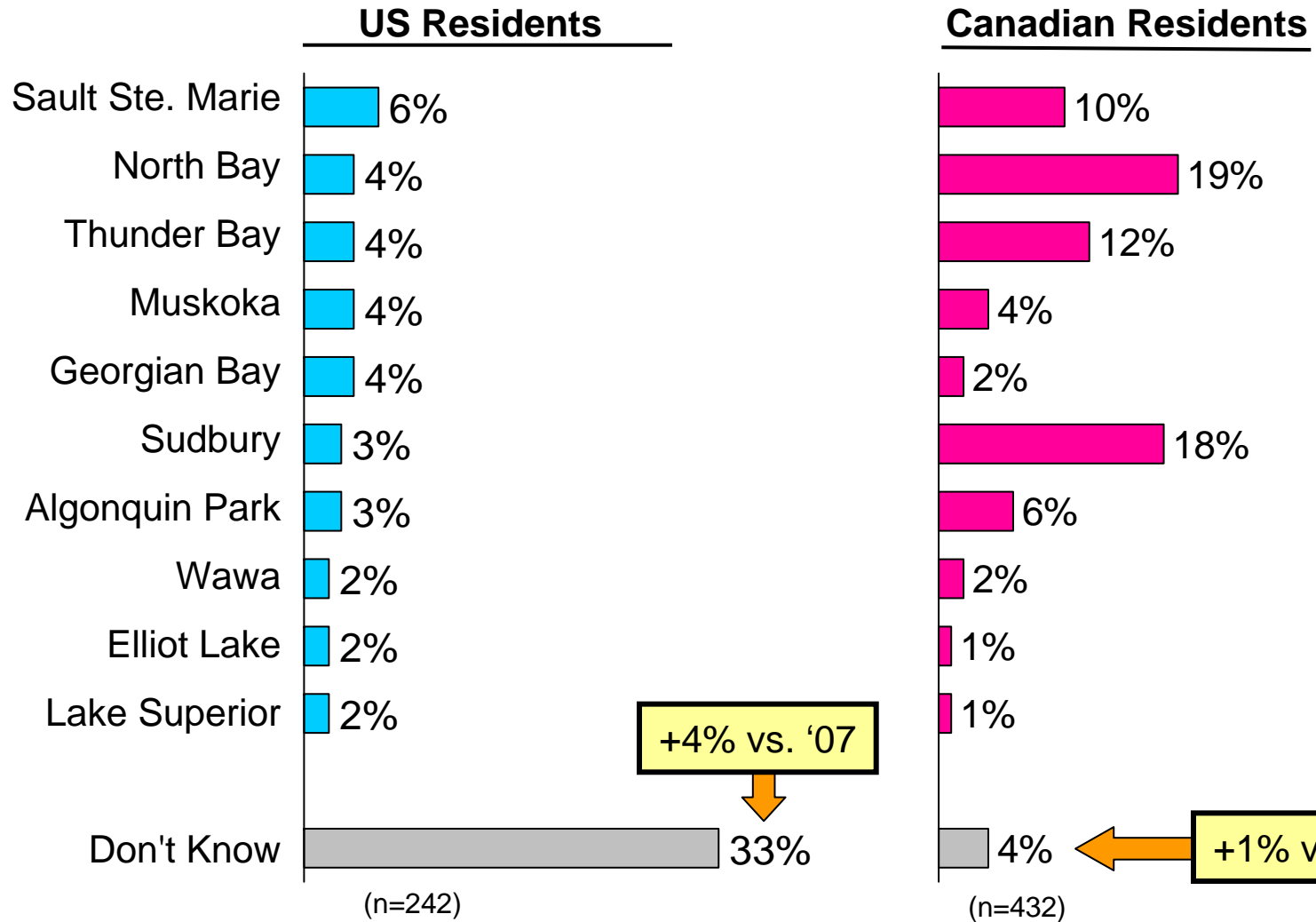
Percent of those aware of Ontario



* Less than 0.5%

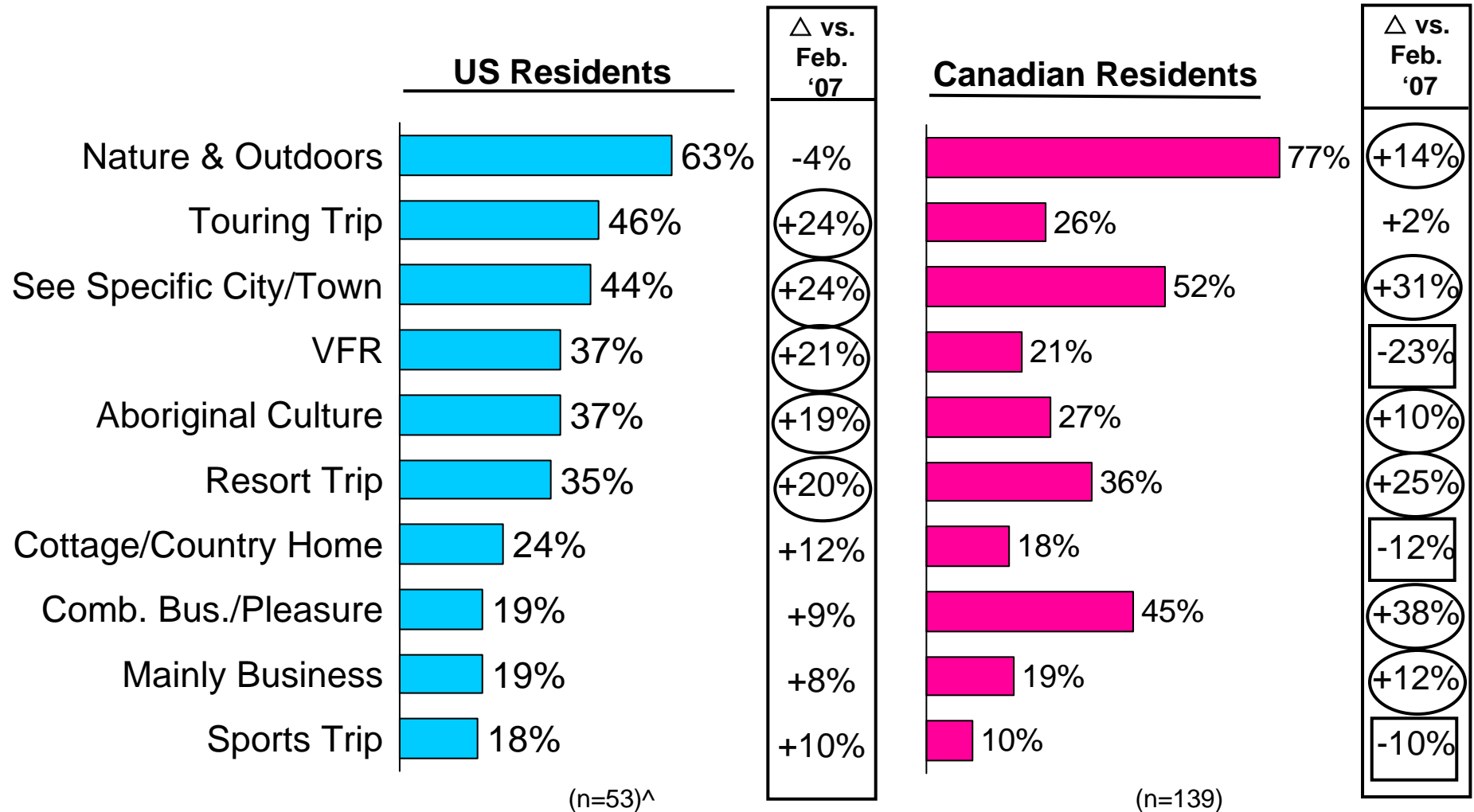
Places Visited In Northern Ontario

