Quebec Tourism Consumer Research

Ontario Tourism Marketing Partnership Corporation and Industry Canada - FedNor

Canada

ONTARIO
Yours to discover

FedNor

October 19, 2006

Dear Tourism Partners,

On behalf of FedNor and the Ontario Tourism Marketing Partnership Corporation, we are pleased to present the Quebec Tourism Consumer Research report. Commissioned by the Government of Canada and the Ontario Government, it provides keen insight into the motivations, perceptions, attitudes and specific interests of Quebec residents, regarding travel to Ontario.

The study examines how motivational drivers, travel barriers and the role of Francophone culture and language affect travel decisions. Surprisingly, language isn't as much a barrier to Quebec travellers as is the perception that Ontario residents don't warmly receive French-speaking visitors.

In addition to highlighting the factors that Québécois consider when making travel decisions, the report confirms that Northern Ontario is a haven for people seeking nature-based tourism experiences. By rolling out the welcome mat and ensuring that tourist information is available in French, we can expand our traditional client base to include more of our provincial neighbours to the East.

This information will be invaluable to tourist operators and outfitters as they consider new products or fine-tune their businesses and marketing strategies to attract the Quebec market. By understanding what Quebec residents really want in their tourism experiences, tourism operators will be able to develop products to meet that demand, attracting more visitors from 'la belle province'.

This report is another example of how governments are working together to benefit the tourism industry in Ontario.

Sincerely,

Louise Paquette
Director General
FedNor

Robin Garrett
Chief Executive Officer and President
Ontario Tourism Marketing Partnership Corporation

Table of Contents

Page #

Background and Objectives ………………………………………… 3
Methodology ………………………………………………………… 4
Overview of Quebec Travellers …………………………………… 5
Awareness of Ontario …………………………………………….. 15
Past Visitation of Ontario ………………………………………… 24
Interest in Ontario …………………………………………………. 34
Travel Attitudes and Barriers …………………………………….. 43
Travel Motivations and Activities ………………………………… 51
Perceptions and Competitive Positioning of Ontario ……………….. 67
Travel Planning …………………………………………………… 80
Socio-Demographic Segmentation ……………………………….. 86
Conclusions and Recommendations ……………………………109

Decima Research

Background and Objectives

- The Ontario Tourism Marketing Partnership (OTMP) and FedNor engaged Decima Research to conduct a research study to examine the motivations, perceptions and interests of Quebec travellers.
- The specific study objectives were as follows:
  - Understand perceptions of and motivations to travel to Southern and Northern Ontario;
  - Assess the competitive positioning of Ontario in the minds of Quebec consumers;
  - Identify product interests and experiences that can trigger visitation;
  - Understand regional differences in the Quebec market;
  - Determine differences between Francophone and Anglophone travellers;
  - Identify potential barriers to travel to Ontario;
  - Explore familiarity with specific Ontario travel experiences, including Francophone travel experiences;
  - Identify target segments that provide the best potential for visits to Ontario, and specifically Northern Ontario;
  - Understand the role Francophone services play in motivating visits to Ontario and during the trip;
  - Understand the role of Francophone culture and heritage as a trip motivator and as a desired experience during the trip; and
  - Explore the need for / interest in having services in French.
- To address these objectives, Decima conducted both quantitative and qualitative research. This report focuses on the quantitative component. The results of the qualitative component (i.e., focus groups) were reported under separate cover, although some of the insights are drawn upon here.

Methodology

- Decima Research conducted an online survey of n=2,302 Quebec travellers in April 2006 using our eVox panel.
- The survey population consisted of Quebec residents, aged 18 and older who had either taken a pleasure trip of one or more nights away from home in the past two years or planned to take such a trip in the next two years.
- A breakdown of the survey sample by market is shown in the table below. Due to the small sample sizes in Abitibi-Temiscamingue and Outaouais, these regions have been combined for analysis and reporting purposes.
- Weighting was used to align the screener data (including travellers and non-travellers) to Quebec census data by market, age and gender. The final survey sample was then aligned to the traveller component from the screener (again by market, age and gender).

Market	Sample Size
Abitibi-Temiscamingue	54
Outaouais	118
Greater Montreal	906
Greater Quebec City	538
Other Quebec (i.e., rest of Quebec)	686
Total	**2,302**

Overview of Quebec Travellers

Overview of Quebec Travellers – Key Findings

- Quebec travellers span all ages. They are primarily Francophone* (86% speak French most often at home), although 65% say their spoken English is at least good. Approximately two-thirds are married, and about a third have children living at home. Although a fifth have household incomes of $80k or more, a far greater number (almost 35%) earn under $40k.
- In terms of regional differences, Outaouais/Abitibi travellers are distinguished by the fact that they are more likely to have children living at home. In addition, nearly three-quarters of Outaouais / Abitibi travellers have close friends or relatives living in Ontario, which is likely due to the proximity of these regions to the border. On the other hand, those in Quebec City are least likely to know people in Ontario (less than 40%).
- Other Quebec travellers tend to be the least educated and least affluent (only 15% enjoy incomes of $80k or more).
- Compared with other markets, Montreal travellers are far more likely to be Anglophone*, with close to a fifth who primarily speak English at home, and 75% who rate their spoken English as good to excellent. In fact, Montreal is home to over 80% of all Anglophone travellers in Quebec (as defined by the language spoken most often at home).
- **Quebec travellers who have visited Ontario in the last year tend to be older** (close to 40% are 55 plus), **have higher incomes** (close to 30% earn $80k or over), **are better educated** (55% with college/university education) and more likely to live in Montreal or Outaouais/Abitibi than their non-visitor counterparts. Being older, they are more likely to be retired and less likely to be fettered by young children still living at home.
- **The most notable characteristic of visitors to Ontario, however, is that they are far more likely to be Anglophone**. About a fifth speak English at home, which is far higher than the 6% observed for non-visitors. Furthermore, over 80% of visitors to Ontario say they have a good command of the English language, compared with just under 60% of non-visitors. The flip side of this, however, is that approximately 20% of visitors to Ontario do not speak English well, which shows that it is possible to attract French-speaking travellers to the province.

*NOTE: For the purposes of this report, the term Francophone will be used to refer to those who speak French most often at home and the term Anglophone to refer to those who speak English most often at home.

Overview of Quebec Travellers – Key Findings (Cont'd)

- Also notable is the fact that visitors to Ontario are far more likely to have friends and relatives living in the province (70%), which suggests that **visiting friends and relatives (VFR) is a key driver of travel to Ontario.**
- Travellers to different Ontario regions have somewhat different profiles. Visitors to Northern Ontario are most distinctive, being less educated and less affluent. They are also more likely to be Francophone, with close to 90% who speak French at home and only about 70% who rate their spoken English as good (compared to 80% to 85% of other groups). **This points to better potential for Francophone tourism to Northern Ontario than to the rest of the province**.
- Although travellers to Northern Ontario are more likely to be from Outaouais/Abitibi and less likely to be from Montreal, the Montreal market still accounts for close to half of all Northern Ontario visitors due to the sheer size of its population.
- Visitors to Toronto and Other Southern Ontario are more likely to be Anglophone (with 27% and 37%, respectively, speaking English at home). Although their incomes are no higher, they do tend to be better educated.
- VFR may play a relatively more important role in drawing Quebec travellers to Toronto, Other Eastern Ontario and particularly, Other Southern Ontario, as visitors to these regions are more likely to have close friends and relatives in the province.
- In terms of travel incidence, 86% of (past and potential) Quebec travellers have taken an overnight pleasure trip in the last year. Just over a third of the market is made up of infrequent travellers who take only one or two trips per year, while close to **15% are avid travellers who take six or more trips per year.**

Demographic Profile of Quebec Travellers

Age	Total (n=2,047)	Outaouais / Abitibi (n=153)	Montreal (n=800)	Quebec City (n=491)	Other Quebec (n=603)
18 to 34	30%	32%	32%	29%	27%
35 to 44	22%	25%	22%	21%	21%
45 to 54	19%	20%	18%	21%	20%
55 or older	29%	23%	28%	30%	32%
Gender					
Male	49%	50%	48%	47%	50%
Female	51%	50%	52%	53%	50%
Income					
Under $20K	10%	5%	9%	11%	11%
$20-40K	24%	21%	23%	26%	25%
$40-80K	45%	42%	43%	44%	49%
$80-100K	10%	14%	11%	11%	8%
$100K or more	11%	18%	15%	8%	7%
Education					
High school	19%	14%	14%	18%	27%
CEGEP	23%	19%	23%	24%	23%
Trade school/vocational	13%	16%	12%	13%	12%
College/University	45%	51%	50%	44%	37%
Friends or Relatives Living in Ontario					
Yes	48%	74%	51%	39%	40%

Decima Research

NOTES: Base is those who have taken a pleasure trip of one or more nights in the past two years.
Orange circles indicate a result that is significantly higher than one or more other groups.
Blue circles indicate a result that is significantly lower than one or more other groups.

Demographic Profile of Quebec Travellers (Cont'd)

Household Composition	Total (n=2,047)	Outaouais / Abitibi (n=153)	Montreal (n=800)	Quebec City (n=491)	Other Quebec (n=603)
Live alone	15%	15%	19%	20%	10%
Spouse / partner	67%	68%	64%	64%	73%
Children aged 12 or younger	23%	30%	21%	20%	24%
Children aged 13 to 21	16%	19%	16%	15%	16%
Children over 21	8%	7%	8%	6%	9%
Children in household (Net)	34%	43%	32%	31%	35%
Employment Status					
Employed full-time	52%	60%	54%	50%	47%
Employed part-time	8%	4%	8%	12%	8%
Homemaker	5%	5%	4%	3%	7%
Unemployed	4%	5%	4%	4%	5%
Retired	20%	16%	18%	22%	22%
Student	6%	3%	7%	8%	6%
Language Spoken at Home					
French	86%	96%	76%	98%	93%
English	10%	1%	17%	1%	5%
Both Equally	4%	3%	6%	1%	2%
Language Capabilities (Good/Very Good/Excellent)					
Spoken	65%	67%	75%	56%	54%
Read	76%	74%	84%	75%	67%

Decima Research

NOTE: Base is those who have taken a pleasure trip of one or more nights in the past two years.

Demographic Profile of Travellers to Ontario

Age	Travelled to Ontario (n=557)	Did not travel to Ontario (n=1,744)
18 to 34	25%	31%
35 to 44	20%	23%
45 to 54	17%	21%
55 or older	38%	26%
Gender		
Male	54%	47%
Income		
Under $20K	9%	11%
$20-40K	21%	26%
$40-80K	42%	46%
$80-100K	13%	8%
$100K or more	15%	9%
Education		
High school	14%	23%
CEGEP	18%	25%
Trade school/vocational	12%	14%
College/University	55%	39%
Friends or Relatives Living in Ontario		
Yes	70%	38%
Market		
Outaouais / Abitibi	9%	6%
Quebec City	7%	10%
Montreal	57%	44%
Other Quebec	26%	41%

Decima Research

NOTE: Travelled to Ontario includes those who took an overnight pleasure trip in the past year

Demographic Profile of Travellers to Ontario (Cont'd)

Household Composition	Travelled to Ontario (n=557)	Did not travel to Ontario (n=1,744)
Live alone	18%	15%
Spouse / partner	64%	67%
Children 12 or younger	19%	24%
Children 13 to 21	15%	17%
Children over 21	9%	8%
Children in household (NET)	29%	36%
Employment Status		
Employed full-time	50%	51%
Employed part-time	9%	8%
Homemaker	3%	7%
Unemployed	4%	5%
Retired	23%	17%
Student	6%	7%
Language Spoken at Home		
French	72%	91%
English	20%	6%
Both Equally	6%	3%
Language Capabilities (Good/Very Good/Excellent)		
Spoken	81%	59%
Read	86%	71%

Decima Research

NOTE: Travelled to Ontario includes those who took an overnight pleasure trip in the past year

Demographic Profile of Travellers to Ontario Regions

Age	Ottawa (n=348)	Other Eastern Ontario (n=131)	Toronto (n=251)	Niagara Falls (n=109)	Other Southern Ontario (n=85)	Northern Ontario (n=135)
18 to 34	24%	19%	27%	21%	28%	24%
35 to 44	19%	24%	22%	25%	18%	21%
45 to 54	17%	12%	16%	17%	13%	14%
55 or older	40%	44%	35%	36%	41%	41%
Gender						
Male	56%	56%	59%	51%	50%	49%
Income						
Under $20K	7%	11%	8%	10%	16%	9%
$20-40K	21%	20%	16%	20%	20%	21%
$40-80K	43%	43%	44%	45%	40%	50%
$80-100K	14%	15%	15%	12%	9%	6%
$100K or more	16%	12%	16%	13%	15%	14%
Education						
High school	16%	14%	9%	9%	10%	18%
CEGEP	19%	20%	19%	22%	19%	29%
Trade school/vocational	12%	12%	9%	16%	9%	11%
College/University	53%	54%	63%	53%	62%	41%
Friends or Relatives Living in Ontario						
Yes	69%	77%	77%	64%	82%	64%
Market						
Outaouais / Abitibi	9%	13%	8%	11%	6%	20%
Quebec City	7%	6%	5%	5%	3%	7%
Montreal	57%	55%	62%	53%	60%	48%
Other Quebec	27%	25%	25%	32%	31%	25%

NOTE: Visitation to regions in Ontario is based on the last year, except for Northern Ontario, which is the last 5 years.

Demographic Profile of Travellers to Ontario Regions (Cont'd)

Household Composition	Ottawa (n=348)	Other Eastern Ontario (n=131)	Toronto (n=251)	Niagara Falls (n=109)	Other Southern Ontario (n=85)	Northern Ontario (n=135)
Live alone	17%	18%	18%	15%	20%	12%
Spouse / partner	65%	60%	62%	66%	61%	70%
Children 12 or younger	18%	22%	17%	27%	17%	21%
Children 13 to 21	16%	19%	15%	14%	4%	15%
Children over 21	11%	6%	10%	14%	10%	6%
Children in household (Net)	29%	34%	28%	32%	20%	28%
Employment Status						
Employed full-time	49%	51%	59%	51%	44%	43%
Employed part-time	9%	12%	7%	10%	14%	11%
Homemaker	4%	4%	1%	3%	2%	4%
Unemployed	4%	4%	4%	3%	3%	4%
Retired	23%	22%	18%	24%	26%	22%
Student	6%	1%	5%	8%	8%	3%
Language Spoken at Home						
French	74%	71%	64%	73%	56%	89%
English	18%	16%	27%	17%	37%	3%
Both Equally	7%	12%	8%	6%	8%	8%
Language Capabilities (Good/Very Good/Excellent)						
Spoken	81%	81%	86%	81%	85%	69%
Read	85%	85%	90%	88%	90%	78%

Decima Research

NOTE: Visitation to regions in Ontario is based on the last year, except for Northern Ontario, which is the last 5 years.

Frequency of Travel by Market and Language

Number of overnight pleasure trips in past year	Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
None	14%	14%	14%	11%	15%	10%	15%
1	14%	12%	14%	12%	14%	16%	14%
2	21%	9%	22%	22%	21%	22%	21%
3	16%	25%	17%	17%	14%	14%	17%
4 or 5	20%	25%	19%	20%	20%	25%	19%
6 to 10	11%	11%	10%	14%	12%	9%	11%
11 or more	3%	3%	3%	4%	4%	3%	3%
MEAN	**3.4**	**3.7**	**3.2**	**3.8**	**3.6**	**3.3**	**3.4**

Decima Research

Awareness of Ontario

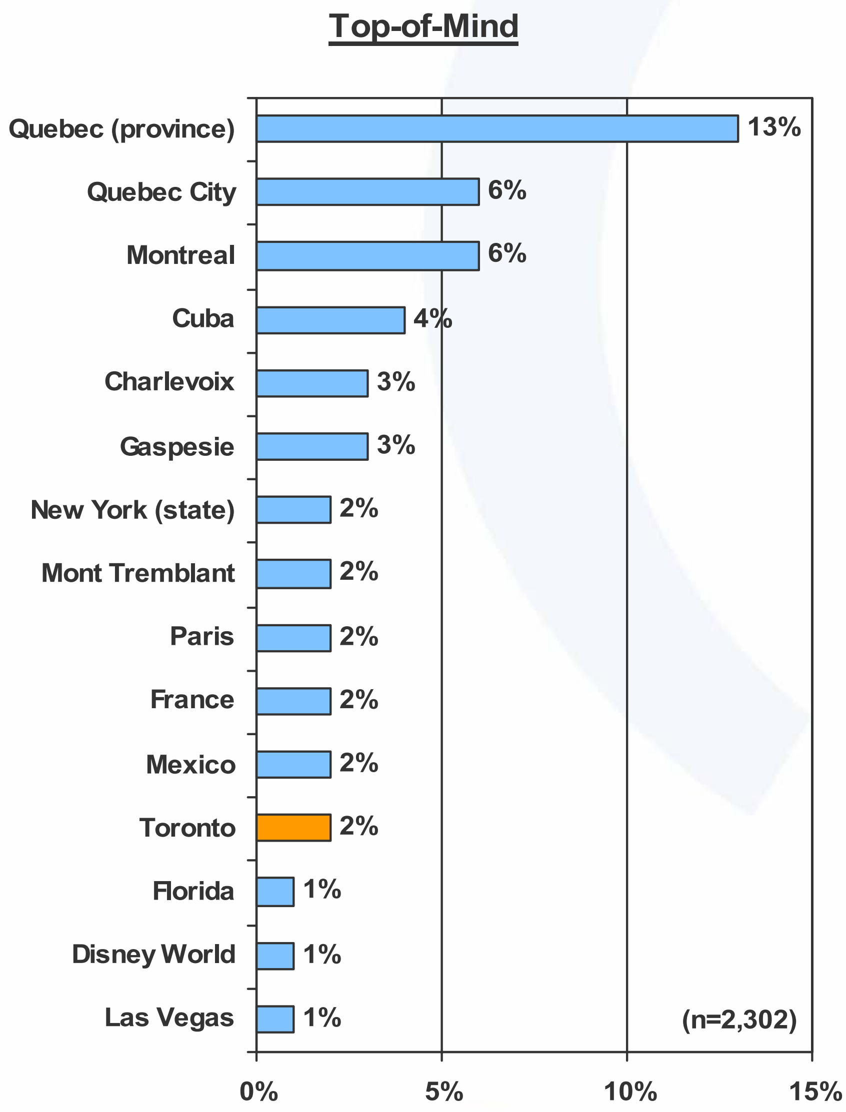
Awareness of Ontario – Key Findings

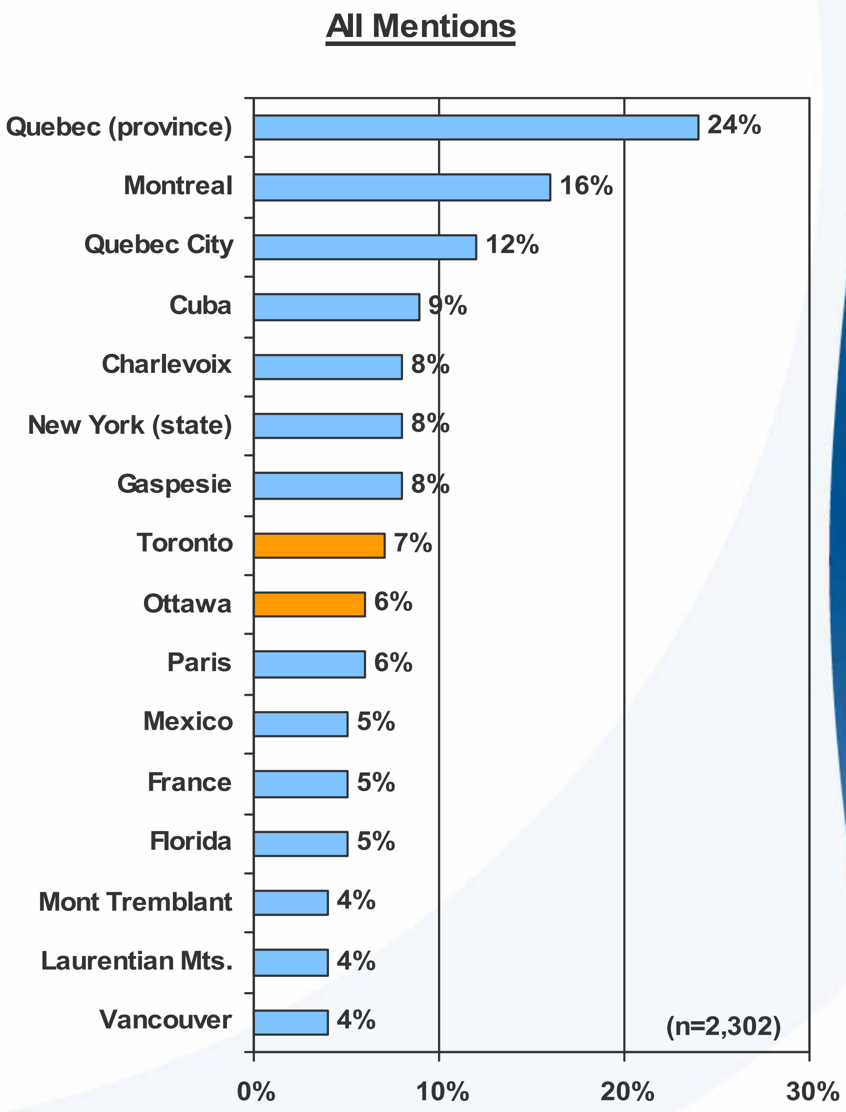
- **When it comes to brand awareness, Quebecers are inwardly focused**, with "Quebec," "Montreal" and "Quebec City" being the top three brands in terms of awareness. In fact, Quebec brands account for seven of the top 15 travel brands in this market.
- Awareness of "Toronto" and "Ottawa" are reasonable (in the range of 6% to 7%), with both ranked among the top 10 brands. "Niagara Falls" and "Ontario" – both at 2% awareness – are the only other Ontario brands to place in the top 50 (28th and 35th, respectively).
- "Paris" and "France" each post awareness levels of around 5%, no doubt benefiting from being French-speaking destinations with a historical connection to Quebec. Quebecers are also attracted to sun and sand destinations, with "Cuba," "Mexico" and "Florida" being other top international brands.
- **In terms of destination (or total) awareness, Quebec is at the top of the province/state roll-up**, with fully two-thirds of all travellers mentioning a destination in their own province for a pleasure trip. Ontario is a distant second, mentioned by just under a fifth of the market (18%). New York and Florida are the only other provinces/states with a total awareness of 10% or more.
- As expected, Canada ranks first in the country level roll-up at 80% total awareness, followed by the US (34%). The remaining countries in the top 10 are split between Europe (e.g,. France, Italy, England, Spain) and the Caribbean region (e.g., Cuba, Mexico, Dominican Republic, Barbados).
- When specifically asked to name Ontario destinations that come to mind for a pleasure trip, the top destinations are, quite unsurprisingly, Toronto (64%), Ottawa (53%) and Niagara Falls (34%). Aside from the Niagara area, awareness of all other Ontario destinations is 5% or less, showing **little familiarity of destinations beyond Ontario's three tourism hot spots**.
- **The Niagara region may offer good potential for Ontario** in the Quebec market. There is reasonable awareness of the region as a whole (50% when rolled up), yet it is a relatively untapped market in that, unlike Toronto and Ottawa, many of those aware have not yet visited. High awareness of the Niagara region was seen in the focus groups as well, and this extends beyond Niagara Falls to the region as a whole (e.g., Niagara peninsula, wineries).

Awareness of Ontario – Key Findings (Cont'd)

- **Awareness of destinations in Northern Ontario is relatively poor.** Only three of the top 20 Ontario destinations are in the northern part of the province – Sudbury, Thunder Bay and Georgian Bay – each with awareness levels of 1% to 2%. When rolled-up to the regional level, awareness of Northern Ontario as a whole sits at a mere 8%.
- **While Quebec destinations are top of mind for Francophones, Anglophones have broader horizons**. While 74% of Francophones name a destination in Quebec as a place that comes to mind for a vacation, only 16% of Anglophones do so. Instead, there is greater awareness of destinations in the US (e.g., Florida, New York, Nevada, California, Hawaii and Vermont to name a few), other parts of Canada (e.g., BC, Nova Scotia), Europe (e.g., Italy, England) and the Caribbean (e.g., Barbados).
- Interestingly, **unaided awareness of Ontario was only marginally higher among Anglophones** (and not significantly so). In other words, Ontario is no more top of mind as a vacation destination among Anglophones than among Francophones. When specifically asked to name Ontario destinations, however, there was greater familiarity with Toronto, Kingston, London, Niagara-on-the-Lake and Stratford among English-speaking Quebecers.
- Montrealers are the most worldly, bypassing Quebec destinations for those in the US and Europe. As Montreal has the highest English-speaking population, this may be due to language considerations as well as to the fact that it is a more sophisticated market with better air access to international destinations.
- Outaouais travellers register the lowest awareness of Ottawa. Because Ottawa is literally next door, it tends to be viewed as a place to go for the day, rather than an overnight trip.
- Other Quebec shows the lowest overall awareness of Ontario (only 15%), and of Toronto in particular. However, this market also demonstrates lower awareness of "Montreal" (26%) and destinations in the US (9%).

