Travel Intentions 2004 Year-End Report

January, 2005
A1353/ME

Presented to • Présenté à
Ontario Ministry of Tourism & Recreation

infocanada@tns-global.com
www.tns-global.com

ORDER OF CONTENTS

I

FOREWORD

A. BACKGROUND INFORMATION

This study is intended to measure intent to travel to Ontario and to specific Ontario destinations within key US and domestic source markets. The research was initially commissioned in response to the SARS crisis, but has evolved into a longer-term study to provide information useful to measuring the robustness of the market, the evolving mindset of potential travelers and the health of Ontario's tourism brands. The research is forward looking to the extent that it focuses on travel intentions for each coming season.

This report is based on information compiled from the four waves of tracking conducted in November 2003, and in February, May and August of 2004. The intent is to delve into market segments in greater detail, to isolate key findings and to emphasize salient marketing implications.

B. OBJECTIVES OF THE STUDY

The main objectives of this research program are outlined below:

- To gauge the impact of negative events on travel to Ontario;
- To forecast demand to assist with industry planning;
- To provide information to assist with messaging and targeting of promotions, communications and marketing initiatives more generally.

C. GENERAL DESIGN AND EXECUTION

In order to meet these research objectives, telephone interviewing was conducted among individuals 18 years or older. Multiple surveys were conducted, each over a three-week period during the month preceding each travel season.

A stringent methodology was used. Sample was assembled using modified random digit dialing using a seed sample drawn from up-to-date telephone listings from Canada and the United States. Multiple callbacks were conducted to secure a completion at each selected (8 calls to achieve a completion once contact was made with the household). One additional contact was made with "soft refusals" with the object of soliciting cooperation to participate ion the survey.

The Trodahl-Carder methodology was used to select a single age-eligible respondent to interview in each household.

The sample was assigned disproportionately by census-defined market as follows:

	Assignment
Canada:	
Toronto	400
Ottawa	200
Hamilton	80
Ontario Community Size Groupings:	
100,000 To 499,999	180
30,000 To 99,999	80
10,000 To 29,999	60
Under 10,000	100
Montreal	300
Quebec City	200
Winnipeg	300

	Assignment
United States:	
Rochester	300
Buffalo — Niagara Falls	300
Syracuse	200
New York City	181
Nassau — Suffolk	43
Other NY State	87
Chicago	230
Other Illinois	70
Indianapolis	90
Other Indiana	55
Boston	150
Mass. Ex-Boston	31
Detroit	300
Northern Michigan	84
Other Michigan	64
Minneapolis—St. Paul	200
Other Minnesota	41
Cleveland—Lorain—Elyria	200
Cincinnati	100
Columbus	104
Other Ohio	60
Pittsburgh	300
Philadelphia	150
Other Pennsylvania	77
Milwaukee—Waukesha	200
Other Wisconsin	67
Washington DC	100
Maryland Ex. Washington DC	118

In total, 23,063 interviews were completed over the four waves of tracking, 7,800 in Canada and 15,263 in the United States. All interviewing was conducted from our central location telephone interviewing facilities in Thunder Bay, London and Montreal. Supervisory staff monitored no fewer than 10% of all interviews. The questionnaire and sample were mounted on our computer-assisted telephone interviewing system, The FACTS Network.

As part of data processing, the sample was weighted in three stages using the most recently available census information from each country:

- By household size within market;
- A household conversion weight was then applied to correct for differential selection probabilities within household due to variations in the number of age-qualified individuals within each;
- Then by age within gender within market.

D. THE STUDY FINDINGS

Results of this research are presented under the following main headings:

- Executive Summary;
- General Summary.

Detailed tabulations of the survey data are available separately in either hard or soft copy format.

E. TESTS OF STATISTICAL SIGNIFICANCE

Tests of statistical difference have been run on the data included in this report only where deemed relevant to the analysis. The 99% level of confidence has been established as the threshold for statistical significance. Unless otherwise stated, each test examines a particular sub-group within Canada or the US in relation to the remainder of Canadians or Americans. Statistically higher figures are indicated with a □ and lower figures with a ○.

NOTE ON DEFINITIONS AND FRAME OF REFERENCE

This report focuses on overnight pleasure travel only. An overnight pleasure trip is defined as any trip on which the respondent stayed one or more nights away from home for pleasure including visits to friends or relatives, but not including trips to the respondent's cottage or vacation home. Within this definition, a pleasure trip could include some business elements, but always has a "pleasure" component.

The US Mid Market and Near Market definitions used in this report conform to those established by the Ontario Ministry of Tourism and Recreation and the Ontario Tourism Marketing Partnership Corporation.

For the purposes of this analysis, the traveling public is defined as all those who have taken an overnight pleasure trip in the past two years or plan to do so in the next 12 months.

January 2005

II

EXECUTIVE SUMMARY

A. TOURISM ISSUES AND MARKETING IMPLICATIONS

The Intentions Tracking Study results clearly demonstrate that Ontario and its destinations have potential to generate significantly more tourism volume than is currently the case. Although cultural, political and emotional barriers may remove Ontario from the consideration set of some Quebecers, in general, very few travelers in any of the domestic or US source markets examined in this research reject the province as a potential travel destination. To the contrary, interest in Ontario travel is widespread within the province and far outstrips actual travel behaviour in markets beyond its borders. This is true whether travelers are asked to consider their long-term travel intentions or the trips they are likely to take during the next season. The implication is that the province has not yet realized its true potential.

Impressions of Ontario among those who have recently taken an overnight pleasure trip to, or within, the province are generally quite positive; demonstrating that the product itself is able to deliver on expectations. However, there are two principal barriers to ultimately choosing Ontario that are clearly a function of its existing profile (or lack thereof) among potential travelers. On the one hand, domestic travelers and many of those in the US source markets nearest the border need reassurance that the Ontario product is sufficiently varied to justify repeat visits – that there is much to see and do beyond what they may have experienced in the past, even when considering the same specific destinations. These potential visitors are constrained by what they think they know – that the Niagara experience is defined solely by the Falls and their immediate environs, that a single visit to Toronto is sufficient to experience the city fully, or that Ontario's outdoor offering is essentially unidimentional and represents all that is best about the province. It is necessary to demonstrate to these individuals in very specific terms, not only that the Ontario product is varied, but also that the offering within any specific locality is broad enough to support repeat visits.

The US Mid Markets, through sheer population size, have the potential to deliver very large tourism volumes to Ontario. Therefore, they might be considered an important secondary geographic target behind Ontario itself and the US Near Markets, and consequently worthy of special attention. In these more distant source markets, the challenge is somewhat different and more daunting. It is fairly typical for Ontario simply to lack profile and, consequently, not make the list of seriously considered destinations for pleasure travel. Many potential visitors resident in the Mid Markets know little about Ontario and, should they consider a possible visit, often base the final decision on widely accepted stereotypical associations with nature and the outdoors (incidentally, often linked to Canada generally rather than Ontario specifically). This lack of profile makes it more difficult for Ontario to compete for the attention of potential travelers in these markets, particularly when issues associated with longer travel distances are taken into account (time, cost, additional inconveniences associated with border crossings and air travel, etc.). Moreover, longer distances from major source markets such as New York City, Boston, Chicago, Philadelphia and Washington D.C., place Ontario in competition with a much wider array of alternative destinations among potential travelers residing in these cities.

Removing these barriers calls for a concerted effort aimed at raising Ontario's profile, establishing some sense of curiosity or excitement about the region and fostering a better sense of the breadth of tourism experiences offered. There is very strong evidence that domestic travelers as well as travelers in either the Near or Mid US markets are far more likely to act on their interest in Ontario if they appreciate the province's recognized "outdoor" strengths as well as a range of tourism experiences beyond this "traditional offering". Value-for-the-money perceptions are enhanced under such circumstances, since the experience is perceived to be richer, and, importantly, positive perceptions of value are less likely to be tied purely to the price point. Research findings indicate that, at the present time, Ontario projects relatively weak, if not unfavourable, value-for-the-money imagery. The quintessential pleasure travel product (beyond VFR) does not appear to have sufficient profile at the present time to support strong perceptions of value – that is, to drive the impression that an exceptional tourism experience will be delivered for the financial investment involved.

Still, the question remains, in raising its profile how should Ontario differentiate itself from competitive destinations? The survey data point to a number of complementary possibilities.

- Promote the array of tourism experiences as being unique (the juxtaposition of city and country with either a rugged or pampered Northern experience, etc.).

- Package and promote the product in a manner that brings this diversity to life and makes it accessible to potential visitors.

- Present Ontario's signature destinations (Toronto and the Niagara Region) in novel ways that promote return visitation.

- Develop distinctive value-added packages or discounts that are accessible both before and during the travel season. This would allow Ontario to compete more effectively for the attention of potential travelers, particularly those who are deal-conscious and inclined to make "last-minute" decisions on the basis of price.

- Structure travel packages (both discount offers and others) in a manner that encourages desired behaviour (experience more of what Ontario has to offer during longer stays). This will help promote positive word-of-mouth and gradually reposition Ontario in the minds of travelers.

- Continue to promote the unique and differentiating aspects of Ontario's outdoor/nature offerings. Approaches that highlight specific products and go beyond generalities may be especially motivating.

- Place some emphasis on safety issues in the American markets. Convey the message that Ontario represents a safe choice (from the perspective of crime and terrorism) that is nonetheless distinctive in relation to alternative US domestic destinations. This sort of message should have resonance with many Americans, particularly as health-related safety concerns continue to dissipate.

- Use Toronto as a focal point for stimulating interest in Ontario across the US Mid Markets. Toronto appears to have achieved good recognition and demonstrates significant drawing power in these markets. The city could act as an engine for stimulating interest within the general Mid Market traveler population, particularly when coupled with other experiences available throughout Ontario.

It is important to keep in mind, that Toronto does not appear to have the same drawing power within Canada. Results from Quebec and Manitoba lead one to the conclusion that Toronto should take its place within the provincial marketing strategy as a major destination in Ontario, but only as one of a number of points of interest within a well-balanced approach. Short-distance and longer-distance destinations relevant to specific source markets within Ontario and beyond should also be placed in balance. Essentially this means effectively integrating large-scale (promoting "Ontario") and localized (supporting specific destinations or local attractions) within the overall marketing effort.

B. TARGETING

Apart from identifying priority source markets in geographic terms and with respect to specific tourism activities, there are clear indications that the marketing effort for Ontario should place some emphasis on the affluent segments. This is largely because these segments are more capable of acting on their interests and of spending significant amounts of money on longer overnight pleasure trips to or within Ontario. Having said this, the mainstream segments within Ontario itself and in the Near Markets should not be alienated or ignored. They also generate a significant volume of same-day and overnight pleasure travel to Ontario.

With respect to basic demographics, an argument can be made that Ontario's arts, culture and urban offering does not appeal sufficiently to youth and that this should be rectified with a view to improving prospects for long-term growth. Beyond this, however, there are few demographic variations that provide direction for targeting. In essence, Ontario's prospects cut across a broad spectrum of the traveling public. It might be said, though, that in both Canada and the US, there may be more difficulty with motivating increased tourism in many of the ethnic markets. Travel propensity is generally lower in these markets and many ethnic groups exhibit a tendency to reserve funds for trips back to their country of origin.

C. TRAVEL INTENTION MODELING

Analyses of results from the first four waves of tracking provide encouraging signs that intentions data can be used to generate relatively stable seasonal forecasts. It is clear, at this point, that separate modeling exercises will have to be developed for specific source markets defined in broad geographic terms, but further work will be required to derive reliable, finely-tuned models. Future waves of tracking will allow us to compare data over consecutive years, keeping season constant. This should help significantly with respect to building a strong model with practical application.

For Detailed Results, See General Summary

III

GENERAL SUMMARY

A-1. MARKET-BY-MARKET ANALYSIS OF ONTARIO TRAVEL INTENTIONS

Experience with Ontario as a tourism destination is quite tightly constrained in a geographic sense. Many Americans in the Near Markets and many more in the Mid Markets have never been to Ontario for an overnight trip of any kind. When those who last visited Ontario five or more years ago are also taken out of the equation, it can be said that only one-in-four Americans within Ontario's primary source markets have traveled to the province for an overnight trip within the recent past - 43% in the Near Markets and 18% in the Mid Markets. When focusing just on the past 12 months, overnight travel incidence levels stand at 19% and 5% respectively.

Expressions of future travel interest paint a much more positive picture, however, with the majority of Americans within each of the broad market categories, and within each of the major Mid Market cities, expressing an interest in visiting at least one of Ontario's destinations for a pleasure trip during the next two years. The "top box score" (Very Interested) is actually quite strong (30% plus), regardless of the particular U.S. region assessed, suggesting that there exists considerable latent demand for travel to Ontario – largely untapped in the Mid Markets.

Of the three major Ontario travel destinations evaluated for interest, Toronto generates the most enthusiasm among Americans. Moreover, when compared with Niagara Falls and "Other Destinations In Ontario", Toronto appears better able to sustain interest over long distances and into Mid Market areas farther removed from the border. As will be explored in subsequent sections of this report, this pattern of response is likely an outcome of poor awareness of the Ontario offering and, in the case of Niagara Falls, limited understanding of the breadth of tourism experiences that the region offers beyond The Falls itself. Indeed, a surprisingly large proportion of Americans in the Mid Markets (7%) claim never to have heard of "Ontario". This lack of profile is most evident in New York City where 16% claim to be unaware of the province. (The reasons for this are undetermined. A larger population of immigrants or new arrivals unfamiliar with the region is a possibility, but whatever the cause this result is clearly indicative of Ontario's weak presence as a possible destination in the minds of many potential travelers in NYC.)

With respect to domestic source markets, the large majority of Canadians residing in either Ontario or the major urban centres of Manitoba and Quebec have taken an overnight trip to a destination within the province at some point in the past. In the border provinces, however, and in Quebec particularly, experience with Ontario has often been in the fairly distant past (five or more years ago) suggesting some potential to generate increased tourism volumes in the immediate future by encouraging repeat visitation.

