

Travel Intentions Study

Wave 15

Survey Conducted: March, 2011



May, 2011



ONTARIO
Yours to discover

OTMPC



MINISTRY OF TOURISM AND CULTURE

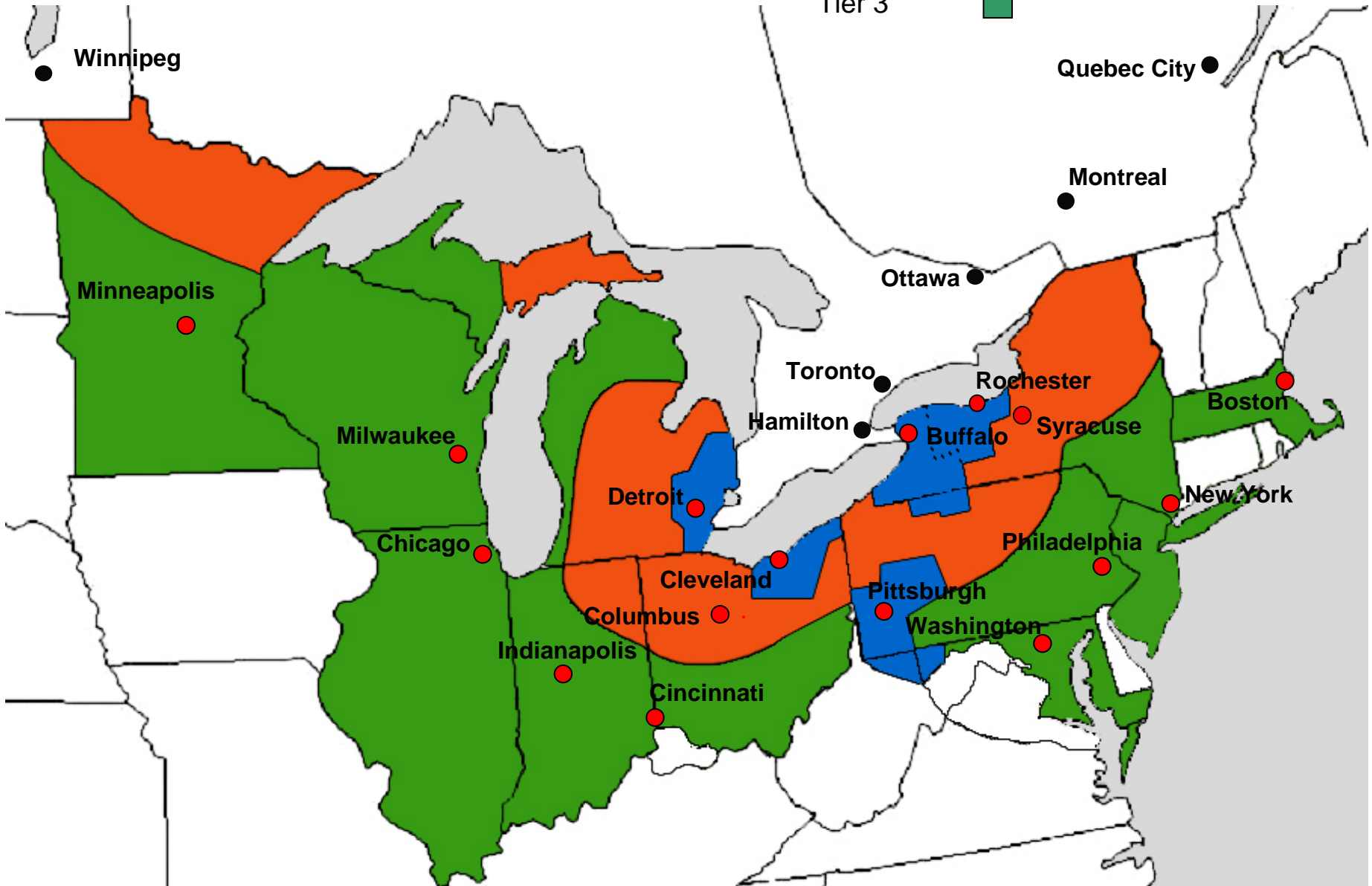


Background

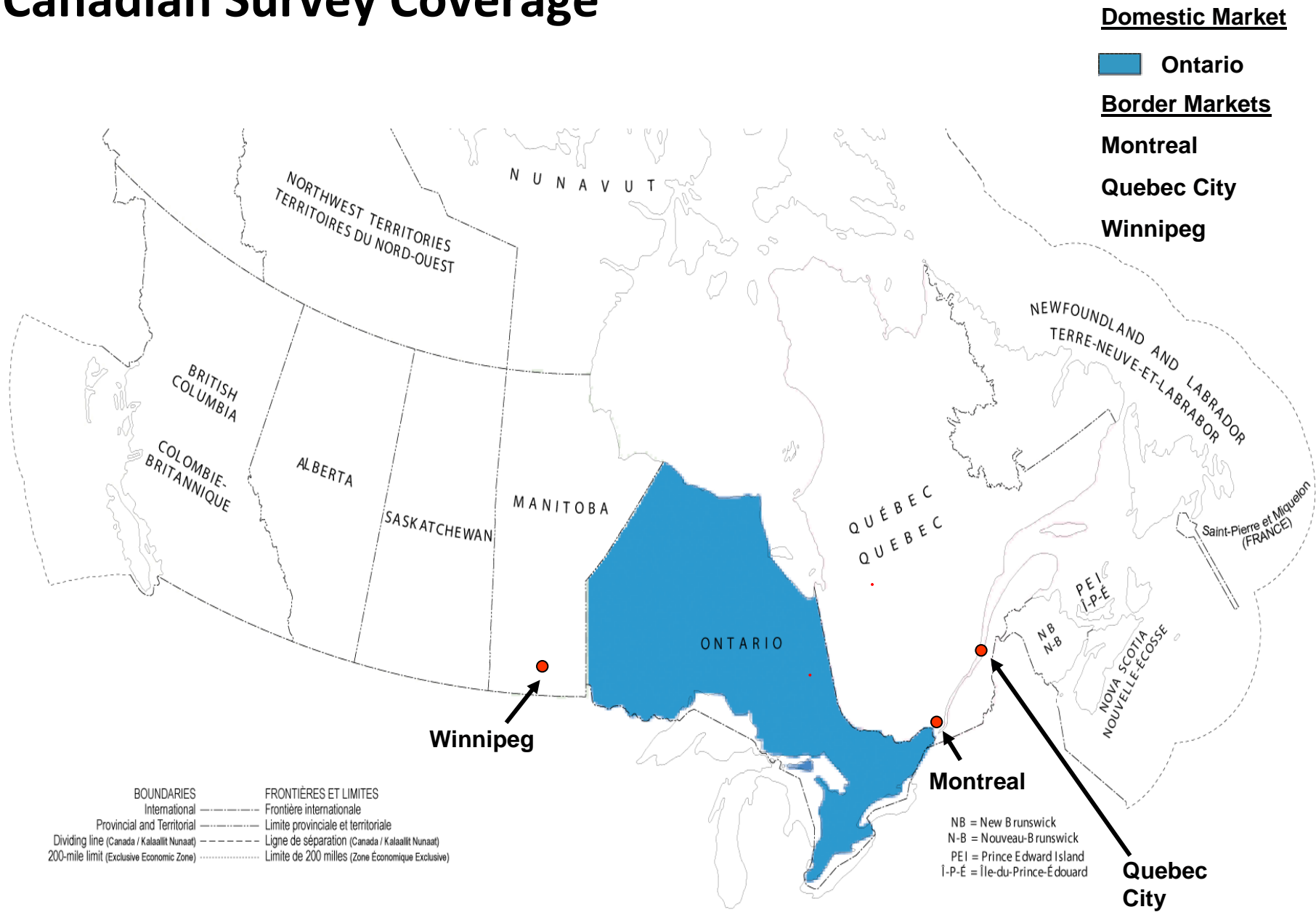
- This wave of Travel Intentions tracking draws comparisons with previous February waves.
- This gives us a sense of trending with seasonality effects removed.
- Research in March 2011 was conducted online with sample drawn from our Canadian and US Online Access Panels.
 - 2,128 in Canada (Ontario, Montreal, Quebec City and Winnipeg)
 - 5,373 in the US (Near and Mid)
- An online approach has been used since February 2008.
- 2007 and earlier studies were conducted exclusively by telephone.
 - Data collection methodology effects have been controlled for where appropriate.

US Survey Coverage

- Tier 1 DMAs ■
- Tier 2 ■
- Tier 3 ■



Canadian Survey Coverage



Methodology

- The following table details completions assigned and achieved by specific market.

Canada:		
	Assigned	Achieved
Montreal CMA	300	300
Quebec City CMA	200	200
Toronto	400	401
Ottawa CMA	300	302
Ontario 500M+ ex- Toronto/Ottawa	200	203
Ontario 100-499.9M	200	200
Ontario 30-99.9M	100	101
Ontario 10-29.9M	60	60
Ontario < 10M	60	60
Manitoba	300	301
Total:	2,120	2,128

Methodology (cont'd)

US:		
	Assigned	Achieved
Rochester NY	300	306
Buffalo NY	300	301
Syracuse NY	200	200
New York City NY	300	307
Nassau Suffix NY	60	60
Other NY	90	92
Chicago IL	300	303
Other IL	90	91
Indianapolis IN	100	100
Other Indianapolis	100	102
Boston NECMA	300	302
MASS ex Boston NECMA	60	61
Detroit MI	300	300
North MI MSA's	80	81
MI Bal	60	60
Minneapolis/St Paul MN	300	305
Other MN	50	50

Continued on the next page



Methodology (cont'd)

Continued from the previous page

US:		
	Assigned	Achieved
Cleveland/Lorain/Elyria OH	300	304
Cincinnati OH	100	102
Columbus OH	100	100
Other OH	120	121
Pittsburgh PA	300	302
Philadelphia PA	300	302
Other PA	120	120
Milwaukee/Waukesha WI	300	306
Other WI	90	93
Washington DC	200	201
MD ex Washington	100	101
Other New Jersey	300	300
Total:	5,320	5,373

Report Outline

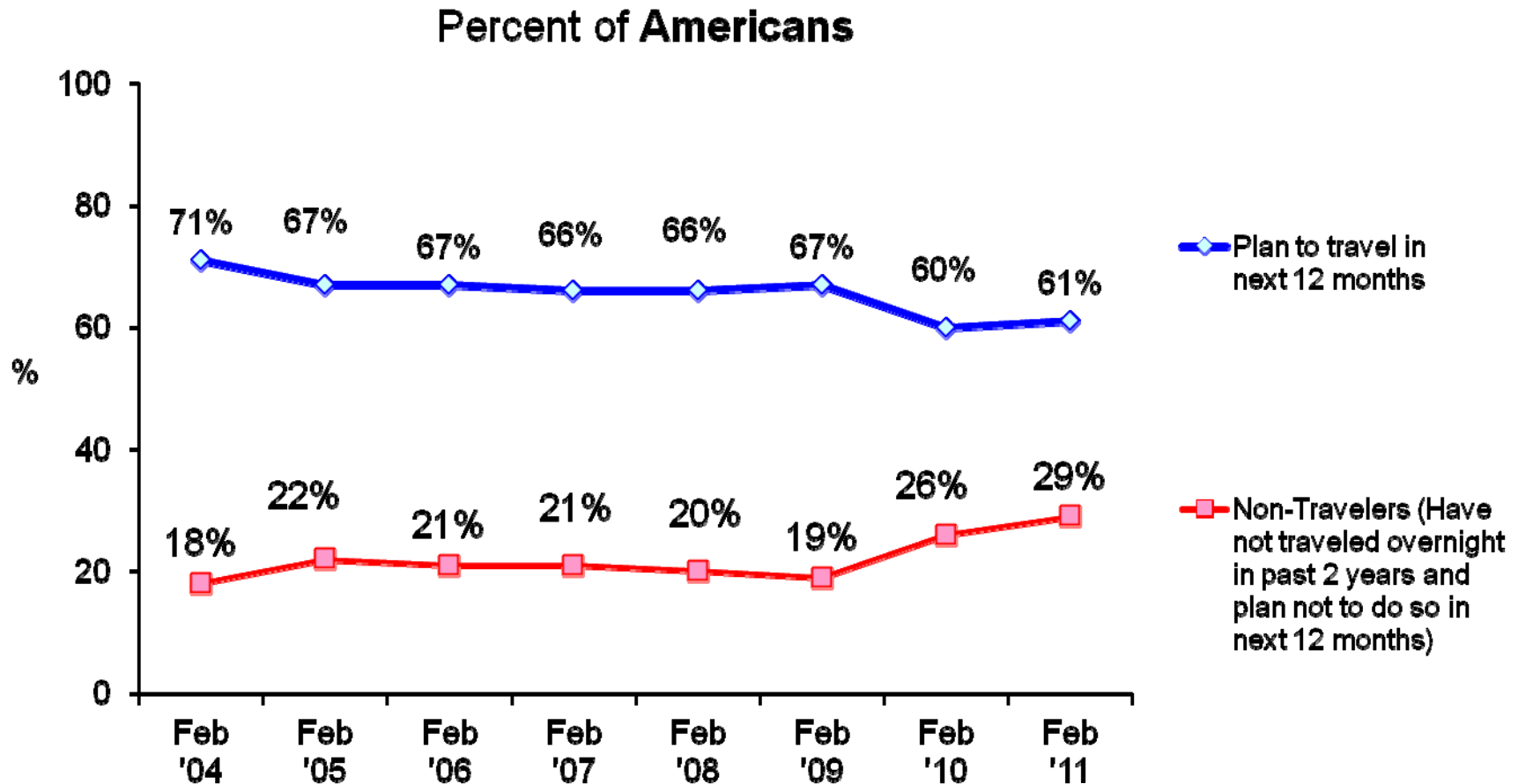
- This report is structured along the following themes.
 - Propensity to Travel and Trip Planning
 - Travel Intention Details
 - Next Trip to Ontario
 - Perceptions of Ontario
 - Toronto Details
 - Niagara Falls Details
 - Northern Ontario Details
 - Summary and Implications
- Comparisons are made primarily with previous waves of February tracking (seasonally aligned long term trends).
- Note that, while a self-selection panel-based survey was initiated, all statistical tests have been performed on the assumption that probability sampling techniques were employed.
 - All statistical significance testing was conducted using a 95% confidence interval, unless otherwise noted.