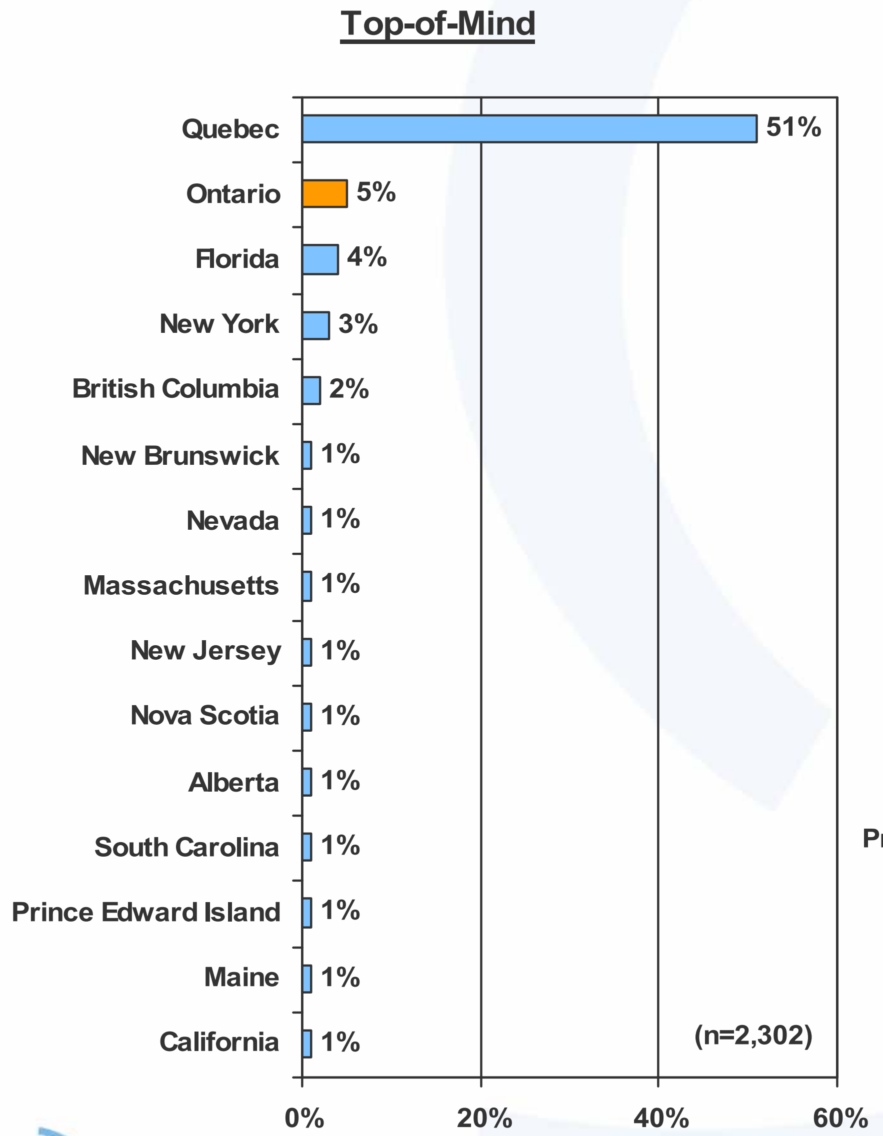
Unaided Destination Awareness (Brand)

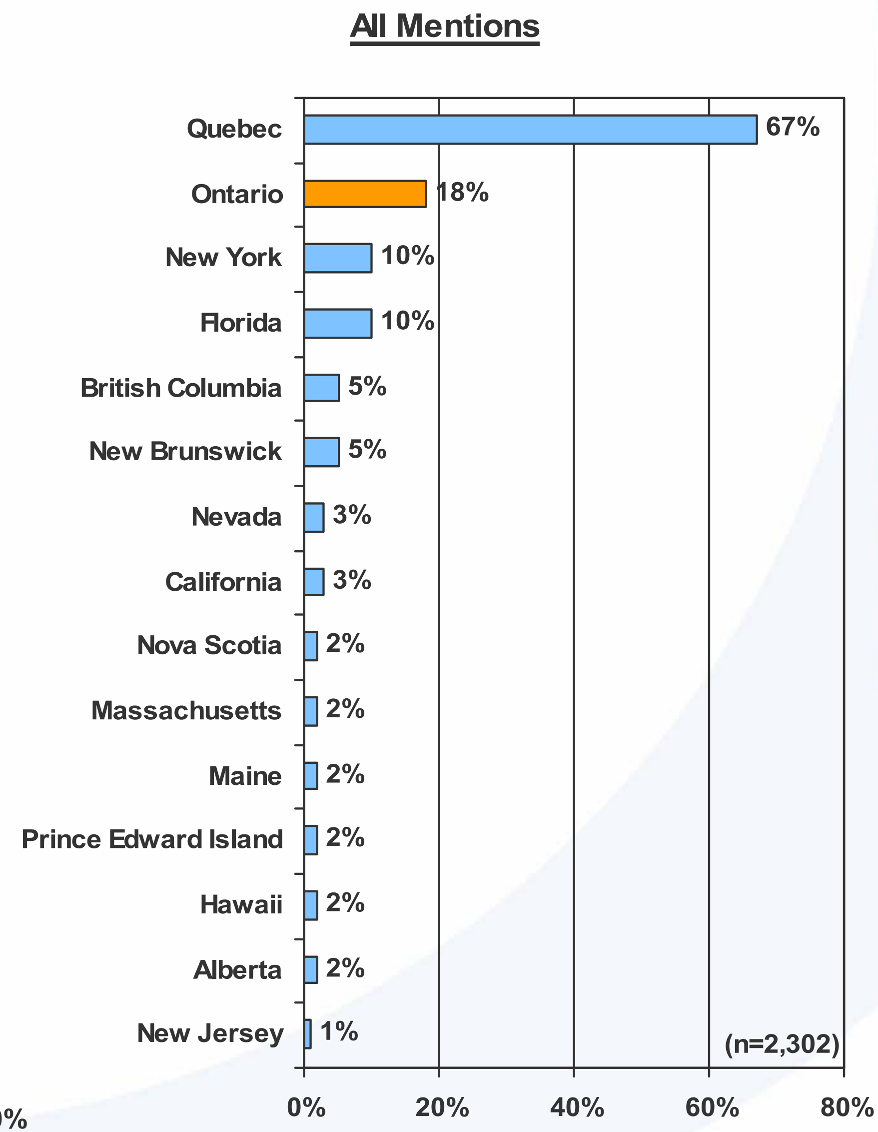




Decima Research

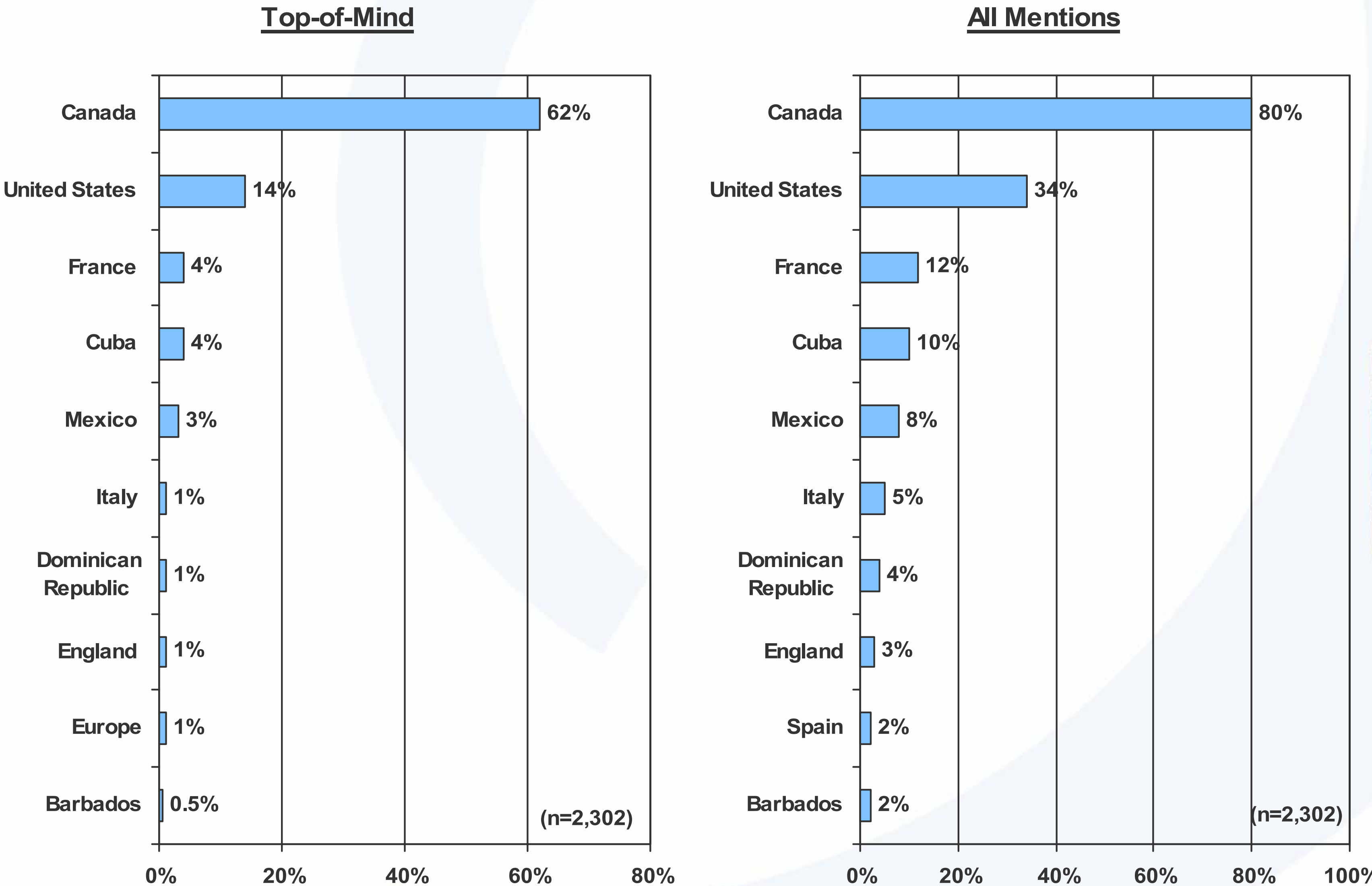
Unaided Destination Awareness (Province/State Roll-up)





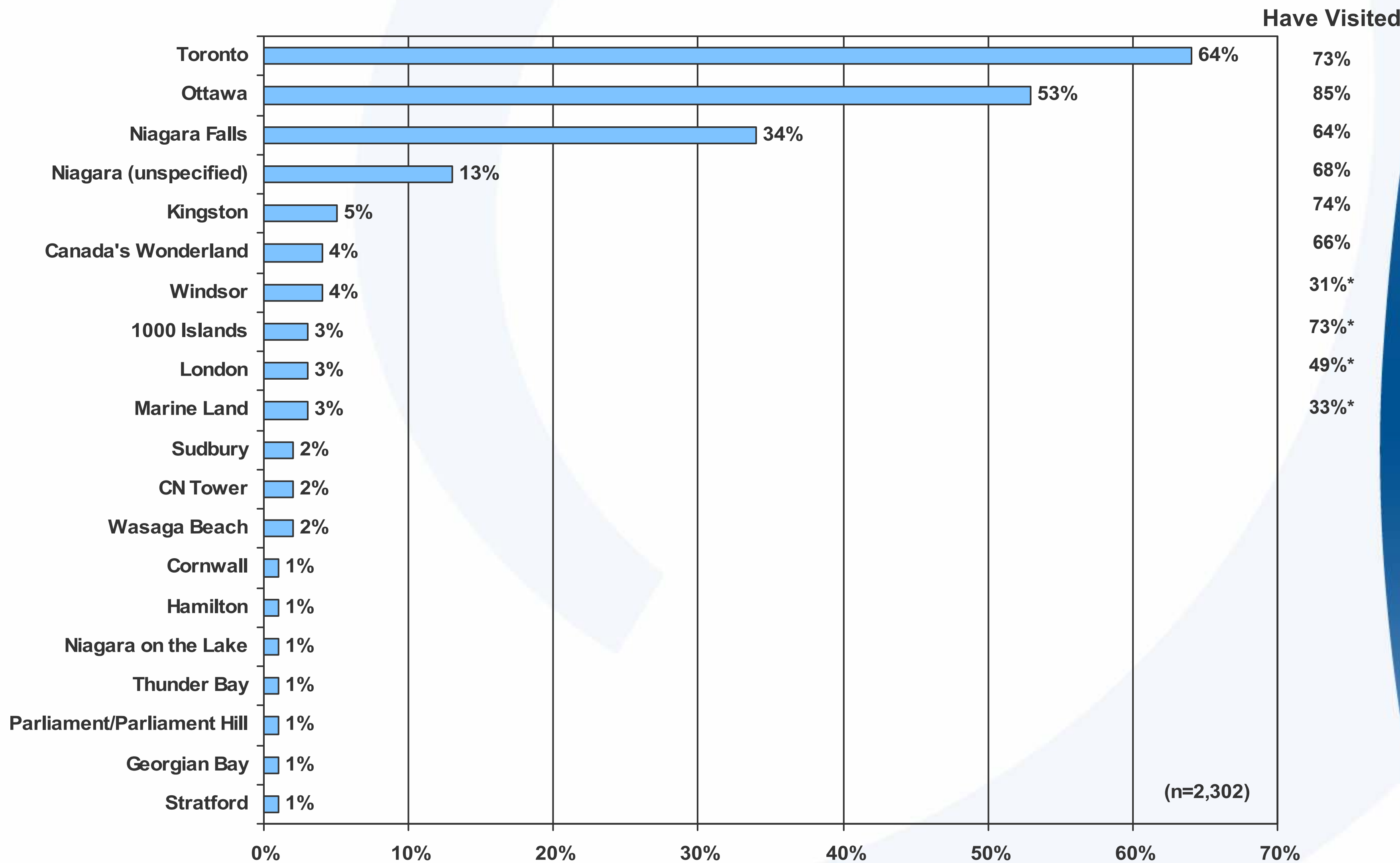
Decima Research

Unaided Destination Awareness (Country Roll-up)



Decima Research

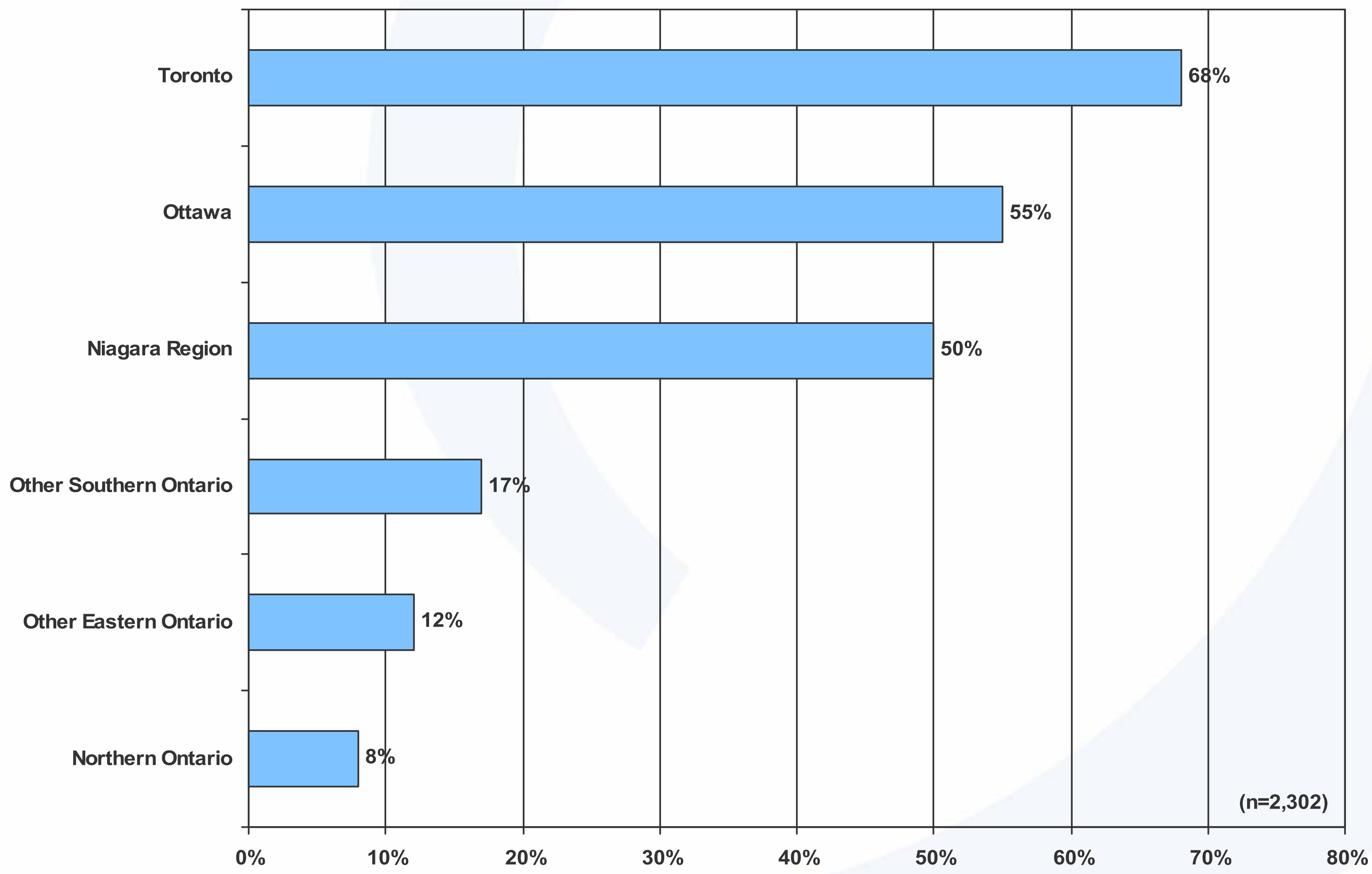
Awareness of Ontario Destinations



Decima Research

NOTES: Base for “Have Visited” is those aware of the destination only.
*Percentages should be interpreted with caution due to the small sample size (n=64 to 87).
The sample size is too low to report “Have Visited” for destinations with awareness levels of under 3%.

Awareness of Ontario Destinations (Regional Roll-up)



Awareness by Market and Language

Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
Unaided Brand Awareness*						
Quebec (24%) Montreal (16%) Que. City (12%) Cuba (9%) Charlevoix (8%) ⇩ Toronto (7%) Ottawa (6%) Niag. Falls (2%) Ontario (2%)	Montreal (32%) Quebec (21%) Que. City (16%) Laurentians (11%) **Toronto (8%)** ⇩ Ottawa (3%) Niag. Falls (2%) Ontario (0.5%)	Quebec (22%) Que. City (13%) NY State (10%) Cuba (10%) **Toronto (8%)** ⇩ Ottawa (7%) Niag. Falls (3%) Ontario (2%)	Montreal (38%) Charlevoix (12%) NY State (10%) **Ottawa (8%)** Gaspesie (8%) ⇩ Toronto (6%) Niag. Falls (1%) Ontario (1%)	Quebec (31%) Montreal (26%) Que. City (12%) Gaspesie (10%) Charlevoix (10%) ⇩ Ottawa (6%) Toronto (4%) Ontario (2%) Niag. Falls (1%)	Cuba (11%) **Toronto (10%)** Barbados (9%) NY State (9%) Florida (8%) ⇩ Ottawa (5%) Niag. Falls (5%) Ontario (4%)	Quebec (27%) Montreal (18%) Que. City (13%) Charlevoix (9%) Cuba (9%) ⇩ Ottawa (6%) Toronto (6%) Niag. Falls (2%) Ontario (1%)
Unaided Destination Awareness (Province/State Roll-up)						
Quebec (67%) **Ontario (18%)** NY (10%) Florida (10%) BC (5%)	Quebec (74%) **Ontario (19%)** Florida (11%) NY (9%) BC (5%)	Quebec (59%) **Ontario (21%)** NY (14%) Florida (11%) BC (5%)	Quebec (74%) **Ontario (18%)** NY (11%) Florida (11%) NB (6%)	Quebec (75%) **Ontario (15%)** Florida (9%) NY (6%) BC (5%)	**Ontario (23%)** Florida (17%) NY (17%) Quebec (16%) BC (12%)	Quebec (74%) **Ontario (17%)** NY (10%) Florida (9%) NB (5%)
Ontario Destination Awareness						
Toronto (64%) Ottawa (53%) Niag. Falls (34%) Niagara (13%) Kingston (5%)	Toronto (69%) Niag. Falls (36%) Ottawa (31%) Niagara (14%) Kingston (11%)	Toronto (66%) Ottawa (57%) Niag. Falls (35%) Niagara (13%) Kingston (6%)	Toronto (67%) Ottawa (55%) Niag. Falls (34%) Niagara (13%) Kingston (5%)	Toronto (59%) Ottawa (51%) Niag. Falls (32%) Niagara (12%) Kingston (5%)	Toronto (73%) Ottawa (57%) Niag. Falls (35%) Kingston (11%) London (9%)	Toronto (62%) Ottawa (52%) Niag. Falls (33%) Niagara (14%) Kingston (5%)

Decima Research

NOTE: *The table shows the top five brands in terms of awareness, as well as awareness of key Ontario brands.

Past Visitation of Ontario

Past Visitation of Ontario – Key Findings

- Quebec captures the lion's share of trips taken by its travellers. With an incidence of 70% who took an overnight pleasure trip within Quebec in the last year and a strong propensity for multiple trips (an average of 2.2 trips per person per year), it is not surprising that intra-provincial travel holds more than a 60% share of the Quebec pleasure travel market.
- Approximately one in four Quebec travellers visited Ontario in the past year. **On average, travellers took an average of 0.4 trips to the province, giving Ontario an 11% share of the Quebec market**. Interestingly, the US's performance is on par with that of Ontario, achieving a similar penetration and share. Far fewer travellers visited the Atlantic region (10%), which holds only a 4% share of the market.
- Of those who had not taken a trip to Ontario in the last year, 86% had visited Ontario at some point – 54% in the last five years and 32% in the more distant past. Thus **overall market penetration is very high, with close to 90% of Quebec travellers having visited Ontario before**.
- Of the Ontario regions, Ottawa enjoys the highest incidence of Quebec visitation (16%), commanding a healthy 41% share of Quebec visits to Ontario. Toronto is the next most popular region for Quebecers, with a travel incidence of 12% and a 23% share of the market.
- Only 2% of Quebec travellers visited Northern Ontario in the last year, and this region holds the smallest share of Quebec visits to Ontario at only 4%.
- As was the case with awareness, there are substantial differences in visitation patterns by language. **Francophones exhibit a far higher incidence of travel within Quebec, while Anglophones show significantly higher visitation of Ontario** (and all Ontario regions except Northern Ontario). In fact, 55% of Anglophone Quebecers visited Ontario in the past year, which is very high. Overall market penetration (i.e., ever visited Ontario) is also higher among Anglophones at 97%, compared with 88% of Francophones.
- Anglophone Quebecers are obviously a key market for Ontario, although **the fact that 88% of Francophones have visited Ontario at some point in the past, and 21% have visited in the last year, is cause for optimism.**
- The penchant among Anglophones for travelling outside of the province is not just restricted to Ontario, with English-speaking travellers generally engaging in more travel to other destinations as well (e.g., Other Canada, the US, the Caribbean and Europe).

Past Visitation of Ontario – Key Findings (Cont'd)

- Across the four markets, **the highest market penetration and incidence of travel to Ontario is seen in Outaouais/Abitibi and Montreal.** Notably higher travel is observed not only to Ottawa and Eastern Ontario, which are in easy reach of these markets, but to Toronto as well. As per the awareness results, Montreal travellers are far less likely to confine their travels to Quebec, preferring far-flung destinations in the US and overseas.
- Of note is the fact that **Outaouais/Abitibi travellers are more likely to have visited Northern Ontario** in the last year (7%), which is likely a function of proximity.
- The key drivers model identified a number of key determinants for past travel to Southern/Eastern (S/E) Ontario, many of which confirm previous findings:
  - Not surprisingly, one of the most important drivers of travel to S/E Ontario is having friends and relatives there. Everything else being equal, those with a VFR connection are two and a half times more likely to visit as those who don't know anyone in the region;
  - Proximity to Ontario is obviously key, with Quebecers who reside in Outaouais/Abitibi and, to a lesser extent, Montreal being more likely than those in other markets to visit;
  - Those who tend to travel domestically and to the US have a higher propensity to visit the province than those with a penchant for overseas travel;
  - The ability to speak English is also a key driver of travel to S/E Ontario, which comes as no surprise;
  - Age and education are other distinguishing factors in determining who visits and who doesn't, with those aged 55 plus and having a college/university education being more likely to make a trip;
  - Quebecers who are looking for events and entertainment on their travels typically have a higher propensity to visit Ontario, no doubt because specific events and shows may be unique to Ontario (i.e., unavailable in Quebec);

Past Visitation of Ontario – Key Findings (Cont'd)

- Quebecers who view the province favourably in terms of offering vacation basics such as safety, cleanliness, value and a friendly and welcoming atmosphere are more likely to visit, as are those who see Ontario as having a lot to offer Francophones. This underscores the importance of the comfort factor in making Quebecers feel at ease in Ontario, particularly in terms of language.

- Although the model for visitation to Northern Ontario was not robust, there are indications that Quebecers who have good impressions of Northern Ontario for information, signage and services in French and those from Outaouais/Abitibi are more likely to visit the Northern region. It would appear that **French language considerations are more important drivers for visitation to Northern Ontario** than to the S/E part of the province.

Decima Research

Number of Overnight Pleasure Trips by Destination

Destination	Took a Trip in the Last Year (n=2,302)	Average Number of Trips (n=2,302)	Market Share
Quebec	70%	2.17	62%
Ontario	**25%**	**0.39**	**11%**
Atlantic Canada / Maritime region	10%	0.14	4%
Elsewhere in Canada	8%	0.12	3%
The US	24%	0.38	11%
The Caribbean	10%	0.11	3%
Europe	8%	0.11	3%
Other international destinations	7%	0.09	3%
Total		**3.50**	**100%**

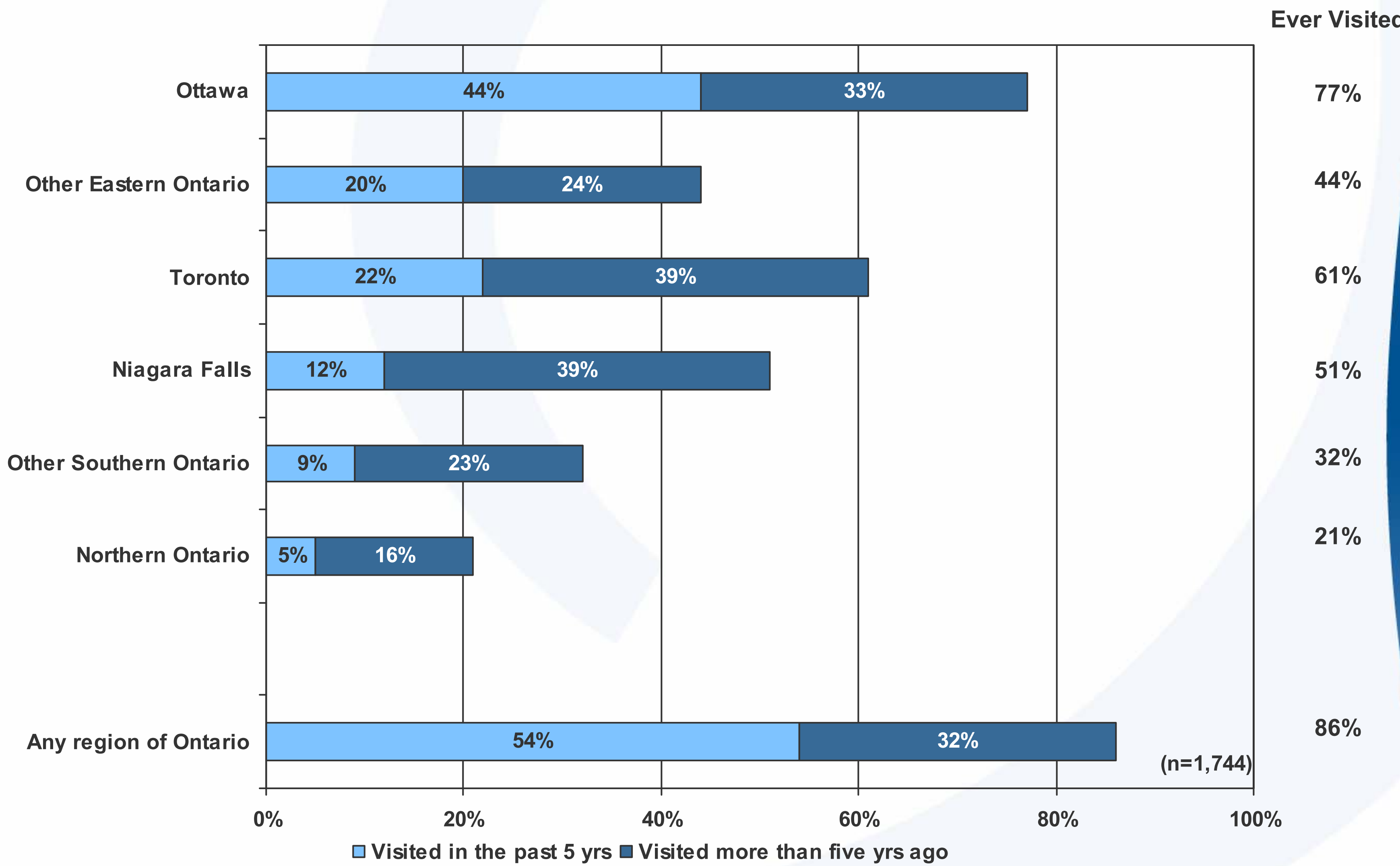
Number of Visits to Ontario Regions in the Last Year

Destination	Visted in the Last Year (n=2,302)	Average Number of Visits* (n=2,302)	Market Share
Ottawa	16%	0.31	41%
Other Eastern Ontario	6%	0.12	15%
Toronto	12%	0.17	23%
Niagara Falls	5%	0.06	8%
Other Southern Ontario	4%	0.07	9%
Northern Ontario	2%	0.03	4%
Total		**0.75**	**100%**

Decima Research

NOTE: *Includes multiple destinations visited on a single trip.

Past Visitation of Regions Among Those Who Had Not Taken a Trip to Ontario in the Past Year



Decima Research

NOTE: Base is those who had not taken a pleasure trip to Ontario in the past year.