Ontario residents are clearly enamored with the province. Proximity and greater knowledge of the tourism offering within Ontario seem to translate into strong interest in the province's signature destinations as well as a wide array of smaller points of interest beyond Niagara Falls and Toronto. Indeed, the catchall category "Other Destinations In Ontario" stimulates more interest among Ontarians than does either Niagara Falls or Toronto individually, in stark contrast to the pattern evident in the U.S.

In the major urban source markets of Manitoba, and particularly those of Quebec, Toronto is less alluring as a potential destination than is the case among Ontario residents or Americans in either the Near or Mid Markets. This probably stems, to some degree, from perceptions of Toronto as a bastion of Central Canadian or English Canadian cultural, economic and political power, and from unfavourable urban connotations associated with Toronto's status as Canada's largest metropolis. Moreover, like Niagara Falls, Toronto also possibly suffers from a perception that one visit, however long ago, is sufficient to experience the destination fully – in other words, there is poor appreciation of the depth and variety of possible tourism experiences.

Overall, these results indicate that there are opportunities to stimulate repeat or more frequent visitation both domestically and within the American Near Markets. Expressed interest in the province among those residing in Ontario and in regions close by suggests that initiatives directed to this goal could bear fruit. For this to happen, however, it is essential that potential visitors are impressed with the idea that there is much to see and do in the province that they have not yet experienced.

There may also exist significant opportunity to generate more tourism volume from the populous U.S. Mid Markets. Interest in Ontario and its main destinations far outstrips experience with the province in these regions of the U.S. Many Americans in these markets could be motivated to experience Ontario for the first time through efforts aimed at raising the province's profile and providing a distinctive edge over the plethora of competing destinations. It should be recognized, however, that a significant communications budget would be required to achieve this goal, since the impact on the potential visitor's consciousness would have to be substantial and sustained.

(See Exhibits 1-a) through 2-b))

EXHIBIT 1-a)

Ontario Travel Experience Among Americans

	Percent Of US Travellers In …..						
	Total (11,980) %	Near Markets (6,224) %	Mid Markets (5,433) %	Boston (468) %	Wash. DC (346) %	NYC (518) %	Chi-cago (699) %
Ontario Overnight Travel Experience:							
Have Never Been	45	30	54	54	50	54	52
5 Or More Years Ago	27	26	27	25	30	23	28
3 To 4 Years Ago	9	11	7	9	9	9	6
1 To 2 Years Ago	9	13	6	7	5	8	8
Within Past 12 Months	10	19	5	5	6	5	7
Pleasure Trip Last Season	2	4	1	1	2	2	1
Pleasure Trip Next Season	7	13	5	4	6	8	4
Not Aware Of Ontario*	5	3	7	4	6	16	7
Toronto Overnight Travel Experience:							
Have Never Been	62	49	69	68	61	63	65
5 Or More Years Ago	22	25	19	17	24	21	22
3 To 4 Years Ago	6	10	4	6	5	6	5
1 To 2 Years Ago	5	9	4	5	5	5	4
Within The Past 12 Months	4	7	3	2	4	4	3
Not Aware Of Toronto*	4	2	5	3	4	10	5

* Among total US adults

EXHIBIT 1-b)

Ontario Travel Experience Among Canadians

	Percent Of Canadian Travellers In …..						
	Total (6,088) %	Ontario (3,599) %	GTA (1,233) %	Ex-Ontario (2,489) %	Mon-treal (948) %	Que. City (598) %	Winni-peg (943) %
Ontario Overnight Travel Experience:							
Have Never Been	4	1	2	9	9	15	6
5 Or More Years Ago	11	6	5	25	25	33	19
3 To 4 Years Ago	7	4	4	13	12	14	13
1 To 2 Years Ago	14	13	16	18	19	16	18
Within Past 12 Months	64	76	72	35	35	22	43
Last Season	26	33	30	8	8	6	10
Next Season	33	40	34	15	16	10	16
Toronto Overnight Travel Experience*:							
Have Never Been	9	4	N/A	18	18	23	16
5 Or More Years Ago	16	8	N/A	34	32	42	33
3 To 4 Years Ago	8	6	N/A	13	13	14	14
1 To 2 Years Ago	14	15	N/A	14	15	8	14
Within Past 12 Months	52	66	N/A	20	21	13	22

* Base excludes GTA residents.

EXHIBIT 2-a)

Interest In Travelling To Ontario Destinations In Next 2 Years Among Americans

	Percent Of US Adults … Aware Of Destination						
	Total	Near Markets	Mid Markets	Boston	Wash. DC	NYC	Chi-cago
	%	%	%	%	%	%	%
Toronto:							
Very Interested	30	34	28	28	34	34	29
Fairly Interested	30	28	30	33	23	35	32
Not Very Interested	19	18	19	22	19	14	21
Not At All Interested	20	19	21	16	23	16	18
Don't Know	1	1	1	1	2	1	1
Niagara Falls:							
Very Interested	20	25	17	15	18	25	17
Fairly Interested	27	28	27	31	20	28	26
Not Very Interested	23	20	25	24	27	21	27
Not At All Interested	28	25	30	28	33	25	29
Don't Know	1	1	1	1	2	2	1
Other Places In Ontario:							
Very Interested	15	20	12	11	16	18	14
Fairly Interested	26	25	26	26	20	25	26
Not Very Interested	28	27	29	34	26	30	31
Not At All Interested	29	27	30	27	35	25	27
Don't Know	2	2	2	2	4	2	2

EXHIBIT 2-b)

Interest In Travelling To Ontario Destinations In Next 2 Years Among Canadians

	Percent Of Canadian Adults In …..						
	Total (5,850) %	Ontario (3,473) %	GTA (1,220) %	Ex-Ontario (2,377) %	Mon-treal (923) %	Que. City (585) %	Winni-peg (869) %
Toronto:**							
Very Interested	33	40	N/A	23	23	18	27
Fairly Interested	20	20	N/A	21	21	26	20
Not Very Interested	20	17	N/A	24	24	23	22
Not At All Interested	25	21	N/A	31	31	32	31
Don't Know	1	2	N/A	1	1	1	*
Niagara Falls:**							
Very Interested	29	34	40	17	18	12	18
Fairly Interested	23	23	23	25	25	26	21
Not Very Interested	22	21	20	24	22	27	29
Not At All Interested	25	21	17	34	34	35	31
Don't Know	1	1	1	1	1	1	1
Other Places In Ontario:							
Very Interested	44	52	51	24	23	17	37
Fairly Interested	22	21	24	24	24	25	23
Not Very Interested	17	14	14	24	24	29	18
Not At All Interested	15	11	10	26	27	27	21
Don't Know	1	1	1	1	2	1	1

* Less than 0.5%

** Base restricted to non-residents of city in question

A-2. THE RELATIVE IMPORTANCE OF THE US NEAR AND MID MARKETS

When assessing the value of specific US origin markets, it is important to translate the incidence of travel interest to potential tourism volumes (that is, *number* of travelers). The following charts illustrate the volume importance of specific origin markets.

A relatively large proportion of the population in each Near Market city may be enticed to travel to Ontario, but in most cases the base population is considerably smaller when comparisons are made with the larger Mid Market cities. Indeed, many of the larger Mid Market urban agglomerations have the capacity to deliver significant numbers of tourists to Ontario and rival the principal Near Market cities in this respect.

To illustrate the point, past travel behaviour demonstrates that while Detroit (Near Market) represents the most important US point of origin from a volume perspective, New York City and Chicago (Mid Market) represent the "second tier" in terms of number of *travelers* delivered to Ontario during the recent past. Ontario travel incidence is decidedly lower within these markets, but sheer population size places them above the major Near Market centres in Western New York, Western Pennsylvania, and Northern Ohio in terms of the number of residents attracted to Ontario.

Similarly, patterns of expressed intent to travel to Ontario during the coming season place New York City a close second to Detroit in terms of the volume of travelers that could potentially be attracted. Moreover, the Mid Market cities of Washington DC, Philadelphia and Chicago carry at least as much weight as the remaining Near Market cities in these terms. Here too, much larger base populations in the Mid Markets offset considerably lower levels of travel interest.

The implication of these geographic flow patterns is that Ontario may be well served by a dual marketing strategy. One element would involve harvesting the "low hanging fruit" in the Near Markets, and another would seek to translate generalized interest into behaviour within the major Mid Market cities. The latter task is more challenging in that marketing initiatives must break through the high level of advertising congestion and clutter in these large US cities and convey both awareness of the Ontario tourism opportunity and some understanding of the nature of the offer.

Moreover, because travel distances to Ontario are longer, the trips that Mid Market residents would be encouraged to take necessarily involve a greater investment in time and money than would typically be the case in US population centres closer to the border. Conversion rates would undoubtedly be lower in the Mid Markets (relative to the Near) regardless of the marketing approach adopted, and a heavier advertising investment would be required to obtain positive results. For these reasons, the Near Markets should remain central to Ontario's US marketing strategy, all the more so given that they also obviously have importance with respect to fueling *same day* cross-border activity.

Still, despite the inherent challenges, a partitioned marketing approach warrants serious consideration. The large US Mid Market cities have the potential to release significant latent demand to Ontario. It is true that, relative to the Near Markets, frequency of visitation from these more distant locations is likely to be lower, but this is mitigated to some degree by the potential to generate extended trips that have greater economic impact on Ontario.

(See Exhibits 3-a) and 3-b))

EXHIBIT 3-a)

Volume of Pleasure Travelers From US Near And Mid Markets — Next Season Intentions

		Percent Of Residents In Each Case Who Plan To Visit Ontario Next Session For Overnight Pleasure Trip
Major Near Market Cities:		
Buffalo	(1,195) %	24
Rochester	(1,251) %	25
Syracuse	(790) %	15
Cleveland	(789) %	11
Detroit	(1,086) %	14
Pittsburgh	(1,150) %	7
Major Mid Market Cities:		
Boston	(578) %	3
New York City	(698) %	6
Washington DC	(408) %	5
Philadelphia	(597) %	5
Chicago	(862) %	3

Projected Number Of Overnight Pleasure Travelers Next Season (in thousands)

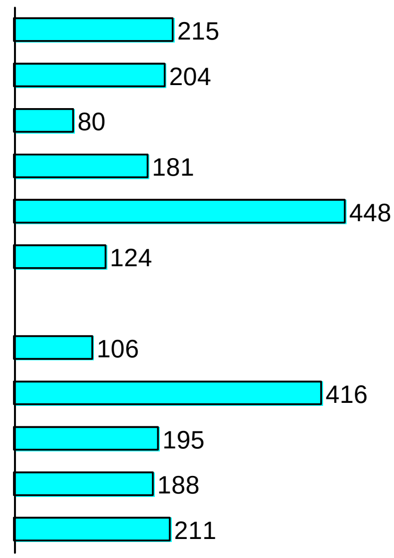
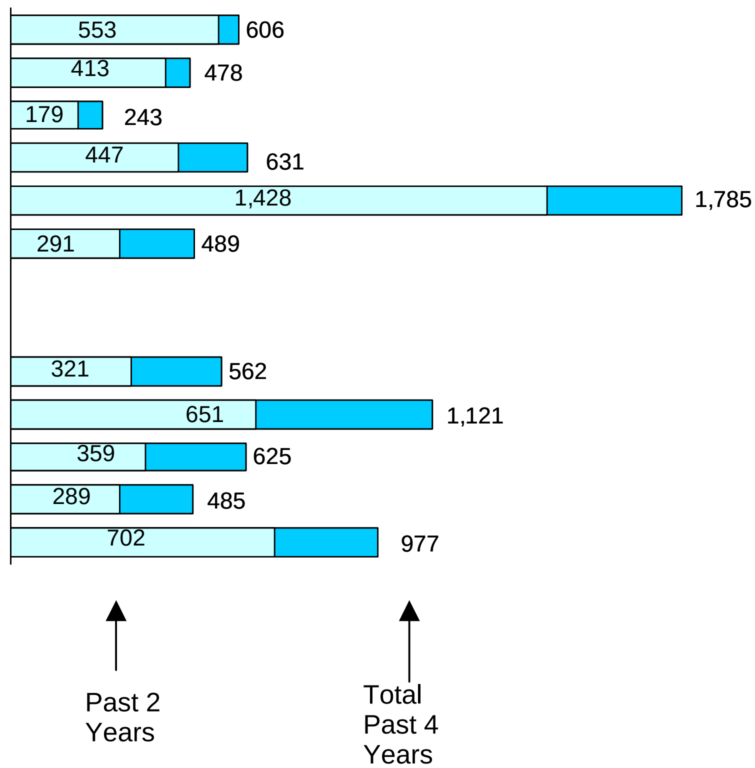


EXHIBIT 3-b)

Volume Of Travelers From

US Near And Mid Markets — Past Behaviour

		Percent Of Residents In Each Case Who Have... For An Overnight Trip		Overnight Visitor Count Estimate (in thousands)	
		Visited Ontario In Past 2 Years	Visited Ontario In Past 4 Years	Past 2 Years	Total Past 4 Years
Major Near Market Cities:					
Buffalo	(1,195) %	62	68	553	606
Rochester	(1,251) %	51	59	413	478
Syracuse	(790) %	33	45	179	243
Cleveland	(789) %	27	38	447	631
Detroit	(1,086) %	44	55	1,428	1,785
Pittsburgh	(1,150) %	23	27	291	489
Major Mid Market Cities:					
Boston	(578) %	10	18	321	562
New York City	(698) %	9	16	651	1,121
Washington DC	(408) %	10	17	359	625
Philadelphia	(597) %	8	13	289	485
Chicago	(862) %	12	16	702	977



B. RELATIONSHIP BETWEEN INTENTIONS AND BEHAVIOUR

Expressed travel intentions have value in their own right as a measure of affinity to a particular destination and desire to travel there. In this sense, quantified intentions represent a measure of tourism volume ***potential*** that can be trended from season-to-season and from year-to-year. Still, it is worthwhile to determine the extent to which intentions data derived from the survey align themselves with external sources of information on travel volume. The objective, here, would be to establish the validity of the measurement approach with respect to generating reasonable travel volume projections.

The following discussion presents the results of a preliminary examination of the relationship between expressed travel intent and behaviour. It should be kept in mind, that this represents only the first step in establishing a valid predictive model of behaviour. The focus is on obtaining some sense of the nature and strength of the relationship. Considerable work is still required to develop and fine-tune a true model.