Total who have ever visited Northern Ontario



Reasons For Visiting Northern Ontario In Next 6 Months

Percent of those planning trip in next 6 months



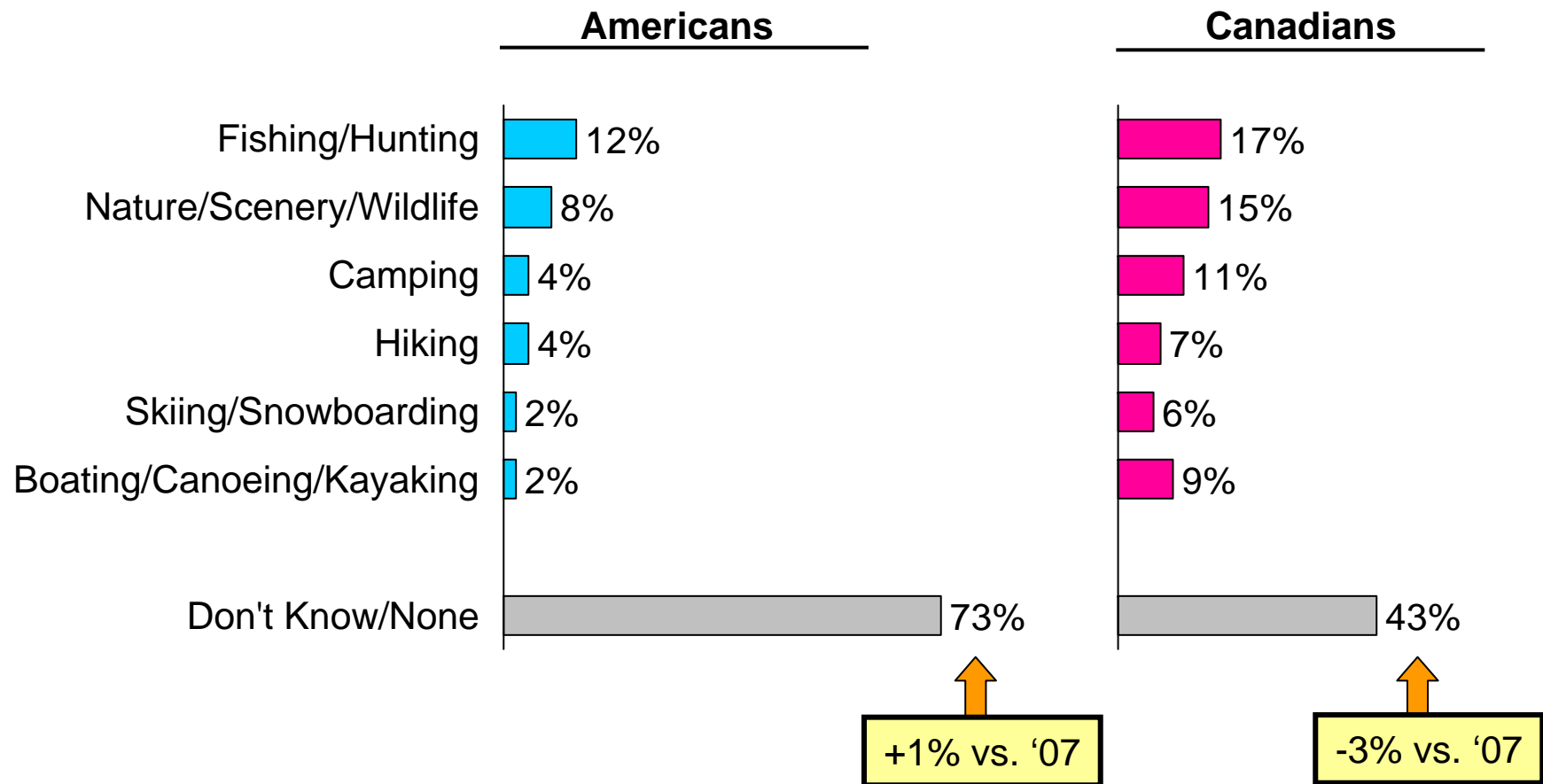
○ Statistically significant increase at 95% level of confidence.

□ Statistically significant decrease at 95% level of confidence.

^Small base - caution.