Past Visitation by Market and Language

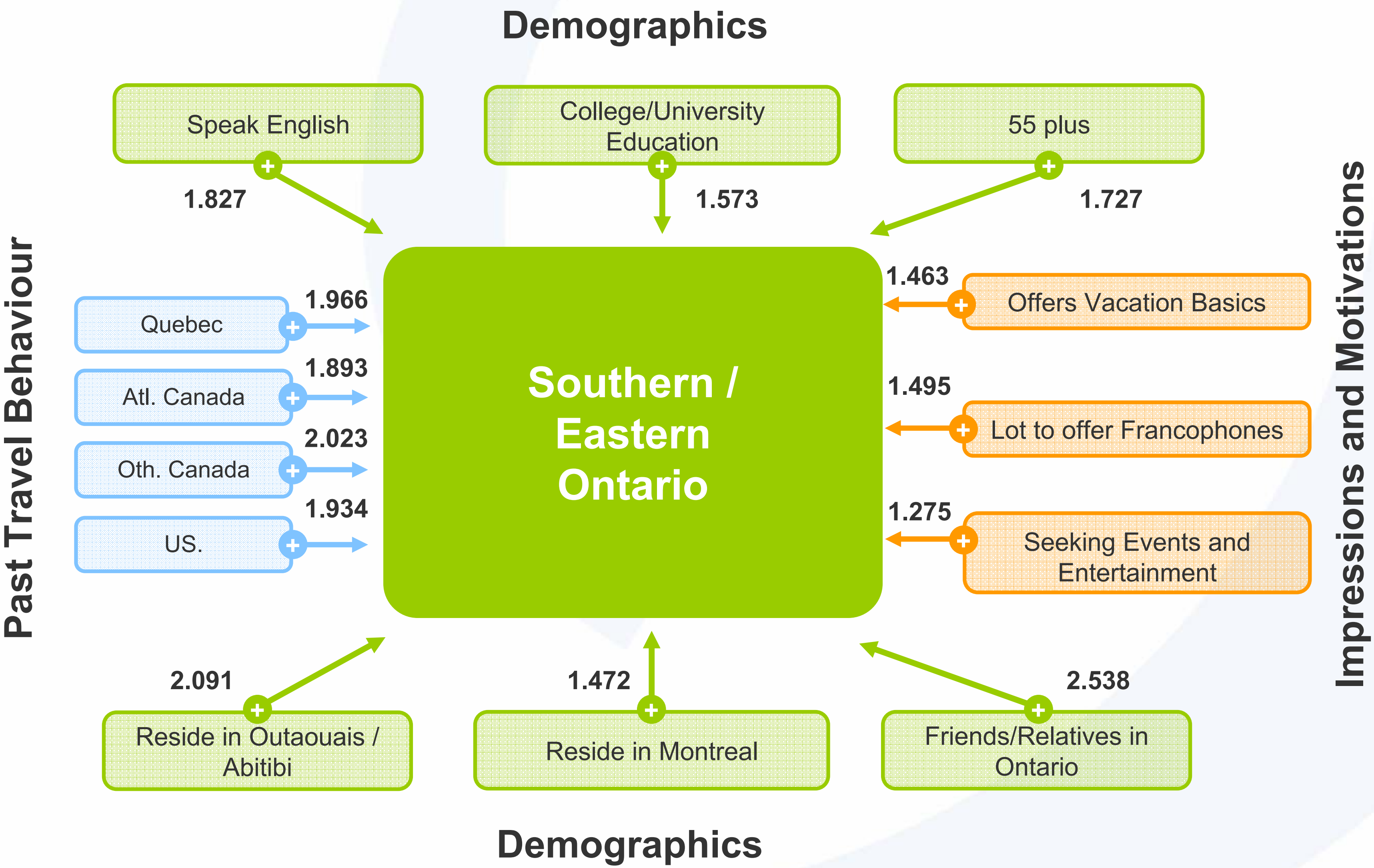
Pleasure Trip Destinations in Past Year	Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
Quebec	70%	78%	64%	80%	75%	33%	75%
Ontario	25%	35%	31%	20%	18%	55%	21%
Atlantic Canada / Maritime region	10%	8%	9%	12%	11%	13%	9%
Elsewhere in Canada	8%	9%	8%	7%	9%	16%	7%
The US	24%	15%	30%	25%	18%	48%	21%
The Caribbean	10%	10%	11%	9%	8%	17%	9%
Europe	8%	4%	11%	7%	6%	15%	7%
Other international destinations	7%	8%	10%	5%	5%	10%	7%
Visited Ontario Region in Past Year							
Ottawa	16%	21%	19%	12%	11%	30%	13%
Other Eastern Ontario	6%	12%	7%	4%	4%	11%	5%
Toronto	12%	14%	16%	7%	8%	34%	9%
Niagara Falls	5%	8%	6%	3%	5%	10%	5%
Other Southern Ontario	4%	3%	5%	1%	4%	17%	3%
Northern Ontario	2%	7%	2%	2%	1%	1%	2%
Market Penetration							
Ever visited Ontario	89%	96%	94%	85%	83%	97%	88%

Decima Research

Key Drivers Analysis

- A logistic regression model was developed with the dependent variable being whether or not travellers had taken an overnight trip to S/E Ontario in the past year.
- The independent variables included:
  - **Demographics.** age, gender, education, income, market, household composition, friends or relatives in Ontario, ability to speak English;
  - **Past Travel Behaviour.** Visited QC, Atlantic Canada, Other Canada, the US, the Caribbean, Europe or Other International in the past year;
  - **Travel Motivations and Selection Criteria.** A factor analysis was run on the motivational attributes for the purposes of data reduction, with the resulting factor scores used as input to the model. Six motivational factors emerged:
    - Vacation Basics (e.g., safe, clean, friendly, value, travel information);
    - Discovery (e.g., local history/culture, Francophone history/culture, learning something new);
    - Events and Entertainment (e.g., nightlife/entertainment, festivals/events, shopping);
    - Relaxation (e.g., relaxing, being pampered, romance);
    - Outdoors Adventure (e.g., nature/outdoors, excitement/adventure);
    - French Services (e.g., travel information, signage/services in French).
  - **Impressions of S/E Ontario and Competitors.** An impressions index was created for each of the 6 motivational dimensions above (based on respondent ratings of S/E Ontario), Overall ratings of NB, NY and QC;
  - **Attitudes Towards Ontario.** Agree/disagree with attitudinal statements.
- A model was also run for Northern Ontario (visited in the last 5 years or not), but was not robust, possibly due to the small sample of people who had visited the region.

Key Drivers for Visitation of Southern/Eastern Ontario



NOTE: Numbers are odds ratios. Odds ratio is the exponentiated value of B. If >1, the odds ratio is the factor by which the odds of having travelled to S/E Ontario increase as the independent variable increases; if <1, it is the factor by which the odds of having travelled to S/E Ontario decrease.

Interest in Ontario

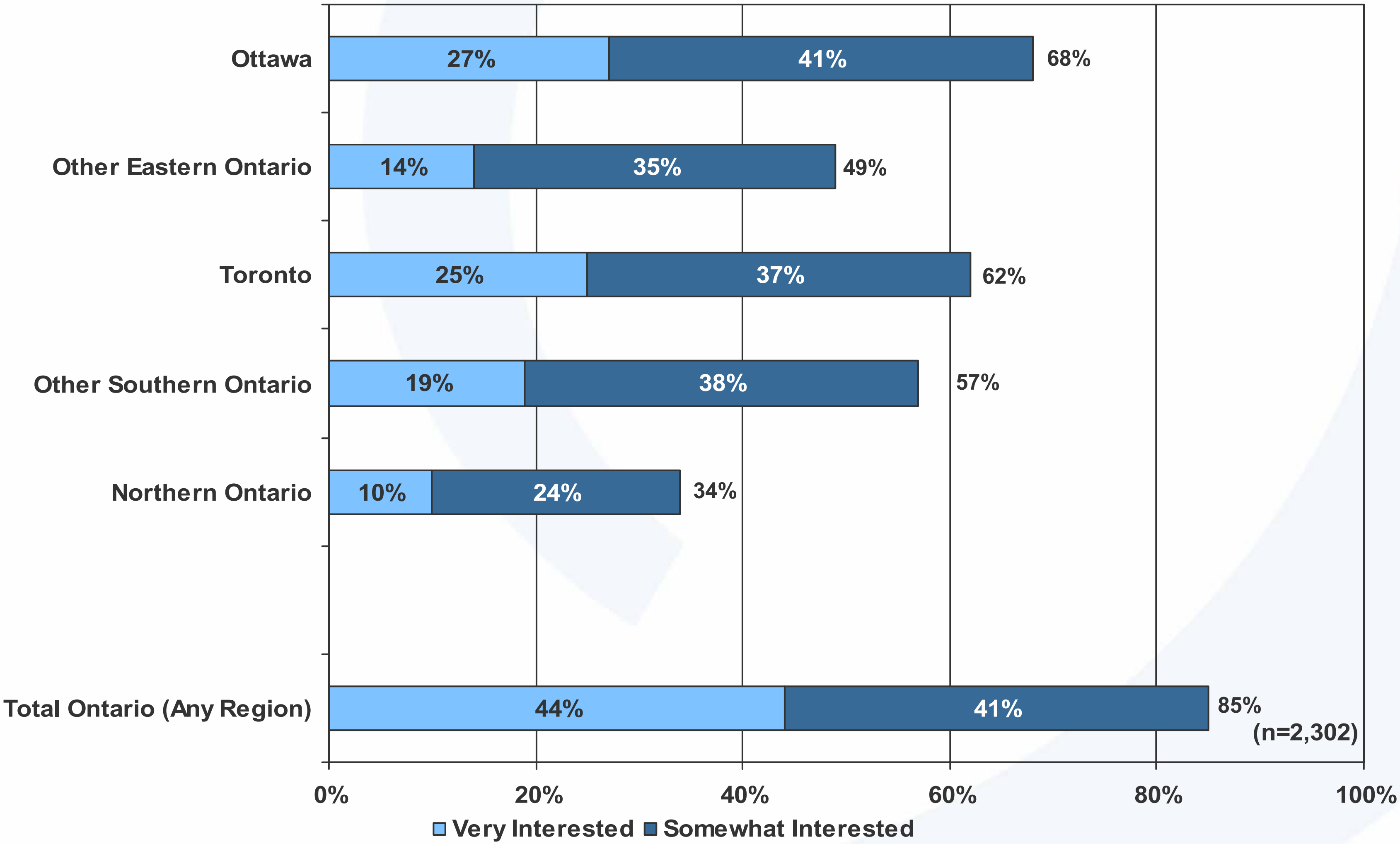
Interest in Ontario – Key Findings

- **Overall interest in visiting Ontario is fairly healthy at 85%,** with 44% who are very interested and 41% who are somewhat interested in taking an overnight pleasure trip to the province in the next two years. Ottawa (68%), Toronto (62%) and Other Southern Ontario (57%) are the regions that garner the highest interest. Northern Ontario fares the worst, with interest of only 34%.
- Beyond Ottawa, interest in Eastern Ontario is predominantly around Kingston (27%) and Cornwall (14%). For Southern Ontario, Niagara Falls is the prime attraction (31%) after Toronto, with Windsor (16%) and London (14%) also well-positioned in the Quebec market.
- Within Northern Ontario, interest is primarily centred on Thunder Bay (18%), Sudbury (11%) and Sault Ste. Marie (11%), although Timmins, North Bay and the James Bay region may offer niche potential.
- Quebecers that are interested in visiting Ontario differ from those who have visited in the last year in that they are less affluent (23% over $80k), less educated (47% have a college/ university education) and are less apt to have friends and relatives in the province (56%). Potential travellers are also distinctive from recent visitors in that they are more likely to be Francophone (80% of those interested vs. 72% of past visitors). **This suggests that the potential or target market is relatively broad, but in the final count, it is more affluent Anglophones who know people in Ontario that are actually visiting.** That this group is easier to convert should come as no surprise.
- Toronto tends to attract a younger crowd (almost 30% of those interested in Toronto are between 18 and 34), while Northern Ontario appeals to less wealthy travellers (almost half of those interested in the Northern region have household incomes of under $40k). As seen in the focus groups, Northern Ontario is generally perceived as being more affordable than destinations like Ottawa and Toronto.
- **Not surprisingly, the potential for Ontario is better among Anglophones than Francophones,** with significantly higher interest in visiting each and every region in the province.
- Interestingly, Francophones whose spoken English is good to excellent are no keener to visit Ontario than those whose English is only poor to fair (84% vs. 82%), which suggests that disinterest in Ontario among Francophones runs deeper than language barriers per se. The same is true for each individual region of Ontario except Toronto, where those with good English show somewhat higher interest than those with poor English (63% vs. 58%).

Interest in Ontario – Key Findings (Cont'd)

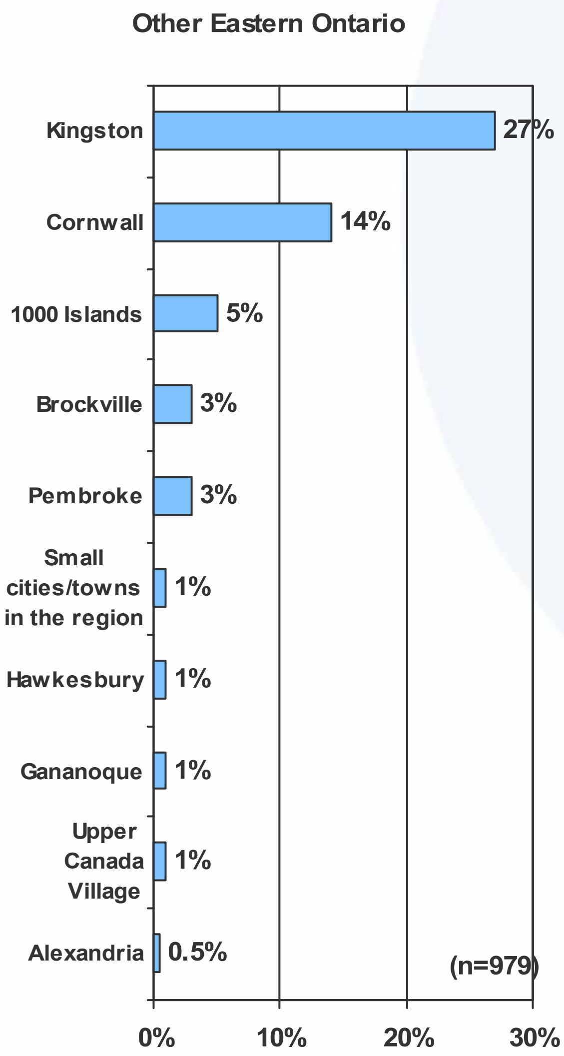
- Consistent with the awareness results, the Outaouais/Abitibi market exhibits less interest than other Quebec markets in visiting Ottawa for an overnight trip. Consistent with past visitation, they are more interested than other markets in Northern Ontario and will be a key target market for this region.
- On the other hand, travellers from Quebec City are the least interested in the Northern region and in Other Eastern Ontario. However, there may be some good opportunities in this market for Toronto, due to higher than average interest (70%).

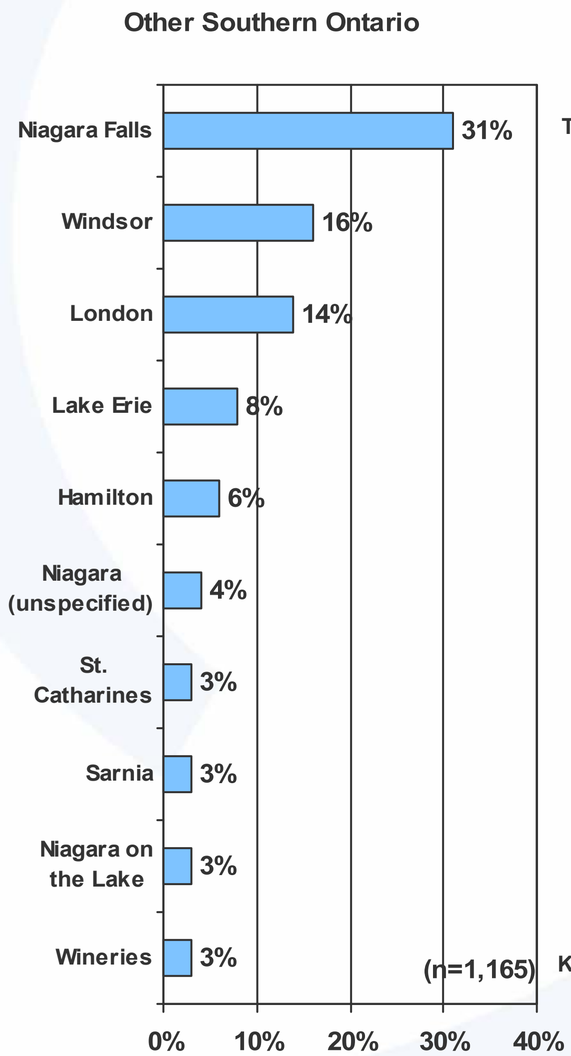
Interest in Visiting Ontario Regions

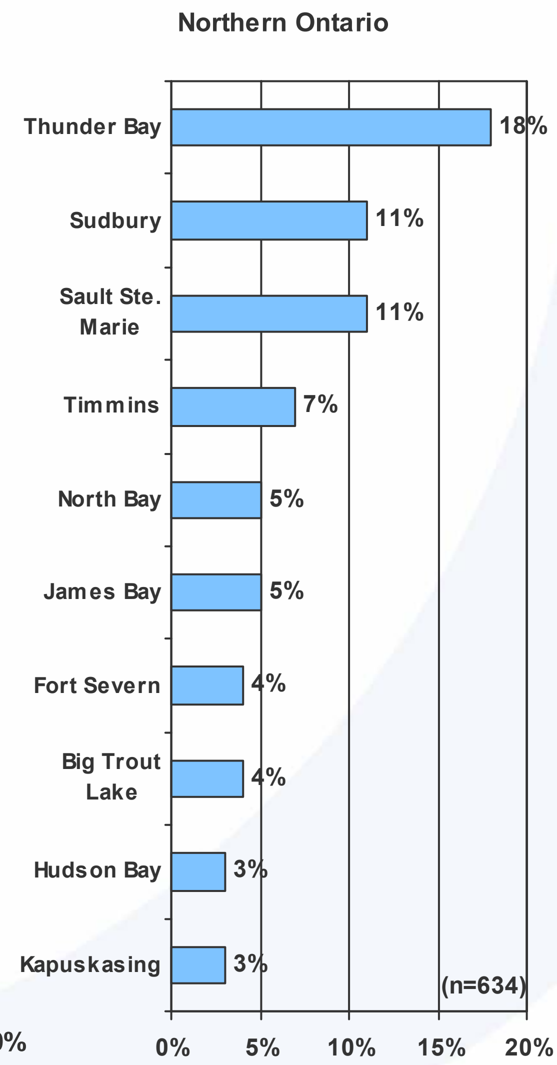


Decima Research

Other Ontario Destinations of Interest



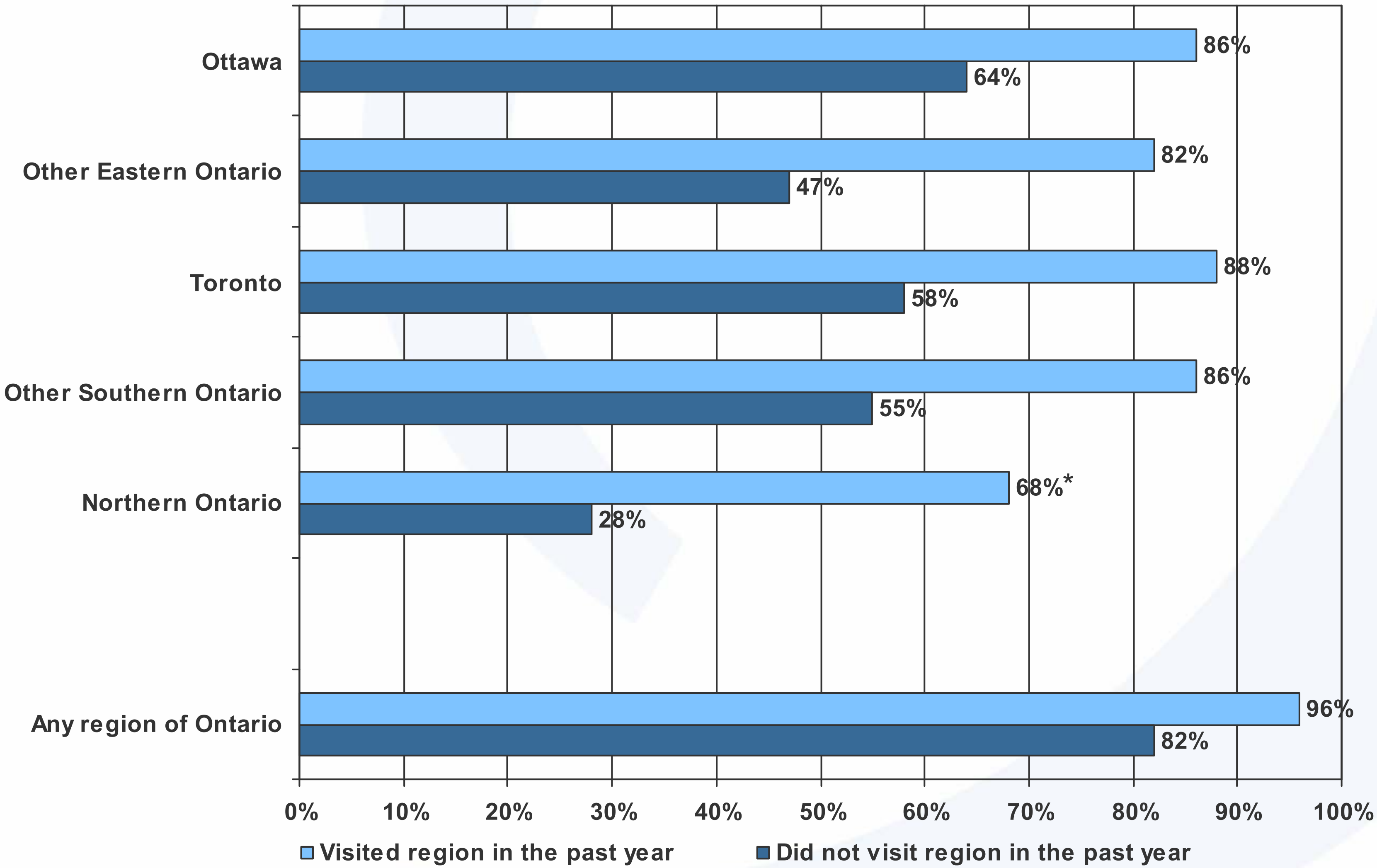




Decima Research

NOTE: Base is those interested in visiting each region.

Interest in Visiting Ontario Regions by Past Visitation



NOTE: *Base for Northern Ontario is visited in the last five years.

Demographic Profile of the Potential Market to Ontario

	Interested in Visiting					
Age	Ottawa (n=585)	Eastern Ontario (n=280)	Toronto (n=559)	Southern Ontario (n=384)	Northern Ontario (n=200)	Any region of Ontario (n=982)
18 to 34	17%	13%	28%	16%	15%	23%
35 to 44	22%	28%	25%	24%	21%	23%
45 to 54	21%	17%	16%	21%	20%	19%
55 or older	40%	43%	31%	39%	44%	35%
Gender						
Male	51%	44%	52%	50%	49%	52%
Female	49%	56%	48%	50%	51%	48%
Income						
Under $40K	29%	38%	33%	32%	46%	32%
$40-80K	47%	43%	47%	43%	38%	46%
$80-100K	10%	9%	9%	10%	6%	10%
$100K or more	14%	11%	11%	14%	11%	13%
Education						
High school	19%	22%	18%	18%	25%	18%
CEGEP	21%	25%	21%	22%	18%	21%
Trade school/vocational	13%	13%	14%	12%	12%	14%
College/University	47%	40%	46%	47%	44%	47%
Friends or Relatives Living in Ontario						
Yes	57%	65%	56%	63%	60%	56%

Decima Research

NOTE: Base is those who are very interested in visiting each region in the next two years.

Demographic Profile of the Potential Market to Ontario (Cont'd)

	Interested in Visiting					
Household Composition	Ottawa (n=585)	Eastern Ontario (n=280)	Toronto (n=559)	Southern Ontario (n=384)	Northern Ontario (n=200)	Any region of Ontario (n=982)
Live alone	17%	14%	17%	14%	13%	16%
Spouse / partner	68%	67%	62%	69%	68%	66%
Children 12 or younger	18%	21%	21%	18%	18%	20%
Children 13 to 21	15%	17%	16%	16%	20%	16%
Children over 21	9%	10%	7%	8%	10%	8%
Children in household (Net)	30%	33%	32%	30%	32%	31%
Employment Status						
Employed full-time	50%	46%	51%	50%	42%	51%
Employed part-time	7%	9%	7%	9%	8%	7%
Homemaker	5%	5%	5%	4%	8%	5%
Unemployed	4%	8%	4%	5%	5%	4%
Retired	24%	24%	18%	23%	25%	22%
Student	4%	5%	8%	4%	6%	6%
Language Spoken at Home						
French	80%	77%	79%	77%	72%	80%
English	13%	15%	15%	17%	21%	14%
Both Equally	6%	7%	4%	5%	7%	5%
Language Capabilities (Good/Very Good/Excellent)						
Spoken	70%	74%	71%	72%	72%	71%
Read	79%	79%	79%	80%	79%	79%

Decima Research

NOTE: Base is those who are very interested in visiting each region in the next two years.

Interest by Market and Language

Interest in Visiting (Very/Somewhat Interested)	Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
Ottawa	68%	59%	67%	71%	69%	82%	65%
Other Eastern	49%	48%	51%	43%	48%	63%	46%
Toronto	62%	64%	61%	70%	62%	72%	61%
Other Southern	57%	59%	57%	53%	56%	78%	53%
Northern	34%	41%	36%	28%	31%	51%	31%
Total Ontario (any region)	85%	88%	86%	85%	85%	96%	84%

Decima Research

Travel Attitudes and Barriers

Travel Attitudes and Barriers – Key Findings

- There are a number of barriers that will challenge Ontario’s bid for Quebec travellers. Key barriers common to all Ontario regions include an overall lack of appeal, lack of knowledge about the region, and a general preference for travelling within Quebec. These are among the top 5 reasons for disinterest across the board (i.e., regardless of the specific region).
- **A major hurdle that is more evident for Northern Ontario is lack of knowledge** – over two-thirds say they don’t know enough about this region to want to visit it. Approximately 64% say there is nothing appealing there, which may again be awareness-related. The distance, lack of nightlife and unreliable weather are other barriers that stand out for the Northern part of the province.
- **More than any other region, Toronto suffers from perceived language and cultural barriers,** with a far higher percentage of travellers mentioning a poor attitude towards people from Quebec (35%), language difficulties (34%) and an unfriendly or unwelcoming atmosphere (26%). Although these issues emerged in many of the focus groups, the quantitative research suggests that these feelings are more likely to be directed at Toronto, with mentions being 10 to 15 percentage points lower in each of the other regions.
- Another major barrier for Toronto is that it is viewed as expensive (almost half mentioned cost-related issues as a reason for not wanting to visit). Toronto is also viewed as being far, although not to the same degree as Northern Ontario.
- Ottawa generally fares better than the other regions in terms of barriers, although it is also seen as being somewhat expensive and as having sparse offerings when it comes to nightlife and entertainment.
- The major stumbling block for S/E Ontario is again lack of knowledge, which at 57% is almost as high as for Northern Ontario. This confirms that **outside of Toronto, Ottawa and Niagara Falls, there is little knowledge of Ontario’s tourism attributes and signature experiences**. Clearly, awareness building is a must if Ontario wishes to develop destinations other than the big three. Barriers such as distance and poor weather can all be overcome if travellers perceive there is something concrete to see and do.

Travel Attitudes and Barriers – Key Findings (Cont'd)

- The results of the attitudinal questions shed further light on the language and cultural barriers faced by Ontario in marketing to Quebecers. A strong sentiment expressed in the focus groups is that Quebecers expect people at Ontario hotels, restaurants and attractions to make an effort to speak some French to them. This also came out loud and clear in the survey findings, with about three-quarters of the market who share this conviction. Moreover, over 60% feel that Ontarians don't really understand the Francophone culture – a viewpoint that emerged in the focus groups as well.
- The good news is that close to 70% of respondents feel that Ontario has a lot to offer Francophone travellers and that 86% disagree that Toronto is the only place worth visiting in Ontario.
- Naturally, those interested in visiting Ontario are more positive in their attitudes towards the province than those uninterested in visiting. In particular, those who want to visit Northern Ontario are far more likely to feel that the province has a lot to offer Francophone travellers, with a remarkable 91% in agreement. This again points to better potential for Francophone tourism in Northern Ontario.
- However, having an interest in Ontario doesn't lessen their expectations regarding language, with all groups equally adamant that Ontarians should make an effort to speak French to them.
- Not surprisingly, **Francophones exhibit more negative attitudes towards Ontario**. French-speaking Quebecers are far more likely to feel that Ontarians lack a good understanding of their culture (62% vs. 46%) and that Ontarians should make the effort to speak French to them (81% vs. 36%). Moreover, they are far less likely to believe that Ontario has a lot to offer for Francophone travellers (67% vs. 86%).
- The focus groups suggested that **the desire to be spoken to in French is not just due to a language barrier, but is a deep-rooted issue that is tied in with cultural and political sensitivities in Quebec**. The survey findings certainly support this notion. That 36% of those who predominantly speak English at home, and 75% of those who speak French at home but have good to excellent spoken English, say they expect to be spoken to in French is a testament to this. In other words, although these travellers are capable of communicating in English, they wish to be greeted or served in French on principle. As mentioned in the groups, this is a fundamental part of making Francophone travellers feel welcome, and is a must if Ontario wishes to make inroads into the Quebec market.