Definitive data on actual travel behaviour corresponding to the seasons covered in the Intentions Survey were not available at the time this report was compiled. However, it is possible to draw comparisons with forecast data available from the Canadian Travel Survey (CTS) and border crossing statistics. Geographically, there are two broad source markets for which we have comparable data: Ontario itself and the US Border States (New York, Pennsylvania, Ohio, Michigan, Illinois, Wisconsin and Minnesota). For the purposes of this comparative analysis our investigation will, by necessity, be restricted to these two jurisdictions. Unfortunately, the Border States can only be examined in aggregate with the data we have in hand. The distinction between Near and Mid Markets can not be made for the purposes of this examination. Moreover, only trips classified as “non-business” in the external databases have been included in the analysis. The “non-business” definition corresponds closely to the definition of pleasure travelers used in the Travel Intentions Study.

Before proceeding with the analysis, adjustments were made to align the quarterly results from the external databases to the seasons defined in the Travel Intentions Study. Adjustments were made to the Travel Intensions survey data as well. More specifically, it was necessary to derive trip count frequencies in order to make direct comparisons with the CTS and border crossing statistics. This was done simply by multiplying the projected number of those intending to travel to/within Ontario by the average number of intended trips per traveler. This calculation was conducted separately for each geographic region included in the analysis.

The analysis conducted on these adjusted data produces results that are enlightening on a number of fronts. With respect to the domestic market (Ontario), the raw projections are very closely aligned with the CTS forecasts, thereby supporting the validity of the approach as far as generating relevant projections. These findings also support the meaningfulness of stated intentions.

With respect to the US Border States, expressed intentions produce projections that are well above the border crossing forecasts. This suggests that the relationship between intent and behaviour becomes more tenuous, or at least less direct, as one moves out of the province itself. By way of explanations, with distance, the ease of traveling to Ontario diminishes and costs increase. This could certainly inhibit the translation of intentions to behaviour. Moreover, as one moves farther out from the province and the “task” of traveling to Ontario becomes weightier, the competitive set expands, with a widening array of alternatives destinations emerging as viable options. For instance, residents of New York City might seriously consider a trip to Ontario, but before making a final decision would likely investigate a number of alternative destinations that can be reached with similar or lower investment in time and money. As distance to Ontario increases, the list of viable alternatives expands. In short, there is much that can intervene to divert attention away from Ontario, despite the US traveler’s innate interest in the province. This is less likely to be the case for Ontario residents who, for instance, would be inclined to consider few destinations outside the province as alternatives to a short overnight Ontario “getaway” trip.

The wide gap between intent and ultimate behaviour lends support to the notion that there is significant untapped volume potential in the US border markets. The challenge is to convert more of this interest into behaviour by establishing a stronger profile for Ontario as an option that offers distinct advantages over competitive destinations – advantages that are strong enough to overcome any practical impediments to traveling there (cost, inconvenience, time).

However, the question still remains, despite the obviously high level of over-statement among US residents, can intentions generate reasonable trip projections if appropriate adjustments are made? In particular, are the *relative* shifts in intentions from season to season consistent enough with behaviour to support development of an easily applied predictive model? To begin answering these questions, we took the intentions data collected in Ontario and the US Border States and applied a simple adjustment factor or constant. The constant was derived by calculating the average magnitude of overstatement or understatement in each market (the raw Travel Intention trip projection divided by the CTS or border crossing forecast, for all seasons combined). The attempt, here, was to derive a single adjustment coefficient for each of the broad source markets that could convert stated intentions to reasonable estimates of behaviour.

The results are shown graphically in Exhibits 3-b) and 3-c). Consistent with the above discussion, the adjustment factor applied to the Ontario data is quite small, while that applied to the US sample is sizeable. However, reasonably strong projections are produced in *both* source markets once adjustments are made.

Further exploration of projection opportunities is required. We can certainly go further with the analysis once we have the data to compare results for the same season year-over-year, and once we incorporate true behavioural statistics at a fine level of geographic granularity (Mid markets independent of Near Markets, etc,). The results of this preliminary analysis are encouraging, however.

(See Exhibits 4-a) through 4-c))

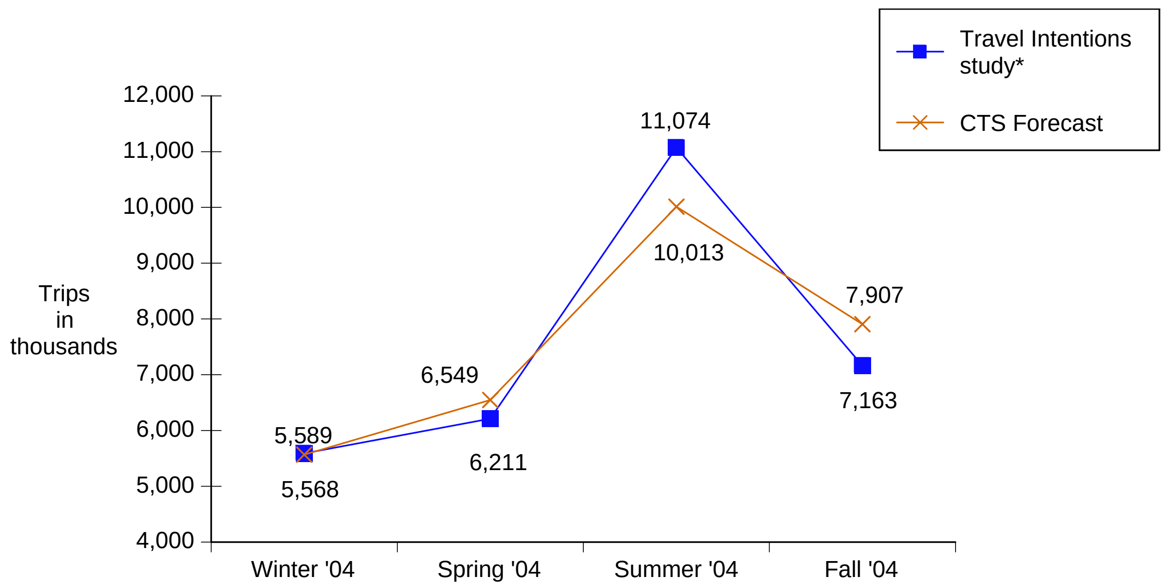
EXHIBIT 4-a)
Intentions Compared With CTS/Border Crossing Forecasts

	Overnight Non-Business Trips To/Within Ontario (in thousands)			
	Ontario Source Markets		US Border State Source Markets*	
	Travel Intentions Survey Projection	CTS Forecast**	Travel Intentions Survey Projection	Border Crossing Forecast**
Winter ‘04 (Dec./Feb.)	5,525	5,568	4,779	654
Spring ‘04 (Mar./May)	6,140	6,549	4,468	989
Summer ‘04 (June/Aug.)	10,948	10,013	8,133	1,576
Fall ‘04 (Sept./Nov.)	7,082	7,907	6,614	1,110

* New York, Pennsylvania, Ohio, Michigan, Illinois, Wisconsin, Minnesota

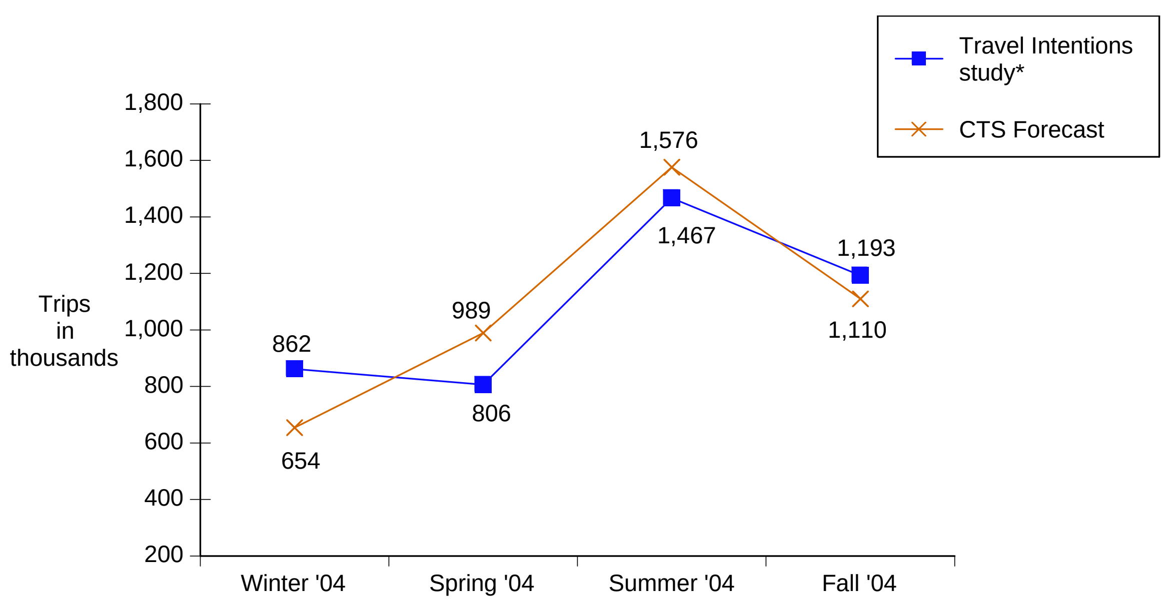
** Quarterly data adjusted to Travel Intentions study seasons.

EXHIBIT 4-b)
Ontario Overnight Non-Business Trips Originating Within Ontario



* With adjustment constant applied (Projection X 1.0115).

EXHIBIT 4-c)
Overnight Non-Business Trips To Ontario From US Border States



* With adjustment constant applied (Projection X 0.1804).

C. TRAVEL MOTIVATIONS WITHIN SPECIFIC SOURCE MARKETS

VFR has a strong role to play in terms of stimulating travel to or within Ontario among Canadians and, to a surprising degree, among Americans as well. This suggests that the tourism product itself may not have reached its full potential to encourage travel activity and that there exists considerable opportunity to enhance appreciation of the product as a means of generating increased travel volume.

Indeed, beyond nature and the outdoors, specific tourism offerings offer limited capacity at the present time to motivate pleasure travel to the province (as demonstrated by reasons given for taking one's next trip to Ontario). And, even in the case of the outdoor experience, the offer's strength of appeal appears to be limited to residents of Toronto, Winnipeg and the US. Efforts to foster appreciation of both the diversity and quality of the Ontario tourism product might, therefore, have a pivotal role to play with respect to improving market performance.

This is clearly evident when travelers are asked to rate specific aspects of a locality for importance in choosing a pleasure travel destination. Having "lots to see and do" is of primary importance, carrying as much weight as value-for-the-money, safety and friendliness. Other aspects such as being within driving distance and the quality of health services available to visitors are not as crucial, though still highly relevant to many travelers.

Canadians and Americans generally agree on the importance assigned to these various destination characteristics. There are some modest market-to-market differences, however. Americans residing in the largest urban source markets (New York City and Chicago) are seen to be somewhat more sensitive to safety issues associated with health, terrorism or crime than are those residing in somewhat smaller Mid Market cities such as Boston or Washington D.C. By contrast, Quebecers are among the least anxious about crime and terrorism, possibly because they are not exposed as frequently to such issues through the American news media.

Finally there is some evidence of a relationship between income and the need for destination proximity. Americans in the Near Markets seem to be more concerned about finding destinations within driving distance than are their counterparts in Mid Market regions, where income levels coincidentally tend to be higher. Compounding this effect is the fact that it is easier to find direct flights to most travel destinations from the large Mid Market cities than from the smaller Near Market centres.

(See Exhibits 5-a) through 6-b))

EXHIBIT 5-a)
Best Description Of Next Pleasure Trip To Ontario Among Americans

	Percent Of US Travellers In… Considering Pleasure Trip To Ontario Next Season		
	Total (1,324) %	Near Markets (1107) %	Mid Markets (207) %
Purpose:			
Visit Friends/Relatives	23	22	27
Enjoy Nature/Outdoors	21	20	22
Arts/Culture/History	13	15	10
Resort Trip	10	11	9
Touring Trip	10	10	11
Combined Business/Pleasure	10	9	13
Big City Trip	7	9	4
Sports Trip	2	1	2

EXHIBIT 5-b)
Best Description Of Next Pleasure Trip To/Within Ontario Among Canadians

	Percent Of Canadian Travellers In… Considering Pleasure Trip To/Within Ontario Next Season				
	Total (1827) %	GTA (430) %	Other Ontario (1031) %	Montreal/ QC (216) %	Winnipeg (150) %
Purpose:					
Visit Friends/Relatives	49	33	55	55	64
Enjoy Nature/Outdoors	16	25	13	9	18
Arts/Culture/History	8	8	8	6	4
Resort Trip	4	8	3	1	1
Touring Trip	7	10	5	10	6
Combined Business/Pleasure	6	5	6	11	3
Big City Trip	4	4	5	4	1
Sports Trip	3	5	2	1	3

EXHIBIT 6-a)

Importance Of Various Factors In Selecting Pleasure Travel Destination Among Americans†

	Average Rating* For Importance Among US Travellers In ….						
	Total (11,980) #	Near Markets (6,224) #	Mid Markets (5,433) #	Boston (468) #	Wash. DC (346) #	NYC (518) #	Chi-cago (699) #
Safe From Criminals/ Terrorists	8.6	8.7	8.6	8.2	8.1	8.7	8.8
Good Value For Money	8.6	8.7	8.5	8.1	8.4	8.5	8.4
Lots To See & Do	8.5	8.5	8.4	8.2	8.6	8.5	8.5
Friendly To Americans	8.3	8.4	8.2	8.0	7.9	8.0	8.2
Don't Have To Worry About Health	8.1	8.2	8.1	7.4	7.4	8.3	8.2
Destinations You Can Drive To	7.1	$\boxed{7.5}$	6.9	6.5	6.5	6.8	6.6
Good Health Services For Visitors	6.7	6.9	6.6	6.2	6.1	7.2	6.5

* Average rating on 10-point scale.

† Based on three waves of data using numeric rather than verbal scale.