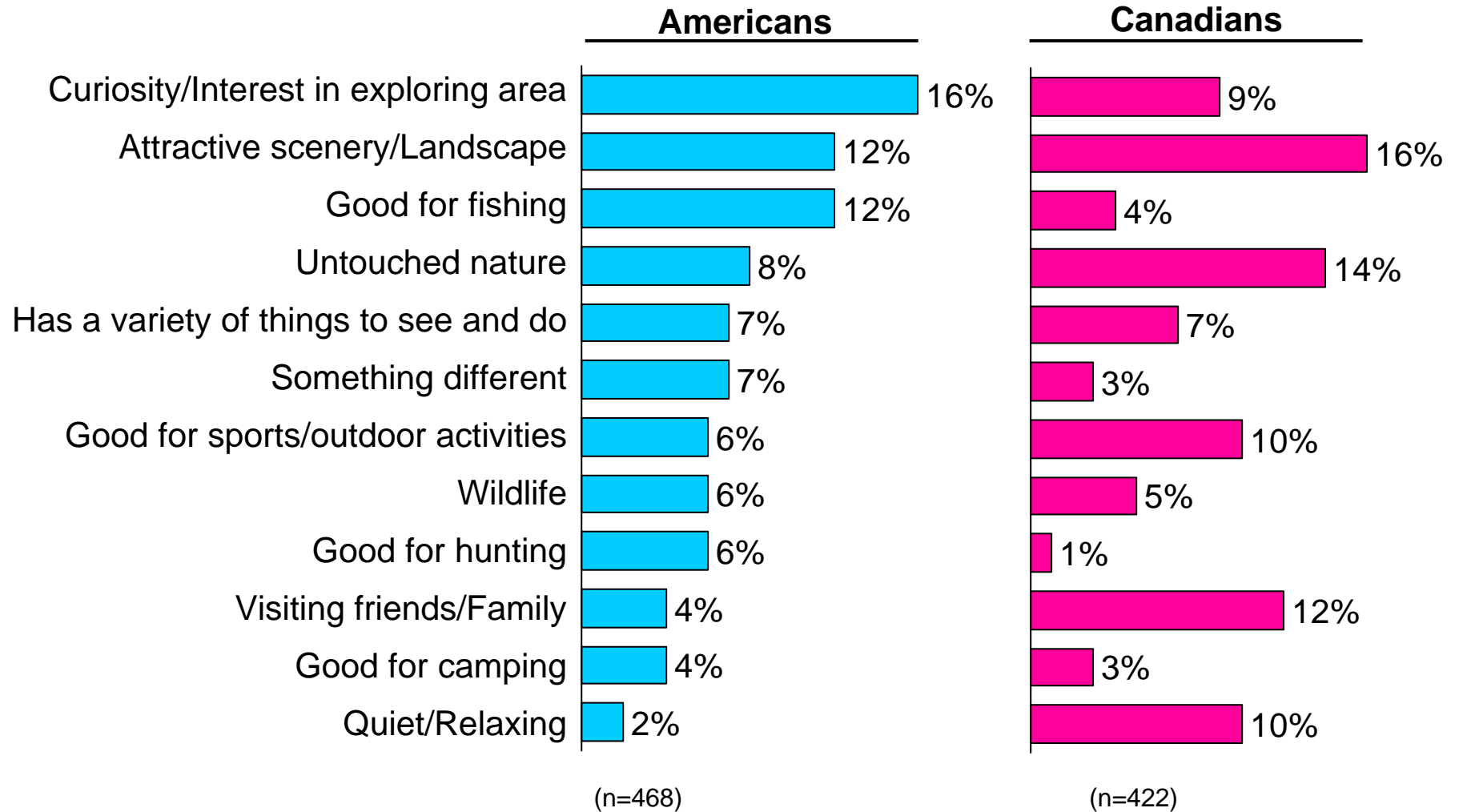
Unprompted Awareness Of Specific Things To See And Do In Northern Ontario