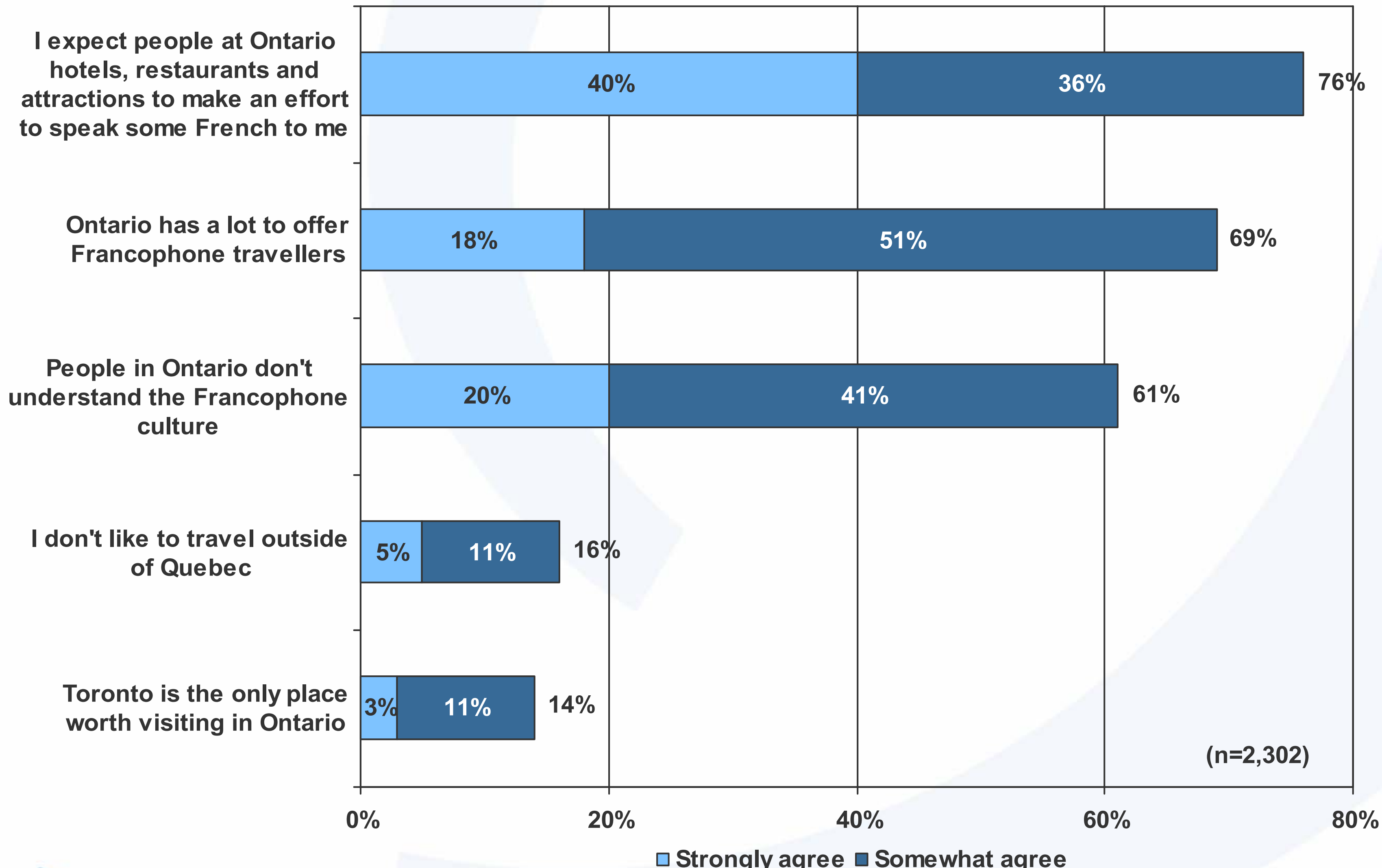
Travel Barriers by Region

Reasons Not Interested in Visiting Region	Ottawa (n=830)	Toronto (n=931)	Other S/E Ontario (n=1,461)	Northern Ontario (n=1,617)
Don't know enough about it	31%	34%	57%	67%
Nothing there that appeals to me	47%	56%	54%	64%
Too far	12%	24%	18%	39%
Prefer to travel within Quebec	36%	35%	32%	29%
Personal reasons	25%	25%	27%	24%
Prefer to be served in French	31%	32%	27%	24%
Language difficulties	25%	34%	25%	24%
No nightlife or entertainment	23%	13%	17%	23%
Poor attitude towards people from Quebec	24%	35%	24%	21%
Poor / unreliable weather	6%	6%	8%	15%
Too expensive	20%	48%	15%	13%
Been there before and didn't like it	26%	29%	13%	12%
People are unfriendly / not welcoming	15%	26%	12%	11%

Decima Research

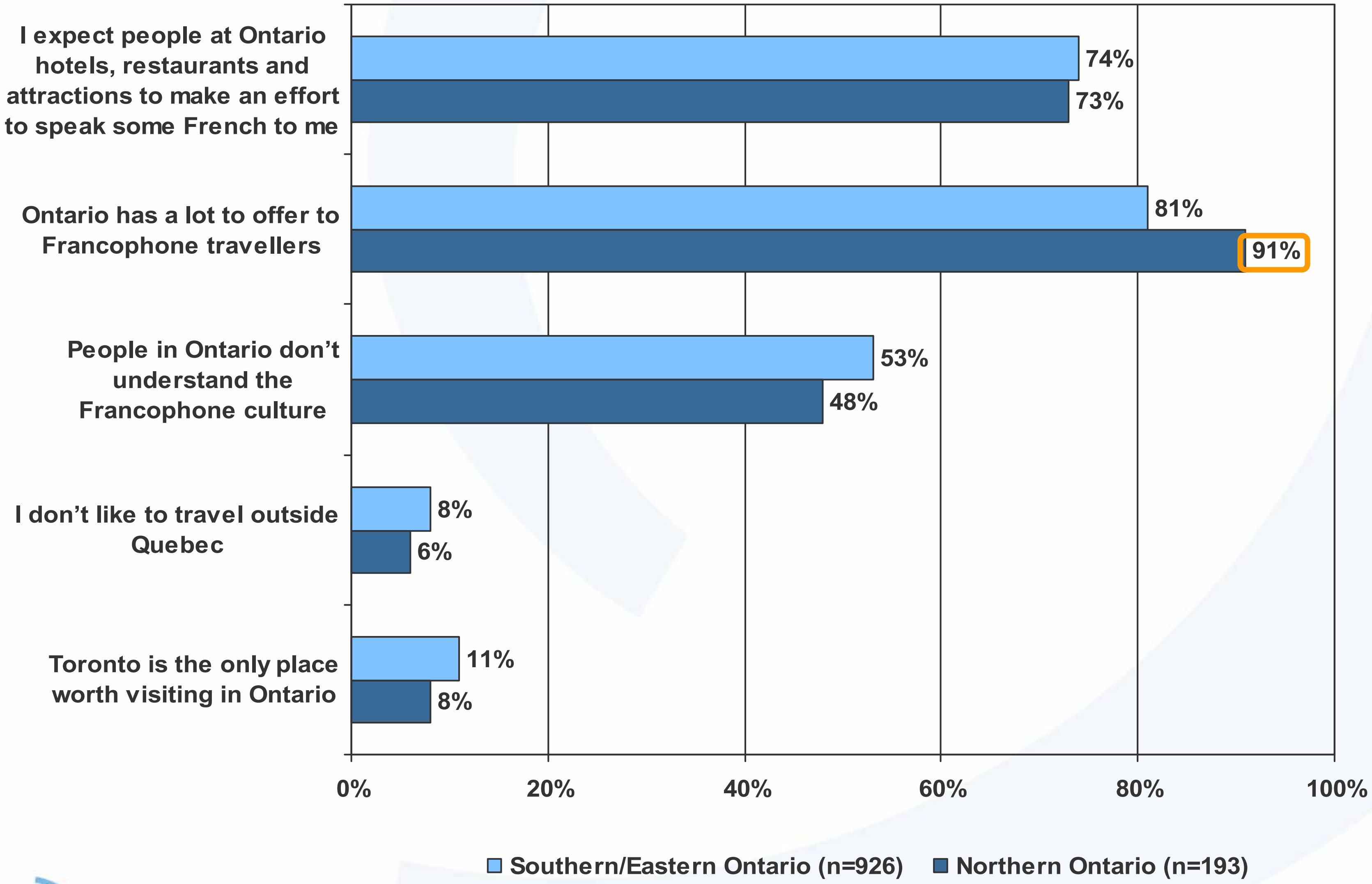
NOTE: Base is those not interested in visiting each region.

Attitudes Towards Ontario Travel



Decima Research

Attitudes Among Those Interested in Ontario



Decima Research

Attitudes by Market and Language

Attitudes Towards Ontario (Strongly/Somewhat Agree)	Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
Ontario has a lot to offer to Francophone travellers	69%	67%	70%	71%	68%	86%	67%
People in Ontario don't understand the Francophone culture	61%	59%	58%	62%	64%	46%	62%
Toronto is the only place worth visiting in Ontario	14%	14%	13%	18%	15%	11%	15%
I don't like to travel outside Quebec	16%	16%	13%	14%	19%	6%	17%
I expect people at Ontario hotels, restaurants and attractions to make an effort to speak some French to me	76%	84%	72%	79%	79%	36%	81%

Decima Research

Detailed Results by Language

Attitudes Towards Ontario (Strongly/Somewhat Agree)	Total (n=2,302)	English* (n=175)	Both English and French* (n=72)	French* with Good to Excellent Spoken English (n=1,199)	French* with Fair to Poor Spoken English (n=842)
Ontario has a lot to offer to Francophone travellers	69%	86%	89%	68%	65%
People in Ontario don't understand the Francophone culture	61%	46%	58%	60%	67%
Toronto is the only place worth visiting in Ontario	14%	11%	17%	13%	17%
I don't like to travel outside Quebec	16%	6%	8%	11%	26%
I expect people at Ontario hotels, restaurants and attractions to make an effort to speak some French to me	76%	36%	74%	75%	89%

NOTE: *Language spoken most often at home.

Travel Motivations and Activities

Travel Motivations and Activities – Key Findings

- **The top travel motivations for Quebec travellers are seeing something new and different, resting and relaxing, and enjoying nature and the outdoors** (important for over 80% of all travellers). All three themes emerged in the focus groups as well, particularly when discussing travellers' ideal getaway trips.
- While experiencing local history and culture is important to about two-thirds of Quebec travellers, **experiencing Francophone history and culture in particular does not tend to be a major travel driver (43%).** In other words, while having Franco-Ontarian experiences may make Ontario more attractive overall to Quebecers, they will not necessarily be the trigger for a trip.
- Those interested in visiting Northern Ontario are relatively more likely to be seeking rest and relaxation (91%), nature and outdoors activities (90%), local history and culture (81%) and Francophone history and culture (56%) on their travels. Many of these are consistent with Northern Ontario's tourism offerings and product strengths.
- **In terms of destination selection criteria, value for money and friendly/welcoming people top the list**, with over 90% of Quebecers who consider these important in choosing a vacation destination. A clean, safe and scenic environment, and a full range of things to see and do, make up the next tier of attributes that Quebecers look for in a vacation spot (important to almost 90% of all travellers).
- Compared with other motivations, Quebecers are generally less interested in being pampered (43%), and are less likely to select their destination on the basis of shopping opportunities (46%) and nightlife offerings (41%). This dovetails with their over-riding desire for simple and restful vacations in the great outdoors.
- Although having readily available travel information is important to Quebecers (86%), having this information in French is less influential in the decision-making process (54%). Similarly, French signage and services is relatively unimportant in the destination selection process (48%). In other words, **simply providing travel material and signage in French is unlikely to sway Quebecers to a destination if other criteria are lacking**. As noted in the focus groups, Francophones going to the US or the Caribbean do not expect to see information or signage in French and do not base their travel decision on this. However, given the sensitivities around language in regards to Ontario specifically, having French language materials is highly recommended as a way of making Francophones feel more welcome – a factor which does, in fact, influence destination selection.

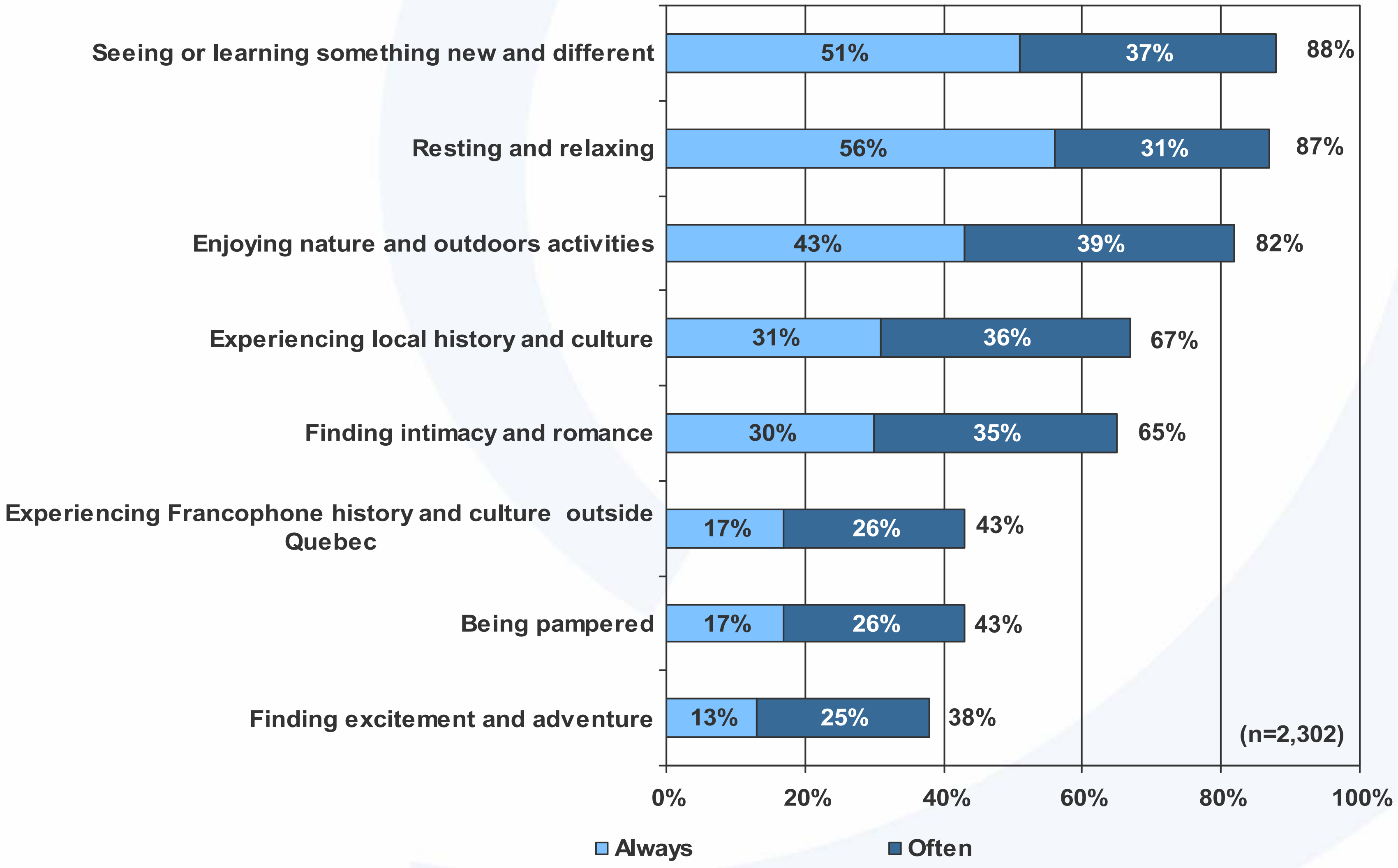
Travel Motivations and Activities – Key Findings (Cont'd)

- Those interested in Northern Ontario are more likely to be looking for small towns and villages (85%) and festivals, exhibitions and events (69%) at their destination than the market as a whole. The latter is also relatively more important to those interested in S/E Ontario (69%).
- In terms of travel activities that Quebecers are interested in doing in Ontario, those of universal interest (i.e., over 75% of travellers interested in them) can be grouped around several themes:
  - **Town and country**: e.g., small towns and villages, B&Bs/country inns, wineries;
  - **Nature and the outdoors**: e.g., national parks, natural landmarks, hiking / nature trails, beaches;
  - **Family**: e.g., theme parks, other family attractions; and
  - **History and culture**: e.g., historic sites, museums, festivals (heritage, music, film).
- **Most Franco-Ontarian products tend to fall under the banner of specialized activities, rather than being universally popular**, including travel routes highlighting Franco-Ontarian history (71%), Franco-Ontarian festivals (67%) and Franco-Ontarian theatre, musicals and shows (60%).
- Interestingly, both festivals in general (77%) and theatre, music and shows in general (68%) are significantly more important than the equivalent Franco-Ontarian experience. Again, this shows that **Quebecers will not necessarily be more interested in an experience simply because it is offered in French.**
- Niche activities are those that only a small proportion of the market are interested in (i.e., 30% or less). For the Quebec market, these include golf, snowmobiling, skiing and hunting.
- Compared with those interested in visiting S/E Ontario, travellers interested in Northern Ontario show greater affinity for a host of Ontario activities and products. These encompass experiences such as town and country, nature, fishing, agri-tourism, history and heritage, arts and culture, and local and ethnic culture. These represent areas of future potential for Northern Ontario in the Quebec market.

Travel Motivations and Activities – Key Findings (Cont'd)

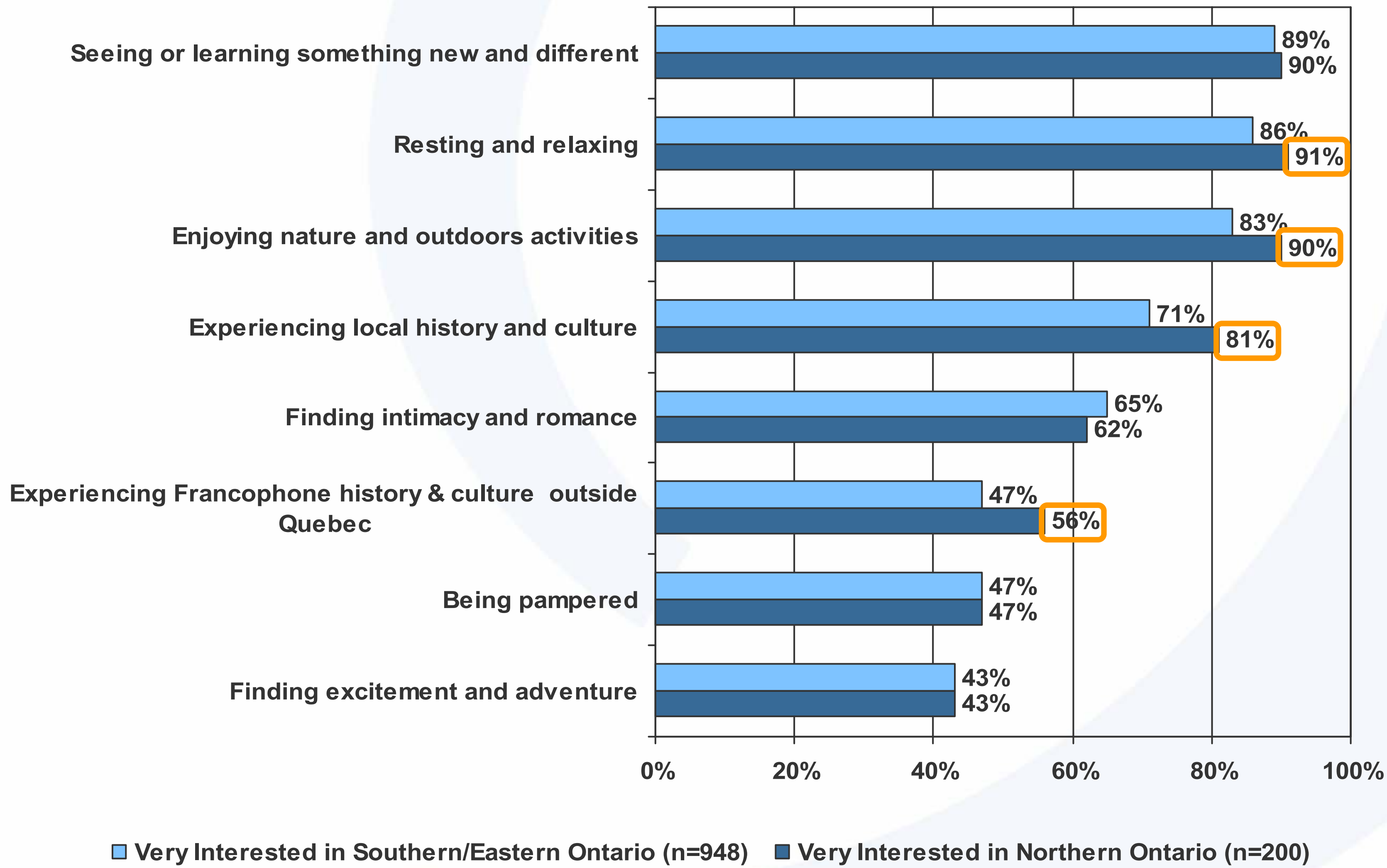
- There are some notable differences in motivations and activity preferences by market:
  - **Montrealers** are less apt to be seeking Francophone history and culture experiences, to require having travel information and signage/services in French, and to be interested in Franco-Ontarian tourism products (due to the larger Anglophone population). As seen previously, they are more worldly travellers, so it is not surprising that they are more likely to be after adventure and excitement on their trips. They are less likely to be interested in going to a place with a family-like atmosphere, and, in fact, tend to eschew theme parks and other family attractions.
  - **Other Quebec** travellers are more likely to consider French signage and services important in selecting a travel destination.
  - **Outaouais/Abitibi** travellers are generally less likely than others to be looking for small towns, local history and friendly local people. In terms of products, they are more likely to gravitate to outdoors activities like camping, fishing, hunting and snowmobiling.
- Most motivations and destination selection criteria are of greater importance to Francophones with the exception of finding excitement and adventure, which is far higher among Anglophones.
- More telling are the differences in activity preferences. Anglophones generally demonstrate greater interest in history, culture and the arts (e.g., historical sites, religious sites, museums, ethnic communities, festivals, theatre, music and shows). Although both Anglophones and Francophones are interested in getting outdoors on their vacations, Anglophones are more interested in passive activities like visiting national/provincial parks and natural landmarks, while Francophones prefer a more active approach, for example, hiking, cycling and snowmobiling.

Travel Motivations

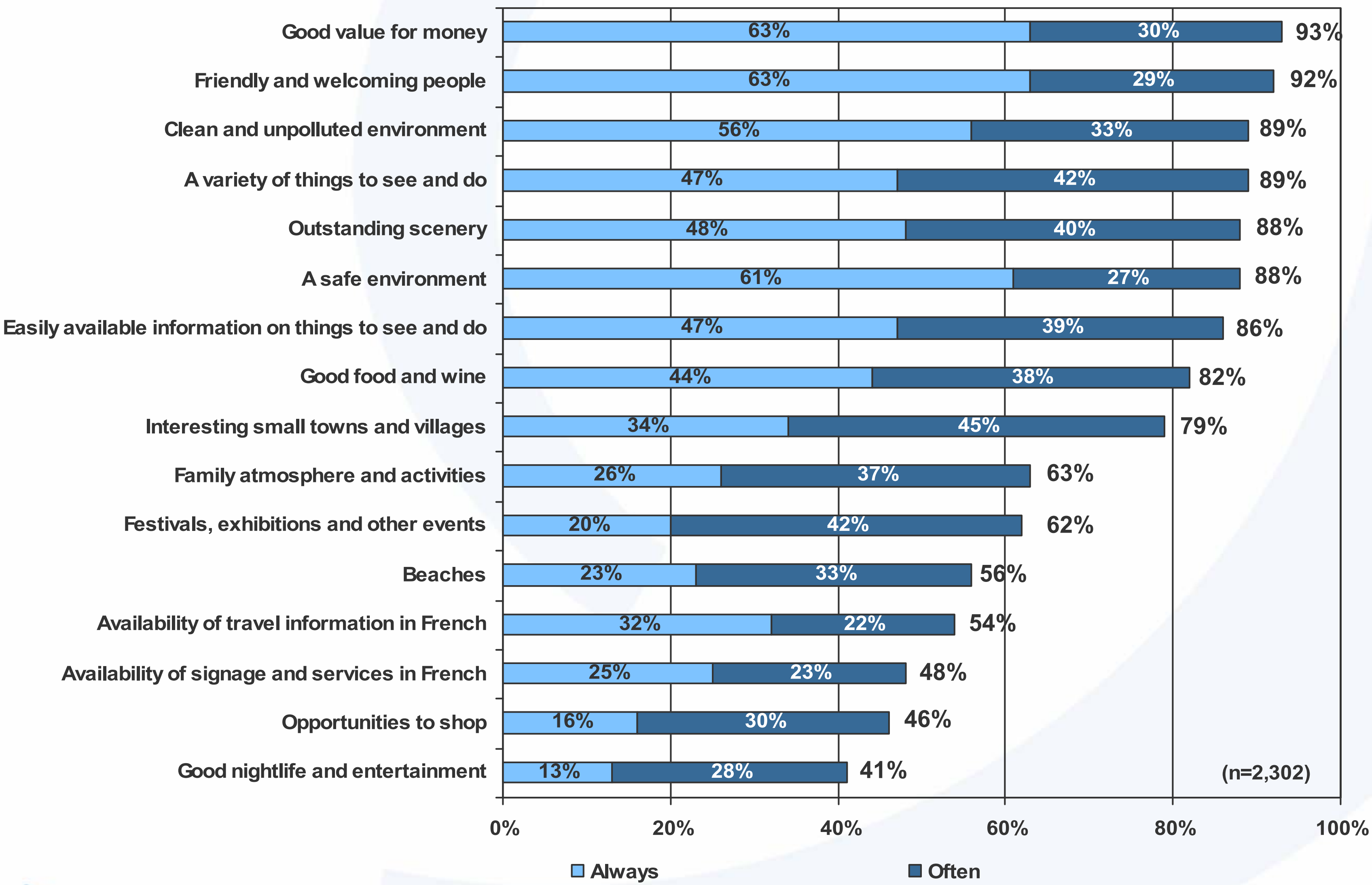


Decima Research

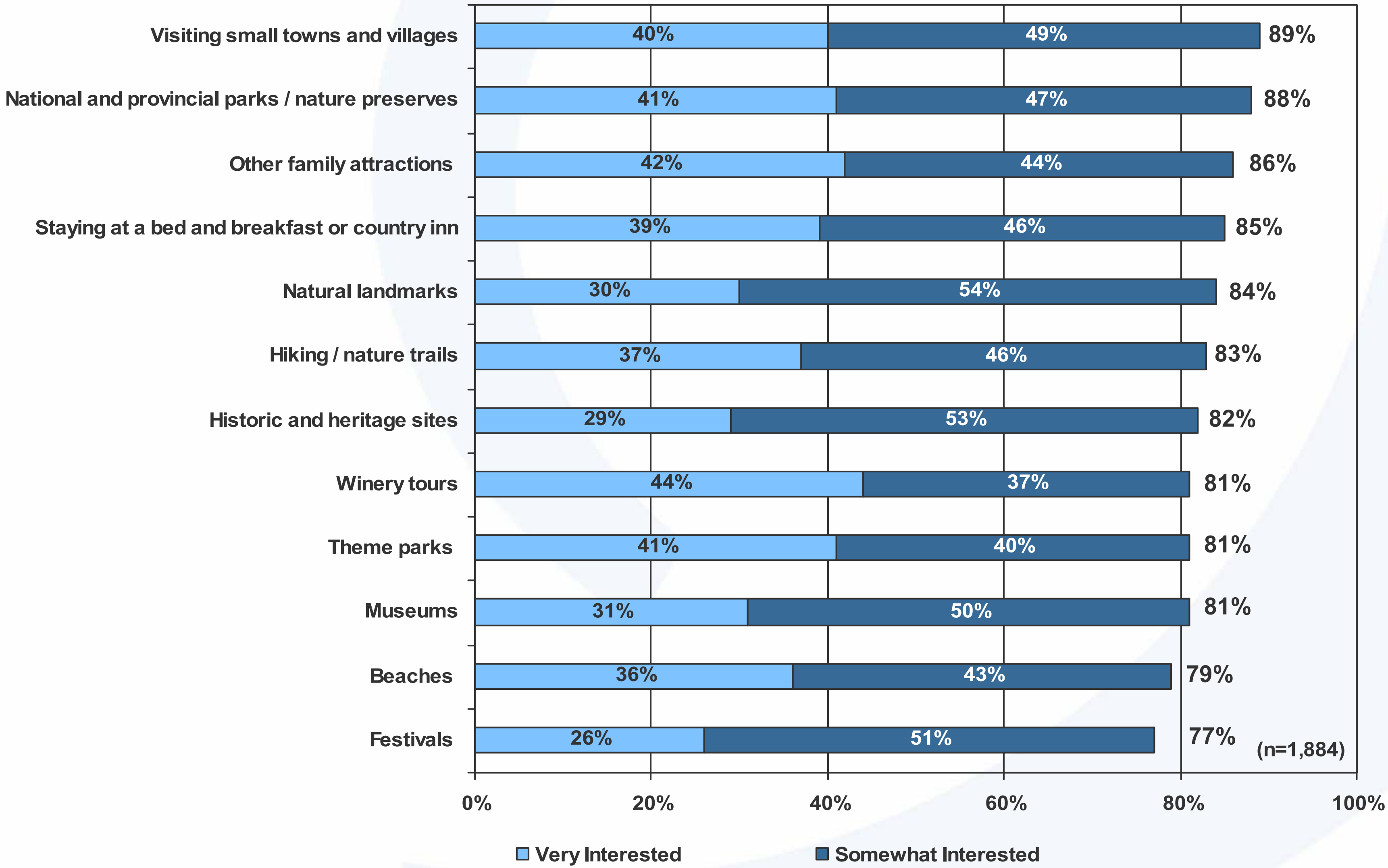
Travel Motivations of those Interested in Ontario