EXHIBIT 6-b)

Importance Of Various Factors In Selecting Pleasure Travel Destination Among Canadians†

	Average Rating* For Importance Among Canadian Travellers In….					
	Total (6,088) #	Ontario 1 Mil. + (1,955) #	Other Ontario (1,644) #	Montreal (948) #	Que. City (898) #	Winnipeg (943) #
Safe From Criminals/ Terrorists	8.4	8.4	8.7	7.9	7.8	8.4
Good Value For Money	8.5	8.3	8.6	8.5	8.3	8.4
Lots To See & Do	8.2	8.3	8.1	8.4	8.2	8.1
Friendly	8.4	8.2	8.5	8.5	8.2	8.4
Don't Have To Worry About Health	8.1	8.0	8.2	8.0	7.7	8.2
Destinations You Can Drive To	6.8	6.5	7.2	6.8	6.9	6.5
Good Health Services For Visitors	7.3	7.2	7.4	7.1	7.1	7.4

* Average rating on 10-point scale.

† Based on three waves of data using numeric rather than verbal scale.

D-1. PERCEPTIONS OF ONTARIO RELATIVE TO BEHAVIOUR WITHIN US

As one might expect in light of the foregoing importance rating discussion, perceptions of Ontario's performance on any of the specific attributes assessed has a bearing on whether the American traveler chooses one of the province's destinations.

Among travelers in the US source markets, value-for-the-money impressions are not only identified as being critically important with respect to choosing a destination, but are also demonstrated to hold this status in terms of motivating travel to Ontario. Americans who have recently taken an overnight trip to Ontario assign much higher ratings to the province for delivering good value than do US travelers who have never chosen an Ontario destination. And, this relationship holds regardless of whether one focuses on the Near or Mid Markets.

To a considerable degree, the same patterns of response apply when attention is turned to impressions of the range of tourism experiences offered by the province (lots to see and do). Those who have never been to Ontario tend to have narrowly defined perceptions of the variety of experiences offered (largely dominated by connotations of nature and the outdoors). This, in turn, is suggestive of a simple lack of awareness and a tendency to fall back on stereotypical views.

Positive perceptions of safety and friendliness contribute to Ontario's motivational power, but all American travelers, regardless of their experience with the province, tend to have favourable impressions of Ontario in this regard. There is some indication, though, that the availability of good health services for visitors may approach the status of a primary driver among Americans living in large Mid Market cities. Travelers in these cities who are highly complimentary of Ontario in this respect are more likely than others to have traveled there within the past two years.

Proximity obviously plays a significant role. Those who are within easy driving distance of Ontario are more likely to have traveled to the province for an overnight pleasure trip within the past two years than are those living farther away. To some extent, this is to be expected. Nonetheless, it can still be said that Ontario apparently has some difficulty overcoming the cost and convenience barriers associated with even moderately longer travel distances. In this case as well, efforts to foster better appreciation of Ontario's unique and varied offering may enhance the province's value as a travel destination in the eyes of potential US visitors and help raise their tolerance of price and convenience issues associated with traveling there.

Many of the conclusions drawn above are further underscored by Americans' assessment of Ontario's appropriateness for various types of pleasure travel (from outdoor adventures to "big city" and cultural trips). Nature and the outdoors are clearly central to Ontario's positive reputation in a tourism context. However, there is strong evidence that perceptions of the province's relevance for a wider variety of tourism experiences have a strong role to play in generating visitation and more frequent overnight pleasure trips.

(See Exhibits 7-a) and 7-b))

EXHIBIT 7-a)

Difference In Rated Impressions Of Ontario (Image) By Experience With Province Among Americans

	Average Rating* Of Ontario Among US Travellers In…Aware Of Ontario			
	Total #	Near Markets #	Mid Markets #	Total Major Market** #
Safe From Criminals/ Terrorists:				
Past 2 Year Visitors	8.4	8.3	8.5	8.4
Never Been	7.7	7.7	7.8	7.8
DIFFERENCE	+0.7	+0.6	+0.7	+0.6
Good Value For Money:				
Past 2 Year Visitors	8.1	8.1	8.2	8.3
Never Been	6.8	6.8	6.8	6.9
DIFFERENCE	+1.3	+1.3	+1.4	+1.4
Lots To See & Do:				
Past 2 Year Visitors	8.4	8.5	8.4	8.4
Never Been	7.4	7.5	7.4	7.3
DIFFERENCE	+1.0	+1.0	+1.0	+1.1
Friendly To Americans:				
Past 2 Year Visitors	8.4	8.4	8.4	8.4
Never Been	7.6	7.6	7.6	7.7
DIFFERENCE	+0.8	+0.8	+0.8	+0.7
Don't Have To Worry About Health:				
Past 2 Year Visitors	8.2	8.1	8.4	8.4
Never Been	7.5	7.4	7.5	7.6
DIFFERENCE	+0.7	+0.7	+0.9	+0.8
Destinations You Can Drive To:				
Past 2 Year Visitors	8.3	8.5	8.0	8.0
Never Been	6.9	7.2	6.8	6.7
DIFFERENCE	+1.4	+1.3	+1.2	+1.3
Good Health Services For Visitors:				
Past 2 Year Visitors	7.6	7.4	7.9	8.1
Never Been	6.9	6.8	7.0	7.0
DIFFERENCE	+0.7	+0.6	+0.9	+1.1

* Based on 10-point scale. ** Boston, Washington DC, New York City and Chicago in combination.

EXHIBIT 7-b)

Difference In Rated Impressions Of Ontario (Trip Types) By Experience With Province
Among Americans

	Average Rating* Of Ontario Among US Travelers In …. Aware Of Ontario			
	Total \#	Near Markets \#	Mid Markets \#	Total Major Markets** \#
Enjoy Nature/ Outdoors:				
Past 2 Year Visitors	8.1	8.0	8.3	8.1
Never Been	7.3	7.3	7.2	7.2
DIFFERENCE	+0.8	+0.7	+1.1	+0.9
Arts, Culture & History:				
Past 2 Year Visitors	7.3	7.4	7.3	7.4
Never Been	6.4	6.5	6.3	6.4
DIFFERENCE	+0.9	+0.9	+1.0	+1.0
Resort Trip:				
Past 2 Year Visitors	6.9	6.9	7.1	6.9
Never Been	6.3	6.4	6.2	6.1
DIFFERENCE	+0.6	+0.5	+0.9	+0.8
Touring Trip:				
Past 2 Year Visitors	7.6	7.6	7.7	7.7
Never Been	6.6	6.6	6.6	6.5
DIFFERENCE	+1.0	+1.0	+1.1	+1.2
Big City Trip:				
Past 2 Year Visitors	7.4	7.4	7.4	7.6
Never Been	6.2	6.2	6.2	6.3
DIFFERENCE	+1.2	+1.2	+1.2	+1.3

* Based on 10-point scale.

** Boston, Washington DC, New York City and Chicago in combination.

D-2. PERCEPTIONS OF ONTARIO RELATIVE TO BEHAVIOUR WITHIN CANADA

Among residents of Ontario, there is a fairly weak relationship between propensity to travel within the province and the extent to which provincial tourism destinations are viewed in a positive light. For the most part, this is because residents are favourably disposed to Ontario as a destination for pleasure travel, regardless of whether they have recently taken an overnight trip within the province. It would appear, then, that for Ontario residents, behaviour is dictated more by the opportunity to travel than by perceptions of the Ontario travel product *per se*.

Having said this, value-for-the money impressions are not particularly strong either within Ontario or among residents of the border provinces. Weak imagery on this dimension would seem to act as a particularly serious barrier to traveling to the province among residents of Winnipeg. There may also be some health-related issues among residents of Quebec and Manitoba, undoubtedly stemming from health events such as SARS and from lack of assurance about non-residents' access to care within the Ontario health plan.

With respect to fundamental components of the travel product, as is the case in the US, the perceived presence of absence of a varied travel offering (lots to see and do) affects the likelihood of selecting Ontario as a destination in the border provinces. To some degree this has some bearing on whether residents of these provinces accept the notion that Ontario offers interesting travel destinations within reasonable proximity of their home province.

Quebec appears to be a particularly difficult market for Ontario. There is considerable skepticism about the province's capacity to offer much to see and do that is relevant to Quebecers. In Montreal, non-visitors are particularly harsh in their criticism of Ontario on this count, suggesting that such perceptions represent a particularly significant travel barrier within this specific domestic source market. There is evidence to suggest, moreover, that some Quebecers feel that they will not be warmly welcomed in Ontario. This lack of perceived friendliness is quite likely a function of language and cultural differences and emotional responses to Quebec's status within Canada. Results from Quebec City lend some credence to this hypothesis. The gaps in impressions of Ontario held by visitors and non-visitors to the province are fairly narrow in this city – the most francophone of the Canadian source markets assessed. This could be taken to mean that there is significant resistance to visiting Ontario among Quebec City residents unrelated to their perceptions of the province's tourism credentials. In other words, non-visitors might appreciate the Ontario travel product in the abstract, but are resistant to visiting for a host of reasons unrelated to tourism per se.

Ratings assigned to Ontario for delivering various types of tourism experiences are consistent with the above interpretation of imagery data. As in the US, the belief that the province offers a diversity of tourism experiences is positively correlated with recent visitation. It must be said, however, that Quebecers are generally quite critical of the province, and that residents of Montreal who have not been to Ontario recently are among the most negatively disposed to the various tourism experiences offered. Moreover, responses from Quebec City confirm that, among francophones farther removed from the border, even relatively strong impressions of Ontario's offering may have limited capacity to overcome resistance to traveling there.

On top of this, one must also consider that VFR is less likely to exist as a reason to travel to Ontario among French-speaking Quebecers than among other Canadians. Moreover, the Ontario's outdoor product is, in many ways, quite similar to that available within Quebec itself and therefore less likely to attract visitors from the latter province.

(See Exhibits 8-a) and 8-b))

EXHIBIT 8-a)

Difference In Rated Impressions Of Ontario (Image) By Experience With Province Among Canadians

	Avg. Rating* Of Ontario Among Canadian Travelers In ….					
	Ontario #	GTA #	Ex-Ontario #	Mon-treal #	Que. City #	Winn-peg #
Safe Criminals/ Terrorists:						
Past 12 Month Visitors	8.7	8.5	8.3	8.3	8.1	8.1
Longer Ago[1]/Never Been[2]	8.5	8.3	7.6	7.5	7.9	7.0
DIFFERENCE	+0.2	+0.2	+0.7	+0.8	+0.2	+1.1
Good Value For Money:						
Past 12 Month Visitors	7.7	7.6	7.3	7.4	7.2	7.0
Longer Ago[1]/Never Been[2]	7.5	7.4	6.6	6.6	6.9	5.9
DIFFERENCE	+0.2	+0.2	+0.7	+0.8	+0.3	+1.1
Lots To See & Do:						
Past 12 Month Visitors	8.6	8.4	7.7	7.5	7.7	8.4
Longer Ago[1]/Never Been[2]	8.3	8.1	6.9	6.7	7.4	7.1
DIFFERENCE	+0.3	+0.3	+0.8	+0.8	+0.3	+1.3
Friendly:						
Past 12 Month Visitors	8.5	8.4	7.4	7.4	7.3	7.5
Longer Ago[1]/Never Been[2]	8.5	8.4	6.4	6.2	6.7	7.1
DIFFERENCE	0	0	+1.0	+1.2	+0.6	+0.4
Don't Have To Worry About Health:						
Past 12 Month Visitors	8.6	8.6	8.3	8.4	8.3	8.2
Longer Ago[1]/Never Been[2]	8.6	8.5	7.3	6.9	8.0	7.5
DIFFERENCE	0	+0.1	+1.0	+1.5	+0.3	+0.7
Destinations Can Drive To:						
Past 12 Month Visitors	8.7	8.6	8.5	8.5	8.6	8.1
Longer Ago[1]/Never Been[2]	8.6	8.4	7.6	7.4	8.1	7.4
DIFFERENCE	+0.1	+0.2	+0.9	+1.1	+0.5	+0.7
Good Health Services For Visitors:						
Past 12 Month Visitors	8.3	8.3	8.0	7.9	8.3	7.9
Longer Ago[1]/Never Been[2]	8.2	8.2	7.3	7.1	7.7	7.0
DIFFERENCE	+0.1	+0.1	+0.7	+0.8	+0.6	+0.9

* Based on 10-point scale.
1 Among Ontario residents.
2 Among Non-Ontario residents.

EXHIBIT 8-b)

Difference In Rated Impressions Of Ontario (Trip Types) By Experience With Province
Among Canadians

	Average Rating* Of Ontario Among Canadian Travelers In ….					
	Ontario #	GTA #	Ex-Ontario #	Mon-treal #	Que. City #	Winn-peg #
Enjoy Nature/ Outdoors:						
Past 12 Month Visitors	8.6	8.5	7.1	6.9	6.7	7.9
Longer Ago[1]/Never Been[2]	8.4	8.3	6.1	5.9	6.5	6.4
DIFFERENCE	+0.2	+0.2	+1.0	+1.0	+0.2	+1.5
Arts, Culture & History:						
Past 12 Month Visitors	7.6	7.4	6.9	6.7	6.8	7.3
Longer Ago[1]/Never Been[2]	7.5	7.4	5.8	5.6	6.2	5.9
DIFFERENCE	+0.1	0	+1.1	+1.1	+0.6	+1.4
Resort Trip:						
Past 12 Month Visitors	7.1	6.9	5.9	5.7	6.0	6.4
Longer Ago[1]/Never Been[2]	7.0	6.8	5.6	5.3	6.2	5.8
DIFFERENCE	+0.1	+0.1	+0.3	+0.4	-0.2	+0.6
Touring Trip:						
Past 12 Month Visitors	7.6	7.5	6.9	6.9	7.2	7.0
Longer Ago[1]/Never Been[2]	7.4	7.3	6.1	5.9	6.7	6.3
DIFFERENCE	+0.2	+0.2	+0.8	+1.0	+0.5	+0.7
Big City Trip:						
Past 12 Month Visitors	7.6	7.6	7.0	7.0	7.4	7.1
Longer Ago[1]/Never Been[2]	7.4	7.6	6.3	5.9	7.1	6.9
DIFFERENCE	+0.2	0	+0.7	+1.1	+0.3	+0.2

* Based on 10-point scale.
1 Among Ontario residents.
2 Among Non-Ontario residents.