Percent of those aware of Ontario



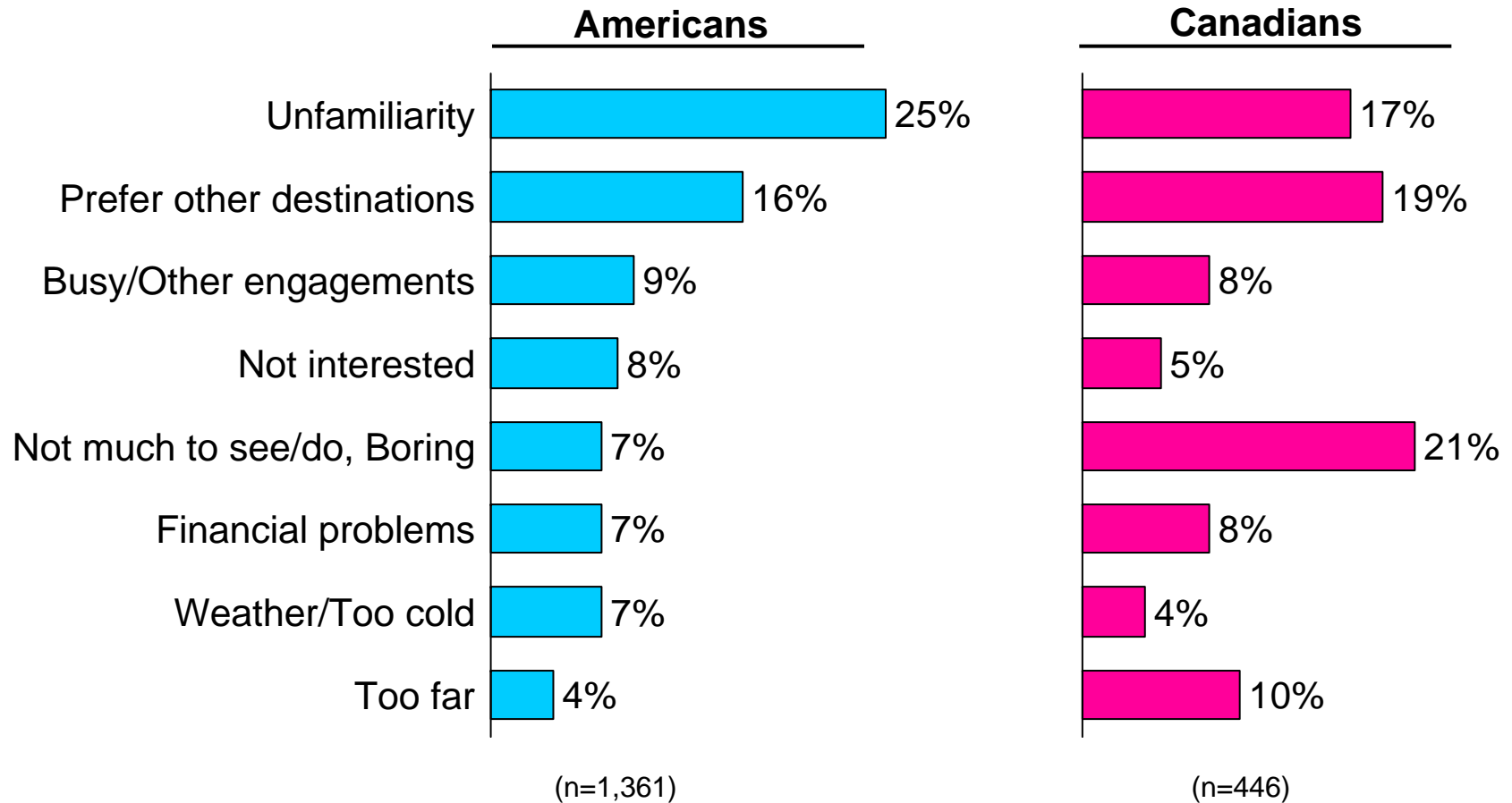
Reasons For Interest In Northern Ontario

Percent of those interested in visiting



Reasons For Lack Of Interest In Northern Ontario

Percent of those not interested in visiting



Rating N. Ont. For Specific Imagery Attributes

Average score* among travelers in each case with some understanding of Northern Ontario