Propensity To Travel & Trip Planning

Summary

- **There are generally fewer American travelers compared to previous years**, but economic factors appear to be easing slightly. Though there may be more calm (or resignation) surrounding cost/budget concerns, they are still the main constraint on travel intentions.
- US discount vacations are noted as being less prominent now vs. two years ago. While the economy may be strengthening to some degree, the toll of the recession may in fact have caused many previously 'discount, price-conscious' travelers to now fall out of the traveler category, as they have abandoned the idea of travel.
- Basically, we have seen a decline in commitment to travel in the US. Behaviourally and attitudinally, more Americans have stepped out of the travel market, at least for now. This does, however, leave the majority of Americans in the market and engaged enough with travel to stimulate volume growth for specific destinations.
- As with Americans, the general perception among Canadians is that their travel activity has waned during the recent past. While this may be indicative of a mindset shaped by the passage through difficult economic times, it is not borne out in either intentions or behaviour.
- Domestic demand appears to be more robust than that in the US. Future travel intentions are strong. While certainly not leaving the market, Canadians are, perhaps, driven more by discounts than they were in the past. This may be the outcome of a number of factors, including the wide availability of discounts and deals (particularly for travel to the US) and ongoing conservatism related to personal finances. Canadians are also using the internet more often for trip planning and booking, and good 'deals' may come in conjunction with online trip planning.

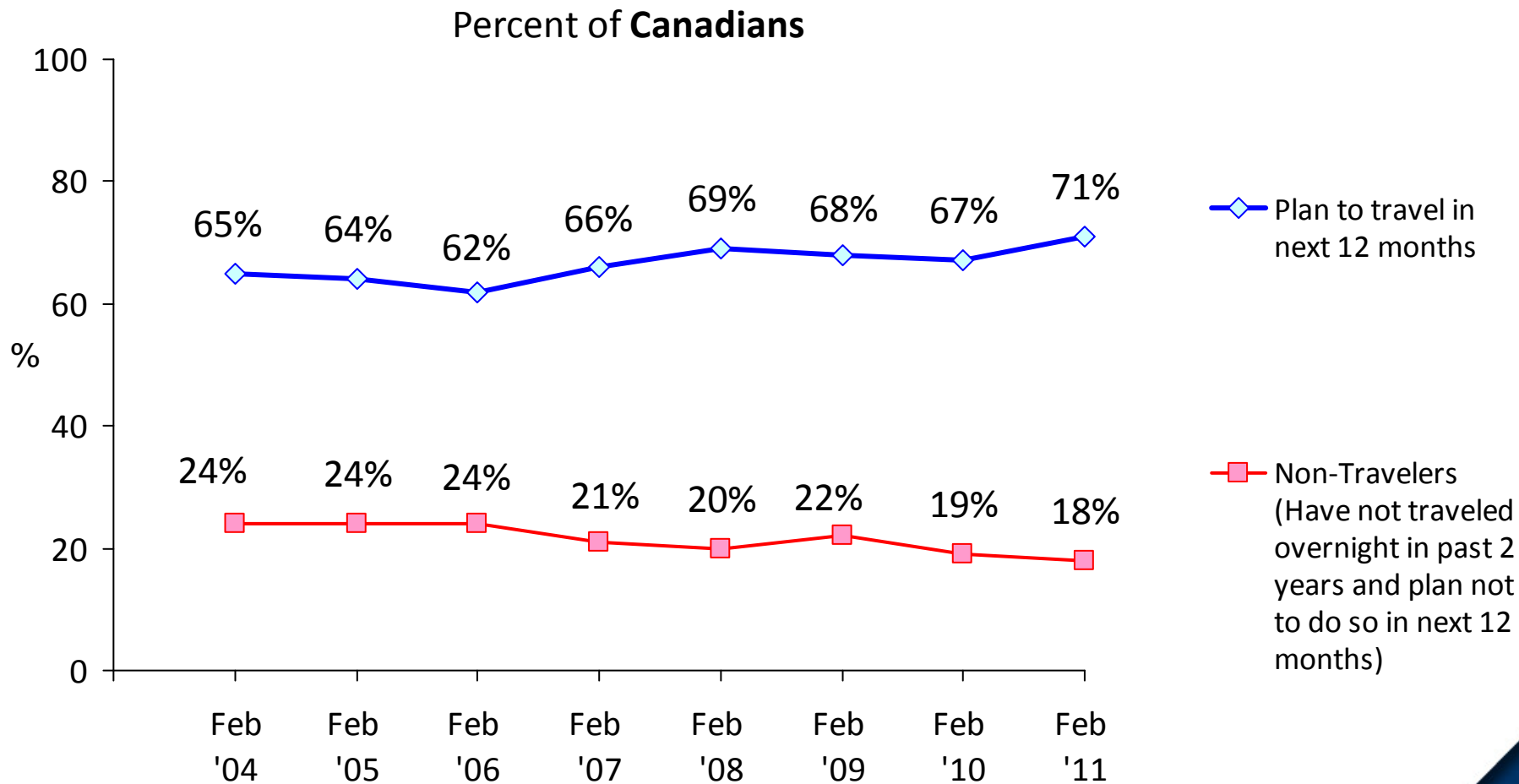
Trend in General Travel Intentions and Propensity to Travel



Q1. Have you taken an out-of-town trip of one or more nights within the past two years, for any purpose, including trips for business, pleasure or vacation, visiting friends or relatives or other personal reasons?

Q2A. Are you considering taking an out-of-town trip of one or more nights away from home within the next 12 months, that is between now and next February 2011?

Trend in General Travel Intentions and Propensity to Travel



Q1. Have you taken an out-of-town trip of one or more nights within the past two years, for any purpose, including trips for business, pleasure or vacation, visiting friends or relatives or other personal reasons?

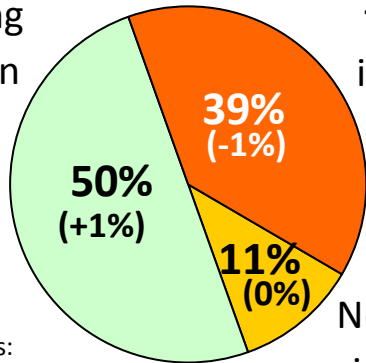
Q2A. Are you considering taking an out-of-town trip of one or more nights away from home within the next 12 months, that is between now and next February 2011?

Rationale for Not Traveling in the Next 12 Months

Total American Adults

In this coming season

Do not plan to travel in next 12 months



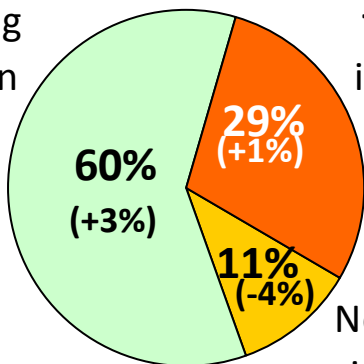
In brackets: difference vs. Feb '10.

Not this coming season

Total Canadian Adults

In this coming season

Do not plan to travel in next 12 months



Not this coming season

Why not?* ...

	Americans		Canadians	
	Feb '11	△ vs. Feb '10	Feb '11	△ vs. Feb '10
Financial Reasons	45	-9	43	-6
Gen. fin. reasons	28	-6	31	+5
Too expensive	12	-3	9	-13
Economy/recession	3	-1	*	n/a
Unemployed	3	-1	2	-4
Personal Reasons	15	-4	16	0
Too busy	6	-3	8	+1
Health reasons	5	0	5	0
Lack of Interest	13	-3	12	0
No plans yet	4	-2	3	-3

*Based on response to open-ended question.

Statistically significant increase at 95% vs. Feb. '10

Statistically significant decrease at 95% vs. Feb. '10

Q2A. Are you considering taking an out-of-town trip of one or more nights away from home within the next 12 months, that is between now and next February 2011?

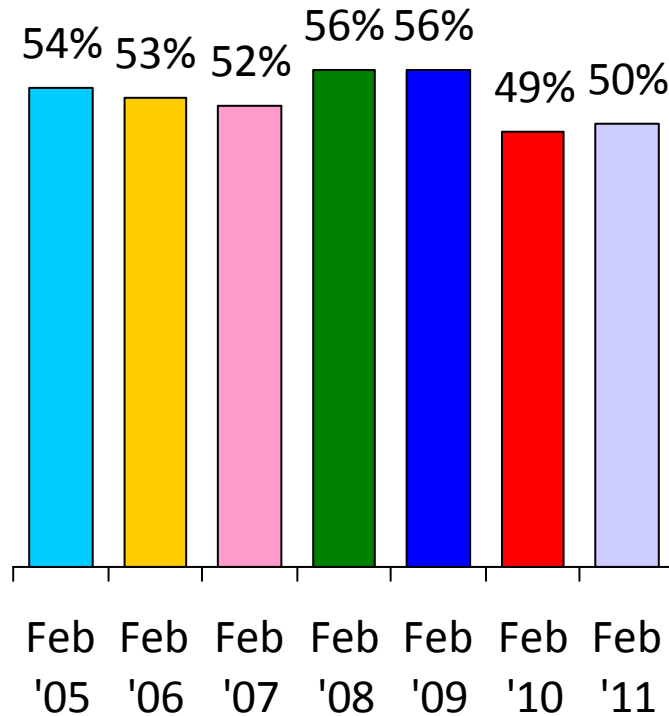
Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

Q4. Why are you not considering taking any overnight trips for any purpose within the next 12 months?

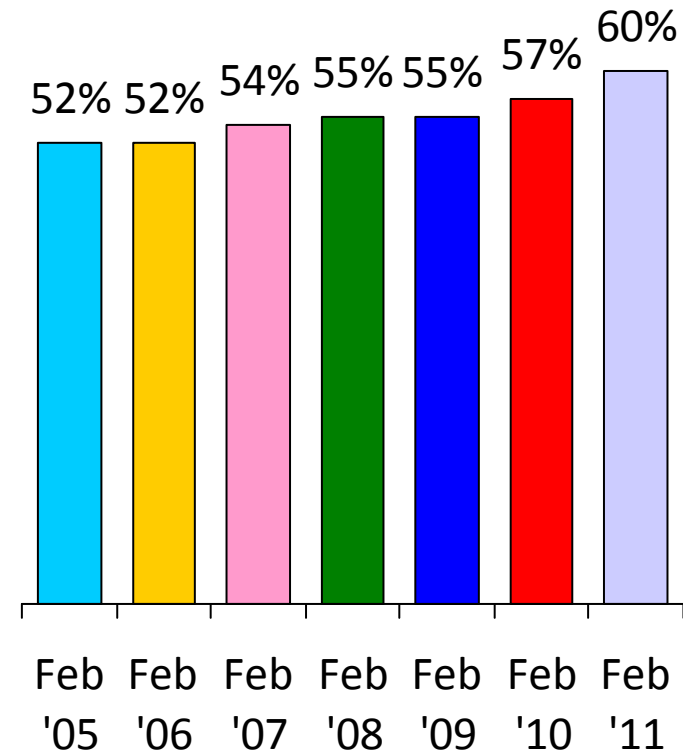
Intent to Take Overnight Trip in March/May to Any Destination