E. PERCEPTIONS OF TORONTO RELATIVE TO BEHAVIOUR WITHIN SPECIFIC SOURCE MARKETS

In the case of Toronto as well, there is a strong body of evidence that recent experience with the city among Americans has met or exceeded expectations. Regardless of whether they reside in the Near or Mid Markets, Americans who have been to Toronto within the past two years are quite positive when expressing their opinion of the city. It is considered a strong destination for arts and culture, architecture, the urban environment, and especially shopping, restaurants and nightlife. Ratings are also fairly positive when considering Toronto's credentials as a destination for a family vacation. In fact many Americans who have been to Toronto recently would recommend it to their friends as a "must see" destination.

Of particular importance, there are very wide gaps between recent US visitors and non-visitors when it comes to assessing Ontario in these terms. Non-visitors have fairly mediocre impressions of the city. The challenge is to establish stronger positive impressions among these individuals so that they will be intrigued enough to want to experience the city's promise.

Results among Canadians are somewhat at variance with those noted in the United States. Ontario residents have strong positive impressions of Toronto's tourism offering, whether or not they have recently taken a trip to the city. This is particularly true when it comes to specific "big city" activities such as experiencing the arts, other cultural activities, entertainment, shopping, restaurants and nightlife. And many Ontarians would recommend Toronto as a "must see" destination. In Quebec particularly, impressions of Toronto are quite weak, and recent experience with the city appears to have done little to change that. These engrained impressions may be difficult to alter, making Quebec a "hard sell" for the city. It should be noted, though that Quebec City residents are a little more positive about Toronto than Montrealers, possibly because they are more appreciative of the generic "big city" tourism opportunities available in Toronto (something that would have considerably less resonance among residents of Montreal). However, as with Ontario generally, positive impressions of Toronto do not necessarily translate into pleasure trips to the city for the reasons discussed earlier.

Perceptions of Toronto are somewhat more positive in Winnipeg, particularly with respect to iconic urban activities such as dining, entertainment, shopping, and experiencing the arts. There may be some potential to draw more volume from Winnipeg by fostering wider appreciation of Toronto's artistic and cultural side, but Winnipeg's population base and the city's distance from Toronto precludes the possibility of drawing tourists in large numbers.

As a final point of interest, some mention should be made of the fact that Canadians and Americans have divergent opinions when considering Toronto's suitability for a family vacation. Americans tend to see Toronto in a positive light when evaluating this aspect of the tourism offering, while Canadians (even those resident in Ontario) are fairly negative. To some extent, these opinions are dependent on the traveler's frame of reference. Many Canadians possibly see Toronto as the epitome of the nation's big city life, and equate it with all of the hustle, bustle and urban problems that term implies. Many Americans, on the other hand, likely see Toronto as offering a softer expression of their own country's urban experience and, as a consequence, are more inclined than Canadians to consider Toronto appropriate for families.

(See Exhibits 9-a) and 9-b))

EXHIBIT 9-a)

Difference In Rated Impressions Of Toronto (Image) By Experience With City Among Americans

	Average Rating* Of Toronto Among US Travelers In …. Aware Of Toronto			
	Total #	Near Markets #	Mid Markets #	Total Major Markets** #
Shopping, Restaurants & Night Life:				
Past 2 Year Visitors	8.2	8.3	8.0	8.1
Never Been	7.1	7.2	7.0	7.0
DIFFERENCE	+1.1	+1.1	+1.0	+1.1
Arts, Culture & History:				
Past 2 Year Visitors	7.9	8.0	7.7	7.8
Never Been	6.9	7.1	6.8	6.8
DIFFERENCE	+1.0	+0.9	+0.9	+1.0
Strolling To See Buildings & Sights:				
Past 2 Year Visitors	7.8	7.8	7.6	7.7
Never Been	6.8	7.0	6.7	6.6
DIFFERENCE	+1.0	+0.8	+0.9	+1.1
Place For Family Vacation:				
Past 2 Year Visitors	7.5	7.5	7.5	7.7
Never Been	6.7	6.7	6.7	6.7
DIFFERENCE	+0.8	+0.8	+0.8	+1.0
“Must See” Destination:				
Past 2 Year Visitors	7.6	7.7	7.4	7.4
Never Been	6.4	6.6	6.3	6.3
DIFFERENCE	+1.2	+1.1	+1.1	+1.1

* Based on 10-point scale.

** Boston, Washington DC, New York City and Chicago in combination.

EXHIBIT 9-b)

Difference In Rated Impressions Of Toronto (Trip Types) By Experience With City Among Canadians

	Average Rating* Of Toronto Among Canadian Travelers In ….					
	Total #	Ontario Ex-Toronto #	Ex-Ontario #	Montreal #	Quebec City #	Winn-peg #
Shopping, Restaurants & Night Life:						
Past 12 Month Visitors	8.4	8.6	7.4	7.1	7.6	8.1
Longer Ago[1]/Never Been[2]	7.0	8.4	6.8	6.6	7.2	7.6
DIFFERENCE	+1.4	+0.2	+0.6	+0.5	+0.4	+0.5
Arts, Culture & History:						
Past 12 Month Visitors	8.1	8.2	7.3	7.2	7.3	7.9
Longer Ago[1]/Never Been[2]	6.8	8.1	6.7	6.5	7.3	7.0
DIFFERENCE	+1.3	+0.1	+0.6	+0.7	0	+0.9
Strolling To See Buildings & Sights:						
Past 12 Month Visitors	7.5	7.6	7.2	7.1	7.6	7.2
Longer Ago[1]/Never Been[2]	6.6	7.3	6.6	6.5	7.0	6.8
DIFFERENCE	+0.9	+0.3	+0.6	+0.6	+0.6	+0.4
Family Vacation:						
Past 12 Month Visitors	6.8	6.8	6.4	6.4	6.9	6.4
Longer Ago[1]/Never Been[2]	5.9	6.6	6.0	5.9	6.4	6.0
DIFFERENCE	+0.9	+0.2	+0.4	+0.5	+0.5	+0.4
A "Must See" Destination:						
Past 12 Month Visitors	7.6	7.7	6.9	6.8	7.2	7.1
Longer Ago[1]/Never Been[2]	6.0	7.3	5.9	5.6	6.5	6.2
DIFFERENCE	+1.6	+0.4	+1.0	+1.2	+0.7	+0.9

* Based on 10-point scale.
1 Among Ontario residents.
2 Among Non-Ontario residents and Total Canada.

F. VOLUNTEERED POSITIVE IMPRESSIONS OF ONTARIO DESTINATIONS BY SOURCE MARKET

Survey participants who expressed interest in visiting Ontario destinations were asked for their unprompted reasons for doing so. The patterns of responses given clearly demonstrate that positive sentiments about the province exist, but generally in the absence of specific focal points related to the tourism product itself. For the most part, beyond the draw of friends and family resident in the province, those expressing interest in visiting point to the general appeal of travel, express vague curiosity about Ontario destinations, make generic references to the outdoors or refer to positive word-of-mouth. In the case of Niagara Falls, there appears little to recommend the location in the minds of travelers beyond the natural splendor of The Falls themselves and their immediate environs. The Casino appears to have little drawing power beyond the Golden Horseshoe and Western New York.

Only in the case of Ontario residents referring to Toronto is there widespread mention of specific travel activities as the catalysts of interest – specifically, shopping, theatre and sporting events.

(See Exhibits 10-a) through 12-b))

EXHIBIT 10-a)
Volunteered Reasons For Interest In Visiting Toronto
Among Americans

	Percent Of US Travelers In… Expressing Interest In Visiting Toronto Within Next Two Years						
	Total (8878) %	Near Market (4923) %	Mid Market (3814) %	Bos-ton (343) %	Wash. D.C. (223) %	NYC (439) %	Chic-ago (499) %
Reasons For Interest:							
Curious	14	13	15	17	13	13	13
Heard Good Things	13	10	14	12	12	14	14
Never Been There	9	6	10	11	12	7	9
Like Toronto	8	11	6	9	6	6	9
Been There Before	7	9	6	9	6	10	7
No Particular Reason	6	4	7	4	5	9	7
Nice City	6	6	6	6	9	6	8
Visit Family	5	4	6	7	4	11	5
Close By	5	5	4	7	6	3	4
It’s Beautiful	5	4	5	3	7	4	4
Visit Friends	4	3	5	5	7	11	6
Culture/ The Arts (general)	4	4	4	4	4	3	4
Lots To See & Do	4	5	3	5	3	2	3
To See A Sports Event	4	5	3	6	4	1	1

EXHIBIT 10-b)
Volunteered Reasons For Interest In Visiting Toronto Among Canadians

	Percent Of Canadian Travelers In… Expressing Interest In Visiting Toronto Within Next Two Years				
	Ontario Ex-Toronto (2104) %	Ottawa (647) %	Montreal (702) %	Quebec City (449) %	Winnipeg (693) %
Reasons For Interest:					
Visit Relatives	21	25	14	5	23
Visit Friends	14	23	8	5	11
See Play/Show/Theatre	16	11	1	1	2
Shopping	14	8	3	3	6
Business	9	11	9	7	9
To See Sports Event	12	5	2	4	8
Lots To See & Do	8	3	4	4	4
Been There Before	4	4	9	7	6
Culture/The Arts (in general)	6	4	3	5	3
Curious	2	2	9	9	7
Like Toronto	4	3	4	4	6
Night Life	4	3	2	1	3
Museums	4	2	3	4	3
Restaurants	4	4	1	2	1
Concerts	4	3	*	1	1
CN Tower	2	1	3	5	2

* Less than 0.5%

EXHIBIT 11-a)

Volunteered Reasons For Interest In Visiting Niagara Falls Canada Among Americans

	Percent Of US Travelers In… Expressing Interest In Visiting Niagara Falls Canada Within Next Two Years						
	Total (5436) %	Near Market (3373) %	Mid Market (2140) %	Bos-ton (201) %	Wash. D.C. (119) %	NYC (261) %	Chic-ago (271) %
Reasons For Interest:							
The Falls	31	31	31	28	39	31	29
Curious	14	11	17	15	13	17	13
Beautiful Region	11	9	12	14	12	15	8
Been There Before	10	12	8	12	10	6	5
Heard A Lot About It	10	6	12	16	9	17	11
To Take Family	9	11	7	6	6	5	10
Never Been Before	8	5	10	16	5	6	8
Like Niagara Falls	7	9	6	7	6	4	4
The Casino	6	13	2	4	3	2	1
Sightseeing	5	5	4	3	4	4	5
Nice City	4	4	3	3	1	4	4

EXHIBIT 11-b)
Volunteered Reasons For Interest In Visiting Niagara Falls Among Canadians

	Percent Of Canadian Travelers In… Expressing Interest In Visiting Niagara Falls Within Next Two Years					
	Ontario Ex-Niagara (2076) %	Toronto (GTA) (844) %	Ottawa (272) %	Montreal (409) %	Quebec City (225) %	Winni-peg (344) %
Reasons For Interest:						
The Falls	30	30	29	37	40	31
The Casino	15	17	5	2	*	2
Beautiful Region	8	9	12	17	9	12
Been There Before	8	9	9	11	6	9
To Take Family	8	7	8	9	3	7
Like Niagara Falls	9	9	9	5	3	8
Lots To See & Do	6	8	4	5	3	2
Tourist Attractions	4	4	5	9	7	3
Curious	3	4	7	6	11	8
Visit Family	6	3	10	2	2	4
Sightseeing	5	4	7	1	1	7
Nice City	4	5	6	3	2	6
Scenery	4	7	1	2	4	6
Visit Friends	4	2	7	1	1	3
Never Been Before	2	2	8	6	9	13
Marineland	3	2	6	4	1	1

* Less than 0.5%

EXHIBIT 12-a)

Volunteered Reasons For Interest In Visiting Other Ontario Destinations Among Americans

	Percent Of US Travelers In… Expressing Interest In Visiting Other Ontario Destinations Within Next Two Years						
	Total (4553) %	Near Market (2673) %	Mid Market (1883) %	Bos-ton (157) %	Wash. D.C. (108) %	NYC (207) %	Chic-ago (248) %
Reasons For Interest:							
Curious	14	12	15	17	13	18	13
Like To Travel	10	9	11	9	14	12	13
Fishing	6	6	7	3	4	1	5
Never Been There	6	3	7	5	10	8	8
Nature & Outdoors	6	5	6	4	10	3	5
Want To See Canada	5	6	5	4	6	4	6
Beautiful Region	4	3	4	5	2	5	4

EXHIBIT 12-b)

Volunteered Reasons For Interest In Visiting Other Ontario Destinations Among Canadians

	Percent Of Canadian Travelers In… Expressing Interest In Visiting Other Ontario Destinations Within Next Two Years					
	Ontario (2520) %	Toronto (GTA) (899) %	Ottawa (436) %	Montreal (442) %	Quebec City (248) %	Winni-peg (551) %
Reasons For Interest:						
Visit Family	15	10	23	11	12	22
Nature/Outdoors	10	11	12	8	10	8
Curious	8	10	9	16	25	7
Visit Friends	9	6	10	8	9	11
Like To Travel	7	9	6	4	4	3
Want To See Ottawa	4	5	-	9	10	4
Want To See Other Specific Towns/ Cities	4	3	6	4	5	7
Camping/Hiking	4	3	6	3	2	6

* Less than 0.5%

G. VOLUNTEERED NEGATIVE IMPRESSIONS OF ONTARIO DESTINATIONS BY SOURCE MARKET

Reasons given for lack of expressed interest in visiting Ontario destinations are generally indicative of apathy rather than antipathy. Certainly, there are some travelers who suggest that Niagara Falls is too "touristy" or that they dislike big cities such as Toronto, but for the most part the rationale for disinterest focuses on general lack of enthusiasm, a stronger preference for alternative destinations and a belief that a previous visit to the destination has been sufficient to experience it fully. The latter sentiment is strongly evident among all travelers with reference to Niagara Falls and among Canadians with reference to Toronto.