	Residents of ...			
	U.S. (Near & Mid)		Canada (Ont, Que, Man)	
		Difference Vs. Rating For Total Ontario		Difference Vs. Rating For Total Ontario
Enjoy nature/outdoors	8.1	+0.6	9.0	+0.9
Good value for money	6.6	-0.1	7.7	+0.5
Lots to see and do	6.5	-0.9	7.4	-0.5
Friendly	7.4	-0.3	8.3	+0.5
Clean & unpolluted environment	8.3	N/A	8.5	N/A
Destinations you can drive to	5.8	-1.5	7.0	-1.3
Good for resort trip	6.5	+0.2	7.5	+0.7
Offers different or unique experience	7.3	±0.0	7.8	+1.0
Having fun & being entertained	6.3	-1.0	7.1	-0.6
Good for touring trip	6.7	-0.2	7.5	+0.1
Overall rating for pleasure travel	6.8	-0.4	7.5	-0.2
	(n=497)		(n=610)	

* Average rating on 10-point scale.

□/○ Statistically significant at α .01

Change In Imagery Attributes Since Feb.'07

Average score* among travelers in each case with some understanding of Northern Ontario

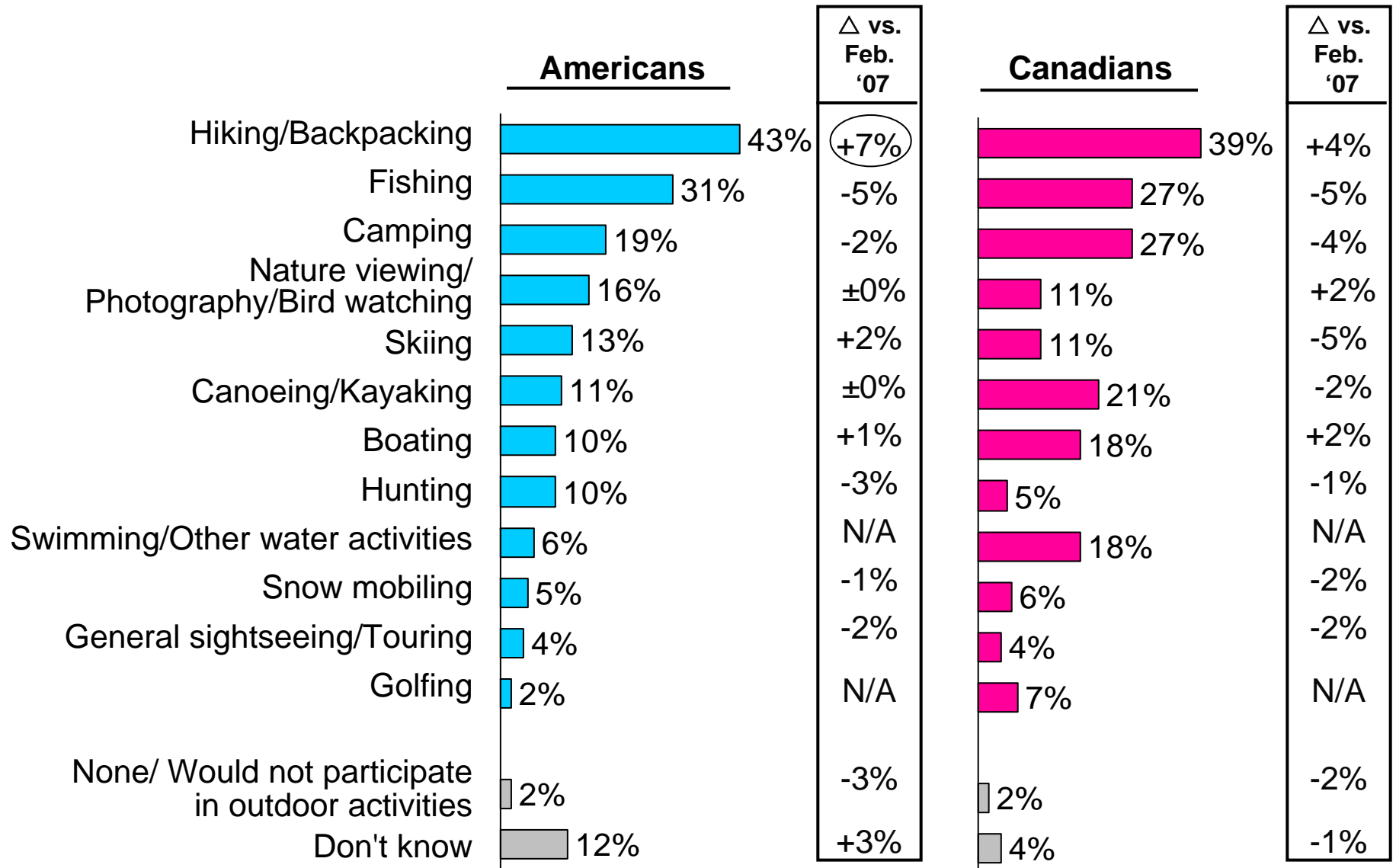
	Residents of ...	
	U.S. (Near & Mid)	Canada (Ont, Que, Man)
		Change Since February 2007
Enjoy nature/outdoors	8.1	-0.4
Good value for money	6.6	-0.6
Lots to see and do	6.5	-0.4
Friendly	7.4	-0.4
Clean & unpolluted environment	8.3	-0.2
Destinations you can drive to	5.8	-0.4
Good for resort trip	6.5	-0.6
Offers different or unique experience	7.3	-0.2
Having fun & being entertained	6.3	-0.5
Good for touring trip	6.7	-0.4
Overall rating for pleasure travel	6.8	-0.1
	(n=497)	(n=610)