Percent of American and Canadian Adults

Americans



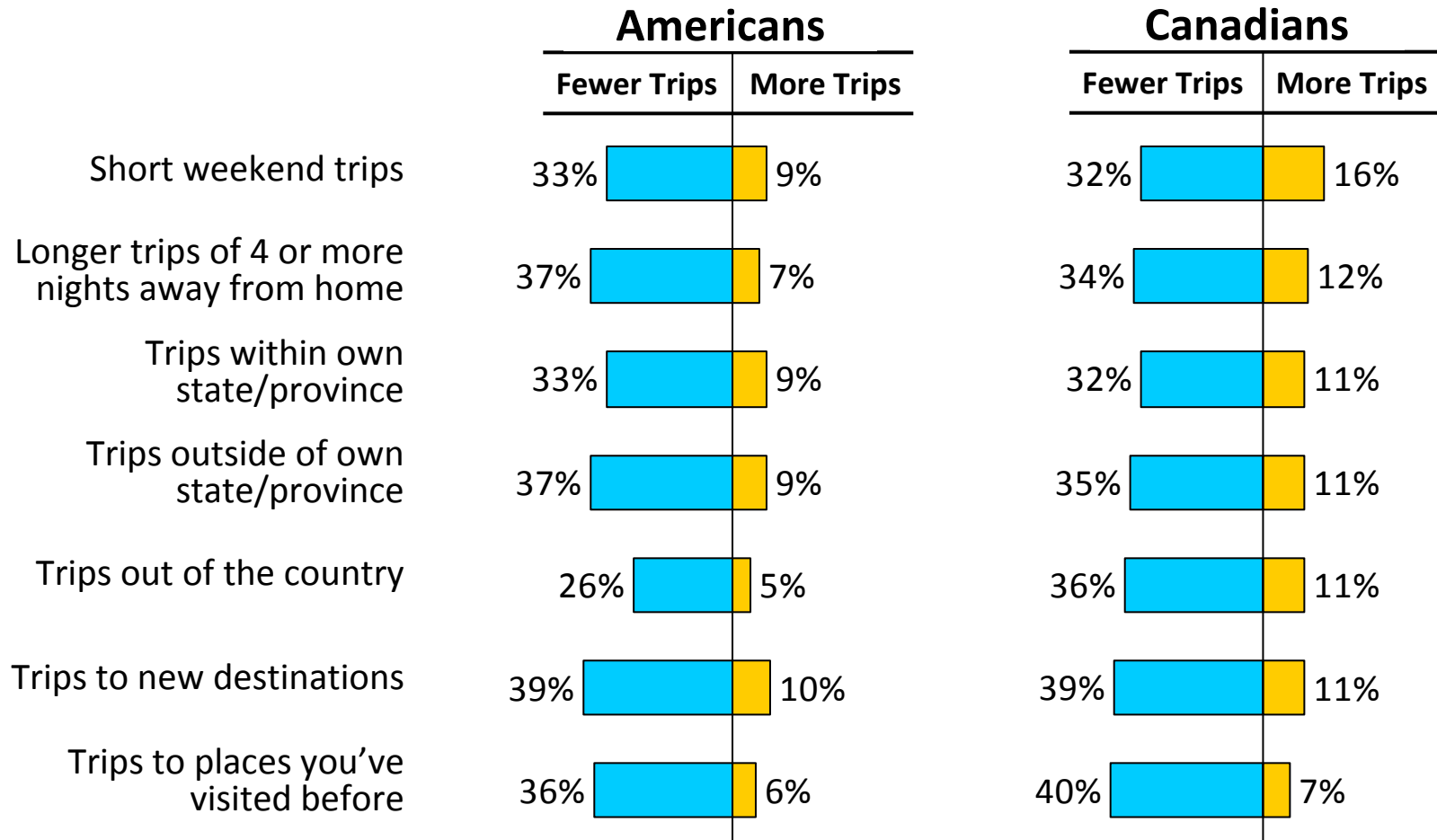
Canadians



Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

Change in Travel Activities Compared with One Year Ago

Percent of American and Canadian Adults

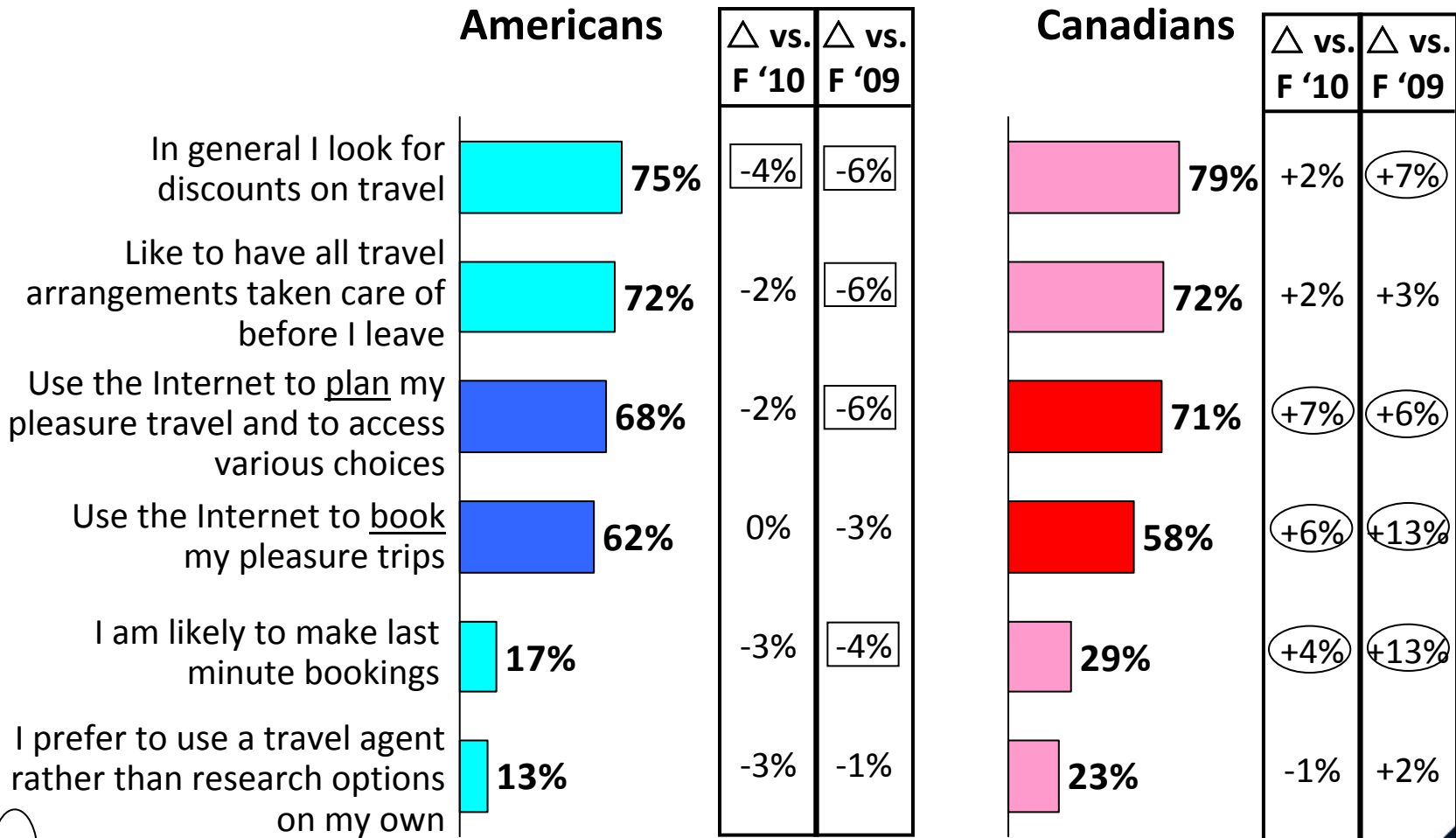


Q26. And, for each specific type of trips, we would like to know if you are taking more trips or fewer trips now than you were one year ago. Just thinking about (INSERT MT), are you taking more trips or fewer trips than you were a year ago?



Various Aspects Considered in Planning Process for Pleasure Travel

Percent of travelers (Feb '11)



Statistically significant increase vs. previous wave at 95%

Statistically significant decrease vs. previous wave at 95%

Q24. Next we have a few questions about travel in general. Which of the following statements would you say apply to you?



Travel Intention Details

Summary

Spring and Summer Intentions among Americans

- Although fewer Americans can be defined as travelers than was the case a number of years ago, Spring travel intentions have held fairly steady when attention is focused on specific destinations. This means that the Spring has retained its popularity as a travel season. Indeed, among those who continue to travel, there may be some openness to considering a wider range of potential destinations for Spring travel than was once the case. It should be noted though, that interest in one's own state has seen the most positive shift, in keeping with the US consumer's attentiveness to cost in the current environment.
- **Interest in Ontario and other Canadian destinations has remained relatively constant** among US travelers since 2006 in the context of Spring travel. There is evidence of a recent shift, though, when these results are broken down across specific source markets.
 - The very Near Markets (Buffalo, Rochester and Detroit) have held steady, while there is directional evidence of slight slippage in other parts of New York State.
 - There is some indication that the western region of the Mid-Market tier has been particularly receptive to Ontario as a potential destination. Significant growth in intentions is evident in centers such as Milwaukee, with signs of recovery in Chicago.
- Signs of buoyancy specific to Ontario (and Canada more generally) are evident when attention is turned to the number of trips being considered. Those Americans who are considering travelling to Ontario during the Spring of 2011 are more inclined to be thinking in terms of multiple trips than was the case one year ago.

Summary (cont'd)

- And, it is important to realize that, while it is clearly more difficult to convert the interest of Americans into action, the pool of potential volume (albeit, much of it currently latent) is quite substantive. Major US markets such as New York, Chicago, Detroit, Philadelphia, Boston and Washington house at least as many travelers expressing an interest in a Spring trip to Ontario as do many of the major domestic source markets. Moreover, when they do make their way to Ontario, overnight visitors from the US tend to stay longer and spend more than do their Canadian counterparts.
- When extending intentions further into the Summer months, the Spring patterns evident in the US tend to persist. To the extent that projections can be made this far into the future, these results support an optimistic perspective in the sense that there is no reason to anticipate volume erosion and some possibility for improvement.
- It should be kept in mind, though, that Summer intentions among Americans could be significantly affected by cost issues associated with exchange rates and gasoline prices as consumers enter the planning cycle for their major trip during the peak season travel.

Summary (cont'd)

Spring and Summer Intentions among Canadians

- Ontario's draw remains very strong in the domestic market.
 - Moreover, the province continues to be considered broadly, with destinations beyond Niagara Falls and Toronto attracting considerable attention.
 - Recent growth in interest is evident, particularly among residents of Ontario's major urban centers. In addition, there are indications of increased momentum in Quebec.
 - Frequency rates are reasonably strong for destinations across the province, despite the fact that Toronto has come somewhat off of its peak frequency posted last year.
- When attention is turned to Summer intentions, interest levels in specific source markets either match or, in the case of the Toronto, Ottawa and (directionally) Quebec City, exceed those recorded one year ago. As a consequence, one might conclude that domestic support of the industry delivered in 2010 will continue unabated during the 2011 Summer season
- These results are certainly positive, but some attention should be paid to **evidence of growing consideration of the US among domestic travelers**. While this has not yet dampened enthusiasm for Ontario, it offers the prospect of doing so in the near-to-mid term.

Summary (cont'd)

- The reasons for stronger interest in the US can not be gleaned directly from this research, but one can conjecture on the following points with some confidence.
 - Currency exchange rates favour the stimulation of interest in US destinations.
 - There is pent up demand for exploration of destinations beyond Ontario within the domestic market.
 - Continued softness of the US economy has given impetus to the development and aggressive promotion of attractive “value” deals and packages among tourism operators in the US.

Intended Travel Patterns Of US Residents

— Spring Season

Percent Of Total US Adults Stating Intend To Travel To ... March-May

	Feb '06 %	Feb '10 %	Feb '11 %
Destinations:			
Within Own State	23	28	28
Elsewhere In US	41	38	39
Ontario	6	5	7
Toronto	3	3	4
Niagara Falls	3	3	5
Elsewhere in Ontario	3	2	3
Other Canada	3	2	4
Mexico/Caribbean	7	6	7
Other Country	8	5	6

Statistically significant increase at 95% vs. Feb '06

Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

Ontario Travel Intention Incidence

By Specific US Market

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

		March/May			June/August		
		Feb '09	Feb '10	Feb '11	Feb '09	Feb '10	Feb '11
Buffalo	%	20	22	23	15	18	18
Rochester	%	16	19	21	12	13	17
Syracuse	%	15	16	11	10	12	9
New York City	%	12	10	8	10	11	8
Pittsburgh	%	5	5	6	6	4	5
Detroit	%	8	10	13	7	7	6
Cleveland	%	10	8	9	10	8	8
Boston	%	9	8	10	7	6	7
Washington DC	%	6	6	7	4	4	6
Cincinnati	%	4	3	4	-	2	3
Milwaukee	%	2	3	11	3	2	5
Indianapolis	%	3	2	0	1	2	3
Chicago	%	10	3	6	9	4	5
Philadelphia	%	7	5	8	6	4	7
Minneapolis	%	4	4	3	5	4	2
Total US	%	7	5	7	5	5	6

Statistically significant increase at 95% vs. previous waves

Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

Intended Travel Patterns Of Canadian Residents

— Spring Season

Percent Of Total Canadian Adults
Stating Intend To Travel To ...
March-May

	Feb '06 %	Feb '10 %	Feb '11 %
Destinations:			
Ontario	25	39	42
Toronto	10	14	14
Niagara Falls	6	17	19
Elsewhere in Ont.	18	28	31
Other Canada	15	13	18
United States	21	21	28
Mexico/Caribbean	10	10	10
Other Country	10	10	10



Statistically significant increase at 95% vs. Feb '06

Statistically significant decrease at 95% vs. Feb '06

Statistically significant decrease at 95% vs. Feb '10

Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

Ontario Travel Intention Incidence

By Specific Canadian Market

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

		March/May			June/August		
		Feb '09	Feb '10	Feb '11	Feb '09	Feb '10	Feb '11
		Quebec City	%	8	9	12	10
Montreal	%	13	17	22	15	20	21
Ottawa	%	44	38	47	38	41	46
Toronto	%	42	45	53	40	42	50
Other Ontario	%	46	50	53	46	46	48
Winnipeg	%	16	15	17	20	16	16
Total Canada	%	36	39	42	35	37	40

○ Statistically significant increase at 95% vs. previous waves

Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?



Average Number of Planned Trips This Spring (March – May)

Among visitors to each destination

Americans					Canadians						
		Feb '09	Feb '10	Feb '11	Change Feb '10 to Feb '11			Feb '09	Feb '10	Feb '11	Change Feb '10 to Feb '11
Within Own State	#	2.4	2.3	2.4	+0.1	Ontario: Toronto	#	2.0	2.8	1.9	-0.9
Other States	#	1.8	1.7	1.9	+0.2	NF	#	1.3	1.5	1.6	+0.1
Ontario: Toronto	#	1.9	1.5	1.9	+0.4	Other ON	#	1.9	1.8	2.2	+0.4
NF	#	1.3	1.7	1.8	+0.1	Other Canada	#	1.5	1.8	1.6	-0.2
Other ON	#	1.4	1.7	2.1	+0.4	United States	#	1.7	1.8	1.6	-0.2
Other Canada	#	1.4	1.5	2.0	+0.5	Mexico / Caribbean	#	1.3	1.7	1.6	-0.1
Mexico / Caribbean	#	1.3	1.7	1.6	-0.1	Overseas	#	1.2	1.5	1.4	-0.1
Overseas	#	1.4	1.5	1.6	+0.1						

-0.9 Statistically significant decrease at 95% vs. Feb. '10

* Average rating on 10-point scale.

Q3D. Thinking about the pleasure travel that you are considering, how many separate trips of one or more nights are you considering taking to the destinations you indicated, for pleasure during the coming months of March, April, or May?

Latent Interest In Ontario Travel Among Americans (Feb '11)

Percent of American Adults

Plan to take overnight trip to Ontario in next 6 months

9%

Not in next 6 months

65%

Non-travelers

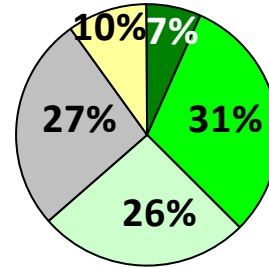
26%



Interest in visiting in next 2 years

Change In Interest vs. Feb. '10

Toronto



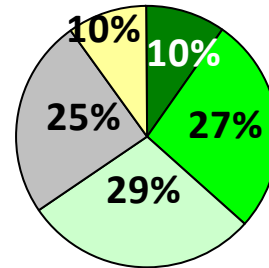
Very

Not At All

-1%

+4%

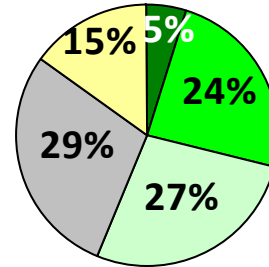
Niagara Falls



-2%

+3%

Other Ontario



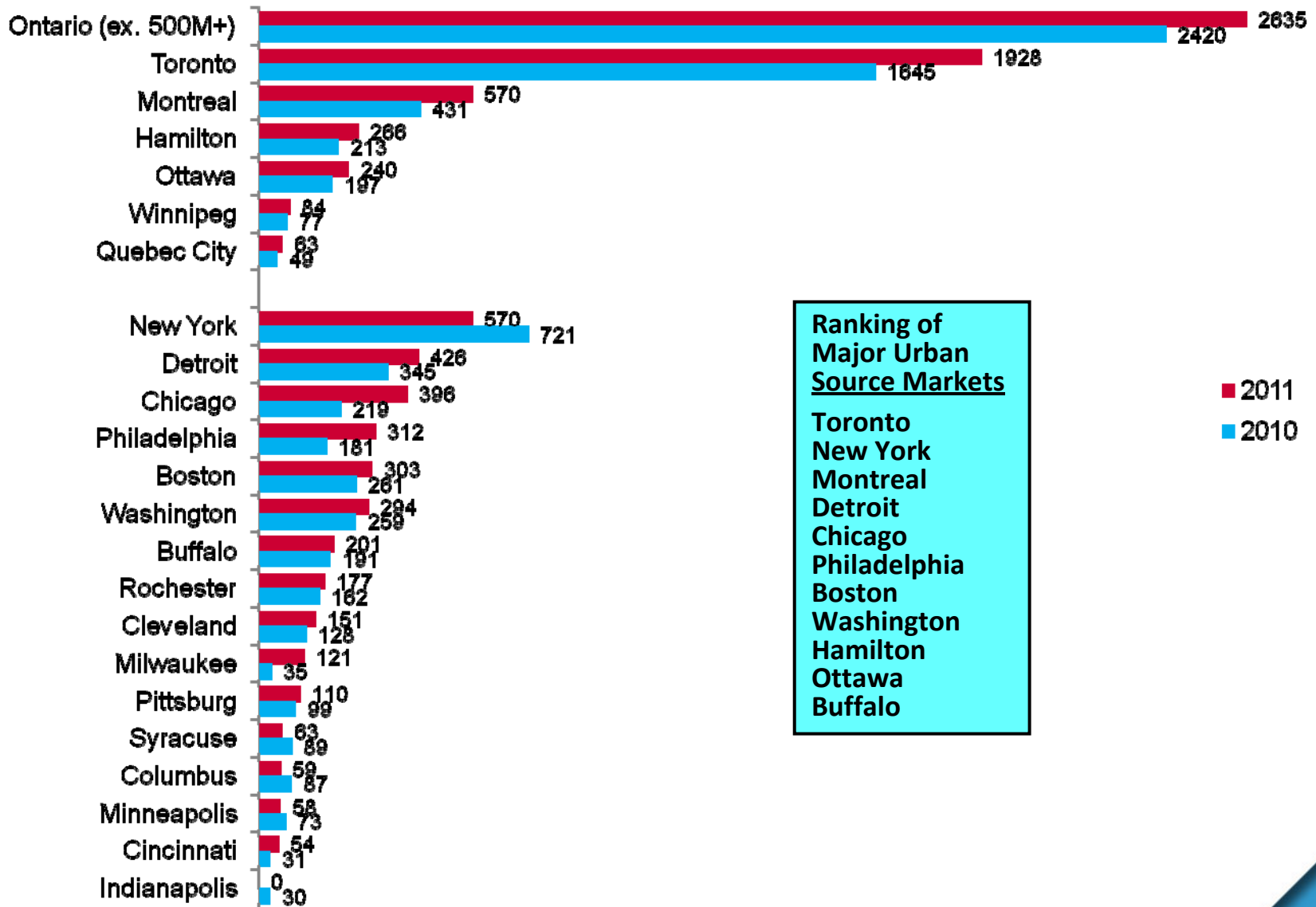
-2%

+2%

Q18B. How much interest do you have in visiting (Toronto/ Toronto, Ontario) within the next two years or so?
 Q19A. How much interest do you have in visiting the city of Niagara Falls, Ontario within the next two years or so?
 Q20A. How much interest do you have in visiting the city of Niagara Falls, Ontario within the next two years or so?