Destination Selection Criteria



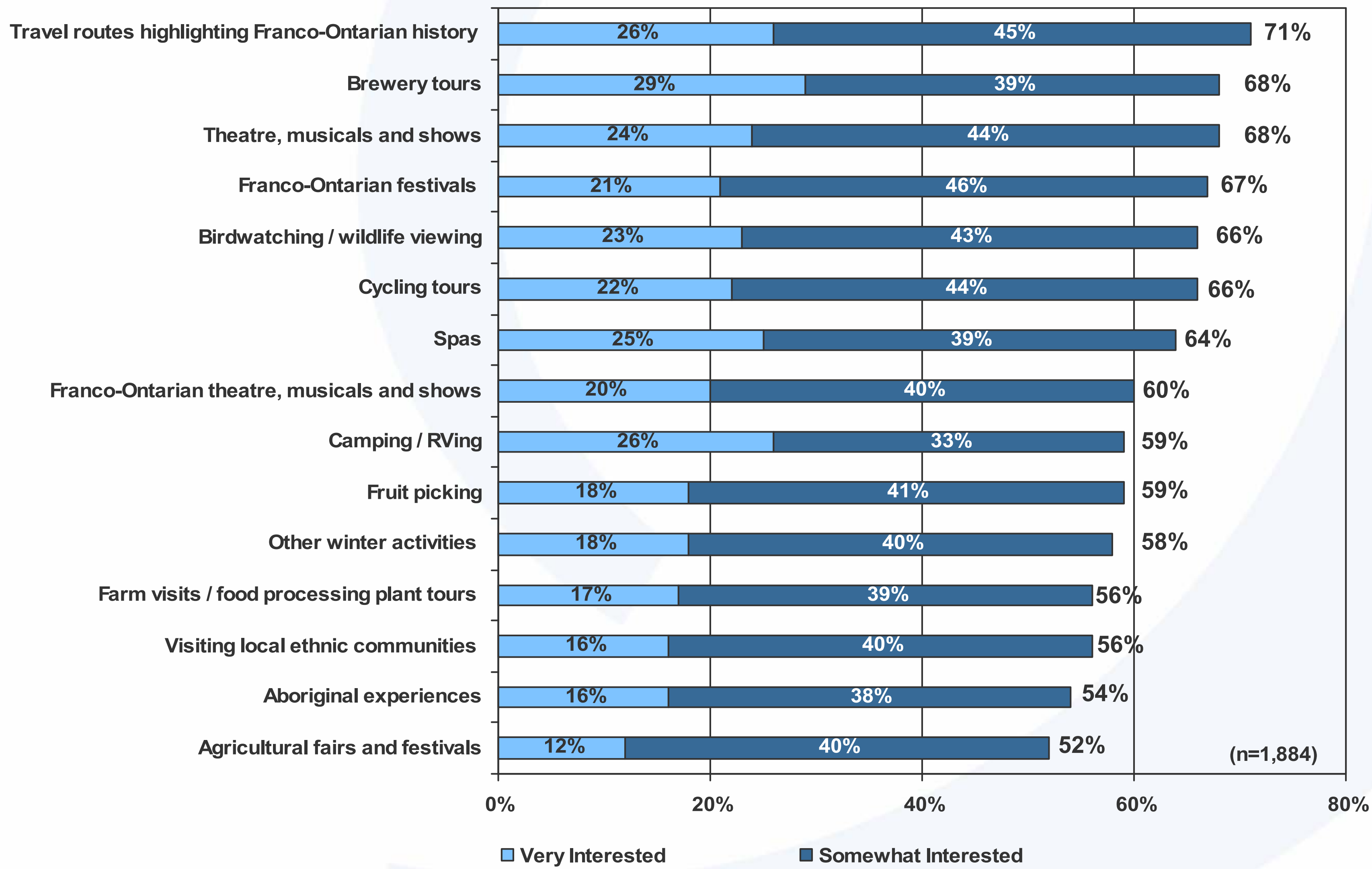
Travel Activities in Ontario – Universal Activities (Over 75%)



Decima Research

NOTE: Base is those who are very or somewhat interested in visiting at least one Ontario region.

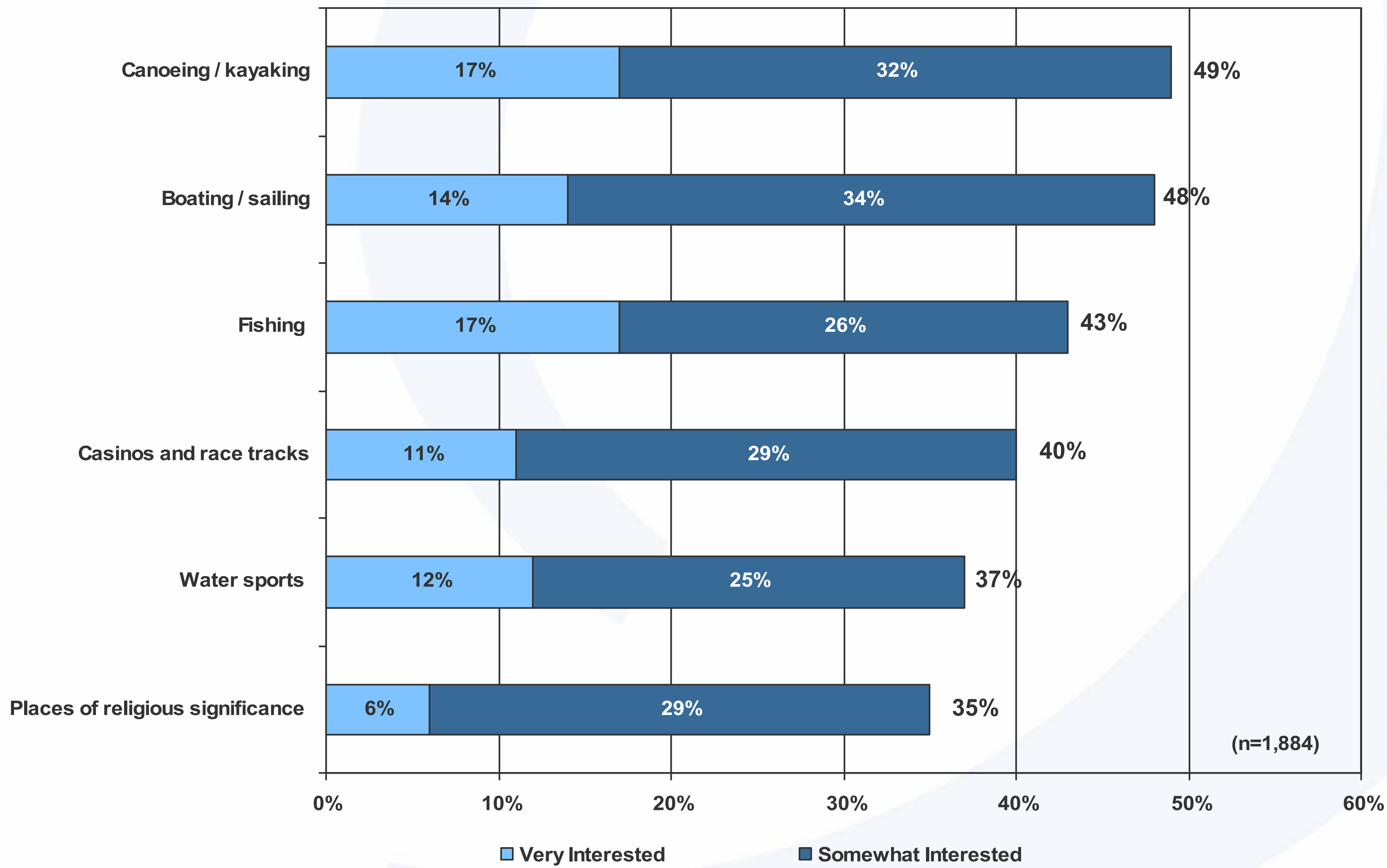
Travel Activities in Ontario – Specialized Activities (31% to 75%)



Decima Research

NOTE: Base is those who are very or somewhat interested in visiting at least one Ontario region.

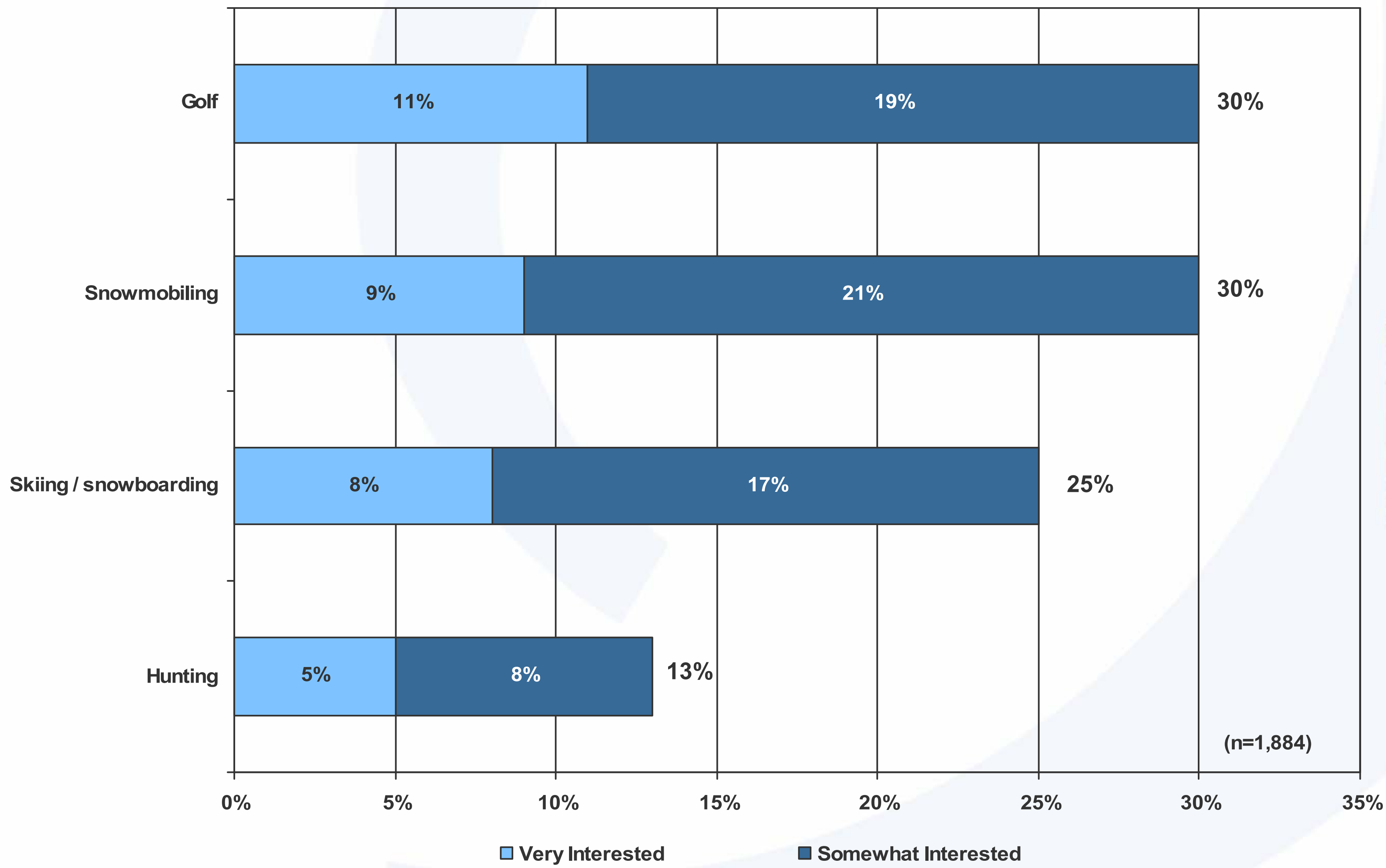
Travel Activities in Ontario – Specialized Activities (Cont'd)



Decima Research

NOTE: Base is those who are very or somewhat interested in visiting at least one Ontario region.

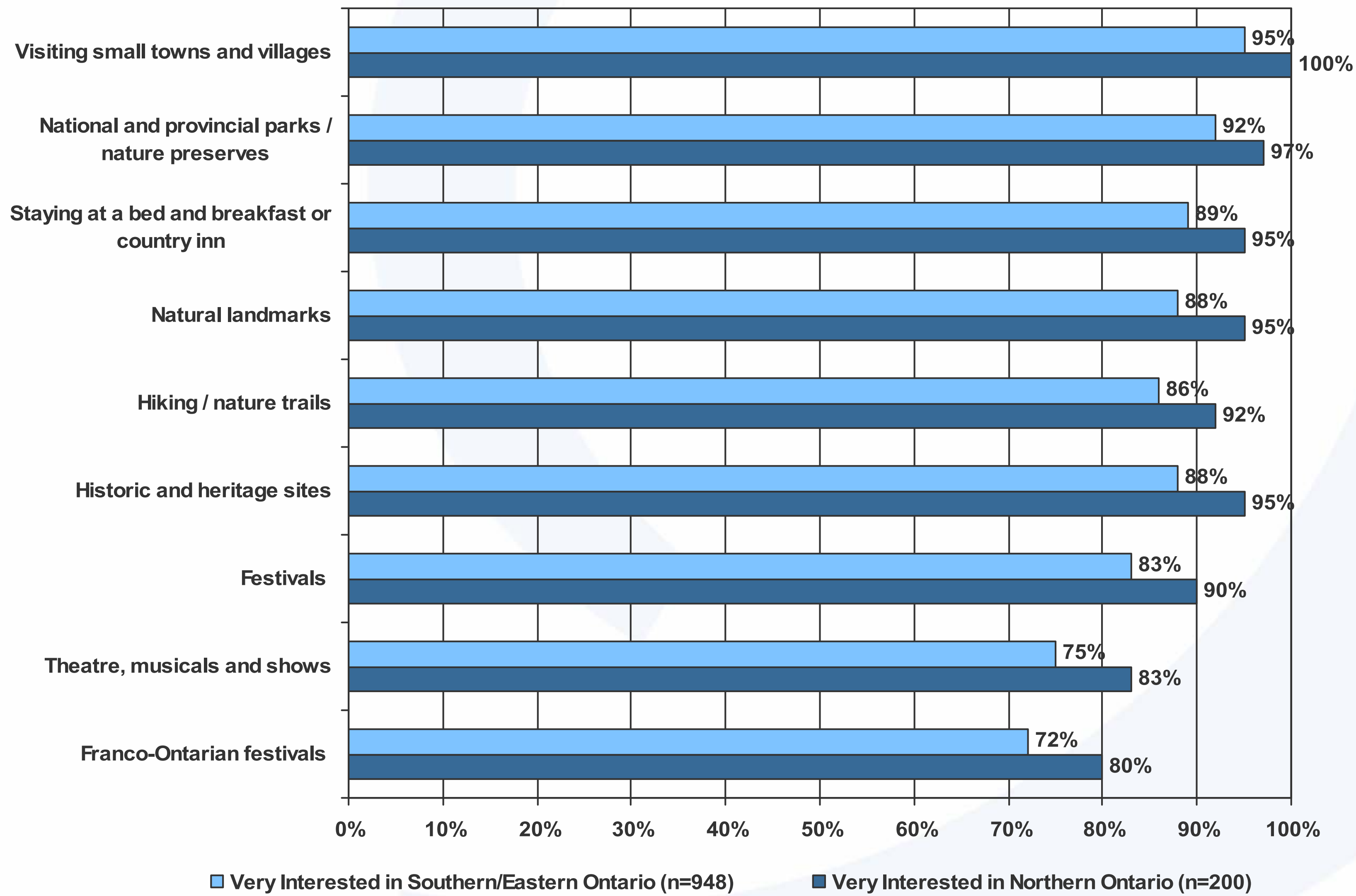
Travel Activities in Ontario – Niche Activities (30% or less)



Decima Research

NOTE: Base is those who are very or somewhat interested in visiting at least one Ontario region.

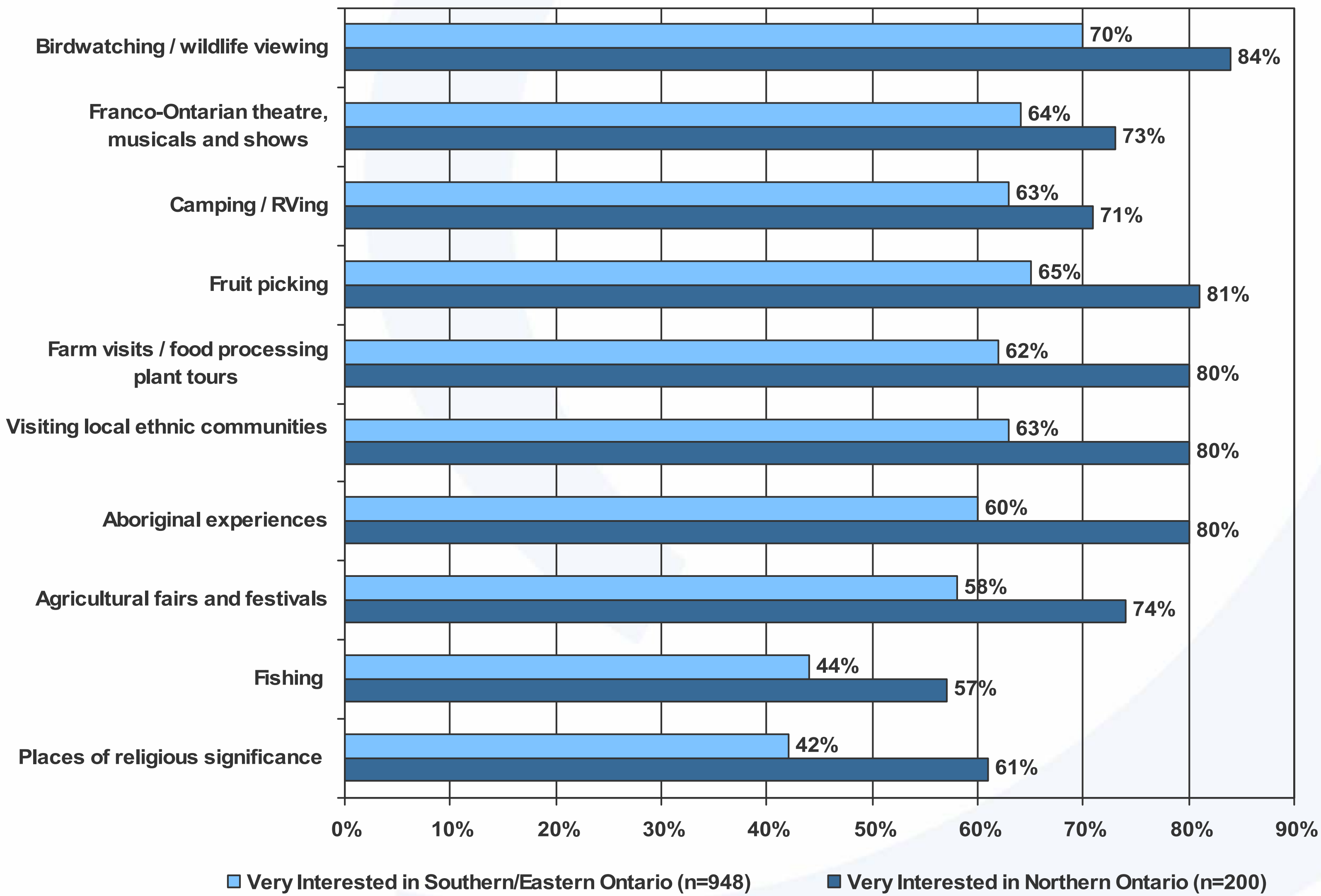
Differences in Activity Preferences Between Those Interested in Northern and Southern/Eastern Ontario



Decima Research

NOTE: Percentages are those very or somewhat interested in a particular activity. Only significant differences are shown.

Differences in Activity Preferences Between Those Interested in Northern and Southern/Eastern Ontario (Cont'd)



Decima Research

NOTE: Percentages are those very or somewhat interested in a particular activity. Only significant differences are shown.

Travel Motivations and Destination Selection Criteria by Market and Language

Motivations	Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
Seeing or learning something new and different	88%	87%	86%	87%	91%	79%	89%
Enjoying nature and outdoors activities	82%	78%	80%	83%	84%	66%	83%
Experiencing local history and culture	67%	60%	68%	69%	67%	59%	68%
Finding intimacy and romance	65%	66%	61%	65%	69%	36%	68%
Experiencing Francophone history and culture outside Quebec	43%	41%	40%	48%	47%	6%	48%
Being pampered	43%	40%	43%	39%	46%	30%	45%
Finding excitement and adventure	38%	33%	42%	32%	37%	63%	35%
Destination Selection Criteria							
Good value for money	93%	93%	93%	94%	95%	88%	94%
Friendly and welcoming people	92%	85%	92%	93%	94%	88%	93%
Clean and unpolluted environment	89%	88%	85%	88%	92%	80%	89%
Outstanding scenery	88%	81%	88%	91%	90%	78%	90%
Easily available information on things to see and do	86%	88%	85%	85%	88%	80%	87%
Good food and wine	82%	78%	83%	80%	84%	77%	84%
Interesting small towns and villages	79%	72%	79%	78%	82%	67%	81%
Family atmosphere and activities	63%	66%	56%	60%	70%	48%	64%
Festivals, exhibitions and other events	62%	55%	61%	62%	65%	50%	64%
Beaches	56%	50%	54%	51%	59%	52%	56%
Availability of travel information in French	54%	60%	44%	57%	64%	3%	61%
Availability of signage and services in French	48%	54%	39%	49%	58%	4%	54%

Decima Research

NOTE: Only significant differences by language or market are shown.

Activity Preferences by Market and Language

Activity Preferences	Total (n=1,884)	Outaouais / Abitibi (n=153)	Montreal (n=756)	Quebec City (n=428)	Other Quebec (n=547)	English (n=166)	French (n=1,638)
National and provincial parks / nature preserves	88%	90%	89%	87%	89%	92%	88%
Other family attractions	86%	91%	84%	87%	89%	86%	87%
Natural landmarks	84%	84%	86%	80%	84%	95%	83%
Hiking / nature trails	83%	86%	82%	88%	84%	76%	84%
Historic and heritage sites	82%	82%	82%	81%	82%	87%	81%
Theme parks	81%	83%	76%	85%	86%	69%	83%
Museums	81%	85%	83%	79%	76%	88%	79%
Festivals	77%	77%	79%	79%	75%	84%	76%
Travel routes highlighting Franco-Ontarian history	71%	78%	66%	74%	74%	33%	75%
Brewery tours	68%	65%	64%	74%	72%	61%	69%
Theatre, musicals and shows	68%	69%	70%	68%	63%	82%	65%
Franco-Ontarian festivals	67%	76%	62%	71%	69%	36%	71%
Cycling tours	66%	67%	64%	71%	67%	47%	68%

Decima Research

NOTE: Only significant differences by language or market are shown.

Activity Preferences by Market and Language (Cont'd)

Activity Preferences	Total (n=1,884)	Outaouais / Abitibi (n=153)	Montreal (n=756)	Quebec City (n=428)	Other Quebec (n=547)	English (n=166)	French (n=1,638)
Franco-Ontarian theatre, musicals and shows	60%	65%	57%	62%	61%	27%	63%
Camping / RVing	59%	69%	58%	59%	60%	53%	60%
Fruit picking	59%	64%	58%	55%	60%	67%	57%
Visiting local ethnic communities	56%	52%	58%	52%	54%	64%	54%
Aboriginal experiences	54%	57%	57%	45%	52%	60%	53%
Agricultural fairs and festivals	52%	43%	53%	41%	54%	68%	49%
Boating / sailing	48%	44%	50%	41%	48%	53%	47%
Fishing	43%	53%	38%	42%	47%	37%	43%
Places of religious significance	35%	36%	33%	30%	36%	42%	33%
Snowmobiling	30%	33%	28%	25%	33%	23%	31%
Golf	30%	32%	29%	29%	31%	37%	29%
Skiing / snowboarding	25%	26%	28%	22%	22%	26%	24%
Hunting	13%	18%	10%	11%	16%	11%	13%

Decima Research

NOTE: Only significant differences by language or market are shown.

Perceptions and Competitive Positioning of Ontario

Perceptions and Competitive Positioning of Ontario – Key Findings

- Respondents were asked to rate their impressions of Northern and S/E Ontario on a scale of 1 to 5 (where 1 was poor and 5 was excellent) for a large battery of tourism-related attributes. Despite the fact that they were encouraged not to use the "don't know" response, 30% to 45% answered don't know on the Northern Ontario attributes and 20% to 35% did so on the S/E Ontario attributes.* The fact that so many Quebecers have no clear impression of Ontario on key attributes underscores the awareness issues in the Quebec market, particularly for the Northern region.
- Of immediate note is that **the impression ratings for both regions are extremely low and could stand improvement**. As mentioned, this is partly due to the high proportion of Quebecers who have no distinct impression of the regions, but even with the "don't knows" removed, the ratings are still extremely low. For example, at 66% and 59%, respectively, nature/outdoors is the highest rated attribute for both Northern and S/E Ontario.
- **Anglophones are generally more favourably disposed towards both S/E and Northern Ontario**, awarding both regions better ratings than Francophones do on virtually every attribute. Again, cultural and political sensitivities may be dampening impressions of Ontario among French-speaking Quebecers.
- Another clear trend is that Quebec City travellers tend to rate S/E Ontario more harshly across a wide range of attributes. The same trend is evident for Northern Ontario, but to a much lesser degree. **Poorer impressions, combined with the distance factor, will make the Quebec City market one of the most difficult for Ontario to convert**.
- Strengths and weaknesses maps look at perceptions of a destination's tourism attributes together with the importance of these attributes in selecting destinations and motivating travel among travellers. This analysis identifies product strengths and weaknesses relative to each other and in isolation from competitors.
- **General marketing strengths** are attributes that are both important to travellers and well-perceived for Ontario in the marketplace. Both Northern and S/E Ontario are viewed as good places to get back to nature, enjoy the great outdoors, and kick back and relax. Both regions are also perceived as being safe, scenic and as having charming small towns and villages to visit.

*NOTE: "Don't know" responses were left in the base when comparing attribute ratings within Northern Ontario or S/E Ontario, but excluded when comparing ratings with competitors.

