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ONTARIO
Yours to discover



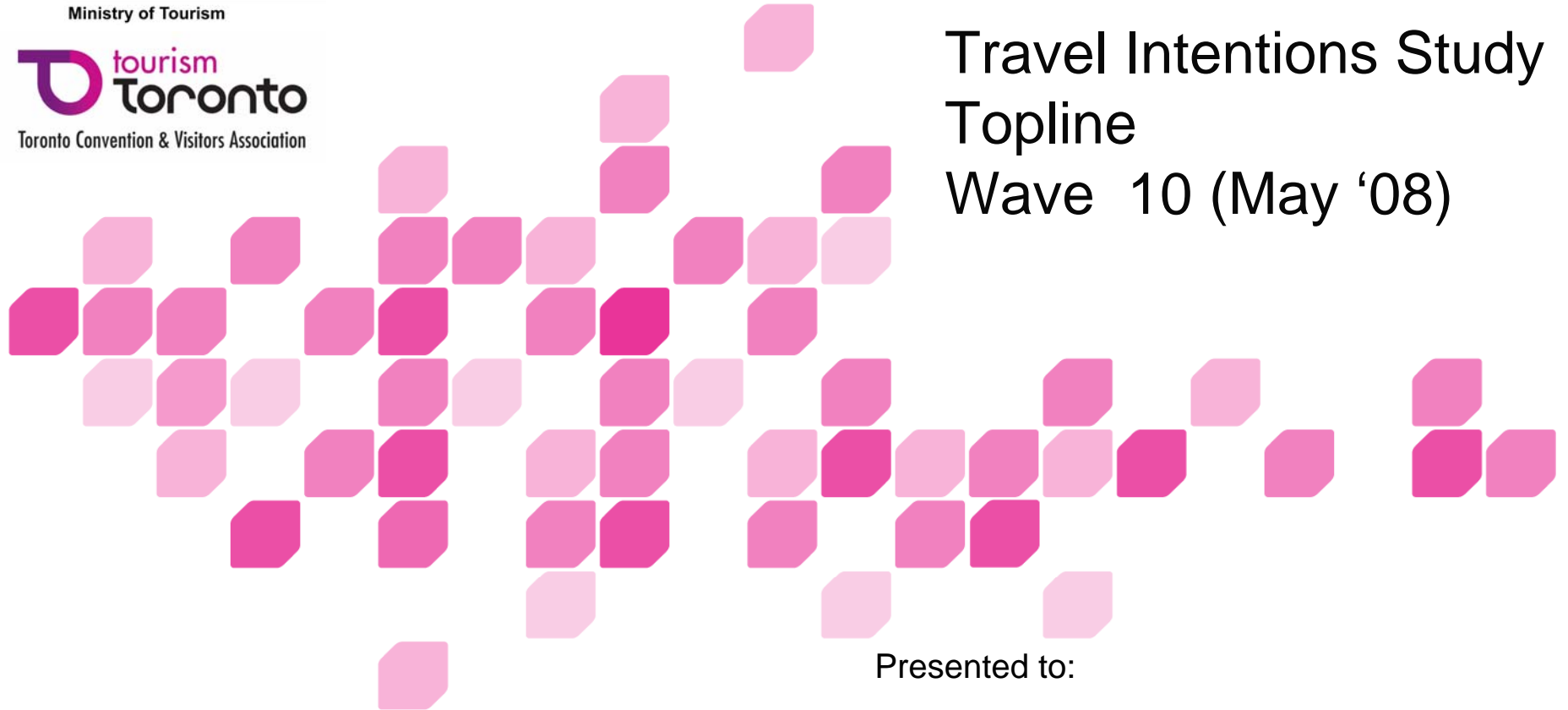
Ministry of Tourism

Canada



Toronto Convention & Visitors Association

Travel Intentions Study Topline Wave 10 (May '08)



Presented to:

Ontario Tourism Marketing Partnership

Ontario Ministry Of Tourism And Recreation

June, 2008

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Travel Intentions — May '08 Topline Summary

- The most recent wave of tracking results suggest that interest in taking a summer vacation in Ontario has dissipated in the Mid US markets and in Montreal since 2005, but has shown signs of some buoyancy domestically and in US cities directly across the border (Detroit and especially Buffalo).
- These expressed intentions of immediate travel plans have some connection to long-term shifts in perceptions of Ontario. This is particularly worrisome in certain respects because it suggests entrenchment of current negative attitudes and behaviour in some quarters. While Americans have not really changed with respect to their overall impression of Ontario as a travel destination, they have apparently become less confident when giving voice to the specific benefits the province might deliver. Perceptions of safety, value, diversity, friendliness and the quality of health services offered, though reasonably stable over the past year or so, have experienced significant erosion in the US since 2005. This is largely the result of vagueness on these points among residents of the populous Mid Markets.