Potential Volumetric Impact of Stated Spring Intentions

Projected number of adults in each source market intending to visit Ontario in the Spring (in '000s)



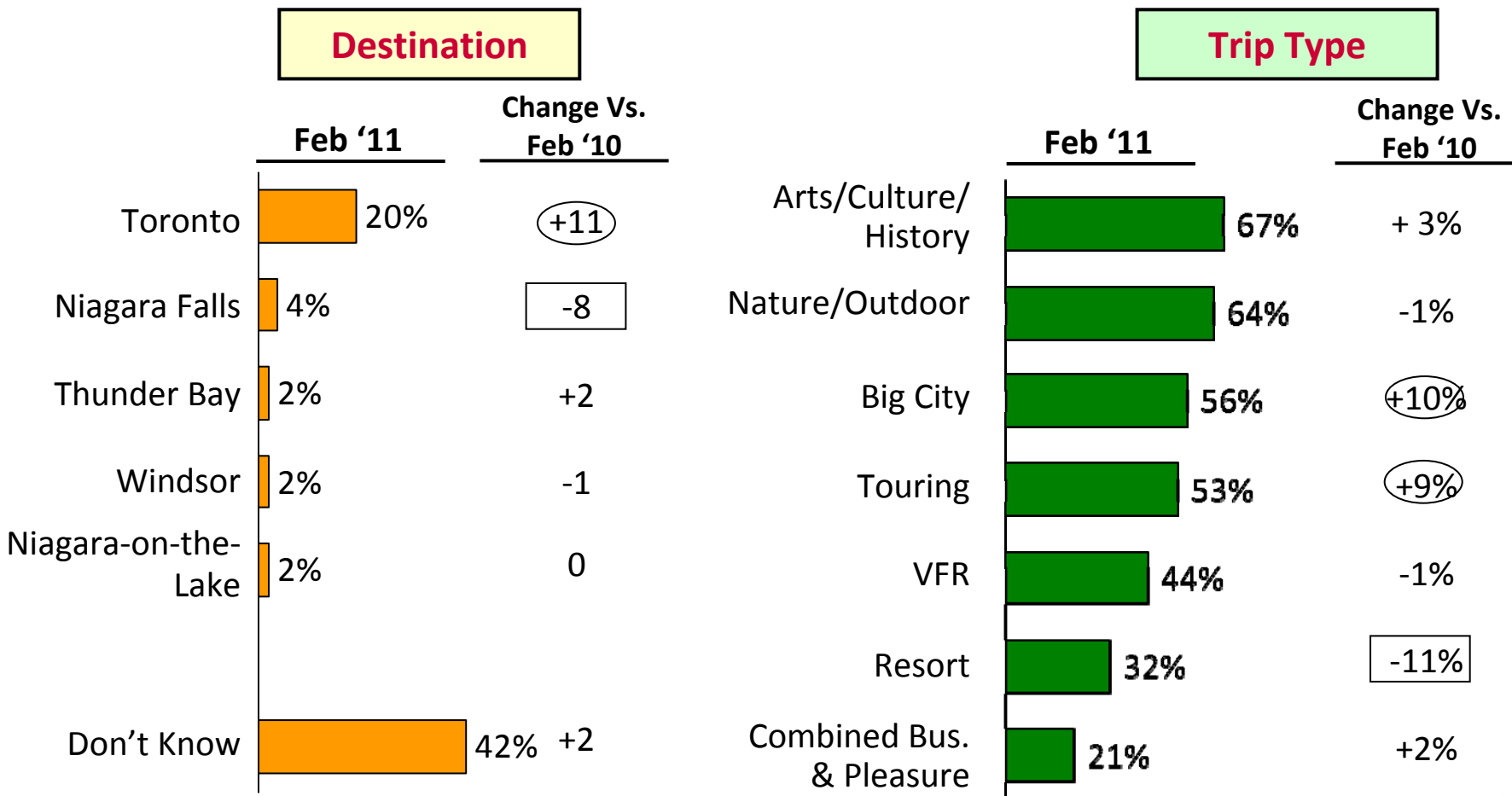
Next Trip To Ontario

Summary

- Toronto's popularity as near-term trip destination has increased among Americans since the last wave of tracking. Big city and touring trips are becoming a bigger draw, which may contribute to the rise in Toronto visit intentions. However, arts/culture/history and nature/outdoors continue to be the main attractions for Americans.
- Toronto's value as a tourism destination for Americans is accentuated by the fact that, as a tourism region, it tends to draw disproportionately larger number of Americans from the affluent segments, as does Niagara and the Wine Region (RTO 2)
- VFR has a major impact with respect to generating trips to Ontario within the domestic market. This has, perhaps, been accentuated to some degree during the recent past in the context of Spring travel, since other significant travel types of travel rationale (namely, Nature and Urban) seem to have lost some of their luster.
- Domestically, the power of VFR, in combination with greater knowledge of the offering, tends to draw attention to many different destinations within the province. As a consequence, among domestic travelers, iconic locations such as Toronto and Niagara, do not dominate as potential travel destinations as they do in the US. The interests of Canadians are spread fairly broadly across the RTOs.

Destinations Plan to Visit in Ontario on Next Pleasure Trip & Trip Type

Percent of Americans intending to visit Ontario on pleasure trip this spring (March-May)



Note: Only destination with at least 2% response in Feb '11 shown.

○ Significant increase at 95% versus Feb '10
 □ Significant decrease at 95% versus Feb '10.

Q6B. Where are you most likely to go on this next pleasure trip (to/within) Ontario?

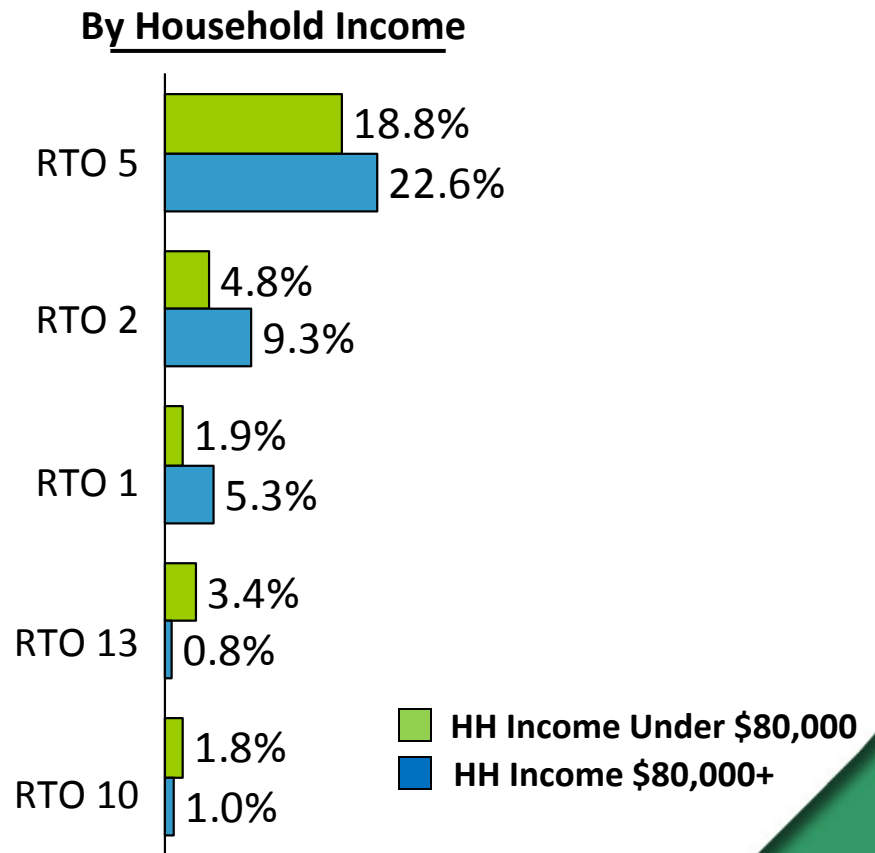
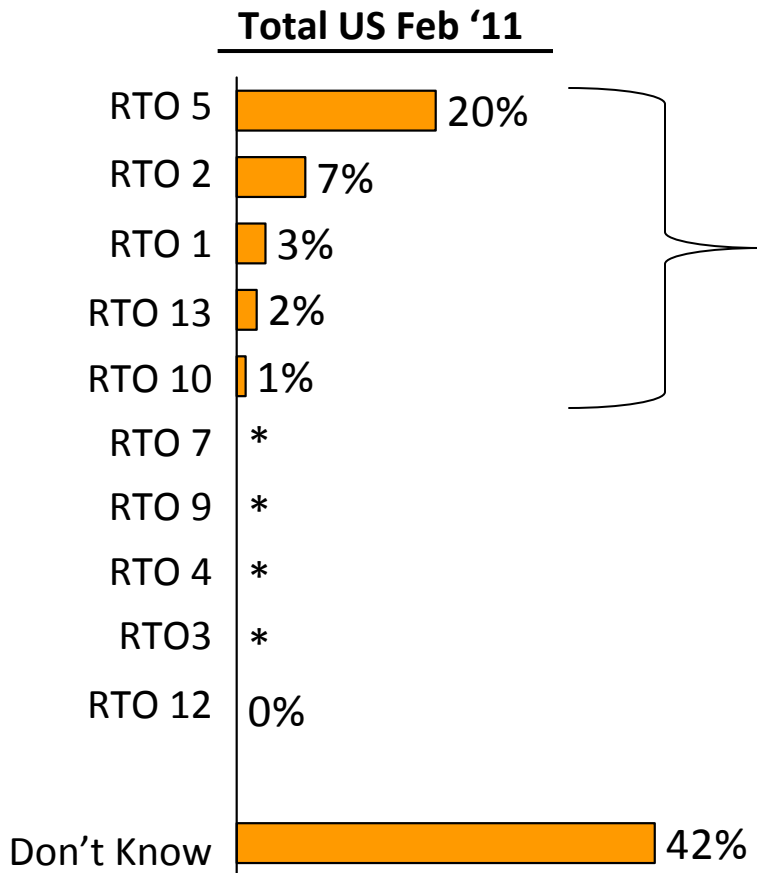
Q7A. People can take pleasure trips for many different reasons. Which of the following statements would you use to describe this next pleasure trip that you will be taking (to/within) Ontario?



Destinations Plan to Visit in Ontario on Next Pleasure Trip

Percent of **Americans** intending to visit Ontario on pleasure trip this spring (March-May)

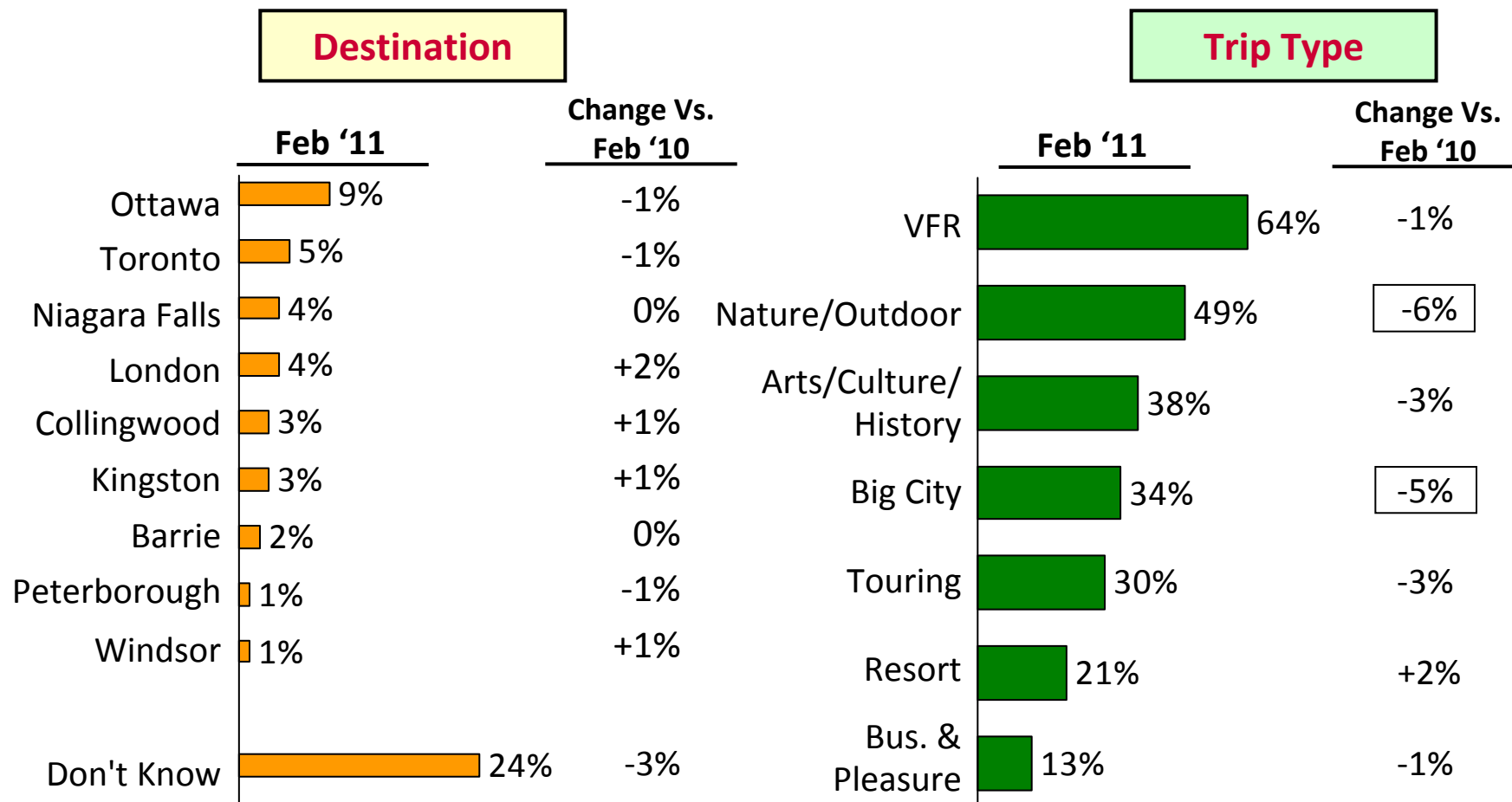
By RTO classification



Q6B. Where are you most likely to go on this next pleasure trip (to/within) Ontario?