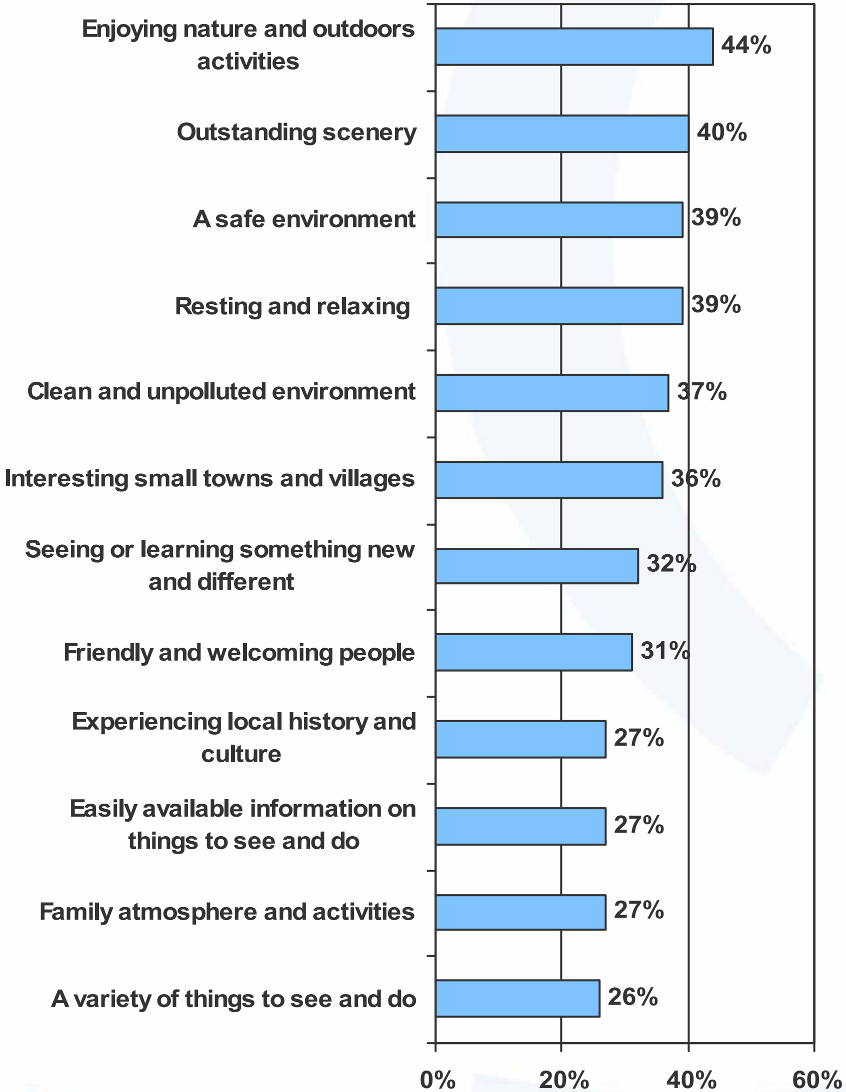
Perceptions and Competitive Positioning of Ontario – Key Findings (Cont'd)

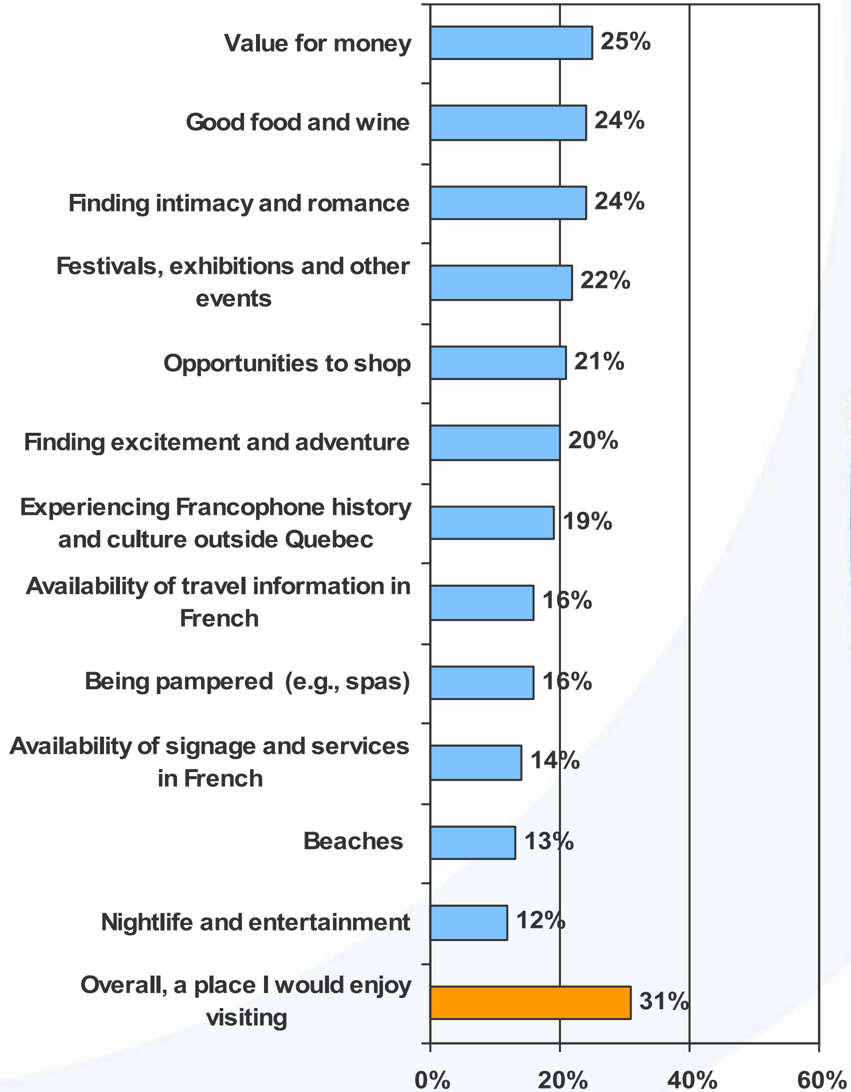
- A key difference, however, is that the clean and unpolluted environment is a key strength for Northern Ontario, but a weakness for S/E Ontario, most likely due to perceptions of Toronto as dirty and polluted (a sentiment expressed in the focus groups). On the other hand, the S/E region is seen as offering a multitude of things to see and do – something that the Northern region is not.
- **General marketing weaknesses** are those that heavily influence destination selection, but for which Ontario is not well-rated. These indicate areas where they may be serious issues (perceptual or actual) to be mitigated. Weaknesses are again similar for the two regions, including lack of novelty, insufficient travel information, an unwelcoming environment and perceptions of poor value.
- Several of these weaknesses lie at the heart of Ontario's challenges in the Quebec market. As mentioned in the focus groups, there is a strong feeling that Ontario fails to offer Quebecers anything new or different than Quebec does, and moreover, they have to go farther and pay more for the same experience in Ontario. On top of this, they feel that Ontarians are unfriendly and don't really want them there. For travellers that feel this way about Ontario, there is no compelling reason to go.
- Food and wine is a weakness for both regions, although S/E Ontario is better positioned, no doubt due to the gourmet restaurants in Toronto/Ottawa and the gastronomical offerings of the Niagara region. With more advertising and promotion in the Quebec marketplace, it should be possible for S/E Ontario to position this as a signature experience.
- **Niche marketing strengths** appeal to smaller groups of travellers and represent potential niche markets to be developed. For the S/E region, these include festivals/events and shopping. Both, however, fall under the domain of weaknesses for Northern Ontario. The former is no doubt an awareness issue, as the Northern region has numerous festivals, fairs and family events that might be popular in Quebec if it can get the word out.
- **Niche marketing weaknesses** are items that are poorly rated for Ontario, but are of less importance to Quebecers. For example, both regions are poorly rated for Francophone history and culture experiences and the availability of travel information and signage/services in French, but these are generally not the driving motivations for this market. Having said this, however, it is probably important for Ontario to mitigate these weaknesses due to the political and cultural sensitivities in Quebec and the need to make Quebecers feel welcome.

Perceptions and Competitive Positioning of Ontario – Key Findings (Cont'd)

- Ontario and New Brunswick top the list of competitors that Quebecers are interested in visiting (each over 80%), with around two-thirds who are interested in visiting New York state, Maine and Vermont. As individual regions, Ottawa and Toronto fare not too badly, with interest levels that compete favourably with the US destinations.
- Not surprisingly, **Quebec** is the most well-positioned destination, rated highest on all but one of six attributes tested on a competitive set consisting of New Brunswick, New York, S/E Ontario and Northern Ontario. Over 90% say Quebec is a place they would enjoy visiting.
- **New Brunswick** is also on solid ground, falling immediately behind Quebec on all attributes except nightlife and entertainment, and besting the province when it comes to offering a warm welcome. It follows that New Brunswick is viewed as the second best destination overall (80%).
- **New York** places last on 4 of the 6 individual attributes, including nature, small towns, friendly people and value for money. In fact, the only attribute where it is well-rated is nightlife and entertainment. It would appear that these ratings are being driven primarily by impressions of New York City. Interestingly though, New York comes out ahead of the two Ontario regions in terms of an overall rating (56%). Obviously, New York has attributes other than those tested that travellers are keen to see.
- **S/E Ontario** is in the middle of the pack on most attributes, while **Northern Ontario** is rated 3rd, 4th or 5th on all attributes. Northern Ontario fares best on nature/outdoors and value for money surpassing both S/E Ontario and New York. Although it bests New York in 4 of the 6 individual categories, the latter is rated far better in terms of overall attractiveness.
- However, Northern Ontario's positioning improves among travellers specifically interested in visiting the region, moving ahead in the rankings on local history/culture, small towns and friendly people. For the potential market at least, Northern Ontario is a more appealing destination than either New York or S/E Ontario.

Perceptions of Northern Ontario

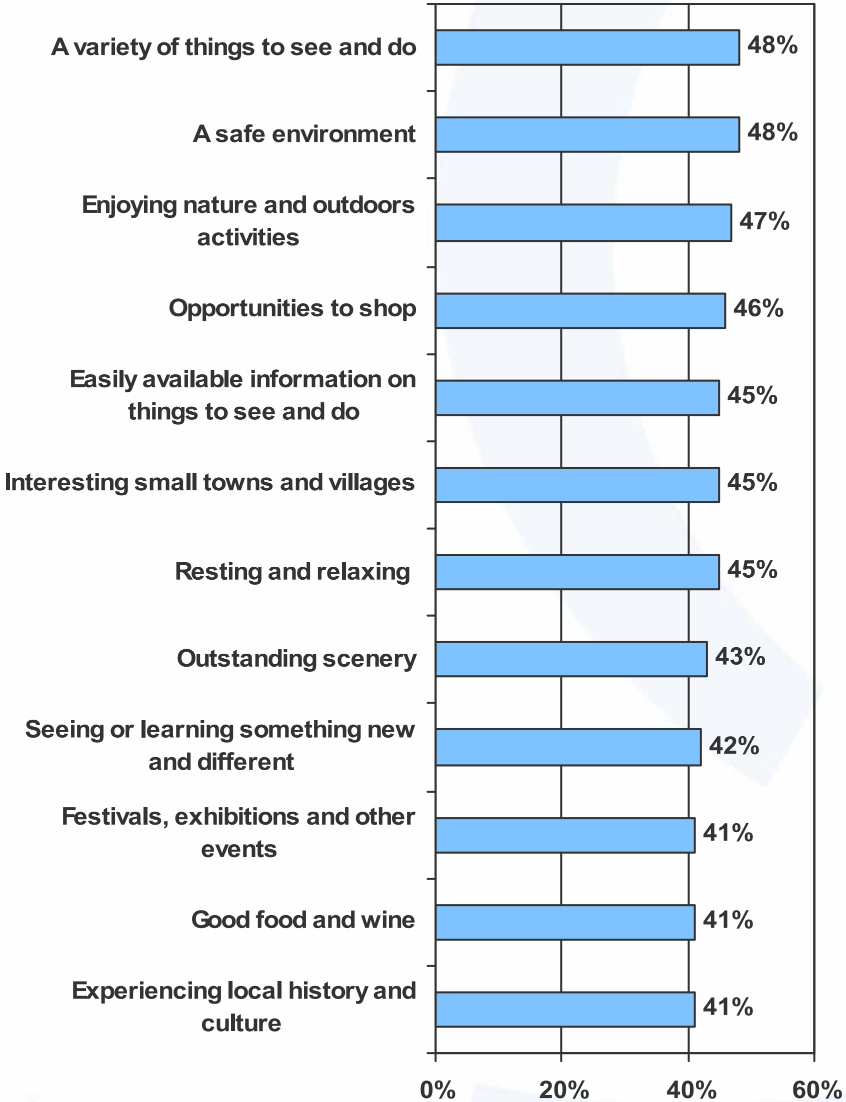


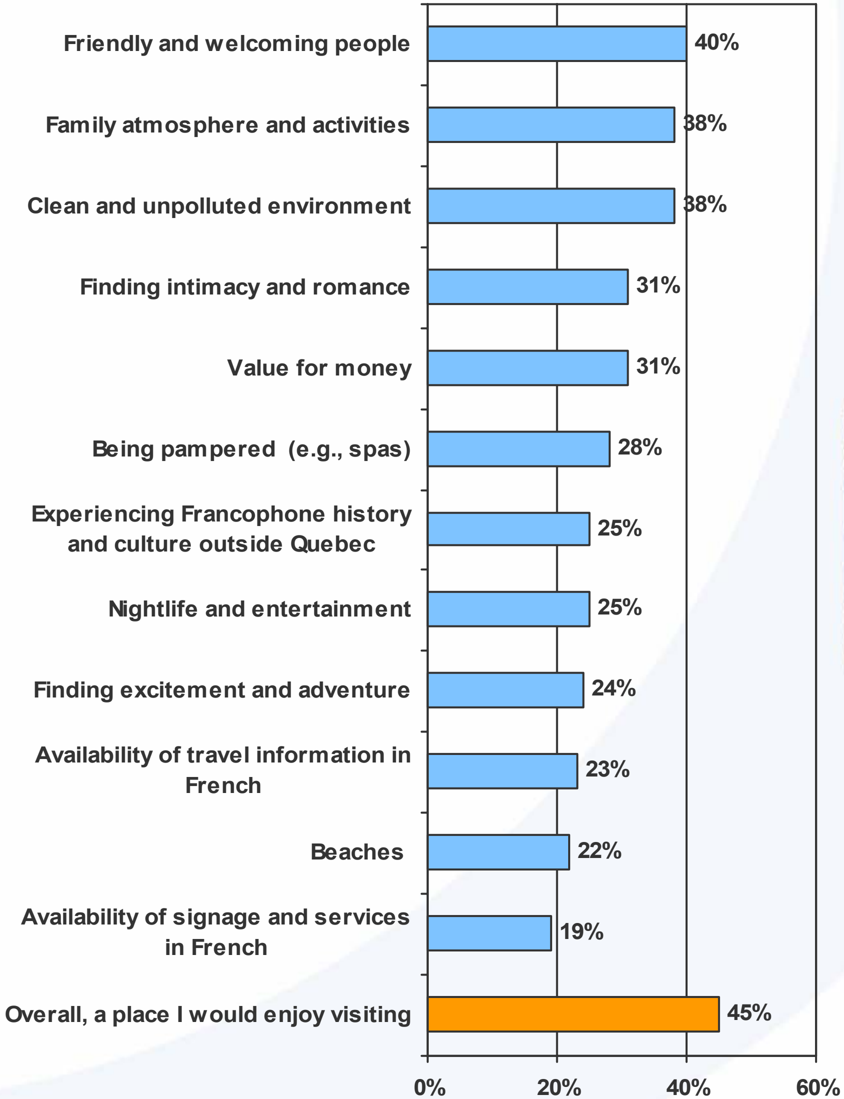


Decima Research

NOTE: Percentages represent those who rated each attribute as a 4 or 5 on a 5 point scale.
Base includes respondents who answered "Don't know" to obtain a true picture of the market (n=2,302)

Perceptions of Southern/Eastern Ontario





Decima Research

NOTE: Percentages represent those who rated each attribute as a 4 or 5 on a 5 point scale.
Base includes respondents who answered “Don’t know” to obtain a true picture of the market (n=2,302)

Perceptions of Northern Ontario by Market and Language

Impression ratings (4 or 5 out of 5)	Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
Enjoying nature and outdoors activities	44%	53%	48%	40%	39%	71%	41%
Outstanding scenery	40%	45%	44%	34%	37%	67%	37%
A safe environment	39%	39%	43%	34%	36%	54%	37%
Resting and relaxing	39%	41%	41%	35%	37%	57%	37%
Clean and unpolluted environment	37%	40%	41%	33%	33%	62%	34%
Interesting small towns and villages	36%	40%	37%	32%	36%	43%	35%
Seeing or learning something new and different	32%	36%	30%	33%	33%	42%	31%
Friendly and welcoming people	31%	35%	31%	29%	31%	54%	28%
Experiencing local history and culture	27%	27%	27%	26%	28%	37%	26%
Easily available information on things to see and do	27%	28%	29%	25%	25%	37%	26%
Family atmosphere and activities	27%	25%	28%	24%	26%	47%	24%
A variety of things to see and do	26%	25%	24%	26%	28%	37%	24%
Value for money	25%	28%	26%	21%	25%	39%	24%
Finding excitement and adventure	20%	16%	22%	17%	18%	34%	17%
Experiencing Francophone history and culture outside Quebec	19%	24%	17%	20%	20%	13%	20%
Availability of travel information in French	16%	20%	15%	15%	17%	10%	17%
Nightlife and entertainment	12%	10%	10%	10%	15%	9%	12%
Overall, a place I would enjoy visiting	**31%**	**29%**	**30%**	**28%**	**32%**	**41%**	**29%**

Decima Research

NOTE: Only items with significant differences by language or market are shown.

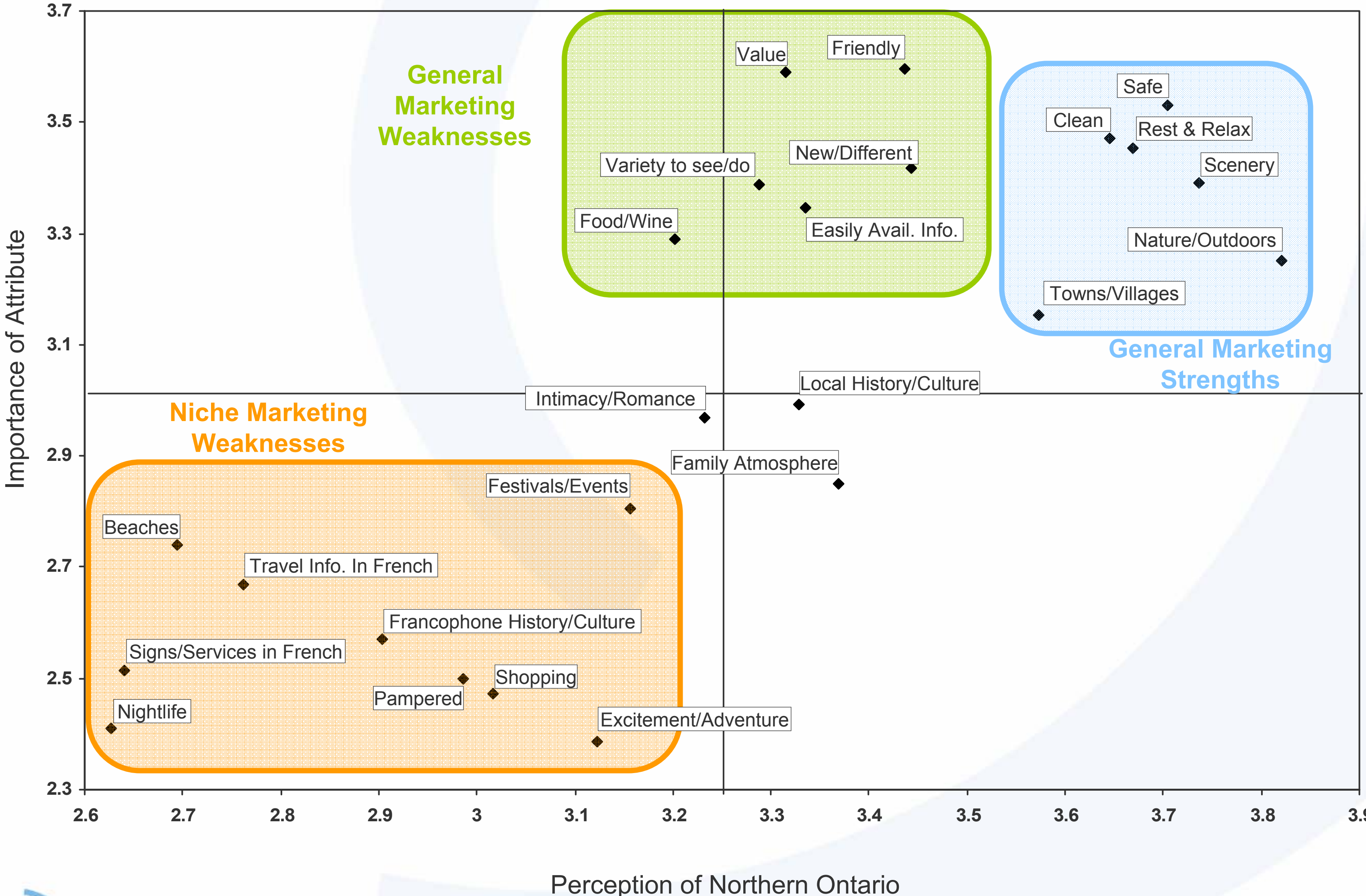
Perceptions of Southern/Eastern Ontario by Market and Language

Impression ratings (4 or 5 out of 5)	Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
A variety of things to see and do	48%	47%	48%	46%	49%	64%	45%
A safe environment	48%	53%	49%	43%	46%	58%	46%
Opportunities to shop	46%	57%	45%	45%	46%	62%	44%
Easily available information on things to see and do	45%	43%	48%	42%	43%	63%	43%
Interesting small towns and villages	45%	50%	45%	39%	45%	56%	43%
Resting and relaxing	45%	54%	46%	39%	43%	59%	43%
Outstanding scenery	43%	47%	45%	38%	42%	55%	41%
Festivals, exhibitions and other events	41%	42%	42%	36%	41%	56%	39%
Good food and wine	41%	51%	41%	36%	41%	53%	39%
Experiencing local history and culture	41%	40%	41%	34%	41%	53%	39%
Friendly and welcoming people	40%	40%	42%	36%	39%	55%	37%
Family atmosphere and activities	38%	39%	41%	34%	36%	60%	35%
Clean and unpolluted environment	38%	36%	41%	32%	37%	46%	36%
Value for money	31%	27%	32%	26%	31%	38%	29%
Experiencing Francophone history and culture outside Quebec	25%	27%	24%	24%	28%	14%	27%
Nightlife and entertainment	25%	31%	22%	26%	28%	35%	24%
Finding excitement and adventure	24%	24%	22%	21%	26%	35%	21%
Beaches	22%	26%	21%	19%	23%	30%	20%
Overall, a place I would enjoy visiting	**45%**	**46%**	**45%**	**43%**	**46%**	**60%**	**43%**

Decima Research

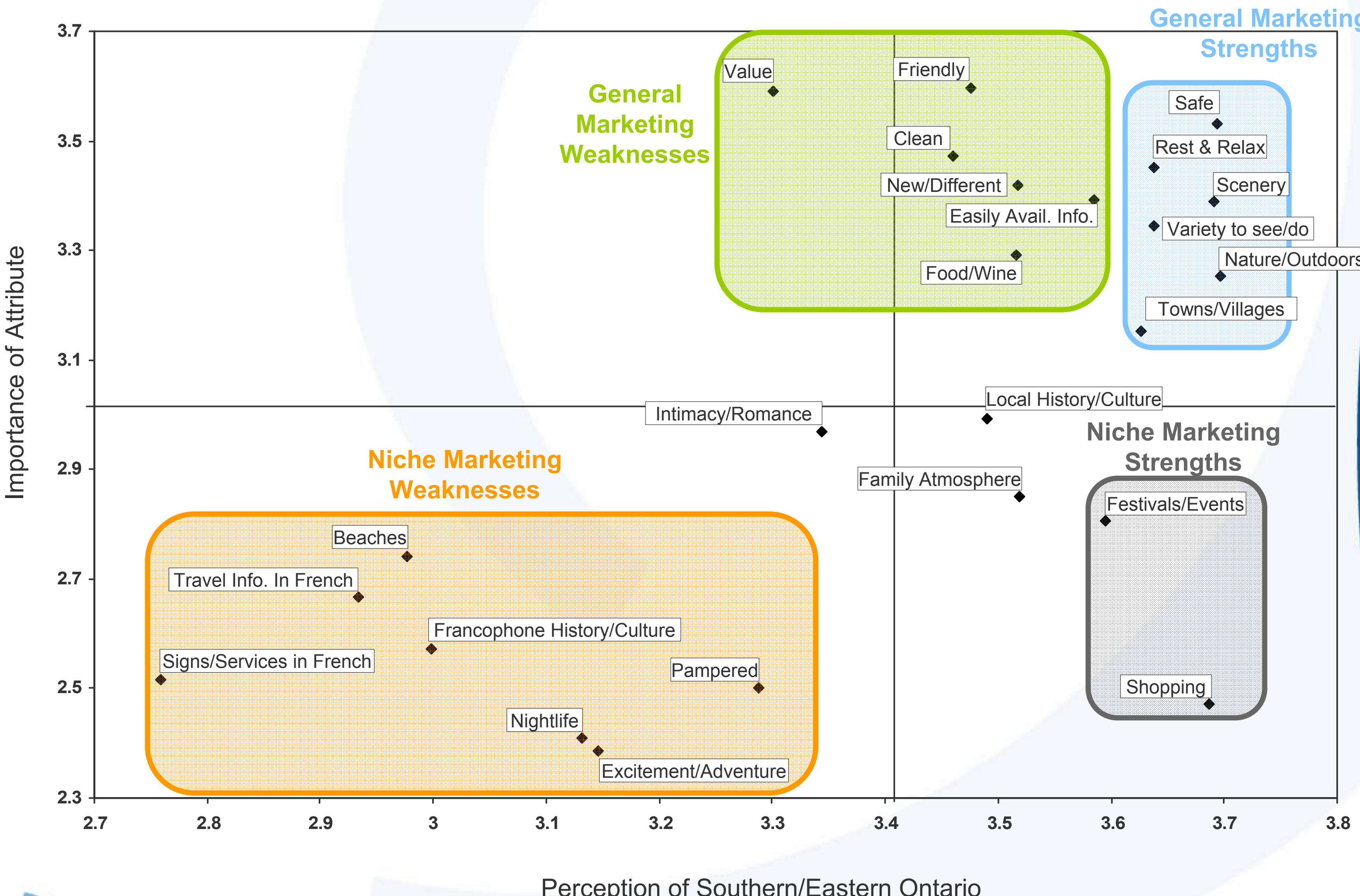
NOTE: Only items with significant differences by language or market are shown.