* Average rating on 10-point scale.

□/○ Statistically significant at $\alpha .01$

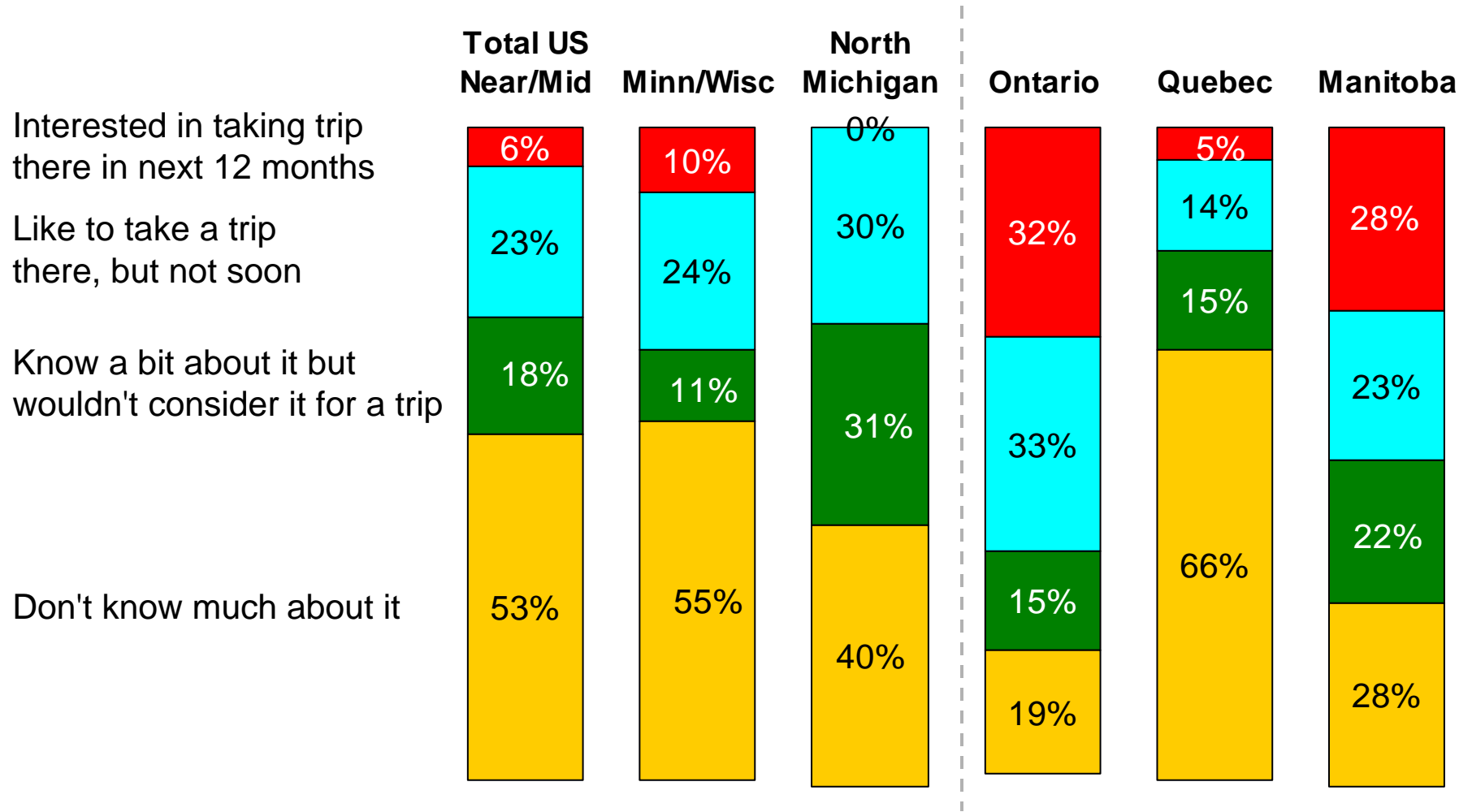
Outdoor Activities of Interest to Potential Visitors