Destinations Plan to Visit in Ontario on Next Pleasure Trip & Trip Type

Percent of **Canadians** intending to visit Ontario on pleasure trip this spring (March-May)



□ Statistically significant decrease at 95% vs. Feb. '10

Note: Only destination with at least 2% response in Feb '11 shown.

Q6B. Where are you most likely to go on this next pleasure trip (to/within) Ontario?

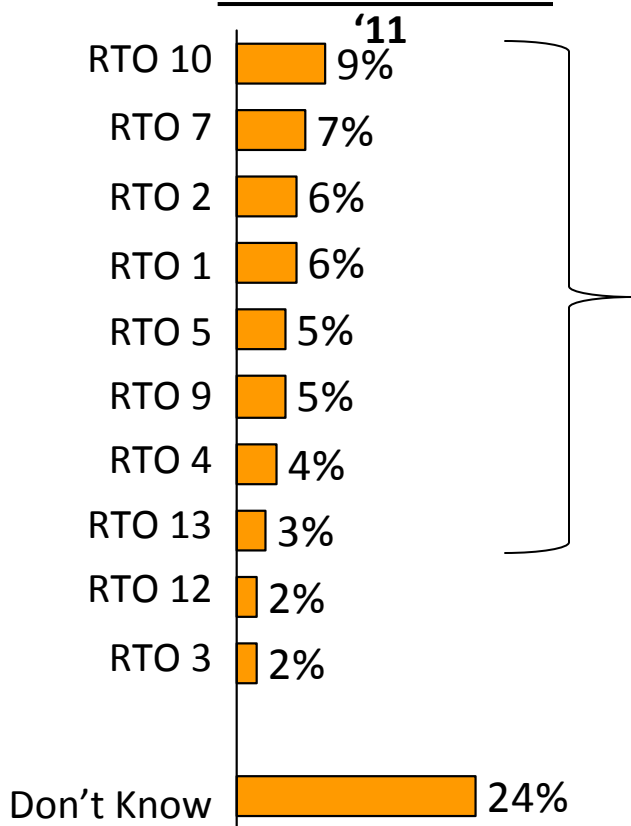
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Destinations Plan to Visit in Ontario on Next Pleasure Trip

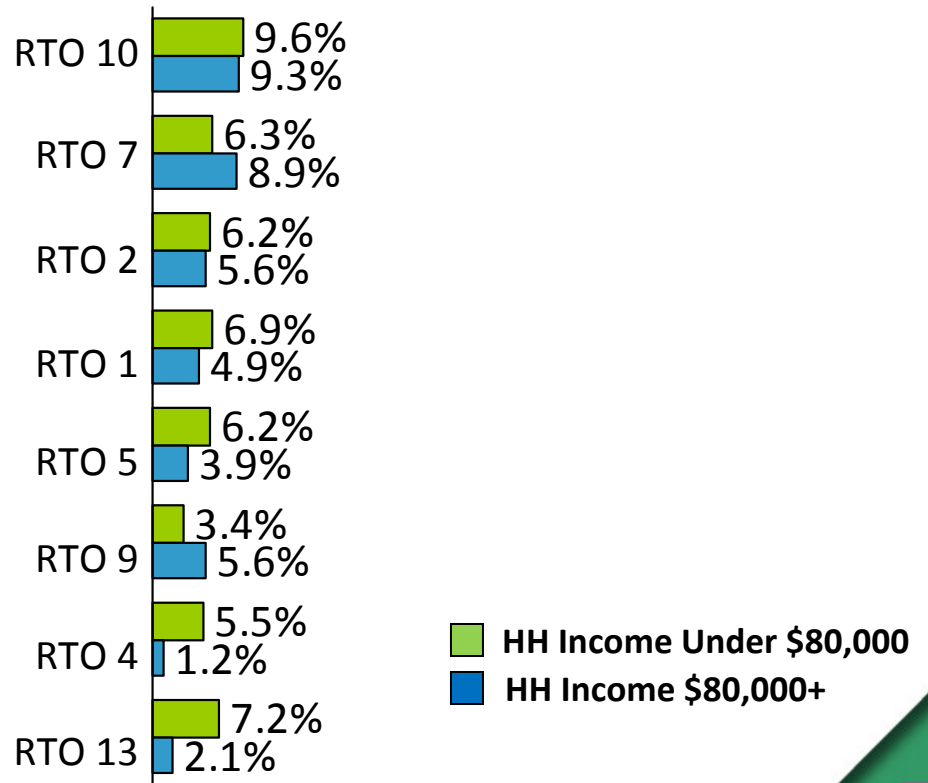
Percent of **Canadians** intending to visit Ontario on pleasure trip this spring (March-May)

By RTO classification

Total Canadian Feb '11



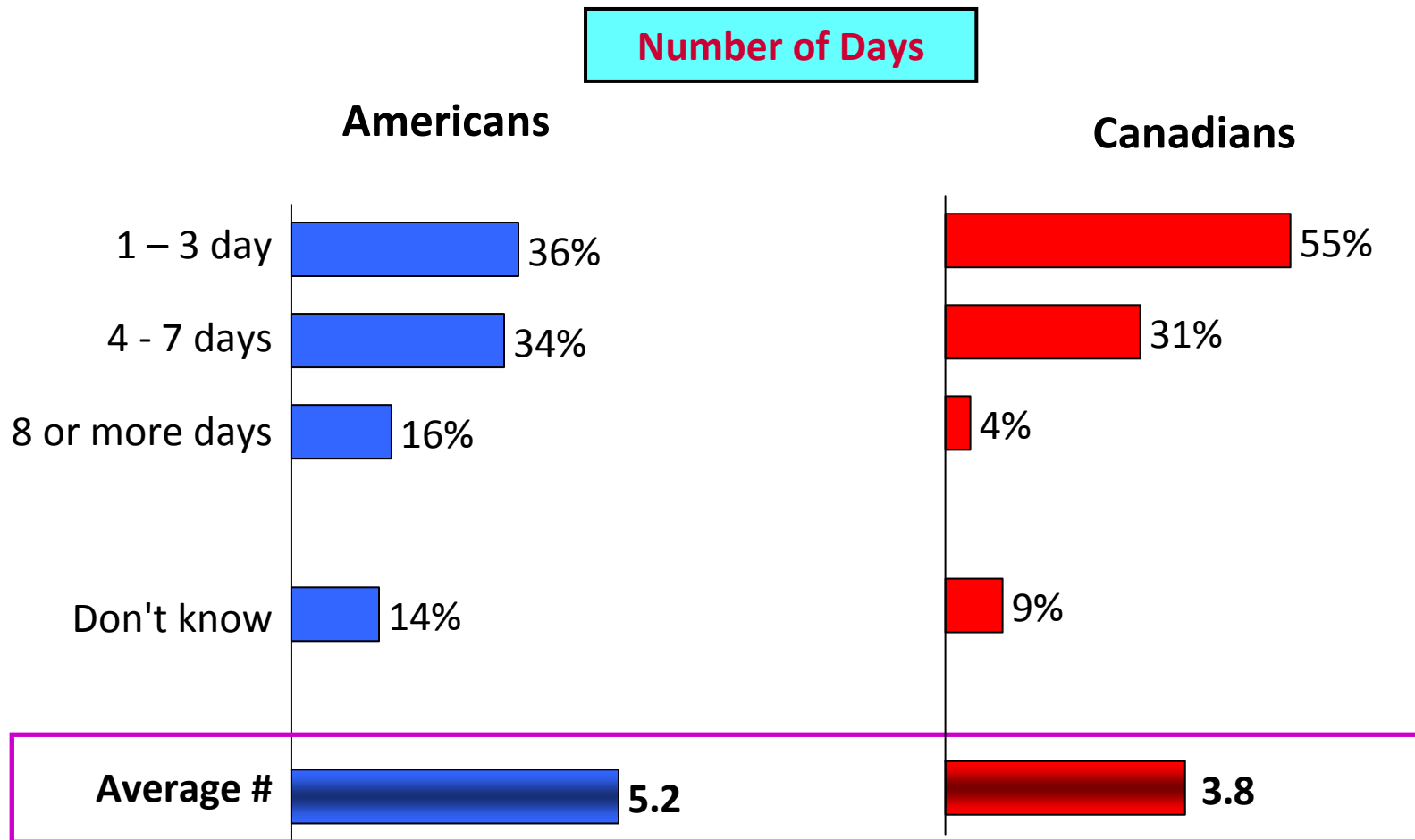
By Household Income



Q6B. Where are you most likely to go on this next pleasure trip (to/within) Ontario?

Length of Next Pleasure Trip to Ontario

Percent intending to visit Ontario on pleasure trip this spring (March-May)



Q6A. How many days do you expect this pleasure trip of one or more nights (to/within) Ontario to take?

Perceptions Of Ontario

Summary

Perceptions

- Overall, **perceptions of Ontario among Canadian residents have remained constant** since the previous wave of tracking. Positive shifts in perception have been noticed since 2006 however, as Canadians view Ontario more favourably for:
 - Safety from terrorists; Value for money; Lots to see and do; Easy to get to; Offers different and unique experiences.
- In the **US, small positive shifts** can be seen across many areas, but most particularly with respect to practical concerns associated with risk – safe from terrorism and health concerns.
- Canadians and Americans have similar views of Ontario with respect to its offer of unique experiences (an attribute posting a considerable positive shift in both countries since 2006).
- Though Americans are somewhat less certain now about which specific locations they would like to visit in Ontario, they are more decisive about what *type* of trip they prefer.
 - There is also evidence that perspectives of the Ontario offer are broadening. While the province continues to be perceived as a strong candidate for a nature/outdoor trips, its standing as a big city trip destination has grown and been sustained among Canadians and Americans alike.

Summary (cont'd)

- Despite these trends, however, the fact remains that **Ontario's image is perhaps not as dynamic as it should be**, particularly in the US.
 - Scores for most attributes are middling, at best.
 - The province's reputation tends to be aligned with considerations of practicality, safety and friendliness. And an analysis of attribute effects suggests that these are currently core to Ontario's draw (certainly not ideal relative to the reality of the offer and the aspirational power of some competitors).
 - While there is clearly some sense that Ontario likely offers diversity and unique experiences, this is generally a manifestation of the unknown. Americans currently have little familiarity with the Ontario offering, and they readily admit this.
 - There is, therefore, little specific tangible evidence of "excitement" on offer that will overcome price and border-crossing barriers, or stimulate enthusiasm for recommending the province to others.
- Certainly, Ontario destinations do not rank among the "must see" locations identified by Americans when considering overnight travel. And, clearly, to raise its profile sufficiently well to generate momentum, there will be a need to focus on a number of dimensions that are capable of stimulating a sense of curiosity and intense interest – from unique landscapes through to cultural experiences and historical sites.
 - One might consider the upcoming War of 1812 commemoration activities as a unique opportunity to establish profile at least on the "history" dimension and possibly others as well.

Summary (cont'd)

- Many Americans who have not been driven entirely out of the travel market by economic/financial considerations are, no doubt, highly price conscious. There are also specific concerns that persist as impediments to choosing Ontario, largely associated with passport requirements and border-crossing difficulties or delays. As a result, if there is a desire to reinvigorate US volume, Ontario will need to “impress” on some level in order to push through these barriers. The need to do so is even more acute given the current exchange rate environment and related price impacts.
- Ontario clearly is able to impress in the domestic market and is capable of pulling considerably more levers to attracting travel activity. Perceptions of fun, entertainment, diversity and uniqueness all have significant roles to play as credible drivers of the province’s appeal as a tourism destination.
- Moreover, while issues associated with urban crime continue to act as a drag on enthusiasm for Ontario’s cities (primarily Toronto), such concerns have tended to dissipate as top-of-mind impediments.

Rating Ontario For Specific Imagery Characteristics

— Average score* among travellers in each case (ranked on American drivers of Ontario overall rating)

	U.S.					Canada				
	Feb. '06	Feb. '10	Feb. '11	Difference		Feb. '06	Feb. '10	Feb. '11	Difference	
			'06 To '11	'10 To '11				'06 To '11	'10 To '11	
Would recommend visiting	N/A	7.1	7.2	N/A	+0.1	N/A	8.1	8.0	N/A	-0.1
Lots to see and do	7.6	7.6	7.6	±0.0	±0.0	7.9	8.2	8.1	+0.2	-0.1
Offers interesting travel experiences	N/A	7.4	7.5	N/A	+0.1	N/A	8.0	7.8	N/A	-0.2
Having fun & being entertained	N/A	7.4	7.5	N/A	+0.1	N/A	8.0	7.8	N/A	-0.2
Offers different or unique experience	7.2	7.4	7.4	+0.2	±0.0	6.8	7.5	7.4	+0.6	-0.1
Friendly	7.5	7.7	7.7	+0.2	+0.2	7.8	8.0	8.0	+0.2	±0.0
Good value for money	6.9	6.9	7.0	+0.1	+0.1	7.2	7.5	7.5	+0.3	±0.0
Safe from crime	7.5	7.2	7.4	-0.1	+0.2	7.8	7.4	7.4	-0.4	±0.0
Can drive there/Easy to get to	7.3	7.4	7.6	+0.3	+0.2	8.2	8.6	8.4	+0.2	-0.2
Don't have to worry about health (issues)	7.6	7.4	7.7	+0.1	+0.3	8.3	8.3	8.4	+0.1	+0.1
Familiar place	N/A	4.8	5.0	N/A	+0.2	N/A	8.0	8.0	N/A	±0.0
Safe from terrorists	7.5	7.3	7.6	+0.1	+0.3	7.8	8.1	8.2	+0.4	+0.1
Overall rating for pleasure travel	7.1	7.1	7.1	±0.0	±0.0	7.5	7.7	7.6	+0.1	-0.1

○ Statistically significant increase at 95%

□ Statistically significant decrease at 95%

*Average rating on 10-point scale.