Strengths and Weaknesses Map for Northern Ontario



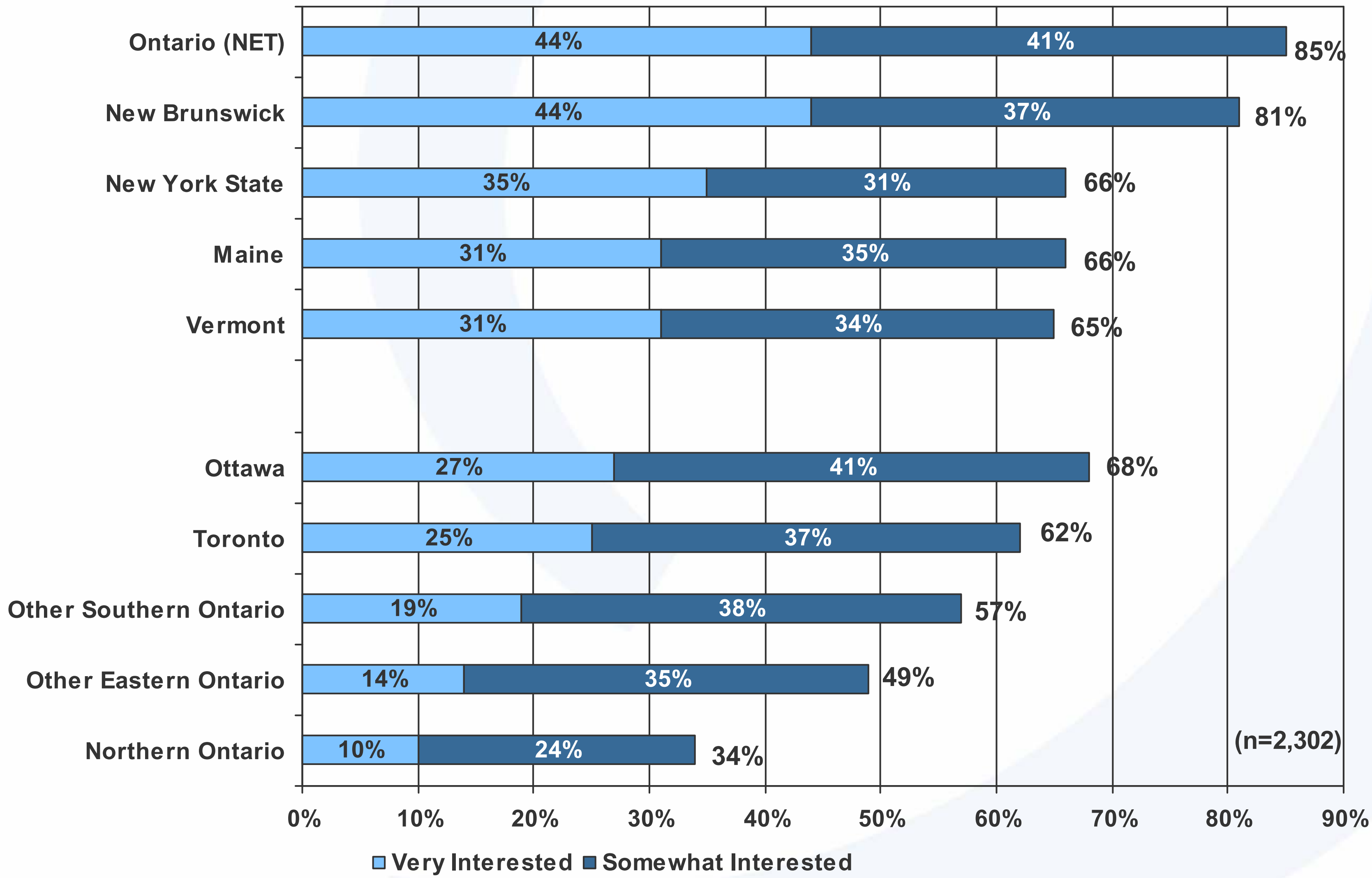
Decima Research

Strengths and Weaknesses Map for Southern/Eastern Ontario



Decima Research

Interest in Visiting Competitive Destinations



Decima Research

Competitive Analysis

% rating destination 4 or 5	1	2	3	4	5
Enjoying nature and outdoors activities	QC (91%)	NB (84%)	**N ON (66%)**	**SE ON (59%)**	NY (50%)
Experiencing local history and culture	QC (84%)	NB (81%)	**SE ON (51%)**	NY (48%)	**N ON (42%)**
Nightlife and entertainment	QC (76%)	NY (73%)	**SE ON (35%)**	NB (27%)	**N ON (20%)**
Interesting small towns and villages	QC (88%)	NB (87%)	**SE ON (57%)**	**N ON (55%)**	NY (42%)
Friendly and welcoming people	NB (89%)	QC (87%)	**SE ON (50%)**	**N ON (48%)**	NY (38%)
Value for money	QC (71%)	NB (68%)	**N ON (41%)**	**SE ON (40%)**	NY (30%)
Overall, a place I would enjoy visiting	QC (91%)	NB (80%)	NY (56%)	**SE ON (54%)**	**N ON (43%)**

NOTE: Base excludes respondents who answered “Don’t know.”

Competitive Analysis – Those Interested in Northern Ontario

% rating destination 4 or 5	1	2	3	4	5
Enjoying nature and outdoors activities	QC (93%)	NB (93%)	**N ON (91%)**	**SE ON (80%)**	NY (71%)
Experiencing local history and culture	QC (90%)	NB (90%)	**SE ON (75%)**	**N ON (70%)**	NY (68%)
Nightlife and entertainment	QC (79%)	NY (77%)	**SE ON (47%)**	NB (45%)	**N ON (41%)**
Interesting small towns and villages	NB (95%)	QC (89%)	**N ON (85%)**	**SE ON (81%)**	NY (67%)
Friendly and welcoming people	NB (94%)	QC (85%)	**N ON (82%)**	**SE ON (70%)**	NY (57%)
Value for money	NB (82%)	QC (78%)	**N ON (67%)**	**SE ON (60%)**	NY (48%)
Overall, a place I would enjoy visiting	QC (93%)	NB (93%)	**N ON (92%)**	**SE ON (86%)**	NY (69%)

Decima Research

NOTE: Base is those who are very interested in Northern Ontario and excludes respondents who answered “Don’t know.”

Travel Planning

Decima Research

Travel Planning – Key Findings

- The main information sources used by Quebec travellers to plan their overnight pleasure trips are destination websites and brochures/pamphlets (each used by close to 70% of travellers). Other information sources are used less often, including non-destination websites and government tourism offices (used by 30% to 40%) and newspaper articles and television advertisements (used by 25% to 30%).
- Anglophone travellers are far less likely to use brochures/pamphlets in their travel planning (under 60%) and more likely to rely on travel magazines (32%) and non-destination websites (56%).
- Approximately 80% of Quebec travellers say they frequently or sometimes watch, listen to or read English media. Most often this is television (almost three-quarters watch English TV), with English radio and magazines enjoyed by around half of all travellers. This only emphasizes the fact that the vast majority of Quebec travellers are capable of getting by in English.
- Approximately 10% of Quebec travellers say they have visited the OntarioTravel.net website in the last year, with an equal proportion who say they have seen the *L'Ontario en Français* travel guide (predominantly Francophones).
- Those interested in visiting Northern or S/E Ontario are significantly more likely to have visited the OntarioTravel.net website (around 15%) and to watch, listen to or read English media (close to 90% consult English media sources at least sometimes). Almost a fifth of those interested in the Northern region have seen or read the *L'Ontario en Français* travel guide, which is double the norm. They are also more likely to have used TV and print advertising, direct mail and magazine articles in their travel planning over the last year, which suggests these are viable means for Northern Ontario to reach its target market.

Information Sources Used

Information Sources used in the Last Year	All Travellers (n=2,044)	Interested in Northern Ontario (n=174)	Interested in Southern/ Eastern Ontario (n=877)
Destination websites	69%	69%	72%
Brochures/pamphlets	67%	65%	70%
Other websites	39%	47%	43%
Government tourism office / board	33%	40%	39%
Articles / features in newspapers	28%	32%	32%
Television advertisements	27%	38%	30%
Information received in the mail	24%	33%	26%
Articles/features in travel magazines	23%	27%	26%
Newspaper advertisements	21%	30%	24%
Articles / features in other magazines	19%	30%	23%
Magazine advertisements	18%	28%	21%
Automobile associations	17%	24%	20%
Clubs / associations	7%	13%	11%
None of the above	9%	10%	7%

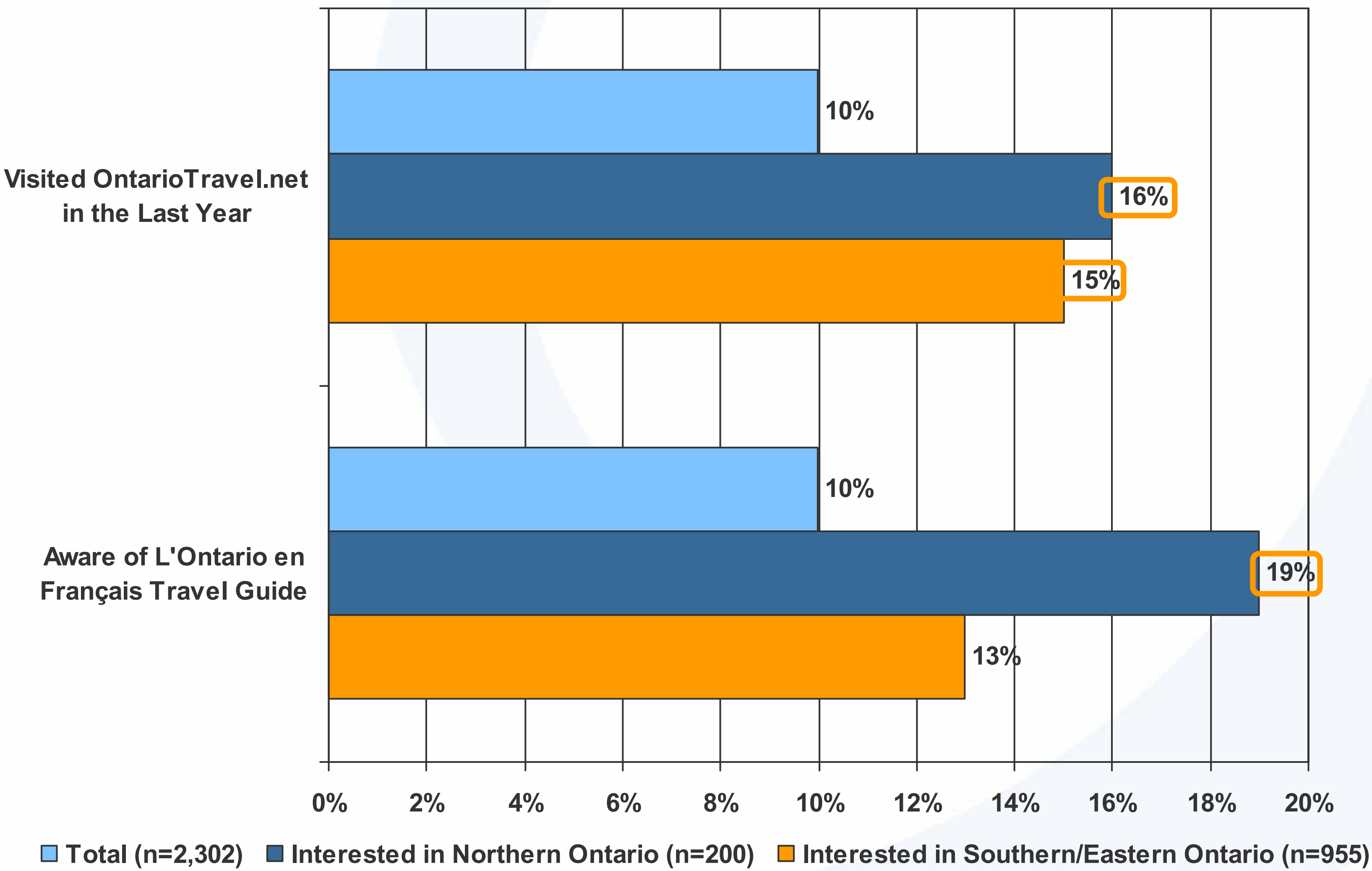
NOTE: Base is those who have taken a pleasure trip of one or more nights in the past two years.

Use of English Media Sources

English Media Consumption (Sometimes or Frequently)	All Travellers (n=2,302)	Interested in Northern Ontario (n=200)	Interested in Southern/ Eastern Ontario (n=955)
Television	74%	83%	80%
Radio	53%	62%	59%
Magazines	52%	69%	62%
Newspapers	39%	56%	48%
Any English Media	80%	87%	86%

Decima Research

Awareness and Visitation of Travel Ontario Resources



Travel Planning by Market and Language

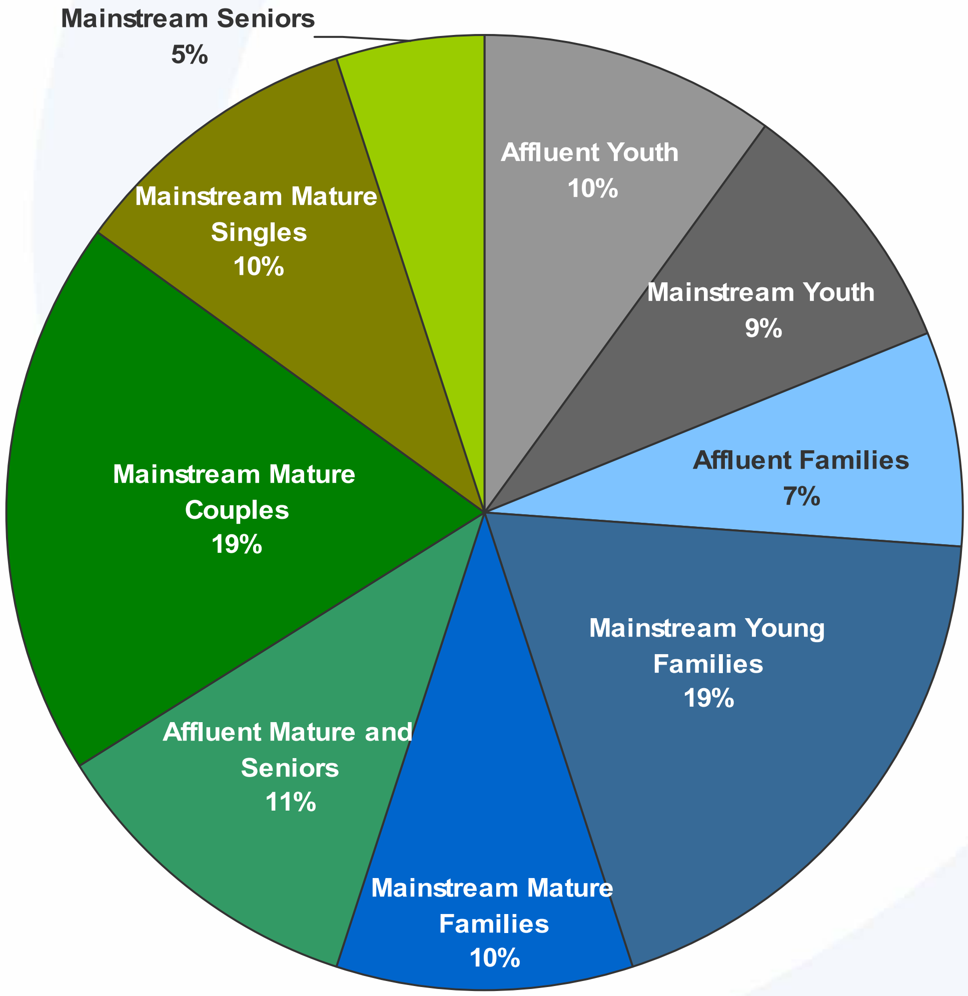
Information Sources Used in Last Year	Total (n=2,302)	Outaouais / Abitibi (n=172)	Montreal (n=906)	Quebec City (n=538)	Other Quebec (n=686)	English (n=175)	French (n=2,041)
Destination websites	69%	64%	71%	71%	68%	66%	69%
Brochures/pamphlets	67%	63%	67%	69%	67%	58%	68%
Other websites	39%	40%	42%	36%	36%	56%	37%
Government tourism office / board	33%	25%	35%	36%	31%	27%	33%
Television advertisements	27%	30%	23%	27%	30%	25%	27%
Information received in the mail	24%	18%	22%	25%	27%	23%	24%
Articles/features in travel magazines	23%	24%	24%	24%	21%	32%	21%
Magazine advertisements	18%	19%	17%	23%	18%	16%	18%
Automobile associations	17%	16%	15%	25%	18%	20%	17%
Clubs / associations	7%	4%	7%	10%	8%	7%	7%
English Media Consumption (Sometimes / Frequently)							
Newspapers	39%	34%	50%	28%	28%	89%	31%
Magazines	52%	50%	64%	45%	40%	94%	46%
Television	74%	77%	81%	72%	64%	97%	70%
Radio	53%	49%	67%	30%	41%	93%	46%
Any English media	80%	82%	88%	77%	71%	99%	77%
Travel Ontario Resources							
www.Ontariotravel.net (last year)	10%	10%	11%	7%	8%	11%	9%
Guide Touristique – l'Ontario en Français	10%	10%	11%	9%	8%	3%	10%

Decima Research

Socio-Demographic Segmentation

Decima Research

Socio-Demographic Segmentation



n=1,944

Decima Research

NOTE: Based on OTMP's lifecycle segmentation scheme. Some segments have been collapsed due to insufficient sample size. Definitions are on the following page.

Socio-Demographic Segments – Definitions

Segment	Defining Criteria
Affluent Youths	18 to 34, single or living together as a couple, annual HHI of $40k or more, college/university education (in the case of couples), no children under 21 at home.
Mainstream Youths	18 to 34, no children under 21 at home, don't meet the income and/or education criterion for Affluent Youths.
Affluent Families	Have children under 21 at home, annual HHI of $80k or more, college/university education.
Mainstream Young Families	Have children 12 or younger at home, don't meet the income and/or education criterion for Affluent Families.
Mainstream Mature Families	Have children 13 to 21 at home (but no children 12 and under), don't meet the income and/or education criterion for Affluent Families.
Affluent Mature and Seniors	Singles 35 to 64 with annual HHI of $40k or more and couples 35 plus with annual HHI of $80k or more, college/university education, no children under 21 at home.
Mainstream Mature Couples	35 to 64, living together as a couple, no children under 21 at home, don't meet the income and/or education criterion for the affluent segments.
Mainstream Mature Singles	35 to 64, single, no children under 21 at home, don't meet the income and/or education criterion for the affluent segment.
Mainstream Seniors	65 plus, single or living together as a couple, no children under 21 at home, don't meet the income and/or education criterion for the affluent segment (in the case of couples).

NOTE: Based on OTMP's lifecycle segmentation scheme. Some segments have been collapsed due to insufficient sample size.

Affluent Youths…

- Are more likely to live in Montreal (57%);
- Crave excitement and adventure when they travel, as well as nightlife and entertainment;
- Have fewer practical concerns when selecting a destination (e.g., cleanliness, safety, friendly, travel information);
- Typically have good English language skills and are less concerned about having signage, services and travel information in French;
- Have fewer sensitivities about language and don't necessarily expect to be spoken to in French when visiting Ontario;
- Enjoy active outdoors pursuits such as cycling, canoeing, boating and water sports;
- Can be targeted for winter tourism as they enjoy skiing, snowmobiling and other winter activities;
- Show less interest in Franco-Ontarian tourism products, but also shun history, culture, religious sites, and town/country experiences;
- Are less fixated on Quebec in terms of awareness and interest, and are drawn to more exciting destinations like New York, Cuba, Mexico and Australia;
- Are also more worldly in their travel choices, being more likely to have visited the Caribbean and (along with the other affluent segments) Europe in the past year;
- Have a very poor impression of Ontario, with the lowest overall rating of both Northern and S/E Ontario and among the lowest ratings on most individual attributes, including excitement/adventure. Moreover, poor nightlife is mentioned as a key reason for disinterest in Ontario;
- Are also not impressed by Quebec or New Brunswick as they prefer more exciting and far-flung destinations;
- Show the least interest in visiting Ontario and each individual region, except Toronto. Toronto is the best bet for targeting this segment as it caters to their desire for excitement and is top of mind among Ontario destinations;
- Can be reached through English language media – particularly television and radio – as well as the Internet.

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Mainstream Youths…

- Are similar in many respects to Affluent Youths;
- Like their wealthier counterparts, seek out excitement and adventure when they travel, but also look for novelty;
- Like Affluent Youths, are less worried about the practical elements of a destination and more likely to be concerned about nightlife and entertainment options;
- Place greater weight on having French signage and travel information than the more affluent group does, no doubt because their English capabilities are poorer than their better educated counterparts;
- Can be targeted with arts and cultural products such as music/film festivals and theatre/shows as interest in these Ontario products is by far the highest of any group (e.g., almost 90% interested in festivals). However, their currently mediocre impressions of S/E Ontario festivals would need to be substantially enhanced;
- Exhibit greater interest in Franco-Ontarian tourism products than the affluent group (festivals and shows in particular), although nowhere near as high as the interest among the mature and senior segments;
- Enjoy similar active outdoors and winter pursuits as Affluent Youths do, and like this group, tend to steer clear of historical/religious sites and town/country experiences;
- Like Affluent Youths, show above average awareness of and interest in New York state, but don't display the same disdain towards intra-provincial travel;
- Make a poor target for Ontario as they have low interest in all Ontario regions (except Toronto), give both Northern and S/E Ontario the second lowest overall ratings, have the poorest impressions of S/E Ontario on virtually every attribute, and at 83%, exhibit very low market penetration compared with the other segments;
- Are the least likely to be swayed by print advertising and travel features, particularly in English newspapers, which they rarely read.

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Affluent Families…

- Love to travel – within Quebec, to Ontario and elsewhere;
- Like Affluent Youths, set their sights on destinations further afield (e.g., Paris, France, Mexico) and are more likely to have visited the US, Caribbean and Europe in the past year;
- Are looking for experiences they can share together as a family, including theme parks, museums and other family-type attractions. Parents can also be targeted with golf vacations;
- Have almost all visited Ontario before (99% penetration), with a particularly high incidence of travel to the province in the last year (35%);
- Along with other affluent groups, have strong English language skills and often watch, listen to or read English media. As such, they are less likely to require French travel information or French services while travelling;
- Favour Ottawa as an Ontario destination (27% visited in the past year), perhaps because of its numerous museums. Proximity no doubt also plays a role as Affluent Families are more likely than other groups to live in nearby Outaouais/Abitibi or Montreal;
- Generally believe that Ontario has a lot to offer Francophone travellers, but personally are not really that interested in Franco-Ontarian tourism products;
- Hold some potential for Ontario, particularly Ottawa (based on strong past visitation) and Other Southern Ontario (based on strong future interest), as they have good perceptions of S/E Ontario for family vacations. However, they show less affinity for the Northern region;
- Can be reached through the Internet, including Ontariotravel.net, with close to a fifth who visited the site in the last year;
- Will likely respond well to direct mail and to marketing/promotions through automobile associations.

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Mainstream Young Families…

- Are one of the largest segments, representing close to a fifth of the total Quebec market;
- Tend to be focused on their own backyard, with higher awareness of Quebec than any other group;
- Naturally choose destinations with a family atmosphere (89%) and opt for family activities such as camping (77%), going to the beach (90%), visiting theme parks (94%) and taking in family-oriented attractions (96%);
- Shy away from local history and culture, and as such, are less interested in historic/heritage sites, museums and religious sites;
- Enjoy being outside in summer (e.g., hunting, fishing, cycling, water sports) and winter (e.g., skiing, snowmobiling) alike;
- Are the least likely to have visited Ontario in the last year (only 18%), and also the least likely to have ever visited the province (82%);
- Along with youths, do not tend to think very highly of S/E Ontario, with low impression ratings for family activities as well as most other attributes;
- Exhibit poor awareness, low visitation and below average future interest for Ottawa;
- Might be good candidates for Canada's Wonderland, which is more likely to be top-of-mind for this group, although past visitation of Toronto is relatively weak;
- Are least likely to read English newspapers or magazines;
- Are less internet savvy, and like Mainstream Youths, don't tend to use print advertisements or articles for travel planning;
- Unlike their more affluent counterparts, will usually bypass automobile associations when planning a trip.

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Mainstream Mature Families…

- Generally travel less than other segments do, averaging 2.5 trips per year;
- Have the poorest English language skills of all segments, so having travel information and signage/services in French is important to them when considering travel destinations;
- Like their Young Family counterparts, Quebec is top-of-mind as a travel destination, perhaps because of the language barrier, but also because they are less sophisticated travellers who don't travel as much;
- Look at vacations as a chance to be pampered and spoiled, for example, going shopping, taking in some entertainment and enjoying good food and wine;
- Being older (predominantly over 45), share some common interests with the mature segments – e.g., aboriginal experiences and birdwatching – but unlike the older groups, are not really interested in delving into local history and culture;
- Are still looking for family activities, but not to the same extent as Young Families do, as their children are older and may not travel with them;
- **Should be targeted by Northern Ontario, as they exhibit strong interest in the region (41%) and have good overall impressions of it;**
- View Northern Ontario as being strong on many dimensions, but especially for small towns, family activities, and festivals and events (where they award the highest ratings of any segment);
- Also see S/E Ontario in a favourable light, although interest is only about average;
- Could stand some awareness-building as they have the lowest awareness of Ontario across all segments, with only 13% who mention an Ontario destination as a place they would go for a vacation;
- Along with Young Families, are the least likely to have travelled to Ontario in the last year or to have ever visited the province. This may be due to poor awareness and language barriers, but is also because they travel less, showing a lower propensity to travel within Quebec, to the US and to Europe as well;
- Feel Ontario has a lot to offer to Francophone travellers (77%), however, they are not necessarily interested in Franco-Ontarian history/culture or entertainment products;
- Need to be reached through French language media and welcomed by making an effort to speak French to them (83%).

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Affluent Mature and Seniors…

- Are inveterate travellers, averaging more than 4 trips per year;
- Along with other affluent segments, are the most likely to venture beyond Quebec – to Ontario, Atlantic Canada, the US and the Caribbean. In fact, they are not really interested in intra-provincial travel and are less likely to see Quebec as a panacea for all of their travel needs;
- View Europe as a destination of choice, with 21% who visited in the last year – almost twice the incidence of any other group – and over 40% who mention an European destination (particularly France and Italy) as a place they would go for a vacation;
- Are the most likely of all groups to speak English at home, and have better English language skills than the other three mature/senior segments;
- For the most part, have already visited Ontario (97% penetration);
- Show the strongest visitation of Toronto, by far, with 21% who visited in the last year, likely attracted by its international flavour and world-class tourism offerings;
- Also **represent a good opportunity for Ontario destinations beyond Toronto**, demonstrating healthy interest in Ottawa, Other Southern Ontario and Other Eastern Ontario. In fact, Ottawa is already a popular destination among this set, with 27% who visited in the last year;
- Tend to be more familiar than other segments with Ontario destinations outside of Toronto and Ottawa – in particular, Niagara-on-the Lake and the Niagara region in general (but not Niagara Falls);
- Are not typically interested in Franco-Ontarian entertainment products, but there is some potential to woo them with travel routes highlighting Franco-Ontarian history (73% interested);
- Find US destinations immensely appealing, with strong interest in both Maine and Vermont;
- Can be reached through the Internet and through articles/features in the print media;
- Can also be reached through English media, with the highest consumption of English TV, radio, magazines and newspapers of all segments.

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Mainstream Mature Couples…

- Are a large segment of avid travellers, accounting for close to 20% of the market, and taking roughly 4 trips per year;
- More than any other group, seek romance and pampering on their travels, and are drawn to shopping meccas and gourmet wine/dine experiences;
- Gravitate towards more leisurely vacation pursuits such as small towns, scenery, aboriginal culture, bird-watching and fishing;
- Have below-average English capabilities, so more than any other segment, are looking for destinations with information, signage and services in French. It follows that Quebec destinations are top-of-mind;
- Along with other Mainstream Mature/Senior groups, **are interested in exploring Francophone history/culture outside Quebec and can be targeted with Franco-Ontarian products**, especially festivals, theatre/shows and travel routes;
- **Are interested in visiting destinations in S/E Ontario beyond Toronto and Ottawa** (e.g., Niagara Falls, Windsor). They have good impressions of S/E Ontario that dovetail with some of their key travel motivations and interests, e.g., romance, nature, small towns and Francophone history/culture;
- Are **one of three segments with the best potential for Northern Ontario**, having the highest interest in the region (43%), combined with positive impressions for many of its tourism attributes, including opportunities for relaxing, small towns, novelty, local history/culture and festivals/events;
- Have some strong language and culturally-related attitudes towards travel in Ontario that could make conversion a challenge. In terms of travel barriers, they are the most likely of all segments to cite prefer travelling in Quebec, to anticipate language difficulties in Ontario, to prefer being served in French, to feel Ontarians have a poor attitude towards Quebecers and to view Ontarians as unfriendly. Moreover, the feeling that Ontarians should make an effort to speak some French to them is more paramount;
- Also view Ontario as being on the expensive side. Ontario will need to get past these barriers to fulfill its potential, particularly since these travellers are more likely to base destination choices on value for money and a welcoming environment. But the good news is that there is an inherent interest in what Ontario has to offer;
- Show strong interest in New Brunswick and Maine, which will present strong competition for Ontario;
- Are good candidates for direct mail campaigns and must be marketed to in French.

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Mainstream Mature Singles…

- Tend to be more infrequent travellers (taking 2.7 trips per year);
- Seek opportunities to shop at their destination, and enjoy attending festivals, visiting religious sites, experiencing aboriginal culture and going to agricultural fairs;
- Like Mature Couples, have below par English skills and share many of the same sentiments in terms of language/cultural barriers towards travel to Ontario (e.g., unwelcoming, poor attitude towards Quebecers). However, having travel information and signage/services in French appears to be less of a concern for them than for Mature Couples;
- Also view Ontario as being too far and too expensive;
- Share the other older mainstream segments' interest in discovering Francophone history/culture outside Quebec, and would be **interested in Franco-Ontarian festivals, theatre/shows and travel routes** if their attitudinal issues can be addressed;
- Unlike their married counterparts, have only average interest in and impressions of both regions of Ontario. This, combined with the language/cultural hurdles, make them a poorer target market for the province than the Couples segment. However, there may be some limited opportunities to woo them with attractions highlighting Francophone history/culture and specific festivals/events, particularly in Northern Ontario where impressions of these products are above average;
- Like Mature Couples, they have a healthy interest in New Brunswick and Maine;
- Could respond well to television advertising if Ontario decides to pursue this segment.