Travel Intentions — May '08 Topline Summary (cont'd)

- It should be noted however, that there may have also been some simultaneous transformation of Ontario's image as a region that is famous for nature and the outdoors, toward one that, perhaps, delivers a better balance of urban and outdoor experiences.
- In Canada, and particularly within Ontario itself, the province's image profile has shown some responsiveness to the thrust of recent marketing efforts. Though safety is currently more of a concern than it was in 2005 (primarily a function of growing media attention to crime in Toronto), there is evidence that Ontario has begun to build a stronger image over the past year for offering unique, exciting and fun experiences. These themes are clearly congruent with the province's current creative strategy.
- In the current economic climate, proximity may have assumed greater weight as a key destination characteristic among some travelers. Ontario is well placed to see some benefit from the increased attention to this consideration, at least in the domestic market and in some US regions that are in close proximity to the province's iconic attractions.

Travel Intentions — May '08 Topline Summary (cont'd)

- In general, these results are consistent with the projections made in previous waves of tracking. The industry is likely to become increasingly dependent on its domestic source markets during the foreseeable future. To begin the process of fuelling new growth, a two-pronged effort is required to protect domestic and Near Market volume, while at the same time applying some creativity and assertiveness to tap into the latent opportunities that do clearly exist elsewhere. Given that it has become increasingly difficult to leverage opportunities in the high potential US markets over the short term, a long time frame for effecting meaningful change must be accepted.

Ontario Travel Intention Incidence By US Market

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

		As of May '05*	As of May '08	Change May '05 To May '08
		During Jun/Aug	During Jun/Aug	
Buffalo	%	20	36	+16
Rochester	%	18	22	+4
Syracuse	%	15	14	-1
New York City	%	12	13	+1
Pittsburgh	%	18	13	-6
Detroit	%	9	13	+4
Cleveland	%	9	12	+3
Boston	%	10	6	-4
Washington DC	%	19	6	-13
Cincinnati	%	12	5	-7
Indianapolis	%	7	4	-3
Chicago	%	9	9	±0
Philadelphia	%	9	8	-1

* Adjusted by algorithm to convert RDD to online.

○ 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 May '05	As of May '08	Change May '05 To May '08
		During Jun/Aug	During Jun/Aug	
Quebec City	%	13	15	+2
Montreal	%	31	19	(-12)
Ottawa	%	40	56	(+16)
Toronto	%	33	48	(+15)
Winnipeg	%	23	20	-3

○ Significant at α .05

Rating Ontario For Specific Imagery Characteristics

Average score* among travelers in each case

	U.S.					Canada				
	May '05	Feb. '07	May '08	Difference		May '05	Feb. '07	May '08	Difference	
				'05 To '08	'07 To '08				'05 To '08	'07 To '08
Safe from criminals/terrorists	8.2	7.6	7.4	(-0.8)	-0.2	8.5	7.8	7.9	(-0.6)	+0.1
Good value for money	7.2	6.9	6.7	(-0.5)	-0.2	7.4	7.3	7.3	-0.1	±0.0
Lots to see and do	7.9	7.6	7.5	(-0.4)	-0.1	8.1	7.9	8.1	±0.0	+0.2
Friendly	7.9	7.6	7.5	(-0.4)	-0.1	8.1	7.9	7.9	-0.2	±0.0
Don't have to worry about health	8.1	7.6	7.4	(-0.7)	-0.2	8.6	8.3	8.4	-0.2	+0.1
Can drive there	7.4	7.2	7.5	+0.1	N/A	8.5	8.2	8.6	+0.1	N/A
Good health services for visitors	7.1	6.6	6.8	(-0.3)	+0.2	8.2	7.6	8.0	-0.2	(+0.4)
Offers different or unique experience	7.3	7.2	7.3	±0.0	+0.1	6.9	6.9	7.3	(+0.4)	(+0.4)
Having fun & being entertained	N/A	7.2	7.4	N/A	+0.2	N/A	7.4	7.9	N/A	(+0.5)
Would recommend visiting	N/A	N/A	7.2	N/A	N/A	N/A	N/A	8.0	N/A	N/A
Overall rating for pleasure travel	7.3	7.2	7.3	±0.0	+0.1	7.7	7.7	8.0	(+0.3)	(+0.3)

○ 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				
	May '05	Feb. '07	May '08	Difference		May '04	Feb. '07	May '08	Difference	
				'05 To '08	'07 To '08				'05 To '08	'07 To '08
Enjoy nature/outdoors	7.5	7.5	7.3	-0.2	-0.5	8.0	7.9	8.0	±0.0	+0.1
Arts, culture and history	6.7	6.5	6.8	+0.1	+0.3	7.2	7.2	7.2	±0.0	±0.0
Resort trip	6.4	6.4	6.3	-0.1	-0.1	6.6	6.7	6.7	+0.1	±0.0
Touring trip	7.0	6.9	7.1	+0.1	+0.2	7.3	7.2	7.3	+0.1	+0.1
Big city trip	6.7	6.6	7.0	+0.3	+0.4	7.2	7.2	7.1	-0.1	-0.1

* Average rating on 10-point scale.

○ Statistically significant at α .01



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