Percent of those interested in Northern Ontario and rating it highly for Nature/Outdoors



Familiarity With, And Interest In, Northern Ontario As A Travel Destination

Percent of travellers from who have ever been to any region of Ontario



Conclusions

Conclusions

- Northern Ontario suffers from a low awareness profile and limited appreciation of what it offers the traveller. As a consequence, interest levels and experience the region are suppressed beyond the domestic market and the immediate border areas.
- This is not to say, however, that there have been no signs of recent progress.
- In the domestic market, interest in travelling to Northern Ontario has grown since the last tracking wave, mostly fuelled by travellers from Manitoba, and Ontario itself. Quebec's position can be regarded as the most deficient in terms of familiarity with, and interest in, the North. These results are consistent with the general pattern of past behaviour.

Conclusions (cont'd.)

- While there is still lack of knowledge in the US of what differentiates Northern Ontario as travel destination, the range of reasons for visiting this part of the province seems to have widened significantly over the past year.
- Activities such as touring, experiencing a specific city or town, aboriginal cultural events, sports, and especially staying in a resort have gained greater profile among US travellers expressing an interest in visiting Northern Ontario.
 - The relative richness of response strongly suggests an improved likelihood of interest translating into visitation.
 - And, one could postulate that these positive developments are attributable, in part, to a more effective marketing campaign.
- Still, these effects have tended to be isolated, and certainly not wide-reaching. Overall, Northern Ontario's image has shown signs of softening within the general travelling population in the US.

Conclusions (cont'd.)

- In Canada, though resort trips and the opportunity to experience specific a city/town have gained some popularity as reasons for visiting Northern Ontario, nature and outdoors have cemented their position as key drivers of visitation.
- It can be said, in fact, that Northern Ontario's draw tends to be based on basic, almost stereotypical perceptions in both countries.
 - The great outdoors
 - Fishing
 - Camping
 - Hiking
 - With a strong dose of swimming, canoeing and boating in the domestic source markets
- There is still little appreciation of diversity of experience beyond this, particularly in the US.

Conclusions (cont'd.)

- As a consequence, some question Northern Ontario's capacity to deliver fun and entertainment.
- They also have concern about the value offered for the money, particularly given the region's remoteness and the inconvenience involved with getting there.
- In the end, these perceived impediments combined with lack of familiarity feed a sense of risk about choosing to vacation in Northern Ontario.



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