

ONTARIO
Yours to discover

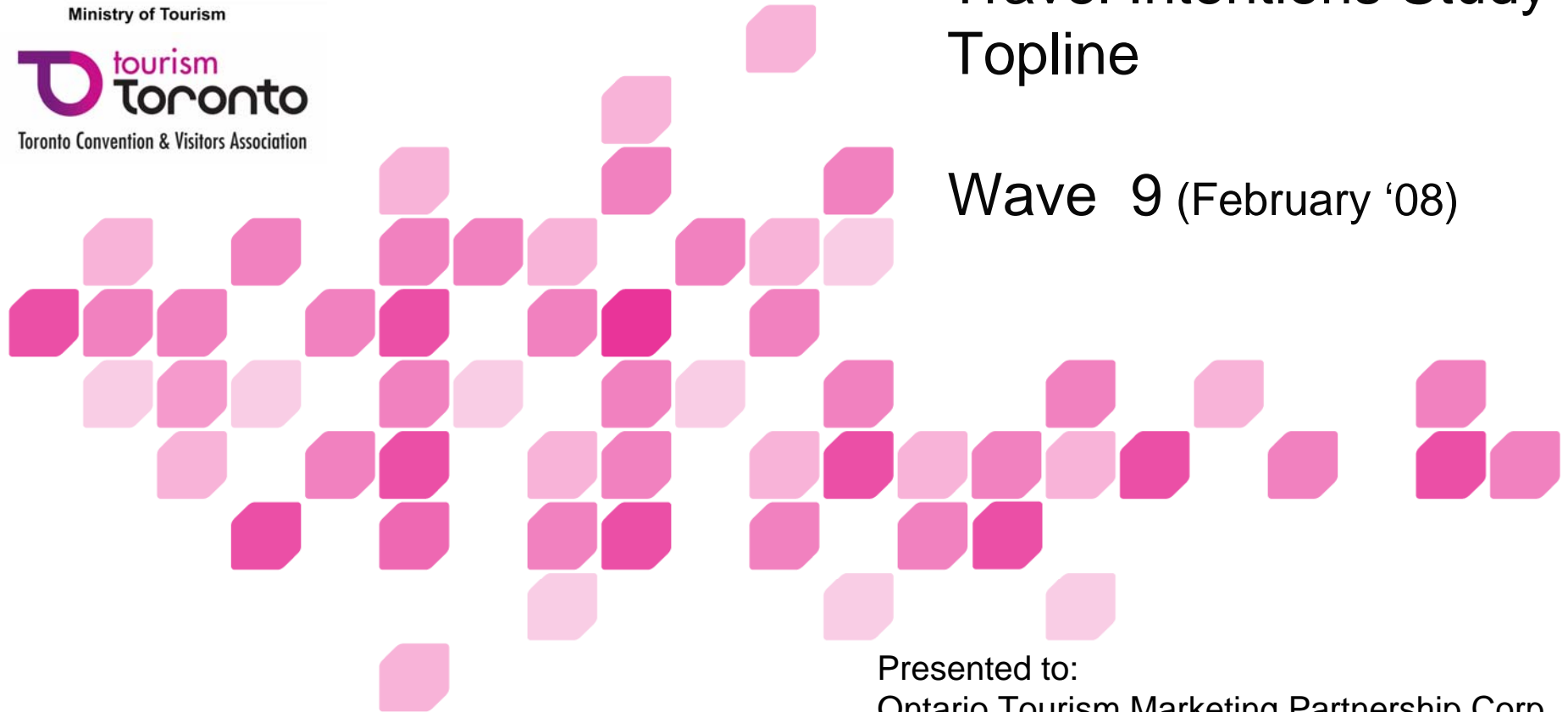


Canada



Travel Intentions Study Topline

Wave 9 (February '08)



Presented to:
Ontario Tourism Marketing Partnership Corp.
FedNor – Industry Canada
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Travel Intentions — February '08 Topline Summary

- Over the past year, Ontario appears to have had some success among domestic travellers with respect to igniting enthusiasm for overnight travel within the province. Interest in visiting Ontario's destinations during the spring season is up significantly across the province relative to previous years. In fact, the level of interest recorded among Toronto residents is the highest registered during a February measurement period over the course of this tracking series, and interest expressed among residents of Ottawa suggests recovery to levels last seen in 2004.
- Beyond the boundaries of Ontario, however, intransigence persists. There is no evidence that intentions to travel to Ontario during the spring season have improved in any consistent manner versus last year across the US Near and Mid Markets. There is some indication that momentum continues to build in Chicago and that recovery has taken place in certain Near Markets – Buffalo, Syracuse and, more gradually, Detroit. At the same time, however, intentions have declined in Rochester and across Ohio. Interest also appears to be suppressed in major Mid Market cities, such as New York , Philadelphia and Washington DC.

Travel Intentions — February '08 Topline Summary

- The situation in Quebec implies stability, although interest expressed in Quebec City itself currently sits at the low end of the range recorded over the past few years. In Winnipeg, however, the trend line points to declining momentum as residents of this city set their sites on alternative destinations both within Canada and elsewhere.
- From these trends, it might be hypothesized that the industry will be supported increasingly by the domestic market in the coming months, with perhaps somewhat greater input from regions of the US that are within the immediate vicinity of the major border crossings (Buffalo and Detroit). Significant unrealized opportunity continues to exist elsewhere in the US. And, the Quebec market, especially French Quebec, continues to represent a challenge with respect to converting existing interest into a firm commitment to choosing Ontario.