- Q9. Thinking about (Ontario, the province of Ontario, Canada) overall, based on your experience or general impressions from anything you have seen or heard, how would you rate Ontario as a pleasure travel destination on a ten-point scale, where 1 means very poor and 10 means excellent?
- Q12. Next, we would like to ask you about your impressions of (Ontario, the province of Ontario, Canada) as a pleasure travel destination for specific attributes. Based on your experience or general impressions from anything you have seen or heard, please rate Ontario on a ten-point scale, again where 1 is very poor and 10 is excellent.

Rating Ontario For Specific Trip Types

— Average score* among travellers in each case

	U.S.					Canada				
	Feb. '06	Feb. '10	Feb. '11	Difference		Feb. '06	Feb. '10	Feb. '11	Difference	
				'06 To '11	'10 To '11				'06 To '11	'10 To '11
Enjoy nature/outdoors	7.4	7.4	7.3	-0.1	-0.1	8.0	8.0	8.0	±0.0	±0.0
Arts, culture and history	6.7	6.9	6.9	+0.2	±0.0	7.2	7.5	7.5	+0.3	±0.0
Resort trip	6.4	6.4	6.3	-0.1	-0.1	6.6	6.9	6.7	+0.1	-0.2
Touring trip	6.9	7.1	7.1	+0.2	±0.0	7.2	7.5	7.5	+0.2	±0.0
Big city trip	6.5	7.0	7.1	+0.6	+0.1	7.2	7.8	7.8	+0.6	±0.0

○ Statistically significant increase at 95%

□ Statistically significant decrease at 95%

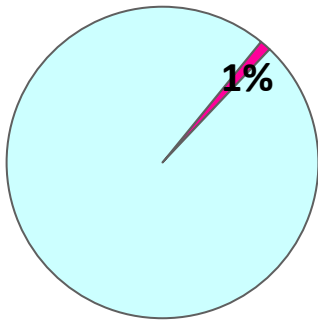
*Average rating on 10-point scale.

Q10. And again, using a 10 point scale, how would you rate (Ontario, the province of Ontario, Canada) as a destination for ...?

Ontario's Standing Among "Must See" Destinations (Feb '11)

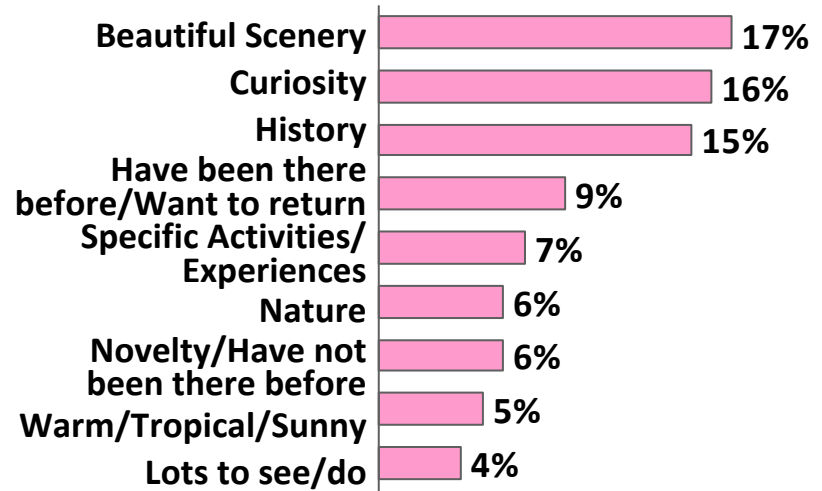
Among total travelers aware of Ontario

American Travelers

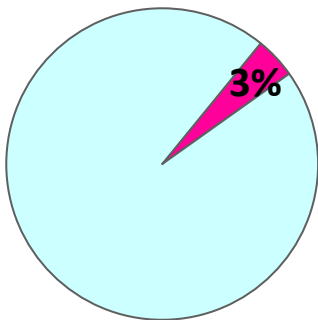


Any Destination
In Ontario
(Toronto = 0.3%)
(Niagara Falls = 0.1%)

What do Americans look for in a ideal destination?

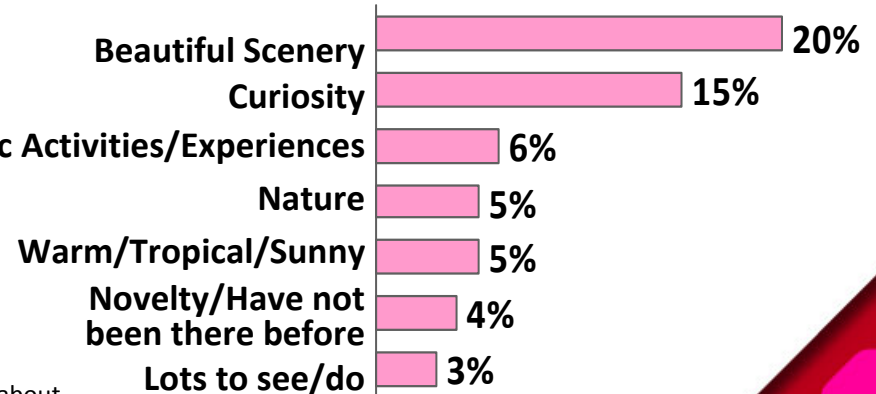


Canadian Travelers



Any Destination
In Ontario
(Toronto = 0.3%)
(Niagara Falls = 0.3%)

What do Canadians look for in a ideal destination?

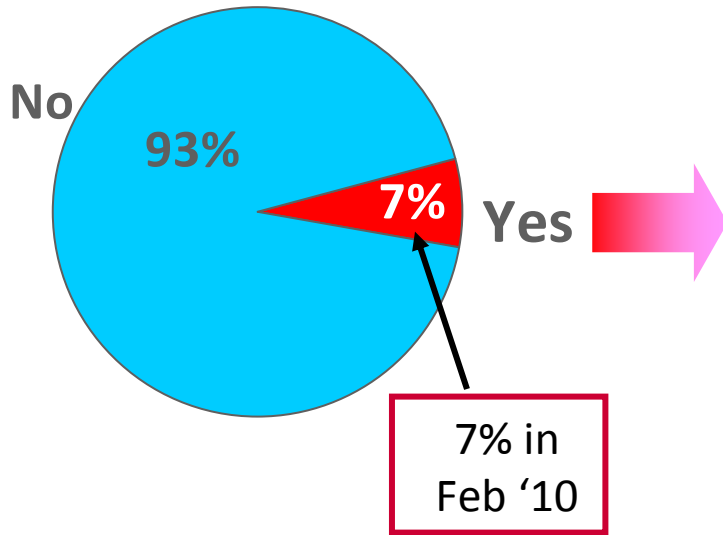


Q11A. Now we would like you to think about your ideal destination. Thinking about all the possible destinations you could travel anywhere in the world, if you had to choose one destination as a "must see" place, what would it be?

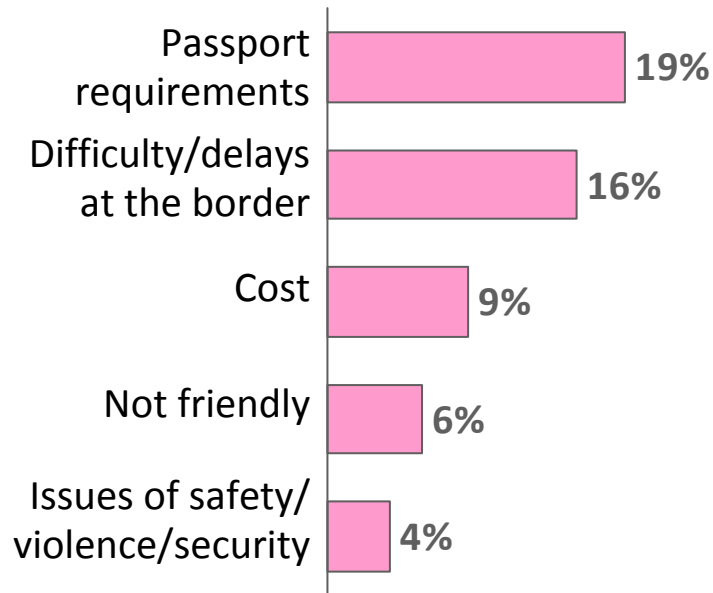
Q11B. What reasons do you have for choosing this as your ideal destination?

Are there any specific events or issues that you have heard about that make you less inclined to travel to Toronto, Niagara Falls or other places in Ontario?

Percent of Americans aware of Ontario



What are these specifically?



Change vs. Feb '10
+1%
+8%
-2%
+2%
+2%

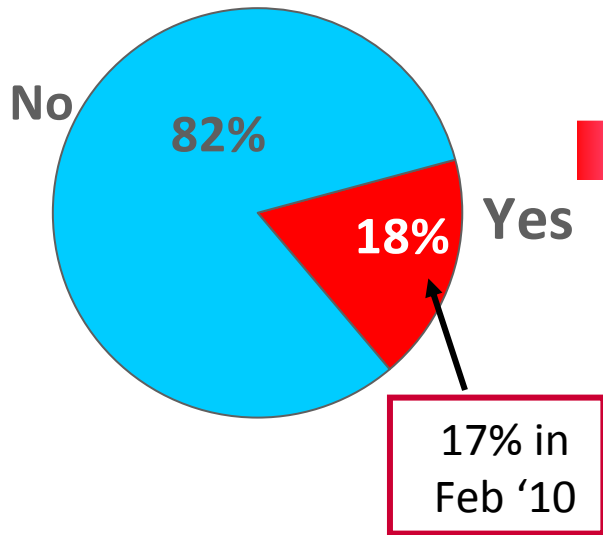
○ Significant increase at 95% versus Feb '10

Q21A. You may have already mentioned this, but apart from your own personal circumstances or your general interest in Ontario, are there any specific events or issues that you have heard about that make you (less inclined to travel to/at all concerned about traveling to) Toronto, Niagara Falls, or other places in Ontario?

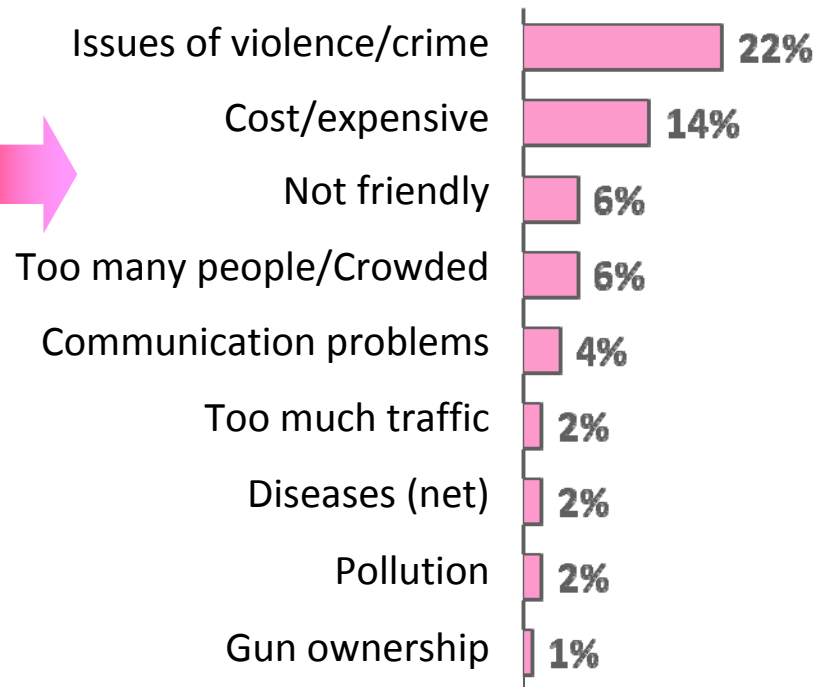
Q21B. What are these issues specifically?

Are there any specific events or issues that you have heard about that make you less inclined to travel to Toronto, Niagara Falls or other places in Ontario?

Percent of Canadians



What are these specifically?



Change vs. Feb '10
-10%
+5%
+2%
+4%
+1%
-1%
+1%
+1%
-1%



Significant decrease at 95% versus Feb '10

Q21A. You may have already mentioned this, but apart from your own personal circumstances or your general interest in Ontario, are there any specific events or issues that you have heard about that make you (less inclined to travel to/at all concerned about traveling to) Toronto, Niagara Falls, or other places in Ontario?

Q21B. What are these issues specifically?



Toronto Detail



Summary

- Toronto's appeal has remained steady south of the border with few exceptions, while softening in Canada.
 - And even in the US, like Ontario overall, Toronto has seen interest slip in Syracuse and New York City.
 - The slippage in Canada is confined to Ontario itself and, in particular, those parts of the province beyond the largest urban centres. Brand image has been sustained at high levels, however, suggesting that issues associated with Toronto may be related to the cost of getting there (gasoline prices) from more distant parts of the province and ongoing concerns about safety and crime.
 - Canadians are slightly more committed to their planned trips to Toronto compared with last year, evidenced by an increase in booked elements. This suggests that while appeal has slipped those currently considering travel to the city are more likely to follow through on intentions than was the case one year ago.
 - Americans, on the other hand, have consistent booking activity compared with last year.
 - Though there has been a very slight improvement in perceptions of the city among US residents, this attitudinal shift is too recent and too subtle to be noticed yet in their behaviour.
 - Toronto's arts & cultural scene, remains the main driver of travel to the city, but the draw remains very diverse, extending to sports, nightlife, entertainment and shopping. The challenge in the US is to make this diversity of potential experience more widely known.