To some degree, this negativity stems from lack of knowledge about what the destination offers, perhaps expressed most directly by Americans with reference to "Other Destinations In Ontario". When turning to Toronto and especially Niagara Falls, knowledge of the breadth of available experiences may certainly be limited, particularly when comparisons are made with more forcefully promoted alternative locations. Some potential visitors are likely encumbered by one-dimensional or stereotypical perceptions and, in the case of some Quebecers, there is a need to overcome resistance to English Canadian loci of power such as Toronto.

(See Exhibits 13-a) through 15-b))

EXHIBIT 13-a)

Volunteered Reasons For Lack Of Interest In Visiting Toronto Among Americans

	Percent Of US Travelers In… Expressing Little Or No Interest In Visiting Toronto Within Next Two Years						
	Total (5409) %	Near Market (2828) %	Mid Market (2550) %	Boston (206) %	Wash. D.C. (159) %	NYC (184) %	Chicago (315) %
Reasons For Lack Of Interest:							
Other Places Would Rather Go	23	19	25	30	26	23	27
Not Interested/ Not An Interesting City	11	8	12	6	16	12	12
Been There Before	9	11	8	5	11	10	10
Don't Like To Travel	8	9	8	7	4	11	7
No Desire/ Nothing To See There	6	6	6	7	3	7	6
Cold Weather	6	5	6	10	8	4	6
Can't Afford It	6	6	5	4	4	5	4
Want To Travel In The US	5	7	4	3	8	3	4
No Plans To Go There	4	5	4	2	3	5	2
No Reason Or Need To Go	4	5	4	2	4	7	2

EXHIBIT 13-b)
Volunteered Reasons For Lack Of Interest In Visiting Toronto Among Canadians

	Percent Of Canadian Travelers In… Expressing Little Or No Interest In Visiting Toronto Within Next Two Years				
	Ontario Ex-Toronto (886) %	Ottawa (206) %	Montreal (519) %	Quebec City (322) %	Winnipeg (459) %
Reasons For Lack Of Interest:					
City Is Too Big	17	20	5	8	16
City Is Too Busy	13	9	1	1	4
Been There Before	18	28	21	24	15
Don't Like Toronto	9	7	4	2	7
Traffic/ Drivers	9	6	*	-	4
Not Interested	8	8	24	22	11
Can't Afford It	5	8	5	4	8
Don't Like To Travel	4	6	4	4	3
Other Places Would Rather Go	4	8	17	23	17
Don't Know Anyone There	3	4	2	1	11
Anglo Environment	*	2	6	5	-

* Less than 0.5%

EXHIBIT 14-a)

Volunteered Reasons For Lack Of Interest In Visiting Niagara Falls Canada Among Americans

	Percent Of US Travelers In… Expressing Little Or No Interest In Visiting Niagara Falls Canada Within Next Two Years						
	Total (5634) %	Near Market (2676) %	Mid Market (2641) %	Bos-ton (214) %	Wash. D.C. (175) %	NYC (222) %	Chic-ago (340) %
Reasons For Lack Of Interest:							
Been There Before	34	41	30	34	31	36	31
Not Interested	13	12	14	12	10	14	15
Other Places Would Rather Go	13	9	15	18	22	6	18
Don't Like To Travel	6	6	6	4	4	7	5
No Desire To Go There	6	8	5	4	5	8	5
Can't Afford It	4	3	4	3	3	5	3

EXHIBIT 14-b)
Volunteered Reasons For Lack Of Interest In Visiting Niagara Falls Among Canadians

	Percent Of Canadian Travelers In… Expressing Little Or No Interest In Visiting Niagara Falls Within Next Two Years					
	Ontario Ex-Niagara (1416) %	Toronto (GTA) (442) %	Ottawa (368) %	Montreal (525) %	Quebec City (360) %	Winni-peg (523) %
Reasons For Lack Of Interest:						
Been There Before	58	69	57	49	41	43
Not Interested	15	15	16	16	22	14
Other Places Would Rather Go	4	5	5	7	20	10
Can't Afford It	6	5	5	3	3	4
No Desire To	5	2	5	2	3	5
Don't Like To Travel	3	2	2	3	4	2
Too Touristy	3	2	4	3	7	2

* Less than 0.5%

EXHIBIT 15-a)
Volunteered Reasons For Lack Of Interest In Visiting Other Ontario Destinations Among Americans

	Percent Of US Travelers In… Expressing Little Or No Interest In Visiting Other Ontario Destinations Within Next Two Years						
	Total (6558) %	Near Market (3270) %	Mid Market (2988) %	Bos-ton (260) %	Wash. D.C. (194) %	NYC (243) %	Chic-ago (364) %
Reasons For Lack Of Interest:							
Don't Know Much About It	16	15	16	20	19	18	16
More Interested In Other Places	14	10	16	16	15	17	19
Not Interested	13	13	12	8	12	12	10
Don't Travel Much	12	14	10	7	9	11	6
Can't Afford It	5	5	4	2	5	5	5
No Time	4	5	4	5	4	3	4
Too Cold	4	4	4	5	5	3	5
Been There/ Seen Everything	4	4	4	4	7	4	5
Nothing There/ Boring	3	4	3	6	2	5	3

EXHIBIT 15-b)

Volunteered Reasons For Lack Of Interest In Visiting Other Ontario Destinations Among Canadians

	Percent Of Canadian Travelers In… Expressing Little Or No Interest In Visiting Other Ontario Destinations Within Next Two Years					
	Ontario (866) %	Toronto (GTA) (280) %	Ottawa (168) %	Montreal (489) %	Quebec City (329) %	Winni-peg (351) %
Reasons For Lack Of Interest:						
Not Interested	10	12	17	16	13	17
Nothing There/Boring	5	8	7	6	8	5
Do Not Travel Much	19	11	13	11	9	12
More Interest In Other Places	8	10	14	19	20	16
Been There/ Seen Everything	10	13	11	7	7	8
Don't Know Much About It	4	5	6	11	9	3
Can't Afford It	8	9	5	3	5	3
No Time	9	9	4	1	3	2
Anglo Environment	-	-	-	6	3	-

H. OVERALL ASSESSMENT OF ONTARIO AS TRAVEL DESTINATION

In keeping with preceding findings indicating a dearth of strong focal points for stimulating real enthusiasm, overall perceptions of Ontario as a travel destination are positive on balance, but certainly not superlative. Both Americans and Canadians believe that Ontario is at a considerable disadvantage to one's ideal destination. Moreover, while Ontario residents and Americans in the Near Markets concede that the province and its main destinations have allure, travelers in bordering provinces and the US Mid Markets are somewhat guarded on this count.

Niagara Falls may have a special place in the hearts of Canadians, but appears to have considerable difficulty stimulating anything approaching enthusiasm in Quebec. Moreover, Ontario as a whole, and Toronto in particular, generate particularly low overall rating scores in Quebec, and residents of Winnipeg are equally unflattering in their assessment of Toronto.

On the positive side, travelers residing in the US Mid Markets are fairly positive in their assessment of Toronto, and Americans and Canadians throughout all of the regions surveyed believe that Toronto offers more as an urban travel destination than Chicago, a comparable US city. (Of some interest, while residents of Toronto and Chicago are equally effusive in praising their respective cities, other North Americans are less positive in their assessment of both, but tend to confer a fairly substantial advantage to Toronto.)

These findings suggest that Ontario has significant room to improve its image beyond the province itself and the US markets in closest proximity to its signature destinations. However, within most of the source markets capable of delivering large tourist volumes, there does appear to be sufficient goodwill to give impetus to future image improvement.

(See Exhibits 16-a) and 16-b))

EXHIBIT 16-a)
Overall Rating Of Destinations For Pleasure Travel Among Americans

	Average Rating* Of Each Destination Among US Travelers In …. Aware Of Each Destination						
	Total #	Near Markets #	Mid Markets #	Boston #	Wash. DC #	NYC #	Chi-cago #
Overall Rating Relative To Ideal Destination:**							
Ontario	5.4	5.7	5.3	4.9	5.0	5.4	5.2
Overall Rating As A Pleasure Travel Destination:							
Ontario	7.3	7.6	7.1	7.1	7.1	7.0	7.2
Niagara Falls Canada	7.7	8.0	7.5	7.4	7.4	7.5	7.3
Toronto	7.4	7.7	7.3	7.3	7.2	7.5	7.4
Chicago	6.7	6.7	6.7	6.5	6.3	6.5	8.2

* Based on 10-point scale.

** Among those aware of Ontario and able to name an ideal destination.

EXHIBIT 16-b)
Overall Rating Of Destinations For Pleasure Travel Among Canadians

	Average Rating* Of Each Destination Among Canadian Travelers In ….						
	Total (6,088) #	Ontario (3,599) #	GTA (1,233) #	Ex-Ontario (2,489) #	Mon-treal (948) #	Que. City (598) #	Winn-peg (943) #
Overall Rating Relative To Ideal Destination:**							
Ontario	5.6	6.2	5.9	4.3	4.1	4.6	5.2
Overall Rating As A Pleasure Travel Destination:							
Ontario	7.7	8.1	7.9	6.8	6.7	6.9	7.2
Niagara Falls Canada	7.8	7.9	7.9	7.4	7.4	7.3	7.8
Toronto	7.4	7.7	8.1	6.7	6.7	7.1	6.8
Chicago	5.8	5.9	6.3	5.7	5.7	5.9	5.8

* Based on 10-point scale.

** Among those aware of Ontario and able to name an ideal destination.

I. TRAVEL BEHAVIOUR PROFILE BY ETHNIC GROUP

Measures of travel intentions and previous travel experience strongly support the hypothesis that overnight travel prevalence and destination choice vary by ethnic group. Individuals born in Asia, Africa and South/Central America are less likely to travel for pleasure than are native Canadians or Americans, with prevalence perhaps reaching its lowest point among individuals of sub-continental Asian origin. Data collected in Canada indicate that travel behaviour may also be suppressed among those born in Southern Europe. By contrast, pleasure travel is more common among those originating from other parts of Europe, the UK and Canada (among American residents) or the US (among residents of Canada). In fact, those coming from other countries in the English-speaking world appear more inclined to travel than Americans or Canadians generally.

As might be expected, the incidence of traveling to a specific region or country tends to be elevated among those originating from there (travel back "home"). Apart from this, there is evidence that among residents of the US, those born in Canada are more likely to travel within their own state, those born in the UK are more inclined to travel to other parts of the US and those born in Europe are more likely to travel to Canada. Interest in Mexico and the Caribbean also seems to be elevated among those born in the UK and Eastern Europe.

Among Canadian residents, apart from the "home country skew" noted above, we again see evidence of elevated sun destination travel among those of British and European origin. Those born in the UK (and possibly those born in Jamaica or other parts of the Caribbean) are more likely to visit the US. Those born in the US appear more interested than native Canadians in traveling domestically, while the reverse holds true for those born in Eastern or Southern Europe and among those originating from most regions of the developing world.

(See Exhibits 17-a) through 17-d))

EXHIBIT 17-a)
Travel Behaviour By Ethnic Group — United States

		Percent Of US Residents In Each Case Stating …		
		Have Traveled Overnight In Past 2 Years	Will Travel Overnight In Next 12 Months	Total Past/Intended Travelers
Country Of Birth:				
United States	(14,108) %	76	70	82
Canada	(115) %	$\boxed{88}$	74	88
UK	(92) %	87	82	94
Eastern Europe	(83) %	83	77	86
Other Europe	(208) %	73	67	78
South/Central America (including Mexico & Carib.)	(266) %	54	55	66
China, Japan & Southeast Asia	(82) %	59	51	63
Other Asia	(97) %	64	48	69

Note: Statistical tests run on specified ethnic group versus US born.

EXHIBIT 17-b)
Next Season Travel Intentions By Ethnic Group — United States

		Percent Of US Residents In Each Case Stating Will Take Overnight Trip To …Next Season						
		Any Destination	Own State	Other US	Total Canada	Ontario	Mex. Or Carib.	Overseas
Country Of Birth:								
United States	(14,108) %	58	29	45	11	7	8	8
Canada	(115) %	71	45	43	47	36	6	9
UK	(92) %	79	23	58	16	9	14	31
Eastern Europe	(83) %	62	30	43	19	8	19	33
Other Europe	(208) %	63	24	40	19	16	9	34
South/Central America (including Mexico & Carib.)	(266) %	45	21	30	15	11	28	13
China, Japan & Southeast Asia	(82) %	43	22	33	15	7	5	11
Other Asia	(97)%	42	23	31	22	14	7	23

Note: Statistical tests run on specified ethnic group versus US born.

EXHIBIT 17-c)
Travel Behaviour By Ethnic Group — Canada

		Percent Of Canadian Residents In Each Case Stating …		
		Have Traveled Overnight In Past 2 Years	Will Travel Overnight In Next 12 Months	Total Past/Intended Travelers
Country Of Birth:				
Canada	(6,158)	75	67	80
US	(89) %	81	81	88
UK	(190) %	87	75	89
Western Europe	(197) %	71	68	82
Eastern Europe	(175) %	78	68	82
Southern Europe	(109) %	62	40	64
Jamaica/Caribbean	(126) %	60	54	70
China/Hong Kong	(103) %	58	51	66
India	(83) %	43	33	47
Other Pacific Asia	(76) %	53	43	62
Other Asia	(113) %	40	35	47
South/Central America	(77) %	67	53	75
Africa	(132) %	68	66	79

Note: Statistical tests run on specified ethnic group versus Canadian born.

EXHIBIT 17-d)
Next Season Travel Intentions By Ethnic Group — Canada

		Percent Of Canadian Residents In Each Case Stating Will Take Overnight Trip To …Next Season					
		Any Destin-ation	Own Prov.	Total Can-ada	U.S.	Mexico Or Carib.	Over-seas
Country Of Birth:							
Canada	(6,158)	57	40	48	19	9	8
US	(89) %	73	46	60	49	4	13
UK	(190) %	66	40	51	27	13	21
Western Europe	(197) %	61	35	47	24	12	24
Eastern Europe	(175) %	49	25	36	21	16	16
Southern Europe	(109) %	34	23	26	10	11	17
Jamaica/Caribbean	(126) %	50	28	46	27	29	2
China/Hong Kong	(103) %	44	24	30	13	1	18
India	(83) %	29	17	23	20	3	13
Other Pacific Asia	(76) %	32	16	18	21	3	13
Other Asia	(113) %	37	26	33	17	8	15
South/Central America	(77) %	50	22	31	18	22	16
Africa	(132) %	56	41	47	23	16	29

Note: Statistical tests run on specified ethnic group versus Canadian born.