Travel Intentions — February '08 Topline Summary

- With respect to brand image, overall perceptions of Ontario as a travel destination have remained stable and moderately positive. Ratings for specific attributes have not altered in any substantive way since February of 2007. This means that Ontario continues to be more widely criticized for safety issues in the domestic and other Canadian markets than was the case in the earlier part of the decade, and that value for the money impressions remain suppressed in the US versus 2004. These data suggest, as well, that it is difficult to impress travellers with the diversity of experience offered in the highly competitive and evolving tourism environment that exists across these broad markets.
- As one might expect, given the overall pattern of stability, Ontario's positioning in the marketplace continues to be tied primarily to its natural, outdoor heritage.

Ontario Travel Intention Incidence By US Market

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

		<u>As Of</u> <u>Feb. '04</u> <u>During</u> <u>Mar/May</u>	<u>As of</u> <u>Feb. '06</u> <u>During</u> <u>Mar/May</u>	<u>As of</u> <u>Feb. '07</u> <u>During</u> <u>Mar/May</u>	<u>As of</u> <u>Feb. '08</u> <u>During</u> <u>Mar/May</u>	<u>Change</u> <u>Feb '04</u> <u>To</u> <u>Feb. '08</u>	<u>Change</u> <u>Feb '06</u> <u>To</u> <u>Feb. '08</u>	<u>Change</u> <u>Feb '07</u> <u>To</u> <u>Feb. '08</u>
Buffalo	%	29	21	20	27	-2	+6	+7
Rochester	%	23	20	16	13	-10	-7	-3
Syracuse	%	17	12	10	18	+1	+6	+8
New York City	%	9	9	8	3	-6	-3	-5
Pittsburgh	%	8	6	6	6	-2	±0	±0
Detroit	%	20	12	14	16	-4	+4	+2
Cleveland	%	18	10	14	6	-12	-4	-8
Boston	%	3	7	3	5	+2	-2	+2
Washington DC	%	9	4	2	3	-6	-1	+1
Cincinnati	%	6	10	7	2	-4	-8	-5
Milwaukee	%	3	4	1	2	-1	-2	+1
Indianapolis	%	6	2	2	*	-6	-2	-2
Chicago	%	2	4	6	8	+6	+4	+2
Philadelphia	%	9	5	6	2	-7	-3	-4
Minneapolis	%	5	4	4	2	-3	-2	-2

○ Significant at α .05

* Less than 0.5%

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. '06	As of Feb. '07	As of Feb. '08	Change Feb '04 To Feb. '08	Change Feb '06 To Feb. '08	Change Feb '07 To Feb. '08
		<u>During Mar/May</u>	<u>During Mar/May</u>	<u>During Mar/May</u>	<u>During Mar/May</u>			
Quebec City	%	9	10	7	6	-3	-4	-1
Montreal	%	18	17	13	15	-3	-2	+2
Ottawa	%	44	34	32	47	+3	+13	+15
Toronto	%	28	23	25	37	+9	+14	+12
Winnipeg	%	17	16	17	10	-7	-6	-7

○ Significant at $\alpha .05$

Rating Ontario For Specific Imagery Characteristics

Average score* among travelers in each case

	U.S.					Canada				
	Feb. '04	Feb. '06	Feb. '08	Difference		Feb. '04	Feb. '06	Feb. '08	Difference	
				'04 To '08	'06 To '08				'04 To '08	'06 To '08
Safe from criminals/terrorists	7.9	7.5	7.6	(-0.3)	+0.1	8.5	7.8	7.9	(-0.6)	+0.1
Good value for money	7.4	6.9	6.7	(-0.7)	(-0.2)	7.5	7.2	7.2	(-0.3)	±0.0
Lots to see and do	7.8	7.6	7.4	(-0.4)	(-0.2)	8.3	7.9	7.9	(-0.4)	±0.0
Friendly	7.9	7.5	7.7	(-0.2)	(+0.2)	8.2	7.8	7.8	(-0.4)	±0.0
Don't have to worry about health	7.8	7.6	7.5	(-0.3)	-0.1	8.5	8.3	8.4	-0.1	+0.1
Can drive there	7.5	7.3	7.3	(-0.2)	±0.0	8.6	8.2	8.3	(-0.3)	+0.1
Good health services for visitors	7.2	6.7	6.8	(-0.4)	+0.1	8.0	7.7	7.8	-0.2	+0.1
Offers different or unique experience	N/A	7.2	7.3	N/A	+0.1	N/A	6.8	6.8	N/A	±0.0
Having fun & being entertained	N/A	N/A	7.3	N/A	N/A	N/A	N/A	7.7	N/A	N/A
Would recommend visiting	N/A	N/A	7.2	N/A	N/A	N/A	N/A	7.8	N/A	N/A
Overall rating for pleasure travel	7.2	7.1	7.2	±0.0	+0.1	7.8	7.5	7.7	-0.1	+0.2

○ Statistically significant at α .01

* Average rating on 10-point scale.

Rating Ontario For Specific Trip Types

Average score* among travelers in each case

	U.S.					Canada				
	Feb. '04	Feb. '06	Feb. '08	Difference		Feb. '04	Feb. '06	Feb. '08	Difference	
				'04 To '08	'06 To '08				'04 To '08	'06 To '08
Enjoy nature/outdoors	7.6	7.4	7.5	-0.1	+0.1	8.1	8.0	8.1	±0.0	+0.1
Arts, culture and history	6.8	6.7	6.6	(-0.2)	-0.1	7.3	7.2	7.3	±0.0	+0.1
Resort trip	6.6	6.4	6.3	(-0.3)	-0.1	6.9	6.6	6.8	-0.1	+0.2
Touring trip	7.1	6.9	6.9	(-0.2)	±0.0	7.4	7.2	7.4	±0.0	+0.2
Big city trip	6.7	6.5	6.7	±0.0	(+0.2)	7.4	7.2	7.3	-0.1	+0.1

* Average rating on 10-point scale.

○ Statistically significant at α .01



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