Toronto Spring Travel Intention Incidence

By Specific US Market

Percent of American Adults In Each Case Stating
Intent To Travel To Toronto During March/May

		As of Feb '09	As of Feb '10	As of Feb '11	Change Feb '10 to '11
Buffalo	%	11	14	12	-2
Rochester	%	7	9	10	+1
Syracuse	%	9	9	2	-7
Cleveland	%	3	4	3	-1
Detroit	%	2	6	8	+2
Boston	%	3	7	5	-2
New York City	%	7	8	4	-4
Pittsburgh	%	3	2	3	+1
Philadelphia	%	2	3	6	+3
Washington DC	%	3	3	4	+1
Cincinnati	%	1	1	2	+1
Chicago	%	5	2	5	+3
Indianapolis	%	1	2	0	-2
Milwaukee	%	1	2	5	+3
Minneapolis	%	3	3	1	-2
TOTAL US	%	3	3	4	+1

Significant decrease at 95% versus Feb '10

Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

Toronto Spring Travel Intention Incidence

By Specific Canadian Market

Percent Of Canadian Adults In Each Case Stating
Intent To Travel To/Within Toronto During March/May

		As of Feb '09	As of Feb '10	As of Feb '11	Change Feb '10 to '11
Quebec City	%	5	3	6	+3
Montreal	%	8	10	14	+4
Ottawa	%	30	25	25	0
Other Ontario*	%	19	27	15	-12
Winnipeg	%	8	6	5	-1
Total Canada*	%	15	19	15	-4

* Excluding Toronto residents

Significant decrease at 95% versus Feb '10

Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

Toronto Ratings for Trip Types

— Average on 10-point scale among Travelers aware of Toronto (ranked on American drivers of Toronto overall rating)

	Americans			Canadians		
	Feb '09	Feb '10	Feb '11	Feb '09	Feb '10	Feb '11
A great place for an urban getaway	n/a	7.4	7.5	n/a	7.7	7.6
A place with great restaurants	7.6	7.7	7.7	8.2	8.2	8.1
Lots for adults to see and do	7.8	7.7	7.8	8.1	8.2	8.1
A great place for cultural and art festivals	7.5	7.2	7.3	8.1	7.9	8.2
Lots for kids to see and do	7.0	7.1	7.1	7.8	7.8	7.8
Strolling around to see buildings/sights	7.5	7.5	7.6	7.6	7.7	7.6
A great place to visit art galleries and museums	7.4	7.4	7.6	8.1	8.1	8.1
Has friendly and welcoming people	n/a	7.6	7.6	n/a	7.1	7.1
A great place for shopping	7.4	7.4	7.5	8.1	8.1	8.0
A place with great nightlife	7.4	7.4	7.5	7.8	7.9	7.8
A great place for theatre/other cultural performances	7.5	7.5	7.6	8.2	8.2	8.2
A great place for attending pro sports event	7.0	7.1	7.1	8.1	8.0	8.0
Overall rating	7.1	7.2	7.3	7.1	7.3	7.2

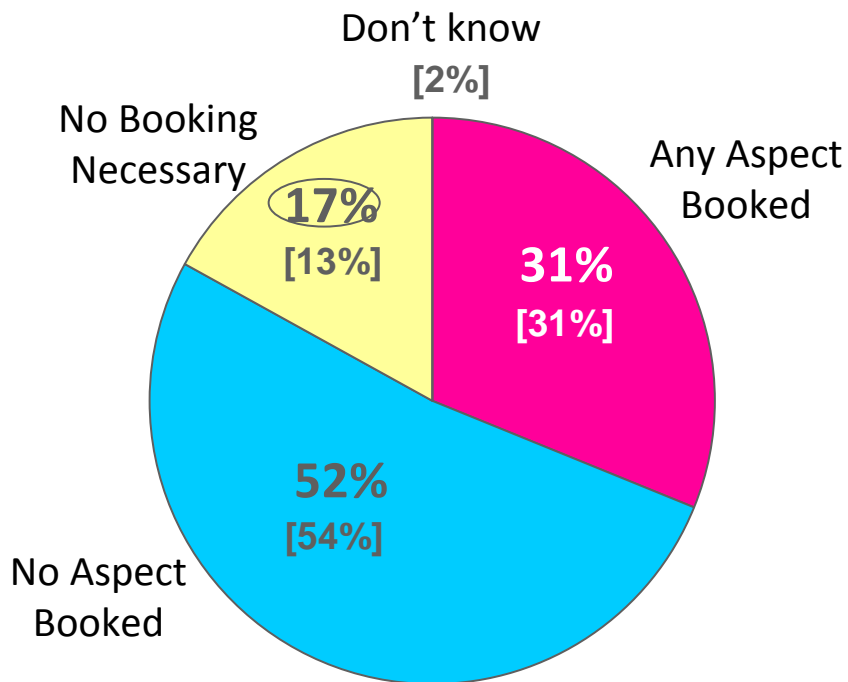
Q16. We would like to know about your overall impressions of (Toronto/Toronto, Ontario). Based on (your experience or) your general impressions from anything you have seen or heard, how would you rate (Toronto/ Toronto, Ontario) as a travel destination on a ten-point scale, where 1 is very poor and 10 is excellent.

Q17. Based on (your experience or) your general impressions from anything you have seen or heard, we would like you to rate (Toronto/ Toronto, Ontario) for specific attributes on a ten-point scale, where 1 is very poor and 10 is excellent.

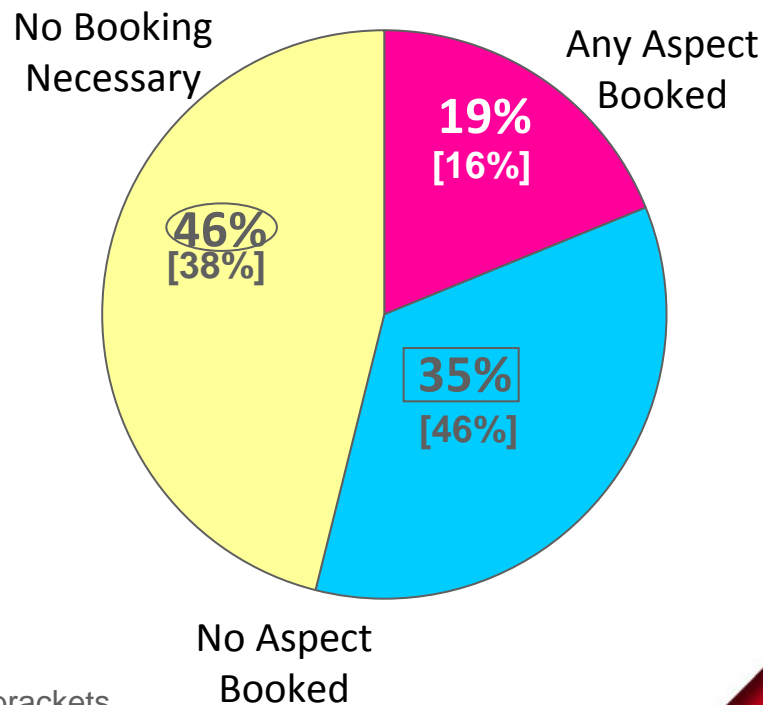
Booking Activity for Planned Ontario Spring Trip

Percent of those planning pleasure trip to **TORONTO** – March/May '11

Americans



Canadians



[] February '10 figures in brackets

○ Statistically significant increase at 95% vs. Feb. 2010

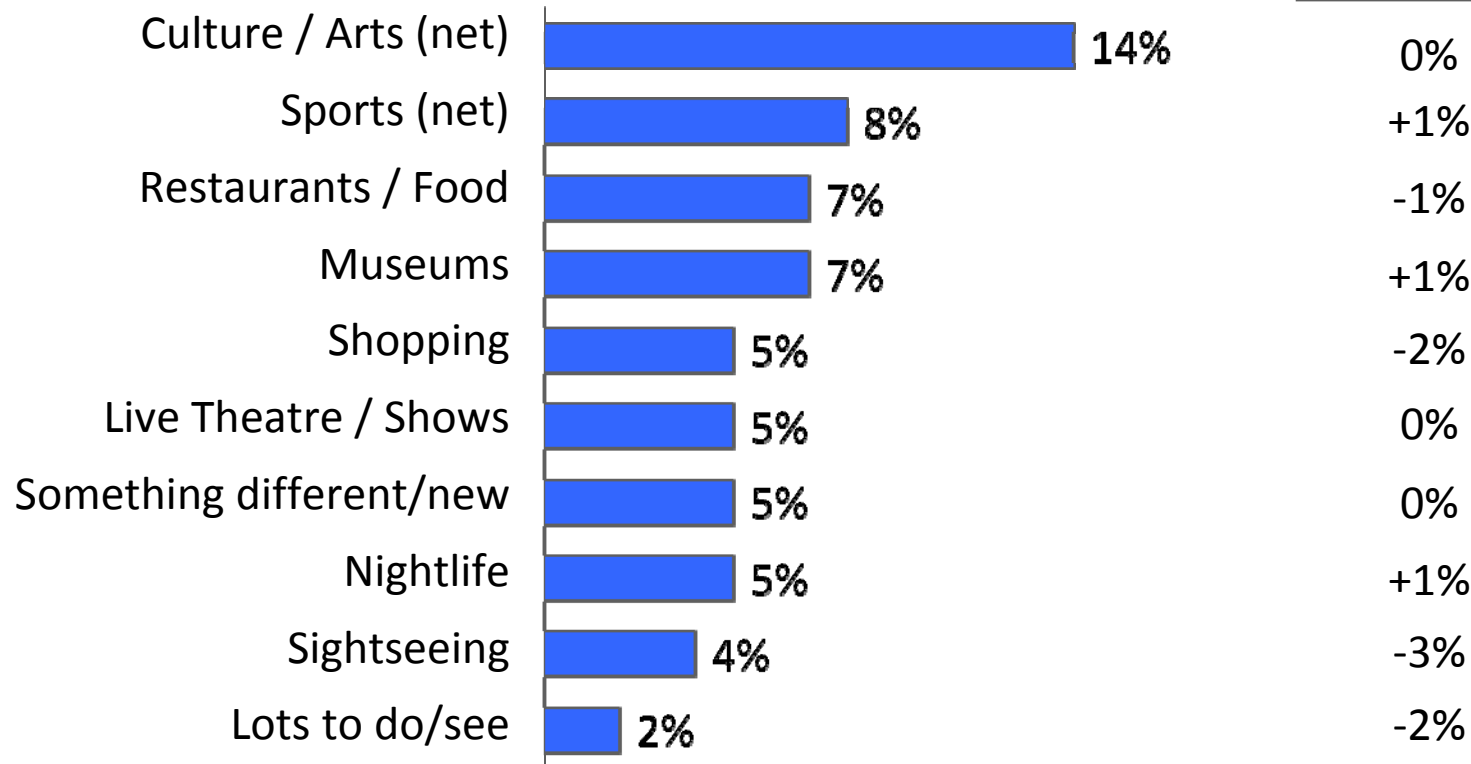
□ Statistically significant decrease at 95% vs. Feb. 2010

Q3F. Have you already booked any aspect of a pleasure trip (pleasure trips) you are considering taking during the coming months of March, April, or May?

Volunteered Reasons for Interest in Visiting Toronto (Feb '11)

Percent of **Americans** stating Very/Fairly Interested

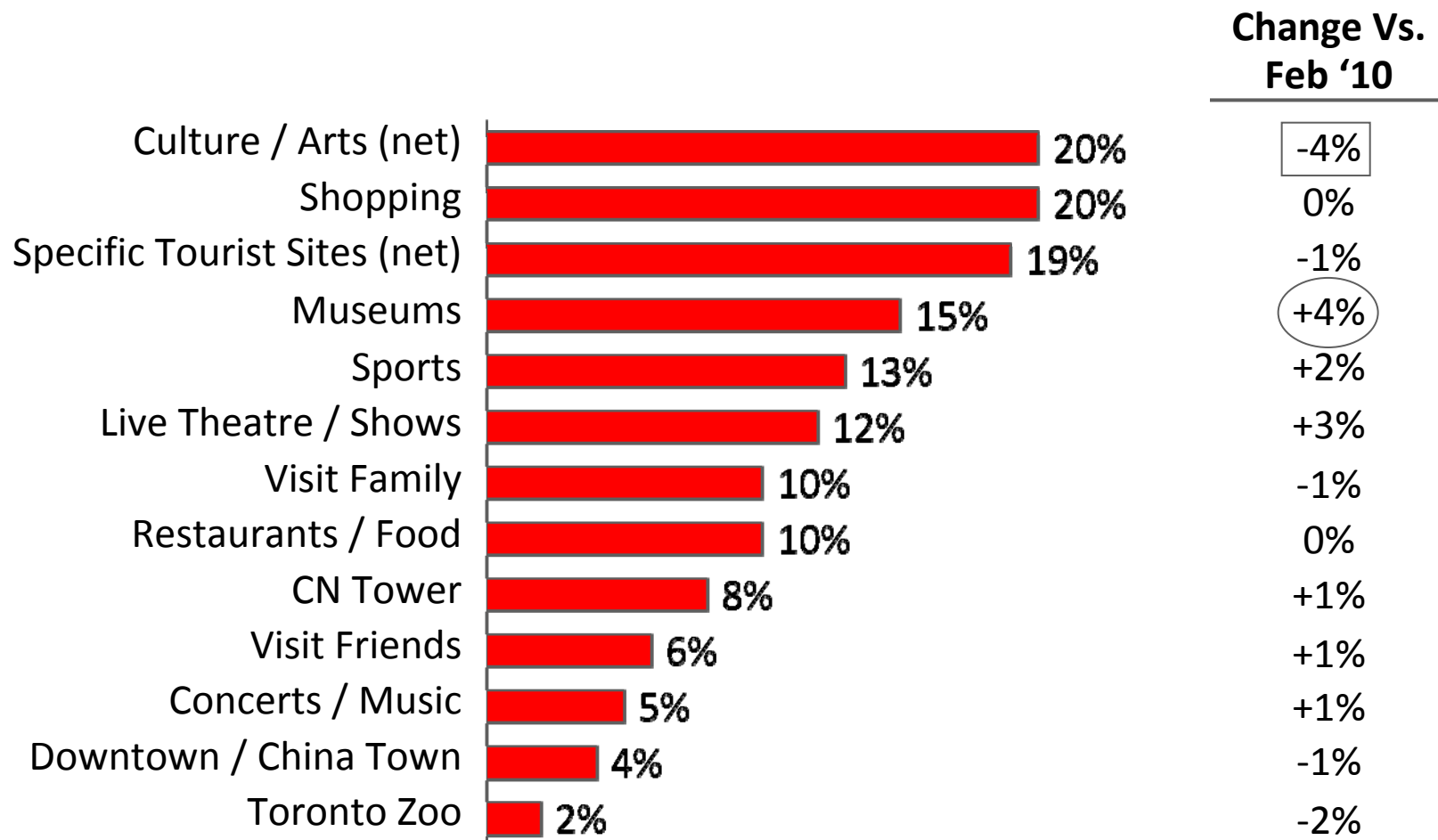
**Change Vs.
Feb '10**



Q18c. (You said earlier that you plan to visit Toronto within the next several months. What specific aspects of Toronto interest you?/
What specific aspects of Toronto interest you?/ Why do you say that you would not be interested in visiting Toronto?)

Volunteered Reasons for Interest in Visiting Toronto (Feb '11)

Percent of **Canadians** stating Very/Fairly Interested



○ Significant increase at 95% versus Feb '10.

□ Significant decrease at 95% versus Feb '10.

Q18c. (You said earlier that you plan to visit Toronto within the next several months. What specific aspects of Toronto interest you?/
What specific aspects of Toronto interest you?/ Why do you say that you would not be interested in visiting Toronto?)



Niagara Falls Detail



Summary

- Intention to travel to Niagara Falls has slipped in the immediate cross-border region, but has seen significant growth in Toronto.
 - The region has therefore become somewhat more dependent on the local environs existing on the Canadian side of the border.
 - Support from more distant markets remains steady or may have increased slightly, but is generally sustained at low levels.
 - One could argue that given its status as one of the world's natural wonders and linkages to a variety of other experiences, Niagara should be capable of generating broader sustained interest across North America's northeast.
- It is encouraging that intended travelers to Niagara Falls are committing to their trips more so than last year, with aspects of the trip being booked to a greater degree. This implies that travelers are making more solid plans as opposed to simply considering Niagara an aspiration.
- As expected, The Falls continue to be the main draw to the city. The Casino is a distant secondary draw in Canada and barely registers in the US. It is clear that preservation of The Falls' integrity as the core attraction. This suggests a need for integration, continuity and balance with The Falls in terms of presenting the broader offer to potential visitors – supportive positioning and ambiance.