J. TRAVEL BEHAVIOUR PROFILE BY LIFESTAGE SEGMENT

Travel behaviour clearly varies by affluence. Regardless of whether attention is focused on Canadian or American residents, travel incidence levels are highest among the more affluent segments and bear a stronger relationship to income level than to age or household composition. For instance, overnight travel propensity is as high among the Affluent senior segments as among Affluent youth, and considerably higher than the incidence levels recorded among any of the older Mainstream segments. The appetite for travel drops to its lowest point among Senior Singles and among Mainstream Mature Singles. Given that incidence is considerably higher among Mainstream Youth, these findings imply that once affluence is taken out of the equation, the lifestyle changes that occur with age have the greatest impact on suppressing travel behaviour.

When it comes to choice of destination among Americans, the relationship between Ontario travel interest and lifestyle segment is somewhat convoluted. In the case of Niagara Falls, interest tends to peak among families and mature singles regardless of affluence, but variations by segment are generally quite modest. In the case of Toronto affluence does play a role, with the five affluent groups (and mainstream youth) expressing the most interest. "Other Destinations In Ontario" and Canada generally appear to appeal most strongly to Affluent Young Singles.

Among Canadians, interest in Toronto and "Other Ontario" peaks among the affluent groups, but so too does the appeal of competitive destinations. Among the more affluent, lifestage or lifestyle appears to have some impact on interest in Toronto, with Affluent Mature Singles expressing somewhat less enthusiasm for traveling to the city than individuals falling into the other higher income segments. With respect to Niagara Falls, variations by segment tend to be muted, but here too affluence is positively correlated with travel intention. It is worth noting, though, that Niagara's family appeal seems to have had some success at breaking the income barrier and drawing less affluent families to the region.

(See Exhibits 18-a) through 18-d))

EXHIBIT 18-a)

Travel Behaviour By Lifestage Segment — United States

		Percent Of US Residents In Each Case Stating …		
		Have Traveled Overnight In Past 2 Years	Will Travel Overnight In Next 12 Months	Total Past/Intended Travelers
Lifestage Segment:				
Affluent Young Singles	(488) %	84	84	91
Affluent Young Couples	(205) %	94	84	97
Mainstream Youth	(315) %	77	68	81
Affluent Families	(1305) %	91	84	94
Mainstream Young Families	(1388) %	65	63	74
Mainstream Mature Families	(886) %	66	60	74
Affluent Mature Singles	(803) %	87	84	89
Mainstream Mature Couples	(803) %	72	63	78
Mainstream Mature Singles	(1410) %	52	51	62
Affluent Mature & Senior Couples	(960) %	92	89	95
Mainstream Senior Couples	(495) %	76	63	80
Senior Singles	(987) %	60	51	64

EXHIBIT 18-b)

Next Season Travel Intentions By Lifestage Segment — United States

		Percent Of US Residents In Each Case Stating Will Take Overnight Trip To …Next Season							
		Tor-onto	Nia-gara Falls	Other Ont-ario	Other Can-ada	Own State	Other U.S.	Mex. Or Carib.	Over seas
Lifestage Segment:									
Affluent Young Singles	(488) %	6	4	8	15	39	57	15	17
Affluent Young Couples	(205) %	3	1	4	5	41	58	12	8
Mainstream Youth	(315) %	5	4	2	5	34	39	6	9
Affluent Families	(1305) %	6	6	4	7	35	61	12	13
Mainstream Young Families	(1388) %	4	6	3	3	30	34	7	5
Mainstream Mature Families	(886) %	4	6	3	4	26	35	8	7
Affluent Mature Singles	(803) %	5	5	4	10	35	60	15	14
Mainstream Mature Couples	(803) %	1	4	3	4	26	35	5	4
Mainstream Mature Singles	(1410) %	4	5	3	3	23	31	6	4
Affluent Mature & Senior Couples	(960) %	5	4	4	8	40	64	14	15
Mainstream Senior Couples	(495) %	2	3	3	4	22	39	2	4
Senior Singles	(987) %	2	2	2	3	18	30	3	4

EXHIBIT 18-c)

Travel Behaviour By Lifestage Segment — Canada

		Percent Of Canadian Residents In Each Case Stating …		
		Have Traveled Overnight In Past 2 Years	Will Travel Overnight In Next 12 Months	Total Past/Intended Travelers
Lifestage Segment:				
Affluent Young Singles	(415) %	86	77	90
Affluent Young Couples	(166) %	88	81	90
Mainstream Youth	(315) %	69	64	80
Affluent Families	(650) %	87	81	91
Mainstream Young Families	(685) %	59	54	66
Mainstream Mature Families	(457) %	67	55	72
Affluent Mature Singles	(371) %	89	82	92
Mainstream Mature Couples	(393) %	71	60	76
Mainstream Mature Singles	(611) %	54	50	64
Affluent Mature & Senior Couples	(341) %	86	86	92
Mainstream Senior Couples	(164) %	66	60	71
Senior Singles	(276) %	52	50	60

EXHIBIT 18-d)

Next Season Travel Intentions By Lifestage Segment — Canada

		Percent Of Canadian Residents In Each Case Stating Will Take Overnight Trip To …Next Season						
		Tor-onto*	Nia-gara Falls*	Other Ont-ario	Other Can-ada	U.S.	Mexi-co Or Carib	Over seas
Lifestage Segment:								
Affluent Young Singles	(415) %	27	13	28	29	30	14	17
Affluent Young Couples	(166) %	30	13	27	23	21	12	16
Mainstream Youth	(315) %	16	9	19	17	14	7	10
Affluent Families	(650) %	26	12	32	24	29	11	14
Mainstream Young Families	(685) %	12	11	22	12	14	8	7
Mainstream Mature Families	(457) %	16	11	19	14	19	12	7
Affluent Mature Singles	(371) %	18	11	26	22	29	11	19
Mainstream Mature Couples	(393) %	9	6	15	10	14	6	6
Mainstream Mature Singles	(611) %	11	6	15	14	13	5	6
Affluent Mature & Senior Couples	(341) %	27	15	35	29	28	10	13
Mainstream Senior Couples	(164) %	14	8	16	16	16	4	8
Senior Singles	(276) %	6	6	20	19	14	4	8

K-1. PROFILE OF US RESIDENTS ASSESSING ONTARIO POSITIVELY OR NEGATIVELY FOR SPECIFIC TYPES OF TRIPS

Among Americans, positive perceptions of all facets of the Ontario travel experience are correlated with positive travel behaviour and intentions. Americans who have favourable impressions of Ontario's ability to deliver a positive experience within any of the broad trip categories evaluated are more likely than those who are negatively disposed to have taken a trip to the province within the past two years, to express an interest in doing so "next season" and to assign higher ratings to Ontario overall and for specific pleasure destination attributes. These individuals also tend to be more enthusiastic about travel generally and therefore assign higher importance scores to all aspects of performance delivery when choosing a pleasure travel destination.

A number of conclusions can be drawn from this pattern of response.

1. Recent travel experience within Ontario generally meets or exceeds expectations and, as a consequence, reinforces positive impressions of the province.

2. As a corollary to this line of thought, poor past of experience on any type of trip is likely to curtail future visitation.

3. General lack of enthusiasm for travel suppresses travel behaviour and is associated with poor appreciation of Ontario and other destinations that may not be global tourism icons.

An examination of results by trip-type tends to reveal the expected. For instance, those who highly value Ontario for the nature/outdoor experience are less likely than others to select Toronto as a destination within the province. Those recognizing Ontario as a good destination for a "big city" or cultural trip, on the other hand, are more likely to gravitate to Toronto.

Of more significance, those who go beyond Ontario's reputation for nature and the outdoors and value the breadth of tourism experiences offered within the province are those most likely to be classified as true pleasure travelers. VFR carries less weight as a reason for traveling to Ontario among these individuals. Related to this, there is evidence that those exposed to a more varied Ontario experience through business travel are more inclined than the typical American to express appreciation of Ontario's delivery of satisfactory urban, cultural, resort and touring experiences.

When it comes to demographics, there are few differences between those who are positively and negatively disposed to Ontario within the context of specific trip types. This presents obvious targeting challenges for communication and marketing efforts. Differences that do exist are not dramatic and say more about the existing product than provide assistance with respect to structuring future media plans. There is some indication, for instance, that the population of Americans who take a dim view of Ontario's arts, culture and history offering skews toward youth. In addition, while the nature/outdoor offering seems to appeal in a balanced manner to males and females, appreciation of Ontario's cultural product exhibits a female skew. A modest female skew is also evident when examining the appeal of resort, touring and "big city" trips in Ontario.

With respect to income and geography, the Mid Markets embrace a larger population base and, in theory, the majority of ***potential*** travelers to Ontario, but tend to be over-represented among those who assign low ratings to any of the trip types available within the province. In this case, one can point to lack of knowledge as a primary factor in the suppression of positive impressions. Those reporting high household incomes also tend to be over-represented among the negatively disposed, particularly when asked to consider nature/outdoors, resort and touring trips to Ontario. These individuals may certainly be more discriminating in their tastes when considering these types of travel experience.

(See Exhibits 19-a) through 19-f))

EXHIBIT 19-a)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Americans

	Percent Of US Travellers Rating Ontario For …									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (3989) %	Neg <6 (2141) %	Pos 9/10 (2556) %	Neg <6 (2901) %	Pos 9/10 (2085) %	Neg <6 (3768) %	Pos 9/10 (2948) %	Neg <6 (2670) %	Pos 9/10 (2918) %	Neg <6 (3254) %
Past Experience With Ontario:										
Within Past 2 Years	26	12	27	13	25	14	27	12	31	13
Longer Ago	35	32	38	31	36	37	38	30	38	33
Never	39	55	35	56	39	49	35	58	31	54
Overall rating of Ontario (Avg. On 10-Pt Scale)	8.4	5.7	8.8	6.0	8.8	6.2	8.8	5.6	8.8	6.0
Intent To Travel To…Next Season:										
Toronto	6	4	9	2	8	4	8	3	9	2
Niagara Falls Canada	7	3	10	2	9	4	9	3	9	3
Elsewhere In Ontario	7	2	7	3	7	3	7	2	7	3
Negative Events Likely To Reduce Travel To Ontario	12	12	13	13	14	11	12	12	11	11

EXHIBIT 19-b)
Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Americans

	Percent Of US Travellers Rating Ontario For …And Considering Trip To Ontario Next Season									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (506) %	Neg <6 (188) %	Pos 9/10 (490) %	Neg <6 (169) %	Pos 9/10 (304) %	Neg <6 (318) %	Pos 9/10 (479) %	Neg <6 (165) %	Pos 9/10 (529) %	Neg <6 (209) %
Destination Of Next Pleasure Trip To Ontario:										
Niagara Region	45	46	48	44	51	44	49	48	41	49
Toronto	18	39	34	41	21	41	24	33	34	26
Windsor	4	4	1	1	2	1	2	1	2	5
Northern Ontario	5	-	1	3	2	3	3	1	1	3
Ottawa	2	1	2	1	1	1	2	*	3	1
Description Of Next Pleasure Trip To Ontario:										
Visit Friends/ Relatives	23	24	19	30	18	30	16	25	21	29
Nature & Outdoors	28	8	16	24	19	24	25	27	20	33
Arts Culture/History	12	15	22	14	9	14	14	12	14	6
Resort Trip	10	14	6	2	18	2	9	19	5	6
Touring Trip	6	12	10	11	8	11	10	1	11	11
Combined Business/ Pleasure	14	11	15	5	21	5	18	4	18	2
Big City Trip	4	7	9	6	6	6	6	4	9	2
Sports Trip	1	1	1	2	1	2	1	1	2	2

EXHIBIT 19-c)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Americans

	Average Rating Score On 10-Point Scale Among US Travellers Rating Ontario For….									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (3989) #	Neg <6 (2141) #	Pos 9/10 (2556) #	Neg <6 (2901) #	Pos 9/10 (2085) #	Neg <6 (3768) #	Pos 9/10 (2948) #	Neg <6 (2670) #	Pos 9/10 (2918) #	Neg <6 (3254) #
Importance Ratings:										
Safe FromTerrorists/ Criminals	8.8.	8.3	9.0	8.2	8.9	8.2	9.0	8.3	8.8	8.3
Good Value For Money	8.9	8.2	9.1	8.3	9.1	8.3	9.1	8.4	8.9	8.4
Lots To See And Do	8.7	8.0	9.0	8.0	8.9	8.1	8.9	8.1	8.9	8.0
Friendly To Americans	8.5	7.9	8.7	7.9	8.9	7.8	8.8	7.7	8.5	8.0
Don’t Have To Worry About Health	8.4	7.7	8.7	7.8	8.8	7.6	8.6	7.7	8.4	7.9
Destinations You Can Drive To	7.6	6.6	7.9	6.7	7.9	6.6	7.9	6.7	7.4	6.7
Good Health Services For Visitors	7.3	6.1	7.9	6.0	7.8	6.0	7.4	6.2	7.2	6.4
Ontario Ratings:										
Safe From Criminals/ Terrorists	8.7	6.8	8.8	7.3	8.8	7.4	8.8	7.0	8.8	7.3
Good Value For Money	8.2	6.0	8.7	6.3	8.6	6.4	8.5	6.1	8.5	6.4
Lots To See And Do	8.8	6.5	9.2	6.7	9.2	6.9	9.2	6.4	9.2	6.7
Friendly To Americans	8.8	6.6	9.1	7.0	9.0	7.2	9.0	6.8	9.0	7.1
Don’t Have To Worry About Health	8.7	6.6	8.9	7.1	8.9	7.1	8.9	6.7	8.9	7.0
Destinations You Can Drive To	8.4	6.1	8.9	6.5	8.8	6.5	8.8	6.2	8.8	6.5
Good Health Services For Visitors	8.1	5.8	8.6	6.1	8.5	6.3	8.4	5.9	8.4	6.2