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Mainstream Seniors…

- Are the smallest segment, accounting for only 5% of the total Quebec market;
- Enjoy absorbing the local history and culture of a destination, including Francophone history/culture outside of Quebec. As such, they find historic, heritage and religious sites appealing and **can be targeted with Franco-Ontarian products** such as festivals, theatre/shows and travel routes;
- Are a good target for agri-tourism as they enjoy agricultural fairs/festivals and farm visits;
- Enjoy leisurely outdoors pursuits such as birdwatching, scenery and golf, but are not interested in more extreme outdoors adventure, sports or winter activities;
- **Offer excellent potential for both Northern** (e.g., Sudbury) **and S/E Ontario** (e.g., Cornwall, London, 1000 Islands), with among the best overall impressions of both regions across all segments;
- Think highly of most facets of Northern Ontario, particularly scenery, friendliness, variety, novelty, value, opportunities to relax and Francophone history/culture, where they rate the region the highest of all groups;
- Are also well-disposed towards S/E Ontario, with high, if not the highest, ratings on variety, safety, friendliness, cleanliness, availability of travel information, small towns, local history/culture, Francophone history/culture and opportunities to discover something new;
- **Represent a loyal target group for Ontario with high penetration in the past (98%) as well as high future interest.** They have the highest interest in Ottawa of any segment (89%), and interest in Other Southern, Other Eastern and Northern Ontario is also on the high side;
- Feel that the distance to Ontario is a drawback (50%). Strong competition from the US will also be a negative factor – almost half named a US destination as a place for a vacation. Like the other Mainstream Mature/Senior groups, they are drawn to Maine in particular. They also find New Brunswick appealing, again with above average ratings;
- Travel patterns in the last year mirror their interest and impressions, showing higher than average visitation to Ontario, Atlantic Canada and the US. This suggests that their interest is convertible;
- Are more likely to use the resources of automobile associations and government tourism bureaus in the trip planning process;
- Are more likely to prove responsive to television and print advertising, and like their Affluent counterparts, can be reached through English print media.

NOTE: Profiles highlight key differences for a given segment, compared with other segments.

Socio-Demographic Segments – Summary

Segment	Potential for N. Ontario	Potential for S/E Ontario	Potential for Francophone Products*
Affluent Youths	Low	Low	Low
Mainstream Youths	Low	Low	Mod
Affluent Families	Low	Mod	Low
Mainstream Young Families	Low	Low	Low
Mainstream Mature Families	**High**	Low	Low
Affluent Mature and Seniors	Low	**High**	Mod
Mainstream Mature Couples	**High**	**High**	**High**
Mainstream Mature Singles	Low	Low	**High**
Mainstream Seniors	**High**	**High**	**High**

Decima Research

*NOTE: Francophone history/culture or arts & culture products

Demographic Profile

Age	Affluent Youth (n=193)	Mainstream Youth (n=215)	Affluent Families (n=122)	Mainstream Young Families (n=385)	Mainstream Mature Families (n=195)	Affluent Mature and Seniors (n=207)	Mainstream Mature Couples (n=350)	Mainstream Mature Singles (n=179)	Mainstream Seniors (n=98)
18 to 34	100%	100%	24%	46%	7%	0%	0%	0%	0%
35 to 44	0%	0%	47%	44%	33%	22%	15%	27%	0%
45 to 54	0%	0%	25%	9%	50%	25%	30%	31%	0%
55 or older	0%	0%	4%	1%	11%	53%	55%	42%	100%
Gender									
Male	63%	45%	65%	48%	43%	64%	45%	42%	53%
Income									
Under $20K	0%	36%	0%	9%	7%	0%	5%	31%	16%
$20-40K	0%	54%	0%	27%	33%	0%	26%	54%	31%
$40-80K	79%	10%	0%	61%	54%	38%	63%	14%	50%
$80-100K	10%	0%	37%	3%	5%	26%	4%	1%	0%
$100K or more	11%	0%	63%	1%	1%	36%	2%	0%	3%
Education									
High school / Trade School/ Vocational /Some CEGEP	14%	43%	0%	54%	66%	0%	63%	63%	44%
College/University/ Completed CEGEP	85%	57%	100%	46%	34%	100%	37%	37%	56%
Market									
Outaouais / Abitibi	7%	4%	13%	8%	7%	7%	6%	4%	3%
Quebec City	6%	12%	8%	8%	8%	9%	9%	11%	11%
Montreal	57%	52%	55%	40%	44%	53%	42%	50%	41%
Other Quebec	29%	32%	23%	43%	41%	30%	43%	35%	45%

Demographic Profile (Cont'd)

Household Composition	Affluent Youth (n=193)	Mainstream Youth (n=215)	Affluent Families (n=122)	Mainstream Young Families (n=385)	Mainstream Mature Families (n=195)	Affluent Mature and Seniors (n=207)	Mainstream Mature Couples (n=350)	Mainstream Mature Singles (n=179)	Mainstream Seniors (n=98)
Live alone	17%	28%	0%	0%	0%	30%	0%	72%	27%
Spouse / partner	51%	38%	96%	81%	65%	56%	100%	0%	67%
Children 12 or younger	0%	0%	66%	100%	0%	0%	0%	0%	0%
Children 13 to 21	0%	0%	51%	21%	100%	0%	0%	0%	0%
Children over 21	1%	1%	4%	4%	13%	15%	14%	9%	4%
Employment Status									
Employed full-time	69%	45%	86%	60%	55%	61%	38%	38%	3%
Employed part-time	5%	15%	8%	10%	11%	4%	8%	10%	1%
Homemaker	0%	0.1%	2%	13%	14%	1%	8%	5%	2%
Unemployed	5%	8%	0%	4%	5%	1%	4%	10%	1%
Retired	0%	0%	1%	1%	6%	26%	36%	28%	89%
Student	19%	28%	1%	5%	5%	1%	0.4%	1%	0%
Friends/Relatives in Ontario									
Yes	53%	36%	54%	37%	43%	55%	47%	45%	52%
Language Spoken at Home									
French	88%	89%	79%	90%	86%	77%	90%	87%	84%
English	8%	7%	14%	6%	10%	19%	7%	9%	11%
Both Equally	3%	4%	6%	4%	4%	4%	3%	2%	5%
Language Capabilities (Good/Very Good/Excellent)									
Spoken	77%	65%	79%	58%	54%	74%	59%	60%	67%
Read	91%	83%	86%	70%	63%	86%	66%	67%	75%

Decima Research

Destination Awareness

Affluent Youth (n=193)	Mainstream Youth (n=215)	Affluent Families (n=122)	Mainstream Young Families (n=385)	Mainstream Mature Families (n=195)	Affluent Mature and Seniors (n=207)	Mainstream Mature Couples (n=350)	Mainstream Mature Singles (n=179)	Mainstream Seniors (n=98)
Unaided Brand Awareness*								
NY state (15%) Quebec (15%) Cuba (15%) Que City (12%) Mexico (10%) Toronto (10%) Ottawa (4%) Niag F. (1%)	Quebec (20%) NY state (17%) Montreal (16%) Que City (13%) Cuba (10%) Toronto (8%) Ottawa (4%) Niag F. (2%)	Quebec (16%) Montreal (14%) Paris (11%) Que City (10%) Mexico (10%) Ottawa (6%) Toronto (6%) Niag F. (1%)	Quebec (31%) Montreal (18%) Cuba (10%) Que City (10%) Gaspesie (8%) Toronto (7%) Ottawa (4%) Niag F. (3%)	Quebec (27%) Montreal (16%) Cuba (13%) Que City (10%) Gaspesie (9%) Toronto (6%) Ottawa (3%) Niag F. (1%)	Quebec (19%) Montreal (15%) Paris (11%) Que City (11%) **Ottawa (9%)** Toronto (7%) Niag F. (0%)	Quebec (26%) Montreal (20%) Que City (17%) Charlevoix (13%) Gaspesie (9%) Ottawa (7%) Toronto (5%) Niag F. (2%)	Quebec (25%) Montreal (14%) **Ottawa (12%)** Que City (12%) Charlevoix (10%) Toronto (7%) Niag F. (2%)	Quebec (24%) Montreal (18%) Que City (13%) **Ottawa (12%)** France (8%) Toronto (4%) Niag F. (3%)
Unaided Destination Awareness (Province/State Rollup)								
QC (55%) NY (21%) **ON (17%)** FL (8%) BC (7%)	QC (63%) NY (19%) **ON (17%)** FL (5%) CA (5%)	QC (60%) **ON (20%)** FL (10%) NY (8%) BC (8%)	QC (75%) **ON (18%)** FL (13%) NY (10%) NB (5%)	QC (75%) **ON (13%)** NY (12%) FL (10%) NB (5%)	QC (52%) **ON (19%)** FL (12%) NY (9%) BC (7%)	QC (76%) **ON (18%)** FL (11%) BC (7%) NB (5%)	QC (69%) **ON (22%)** NY (10%) FL (6%) NB (5%)	QC (70%) **ON (22%)** FL (16%) NY (8%) BC (6%)
Ontario Destination Awareness								
Toronto (77%) Ottawa (65%) Niag F. (35%) Niagara (10%) Windsor (5%)	Toronto (64%) Ottawa (60%) Niag F. (38%) Wonderland (6%) London (5%)	Toronto (72%) Ottawa (60%) Niag F. (41%) Niagara (12%) Kingston (9%)	Toronto (56%) Ottawa (40%) Niag F. (38%) Niagara (9%) Wonderland (8%)	Toronto (54%) Ottawa (45%) Niag F. (32%) Niagara (8%) Windsor (6%)	Toronto (75%) Ottawa (68%) Niag F. (23%) Niagara (21%) NOTL (7%)	Toronto (58%) Ottawa (52%) Niag F. (37%) Niagara (17%) Kingston (6%)	Toronto (68%) Ottawa (48%) Niag F. (29%) Niagara (15%) Kingston (7%)	Ottawa (65%) Toronto (57%) Niag F. (34%) Niagara (13%) Kingston (11%)

Decima Research

NOTE: *The table shows the top five brands in terms of awareness, as well as awareness of key Ontario brands.

Past Visitation

Number of Trips Taken in Past Year	Affluent Youth (n=193)	Mainstream Youth (n=215)	Affluent Families (n=122)	Mainstream Young Families (n=385)	Mainstream Mature Families (n=195)	Affluent Mature and Seniors (n=207)	Mainstream Mature Couples (n=350)	Mainstream Mature Singles (n=179)	Mainstream Seniors (n=98)
MEAN	3.3	3.5	3.4	3.2	2.5	4.3	4.0	2.7	3.8
Pleasure Trip Destinations in Past Year									
Quebec	66%	77%	83%	73%	65%	69%	73%	60%	76%
Ontario	25%	22%	35%	18%	18%	41%	24%	22%	32%
Atlantic Canada	5%	7%	12%	9%	7%	15%	13%	7%	15%
Elsewhere in Canada	11%	9%	6%	6%	7%	10%	8%	6%	12%
The US	28%	16%	37%	19%	15%	36%	24%	20%	39%
The Caribbean	18%	6%	13%	7%	7%	12%	10%	6%	7%
Europe	10%	7%	12%	4%	3%	21%	6%	3%	6%
Other international	11%	8%	8%	3%	6%	8%	6%	8%	6%
Visited Ontario Regions in Past Year									
Ottawa	13%	15%	27%	8%	12%	27%	17%	12%	15%
Other Eastern Ontario	4%	4%	9%	5%	5%	9%	6%	6%	7%
Toronto	16%	11%	17%	7%	9%	21%	9%	11%	11%
Niagara Falls	3%	2%	6%	7%	1%	7%	6%	7%	6%
Other Southern Ontario	6%	4%	4%	3%	1%	6%	4%	5%	7%
Northern Ontario	2%	1%	4%	1%	2%	4%	3%	2%	4%
Market Penetration									
Ever Visited Ontario	88%	83%	99%	82%	83%	97%	93%	86%	98%

Decima Research

Interest In and Impressions of Ontario and Competitors

Interest in Ontario Regions (Very or Somewhat)	Affluent Youth (n=193)	Mainstream Youth (n=215)	Affluent Families (n=122)	Mainstream Young Families (n=385)	Mainstream Mature Families (n=195)	Affluent Mature and Seniors (n=207)	Mainstream Mature Couples (n=350)	Mainstream Mature Singles (n=179)	Mainstream Seniors (n=98)
Ottawa	59%	58%	71%	61%	64%	79%	72%	70%	89%
Toronto	62%	67%	57%	63%	61%	66%	60%	63%	64%
Other Southern Ontario	38%	47%	66%	52%	58%	68%	66%	59%	65%
Other Eastern Ontario	36%	37%	46%	46%	49%	57%	57%	49%	57%
Northern Ontario	23%	25%	20%	34%	41%	34%	43%	32%	40%
Total Ontario (any region)	80%	81%	86%	82%	84%	94%	88%	87%	97%
Interest in Competitors (Very or Somewhat)									
New Brunswick	71%	74%	79%	82%	80%	78%	87%	89%	86%
Maine	60%	57%	68%	64%	67%	70%	71%	74%	72%
New York state	72%	70%	67%	65%	66%	66%	62%	65%	64%
Vermont	60%	59%	64%	60%	68%	76%	67%	71%	71%
% Rating Destination 4 or 5 Overall*									
Quebec	87%	95%	90%	91%	90%	89%	92%	95%	94%
New Brunswick	68%	67%	78%	77%	84%	83%	86%	84%	86%
New York State	52%	53%	51%	48%	59%	58%	55%	60%	69%
Northern Ontario	23%	34%	40%	43%	55%	35%	54%	47%	53%
Southern/Eastern Ontario	40%	47%	50%	53%	66%	53%	59%	58%	68%

Decima Research

NOTE: *Don't knows have been excluded from the base.

Attitudes Towards Ontario Travel and Impression Ratings of Ontario vs. Competitors

% Strongly or Somewhat Agree	Affluent Youth (n=193)	Mainstream Youth (n=215)	Affluent Families (n=122)	Mainstream Young Families (n=385)	Mainstream Mature Families (n=195)	Affluent Mature and Seniors (n=207)	Mainstream Mature Couples (n=350)	Mainstream Mature Singles (n=179)	Mainstream Seniors (n=98)
I expect people at Ontario hotels, restaurants and attractions to make an effort to speak some French to me	63%	72%	73%	79%	83%	73%	83%	74%	73%
Ontario has a lot to offer to Francophone travellers	64%	67%	75%	65%	77%	69%	70%	66%	72%
People in Ontario don't understand the Francophone culture	65%	58%	55%	60%	61%	61%	60%	63%	58%
I don't like to travel outside Quebec	11%	14%	15%	21%	18%	7%	17%	20%	18%
Toronto is the only place worth visiting in Ontario	16%	20%	11%	22%	13%	9%	12%	7%	11%

Decima Research

Motivations and Destination Selection Criteria

Motivations	Affluent Youth (n=193)	Mainstream Youth (n=215)	Affluent Families (n=122)	Mainstream Young Families (n=385)	Mainstream Mature Families (n=195)	Affluent Mature and Seniors (n=207)	Mainstream Mature Couples (n=350)	Mainstream Mature Singles (n=179)	Mainstream Seniors (n=98)
Something new and different	92%	95%	88%	87%	88%	89%	85%	85%	89%
Resting and relaxing	86%	90%	87%	90%	90%	86%	91%	86%	81%
Nature and outdoors	85%	81%	75%	85%	76%	77%	83%	83%	80%
Local history and culture	65%	70%	69%	53%	61%	74%	73%	71%	82%
Intimacy and romance	58%	71%	63%	71%	67%	59%	74%	48%	48%
Francophone history/culture	34%	34%	32%	37%	45%	41%	55%	56%	60%
Being pampered	36%	38%	32%	47%	51%	45%	50%	41%	34%
Excitement and adventure	58%	49%	35%	46%	40%	38%	27%	29%	27%
Destination Selection Criteria									
Good value for money	90%	92%	96%	92%	96%	89%	98%	95%	93%
Friendly people	85%	86%	92%	93%	95%	92%	98%	93%	92%
Variety of things to see	89%	91%	93%	88%	92%	89%	88%	88%	90%
Outstanding scenery	84%	89%	85%	87%	92%	87%	93%	86%	92%
A safe environment	74%	74%	87%	91%	92%	83%	95%	90%	92%
Clean environment	75%	87%	91%	90%	93%	81%	94%	88%	94%
Easily available info.	77%	82%	88%	86%	90%	81%	91%	89%	88%
Good food and wine	75%	75%	86%	80%	87%	84%	89%	86%	74%
Small towns and villages	67%	69%	77%	74%	83%	84%	89%	83%	85%
Family atmosphere/activities	50%	48%	78%	89%	75%	36%	62%	47%	51%
Festivals and other events	58%	64%	54%	64%	62%	60%	68%	64%	69%
Beaches	54%	56%	57%	57%	64%	45%	59%	54%	42%
Travel information in French	31%	50%	43%	59%	61%	44%	70%	56%	48%
Signage/services in French	29%	44%	28%	54%	56%	37%	63%	52%	44%
Opportunities to shop	32%	46%	40%	46%	51%	42%	51%	52%	45%
Nightlife and entertainment	56%	60%	30%	40%	46%	32%	32%	42%	22%

Preferred Ontario Vacation Activities

% Very or Somewhat Interested	Affluent Youth (n=149)	Mainstream Youth (n=165)	Affluent Families (n=106)	Mainstream Young Families (n=298)	Mainstream Mature Families (n=157)	Affluent Mature and Seniors (n=193)	Mainstream Mature Couples (n=297)	Mainstream Mature Singles (n=148)	Mainstream Seniors (n=86)
Festivals	81%	89%	70%	79%	70%	76%	76%	82%	76%
Theatre, musicals and shows	65%	82%	48%	60%	61%	74%	71%	68%	67%
Places of religious significance	26%	25%	30%	30%	32%	33%	37%	44%	51%
Historic and heritage sites	79%	72%	85%	75%	82%	85%	86%	87%	91%
Museums	79%	79%	89%	76%	81%	86%	83%	84%	83%
Aboriginal experiences	40%	45%	41%	55%	60%	51%	60%	64%	57%
Visiting local ethnic communities	39%	47%	40%	50%	63%	59%	64%	67%	63%
Skiing / snowboarding	46%	43%	28%	34%	22%	22%	12%	12%	5%
Snowmobiling	43%	46%	27%	44%	34%	18%	20%	25%	11%
Other winter activities	66%	69%	60%	70%	60%	50%	52%	53%	35%
Agricultural fairs and festivals	37%	43%	38%	56%	57%	50%	55%	60%	64%
Farm visits / food processing plant tours	38%	42%	52%	58%	61%	54%	60%	63%	73%
Winery tours	75%	63%	81%	72%	87%	88%	86%	88%	87%
Brewery tours	71%	62%	69%	66%	70%	68%	70%	69%	62%
Fruit picking	48%	56%	59%	63%	67%	52%	58%	64%	60%
Visiting small towns and villages	81%	85%	94%	83%	89%	92%	93%	92%	91%
Staying at a bed and breakfast or country inn	80%	88%	87%	85%	85%	84%	86%	89%	80%

Decima Research

Preferred Ontario Vacation Activities (Cont'd)

% Very or Somewhat Interested	Affluent Youth (n=149)	Mainstream Youth (n=165)	Affluent Families (n=106)	Mainstream Young Families (n=298)	Mainstream Mature Families (n=157)	Affluent Mature and Seniors (n=193)	Mainstream Mature Couples (n=297)	Mainstream Mature Singles (n=148)	Mainstream Seniors (n=86)
Natural landmarks	81%	86%	85%	85%	87%	88%	81%	84%	82%
National and provincial parks / nature preserves	89%	89%	87%	89%	87%	90%	88%	88%	90%
Beaches	75%	84%	84%	90%	82%	71%	80%	74%	52%
Canoeing / kayaking	65%	69%	58%	61%	47%	46%	31%	41%	17%
Boating / sailing	61%	60%	47%	57%	47%	44%	40%	50%	27%
Water sports	59%	57%	37%	54%	31%	26%	25%	31%	7%
Camping / RVing	70%	75%	65%	77%	55%	42%	54%	55%	38%
Hiking / nature trails	88%	83%	85%	85%	82%	82%	82%	84%	77%
Fishing	29%	36%	40%	50%	46%	34%	50%	38%	39%
Hunting	16%	11%	9%	20%	15%	8%	12%	6%	7%
Birdwatching / wildlife viewing	52%	58%	60%	60%	74%	62%	73%	68%	72%
Cycling tours	79%	76%	66%	73%	56%	64%	63%	61%	34%
Casinos and race tracks	46%	45%	35%	42%	42%	30%	43%	39%	33%
Spas	73%	66%	59%	72%	67%	64%	62%	64%	31%
Golf	31%	18%	38%	33%	29%	30%	27%	23%	36%
Theme parks	84%	86%	87%	94%	81%	62%	81%	81%	69%
Other family attractions	82%	87%	92%	96%	85%	75%	87%	87%	87%
Franco-Ontarian festivals	57%	68%	50%	63%	64%	63%	78%	71%	78%
Franco-Ontarian theatre, musicals and shows	46%	62%	35%	54%	57%	58%	75%	68%	66%
Travel routes highlighting Franco-Ontarian history	54%	62%	66%	64%	66%	73%	81%	76%	83%

Information Sources

Information Sources Used	Affluent Youth (n=193)	Mainstream Youth (n=215)	Affluent Families (n=122)	Mainstream Young Families (n=385)	Mainstream Mature Families (n=195)	Affluent Mature and Seniors (n=207)	Mainstream Mature Couples (n=350)	Mainstream Mature Singles (n=179)	Mainstream Seniors (n=98)
Destination websites	75%	72%	79%	62%	66%	80%	64%	61%	66%
Brochures/pamphlets	68%	63%	68%	68%	65%	71%	66%	62%	74%
Other websites	53%	40%	38%	40%	37%	48%	31%	33%	31%
Government tourism office	25%	27%	36%	27%	31%	39%	32%	33%	42%
Articles in newspapers	23%	20%	33%	14%	27%	43%	29%	27%	40%
Television advertisements	24%	22%	21%	28%	27%	21%	28%	34%	35%
Information rec. in the mail	18%	19%	28%	25%	19%	21%	28%	23%	23%
Articles in travel magazines	21%	17%	25%	15%	21%	37%	25%	16%	24%
Newspaper advertisements	20%	13%	20%	15%	22%	25%	25%	20%	32%
Articles in other magazines	16%	15%	20%	14%	15%	29%	18%	21%	22%
Magazine advertisements	17%	13%	16%	13%	22%	20%	19%	20%	28%
Automobile associations	15%	12%	24%	10%	15%	22%	20%	15%	24%
English Media Consumption									
Television	78%	70%	79%	74%	69%	80%	67%	71%	74%
Radio	63%	52%	58%	52%	55%	62%	42%	51%	42%
Magazines	59%	50%	65%	44%	46%	68%	43%	51%	63%
Newspapers	39%	31%	48%	27%	33%	57%	36%	37%	57%
Any English Language Media	86%	80%	87%	79%	76%	87%	72%	78%	77%
Use Of Ontario Travel Resources									
www.Ontariotravel.net	3%	9%	18%	8%	9%	11%	10%	8%	12%
Guide Touristique – L'Ontario en Français	5%	6%	10%	9%	12%	11%	14%	9%	13%

Decima Research

Conclusions and Recommendations

Conclusions and Recommendations

- There is healthy interest in Ontario as a vacation destination in the Quebec market, with 85% who are interested in visiting the province in the next two years. This interest is primarily centred around Ottawa, Toronto and Other Southern Ontario. Much of this interest, however, is not being converted into trips to Ontario. While Ontario appeals to a fairly broad potential market, it is primarily Anglophones with friends and relatives in Ontario who are actually visiting.
- Ontario faces several hurdles in converting Quebec travellers, the most significant of which is lack of awareness. Quebecers don't know what Ontario (particularly the Northern region) has to offer and have a nondescript view of the province. Moreover, its perceptual strengths of safety, cleanliness, scenery, nature and relaxation offer no concrete advantages over Quebec products, which are seen as similar, closer and less expensive. As a result, Ontario does not tend to be top-of-mind as a travel destination.
- Ontario only recently began to target Quebec in its marketing efforts and needs to increase its investment if it wishes to make serious inroads into this market. The province needs to increase awareness of its destinations, attractions and experiences, particularly those that are unique or different from what is already offered in Quebec. It also needs to develop a clear brand image and unique identity in the marketplace – one that positions it differently from Quebec. If Ontario is seen as offering one-of-a-kind experiences, then barriers like distance can be overcome.
- Another major barrier that Ontario faces is the insular nature of the market, with Quebec seen as the panacea for all travel needs, particularly among the Mainstream groups that form a good part of the target market. Equally challenging is the fact that the Affluent segments tend to look beyond Ontario to more unique or exotic destinations in the US, the Caribbean and Europe. Ontario needs to promote exclusive, world-class experiences to encourage Affluent groups to stay closer to home and Mainstream groups to travel beyond their own province.
- A third major obstacle that Ontario faces is resistance towards travelling to Ontario (and Toronto in particular) due to sensitivities around language and culture. This is not a language barrier per se as the vast majority of Quebec travellers (i.e., over 85%) can understand English well enough to watch/listen/read English language media. However, they expect to be served in French on principle. This is true even for Anglophone Quebecers and those whose spoken English is good to excellent.

Conclusions and Recommendations (Cont'd)

- As a result, it is important for Ontario to advertise in French, provide travel information in French and offer French signage and services at key visitor touchpoints, not to address communications issues, but to create a warm and welcoming atmosphere for its Quebec neighbours. The importance of this cannot be under-estimated as a friendly environment ranks as the second most important destination selection factor for this market.
- Both the quantitative and the qualitative research suggest that Franco-Ontarian history/culture experiences are not the primary triggers of visitation to Ontario (particularly S/E Ontario), although they may contribute to a good overall perception of the province. The key is to offer Quebecers the products they seek in a welcoming environment, regardless of whether the experiences are Francophone-related or not. Quebecers will not frequent attractions/events just because they are offered in French – there has to be an inherent interest in the product or experience to begin with.
- To this end, Ontario should focus on marketing town and country, nature and outdoors, family and local history/culture experiences as these are the activities that Quebecers seek on their travels to the province. There is also good potential for festivals, shows and entertainment events as this is a key driver for travel to S/E Ontario. Moreover, entertainment products such as the Lord of the Rings show provide the opportunity for Ontario to distinguish itself with offerings that are not available in Quebec, give travellers a compelling reason to visit and act as a pull factor to overcome other barriers.
- The study points to better potential for Francophone tourism in Northern Ontario. Compared with other regions, visitors to the Northern region are more likely to be Francophone. Moreover, those interested in the region are more likely to be motivated by Francophone history/culture, be interested in Franco-Ontarian entertainment products and feel that the province has a lot to offer Francophone travellers. In addition, good impressions of the region in terms of information, signage and services in French are a key driver of past visitation. Northern Ontario should promote Francophone tourism products to its target segments, while being mindful of the fact that outdoors/nature and town/country experiences still dominate their travel interests.

Conclusions and Recommendations (Cont'd)

- If Ontario wishes to maintain a limited investment in the Quebec market, the best bet is to target Anglophone Quebecers via English media sources. The focus should be Montreal as it is home to over 80% of the Anglophone travellers in Quebec and close to 60% of the Quebecers who visited Ontario in the past year. Outaouais/Abitibi would be a good secondary market to target due to its proximity to Ontario.
- If Ontario wants to seriously pursue the Quebec market and is willing to enhance its level of investment to overcome awareness and cultural barriers, then S/E Ontario should actively target the older segments in the Quebec marketplace – Affluent Mature/Seniors, Mainstream Mature Couples and Mainstream Seniors in particular – as they have an inherent interest and/or good impressions of the region. Affluent Families also offer potential, albeit more modest, for this region.
- Like S/E Ontario, Northern Ontario should target Mainstream Mature Couples and Mainstream Seniors, but also Mainstream Mature Families due to strong interest among this group. Northern Ontario's positioning among these less affluent segments (particularly the Mature groups) should be around affordability/value and a friendly/welcoming atmosphere, as these are by far their most important destination selection criteria. Mature Couples and Seniors can also be targeted with Francophone history/culture and entertainment experiences.
- Northern Ontario should also concentrate its efforts on the Abitibi-Temiscamingue/Outaouais market as there is a greater propensity to visit, but also Montreal as this large market accounts for close to half of the region's Quebec visitors.