EXHIBIT 19-d)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Americans

	Percent Of US Travelers Rating Ontario For….									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (3989) %	Neg <6 (2141) %	Pos 9/10 (2556) %	Neg <6 (2901) %	Pos 9/10 (2085) %	Neg <6 (3768) %	Pos 9/10 (2948) %	Neg <6 (2670) %	Pos 9/10 (2918) %	Neg <6 (3254) %
Age:										
18 To 24 Years	12	11	8	14	10	11	12	13	10	12
25 To 34 Years	17	19	11	21	14	19	14	20	14	19
35 To 44 Years	19	16	20	19	18	19	18	18	17	19
45 To 54 Years	22	21	26	20	27	22	22	22	24	20
55 To 64 Years	15	15	18	12	14	14	17	12	19	13
65 Years Or Older	14	16	17	13	16	16	16	14	16	15
Sex:										
Male	50	44	39	55	46	49	44	52	44	54
Female	50	56	61	45	54	51	57	49	56	46
Marital Status:										
Single	28	27	24	29	27	26	27	27	28	26
Married/Living Together	58	60	59	61	56	63	57	61	57	63
Separated/Divorced	8	6	9	5	9	6	8	6	8	5
Widow/Widower	6	6	7	4	8	5	7	4	7	5

EXHIBIT 19-e)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Americans

	Percent Of US Travelers Rating Ontario For….									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (3989) %	Neg <6 (2141) %	Pos 9/10 (2556) %	Neg <6 (2901) %	Pos 9/10 (2085) %	Neg <6 (3768) %	Pos 9/10 (2948) %	Neg <6 (2670) %	Pos 9/10 (2918) %	Neg <6 (3254) %
Household Size:										
One	14	14	16	12	16	14	14	14	16	13
Two	33	36	33	36	30	36	32	34	34	35
Three	19	19	20	18	19	18	21	18	18	19
Four Or More	33	30	30	33	34	31	32	33	31	32
Household Composition:										
Adult Only	62	62	63	60	60	61	62	59	64	61
Any Children Under 18 Years	36	36	36	38	38	38	37	39	35	37
Any Children Under 13 Years	24	27	25	30	24	30	24	30	24	31
Household Income:										
Under $20,000	12	7	10	9	13	7	14	9	9	9
$20,000 To $39,999	22	19	23	18	26	17	25	19	23	20
$40,000 To $59,999	22	23	22	24	21	23	21	21	20	23
$60,000 To $79,999	17	16	17	20	15	17	16	18	16	19
$80,000 Or More	24	35	28	29	25	36	24	33	32	29

EXHIBIT 19-f)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Americans

	Percent Of US Travelers Rating Ontario For….									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (3989) %	Neg <6 (2141) %	Pos 9/10 (2556) %	Neg <6 (2901) %	Pos 9/10 (2085) %	Neg <6 (3768) %	Pos 9/10 (2948) %	Neg <6 (2670) %	Pos 9/10 (2918) %	Neg <6 (3254) %
Geographic Proximity:										
Near Market	39	34	44	31	42	32	42	33	43	31
Mid Market	59	65	55	66	57	66	56	66	56	67
State:										
New York	17	21	23	16	19	19	19	20	22	18
Massachusetts	5	9	6	8	4	8	5	8	7	5
Pennsylvania	14	14	14	16	16	14	16	13	14	14
Ohio	13	12	13	11	13	11	14	12	13	11
Michigan	12	9	13	9	12	8	12	9	13	8
Indiana	6	6	6	7	6	6	6	5	5	6
Illinois	14	12	11	13	12	13	11	14	11	14
Minnesota	6	4	4	7	6	5	4	6	4	7
Wisconsin	7	4	4	6	6	5	6	5	5	6
Washington D.C.	4	6	4	6	3	7	5	6	5	6

K-2. PROFILE OF CANADIAN RESIDENTS ASSESSING ONTARIO POSITIVELY OR NEGATIVELY FOR SPECIFIC TYPES OF TRIPS

Profile differences between those negatively and positively disposed to various aspects of Ontario's tourism offering are much the same in the key Canadian markets as they are in the US. Indeed, apart from the much stronger representation of Ontario VFR across all groups in Canada, profile results vary between residents of the two countries in fairly minor ways.

In Canada, with the possible exception of "big city" travel, Ontario's tourism offering appears to be somewhat less appealing to singles than to others. This is in keeping with the generally more critical view taken by younger Canadian adults when considering most of the travel experiences offered by Ontario.

Appreciation of all elements of Ontario's travel product tends to be modestly elevated among households with children, at least to the extent that adults representing such households constitute a somewhat larger proportion of those positively disposed to each trip-type. This is not surprising given that budget constraints keep many households closer to home when taking family vacations. It is to be expected, then, that adults in such households are inclined to be more knowledgeable and appreciative of what the province offers than are adults generally.

As previous findings have clearly demonstrated as well, enthusiasm for Ontario's travel destinations skews very strongly toward residents of the province. Canadians living in the border provinces, and especially those resident in Quebec, are much more skeptical.

(See Exhibits 20-a) through 20-f))

EXHIBIT 20-a)
Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Canadians

	Percent Of Canadian Travelers Rating Ontario For …									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (2535) %	Neg <6 (854) %	Pos 9/10 (1424) %	Neg <6 (1110) %	Pos 9/10 (953) %	Neg <6 (1626) %	Pos 9/10 (1931) %	Neg <6 (1084) %	Pos 9/10 (1691) %	Neg <6 (1219) %
Past Experience With Ontario:										
Within Past 2 Years	75	43	71	54	70	59	71	55	70	55
Longer Ago	24	48	28	40	29	36	28	39	28	40
Never	1	9	1	6	2	5	1	6	2	5
Overall rating of Ontario (Avg. On 10-Pt Scale)	8.7	5.6	8.9	6.2	9.2	6.4	9.1	5.9	8.8	6.4
Intent To Travel To…Next Season:										
Toronto	23	17	27	16	21	22	24	17	27	14
Niagara Falls Canada	15	7	16	8	15	11	16	8	17	8
Elsewhere In Ontario	35	17	33	19	34	23	36	18	31	24
Any Negative Events Likely To Reduce Travel To Ontario	7	10	9	8	9	7	8	8	8	9

EXHIBIT 20-b)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Canadians

	Percent Of Canadian Travelers Rating Ontario For …And Considering Trip To Ontario Next Season									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (959) %	Neg <6 (137). %	Pos 9/10 (538) %	Neg <6 (210) %	Pos 9/10 (324) %	Neg <6 (416) %	Pos 9/10 (559) %	Neg <6 (209) %	Pos 9/10 (619) %	Neg <6 (264) %
Destination Of Next Pleasure Trip To/Within Ontario:										
Niagara Region	20	13	22	14	20	18	22	16	23	18
Toronto	22	39	26	22	17	30	22	28	25	22
Windsor	1	7	1	5	2	3	1	5	1	2
Northern Ontario	5	2	5	1	5	1	4	2	3	3
Ottawa	8	13	10	9	7	11	9	11	10	15
Description Of Next Pleasure Trip To/Within Ontario:										
Visit Friends/ Relatives	47	54	48	52	49	51	50	51	47	50
Nature & Outdoors	19	3	12	18	14	18	15	16	15	18
Arts Culture/History	8	8	10	4	8	6	8	8	10	7
Resort Trip	5	2	4	1	6	3	3	5	5	6
Touring Trip	7	9	8	9	8	6	9	2	8	5
Combined Business/ Pleasure	6	12	7	5	7	7	6	7	6	7
Big City Trip	4	9	5	6	5	5	4	7	6	1
Sports Trip	3	2	3	3	4	2	3	1	2	2

EXHIBIT 20-c)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Canadians

	Average Rating Score On 10-Point Scale Among Canadian Travelers Rating Ontario For….									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (2535) #	Neg <6 (854) #	Pos 9/10 (1424) #	Neg <6 (1110) #	Pos 9/10 (953) #	Neg <6 (1626) #	Pos 9/10 (1931) #	Neg <6 (1084) #	Pos 9/10 (1691) #	Neg <6 (1219) #
Importance Ratings:										
Safe FromTerrorists/ Criminals	8.6	7.8	8.9	7.7	8.8	7.6	8.8	7.8	8.8	7.8
Good Value For Money	8.8	8.1	9.0	8.0	9.0	8.1	8.9	7.9	8.9	8.1
Lots To See And Do	8.4	8.0	8.6	7.8	8.5	8.1	8.7	7.9	8.6	7.7
Friendly Destination	8.7	7.9	8.9	7.8	8.8	7.9	8.8	7.9	8.8	8.0
Don’t Have To Worry About Health	8.4	7.4	8.7	7.4	8.7	7.4	8.7	7.3	8.7	7.4
Destinations You Can Drive To	7.3	6.2	7.5	6.3	7.6	6.1	7.7	5.9	7.3	6.5
Good Health Services For Visitors	7.6	6.4	8.2	6.3	8.2	6.6	8.0	6.6	7.9	6.6
Ontario Ratings:										
Safe From Criminals/ Terrorists	8.8	7.5	8.9	7.9	9.0	8.0	8.9	7.9	8.9	8.0
Good Value For Money	8.1	6.0	8.4	6.3	8.6	6.5	8.5	6.1	8.3	6.5
Lots To See And Do	9.0	6.4	9.4	6.7	9.5	7.1	9.6	6.6	9.2	7.1
Friendly Destination	8.8	6.2	9.0	6.8	9.1	7.2	9.1	6.7	8.9	7.1
Don’t Have To Worry About Health	8.9	7.4	9.1	7.7	9.2	7.9	9.1	7.6	9.0	7.9
Destinations You Can Drive To	9.1	7.5	9.3	7.8	9.5	7.9	9.4	7.5	9.2	7.9
Good Health Services For Visitors	8.6	7.3	8.9	7.3	8.9	7.6	8.8	7.4	8.8	7.5

EXHIBIT 20-d)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Canadians

	Percent Of Canadian Travelers Rating Ontario For….									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (2535) %	Neg <6 (854) %	Pos 9/10 (1424) %	Neg <6 (1110) %	Pos 9/10 (953) %	Neg <6 (1626) %	Pos 9/10 (1931) %	Neg <6 (1084) %	Pos 9/10 (1691) %	Neg <6 (1219) %
Age:										
18 To 24 Years	12	16	9	12	6	15	11	11	12	8
25 To 34 Years	17	22	15	19	11	24	14	22	18	17
35 To 44 Years	20	16	19	19	22	18	20	19	22	16
45 To 54 Years	21	17	21	19	22	18	22	19	21	20
55 To 64 Years	16	17	18	15	21	13	17	16	15	19
65 Years Or Older	13	11	16	15	17	11	15	11	12	19
Sex:										
Male	46	53	39	60	43	57	41	56	40	59
Female	55	47	61	40	57	43	59	44	60	41
Marital Status:										
Single	26	33	23	30	18	35	22	31	25	24
Married/Living Together	61	55	62	56	64	55	62	56	61	64
Separated/Divorced	8	7	8	7	9	6	8	8	7	9
Widow/Widower	5	4	5	5	8	3	6	3	5	1

EXHIBIT 20-e)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Canadians

	Percent Of Canadian Travelers Rating Ontario For….									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (2535) %	Neg <6 (854) %	Pos 9/10 (1424) %	Neg <6 (1110) %	Pos 9/10 (953) %	Neg <6 (1626) %	Pos 9/10 (1931) %	Neg <6 (1084) %	Pos 9/10 (1691) %	Neg <6 (1219) %
Household Size:										
One	13	17	14	16	16	14	13	16	12	17
Two	31	35	34	37	32	34	32	35	30	40
Three	18	16	18	16	18	18	18	17	19	15
Four Or More	38	32	34	31	34	33	35	32	39	28
Household Composition:										
Adult Only	65	70	68	70	65	70	64	70	62	72
Any Children Under 18 Years	35	30	32	30	35	30	36	30	38	28
Any Children Under 13 Years	24	24	22	21	25	21	25	23	27	19
Household Income:										
Under $20,000	10	9	11	10	12	9	10	10	9	10
$20,000 To $39,999	21	19	25	16	27	17	25	18	20	18
$40,000 To $59,999	22	25	22	25	20	20	22	22	20	25
$60,000 To $79,999	16	18	15	19	14	17	15	15	19	17
$80,000 Or More	31	29	27	30	27	37	28	35	32	30

EXHIBIT 20-f)

Profile Of Those Assessing Ontario Positively Or Negatively For Specific Trip Types Among Canadians

	Percent Of Canadian Travelers Rating Ontario For….									
	Nature/ Outdoors		Arts/Culture History		Resort Trip		Touring Trip		Big City Trip	
	Pos 9/10 (2535) %	Neg <6 (854) %	Pos 9/10 (1424) %	Neg <6 (1110) %	Pos 9/10 (953) %	Neg <6 (1626) %	Pos 9/10 (1931) %	Neg <6 (1084) %	Pos 9/10 (1691) %	Neg <6 (1219) %
Province:										
Ontario	88	37	81	54	85	60	81	59	81	62
Total Ex-Ontario	12	63	19	5	15	40	19	41	19	38
Quebec	9	57	15	41	11	35	16	36	15	33
Community:										
Toronto (GTA)	30	15	27	23	29	26	27	26	32	22
Ottawa	4	3	5	3	3	5	4	4	4	4
Hamilton	5	2	4	3	5	3	4	4	4	4
Ontario 100M – 499M	17	6	16	9	16	10	16	11	15	11
Ontario 30M – 99M	6	2	5	3	6	4	6	2	6	3
Ontario 10M – 29M	5	1	6	2	6	2	5	3	4	3
Ontario Under 10M	20	7	18	11	20	9	19	10	16	15
Montreal	8	47	13	34	9	29	13	30	12	27
Quebec City	1	11	2	7	2	6	3	5	4	5
Winnipeg	3	6	3	5	3	5	3	6	4	6