Niagara Falls Spring Travel Intention Incidence

By Specific US Market

Percent Of American Adults In Each Case Stating
Intent To Travel To Niagara Falls During March/May

		As of Feb '09	As of Feb '10	As of Feb '11	Change Feb '10 to '11
Buffalo	%	13	17	11	-6
Rochester	%	12	16	14	-2
Syracuse	%	11	12	5	-7
Cleveland	%	8	7	5	-2
Detroit	%	3	1	2	+1
Boston	%	4	4	4	0
New York City	%	7	5	7	+2
Pittsburgh	%	4	4	5	+1
Philadelphia	%	5	3	6	+3
Washington DC	%	3	6	4	-2
Cincinnati	%	4	1	3	+2
Chicago	%	6	2	2	0
Indianapolis	%	1	2	3	+1
Milwaukee	%	1	3	3	0
Minneapolis	%	2	2	1	-1
TOTAL US	%	5	3	4	+1

Significant decrease at 95% versus Feb '10.

Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

Niagara Falls Spring Travel Intention Incidence

By Specific Canadian Market

Percent Of Canadian Adults In Each Case Stating
Intent To Travel To Niagara Falls During March/May

		As of Feb '09	As of Feb '10	As of Feb '11	Change Feb '10 to '11
Quebec City	%	1	3	4	+1
Montreal	%	7	5	7	+2
Ottawa	%	6	9	11	+2
Toronto	%	25	26	36	+10
Other Ontario	%	11	19	16	-3
Winnipeg	%	2	1	3	+2
Total Canada	%	13	17	19	+2

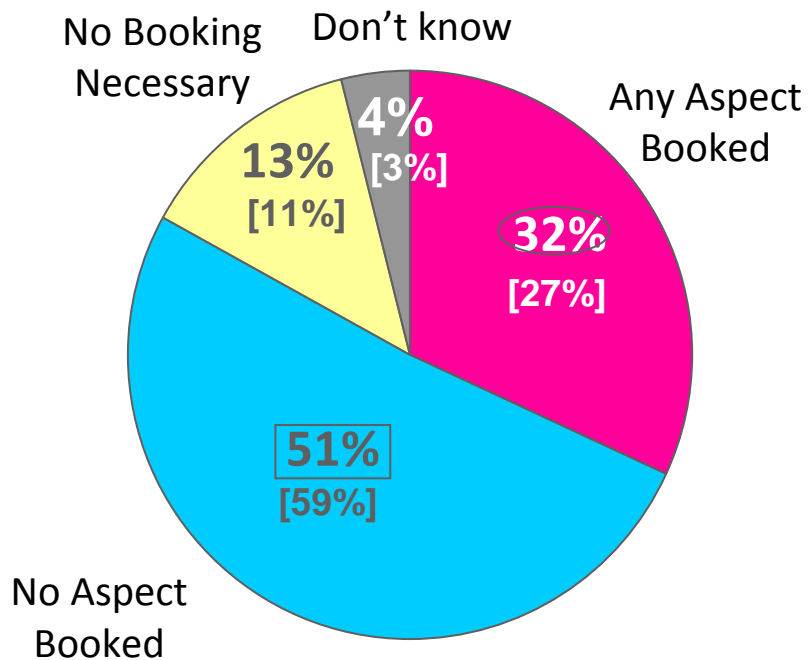
○ Significant increase at 95% versus Feb '10

Q3A. During the coming months of March, April, or May, are you considering taking an out-of-town trip of one or more nights (MT)?

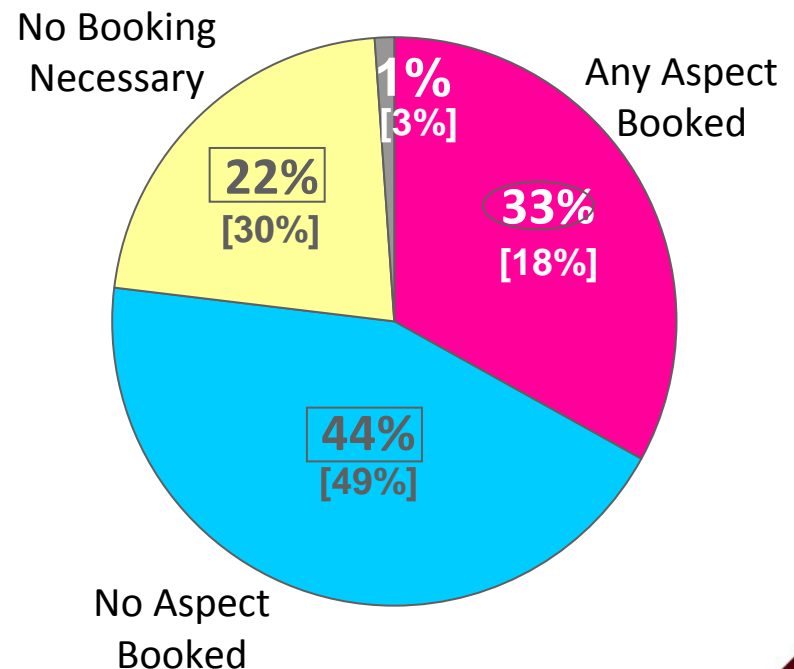
Booking Activity for Planned Ontario Spring Trip

Percent of those planning pleasure trip to NIAGARA FALLS – March/May '11

Americans



Canadians



[] February '10 figures in brackets

○ Statistically significant increase at 95% vs. Feb '10

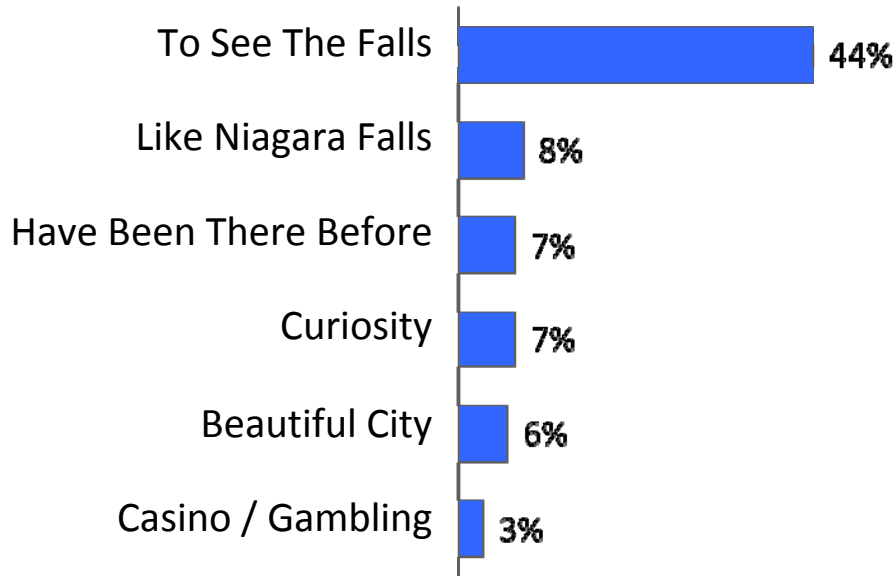
□ Statistically significant decrease at 95% vs. Feb '10

Q3F. Have you already booked any aspect of a pleasure trip (pleasure trips) you are considering taking during the coming months of March, April, or May?

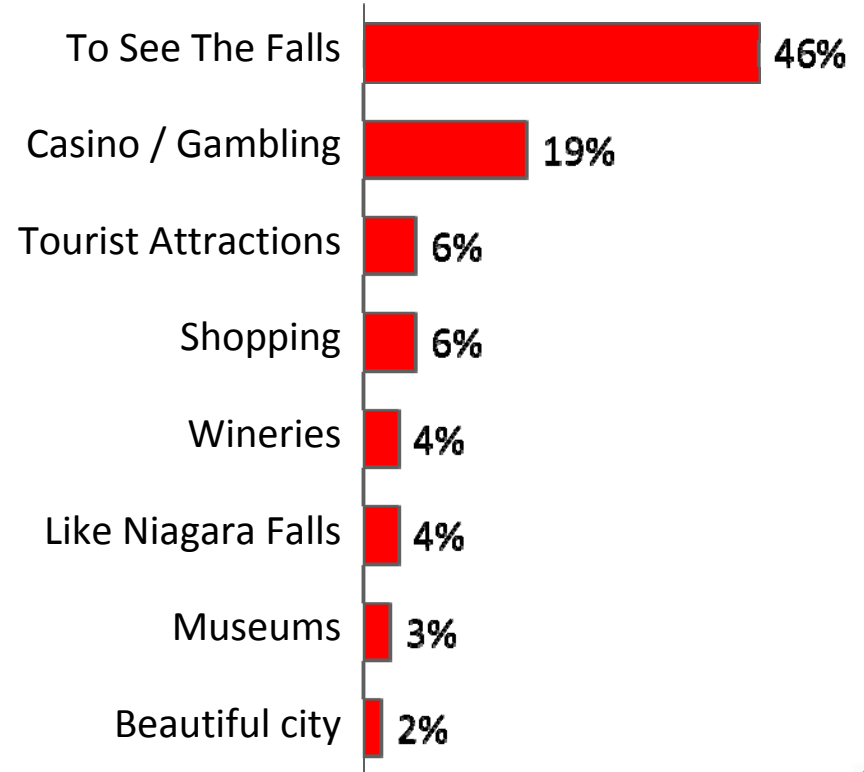
Volunteered Reasons for Interest in Visiting Niagara Falls (Feb '11)

Percent of those stating Very/Fairly Interested.

Among Americans



Among Canadians



Q19b. (You said earlier that you plan to visit the City of Niagara Falls, Ontario within the next several months. What specific aspects of the City of Niagara Falls interest you?/ What specific aspects of the City of Niagara Falls interest you?/ Why do you say that you would not be interested in visiting the City of Niagara Falls?)

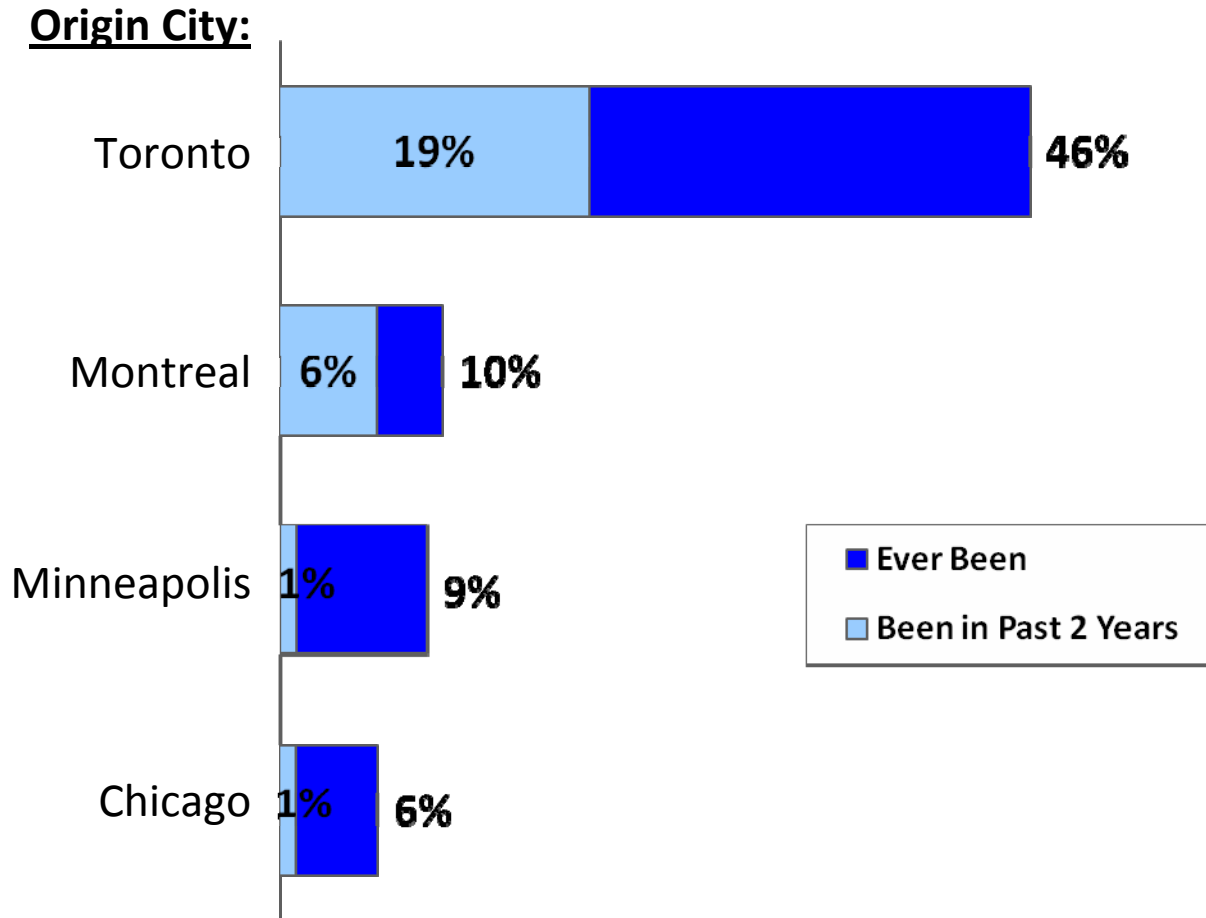
Northern Ontario Detail

Summary

- Northern Ontario has made little headway over the past year in terms of advancing its position as a tourism destination among the traveling public on either side of the border.
 - Interest has stagnated.
 - There is no evidence of image improvement.
 - If anything, Northern Ontario is viewed more stereotypically as a rather remote location generally associated with nature, fishing, hunting, hiking and camping.
- The North's main issue traces to lack of familiarity and poor appreciation of its differentiating features.
- As a consequence, Northern Ontario appeals most strongly to the rest of the province (where familiarity is greatest) and has very limited appeal in Quebec (where travelers, perhaps, have difficulty appreciating the difference from their own North).
- Conveying information that underscores Ontario's distinctiveness in specific terms would seem to be the key to broadening appeal.
 - With respect to the specific attractions assessed conceptually, the Agawa Canyon Tour Train, is clearly the most appealing to Canadians and Americans alike.
 - Science North/Dynamic Earth rivals Agawa for interest among Ontarians, but interest slips significantly beyond Ontario's borders. Suggesting a need to stimulate deeper appreciation in areas unfamiliar with Sudbury or its heritage.
 - The Lumberjack Festival and Great Rendezvous are of more limited interest when presented briefly in conceptual form, indicating that these are either niche opportunities or more complex "sells".

Past Experience With Northern Ontario by City

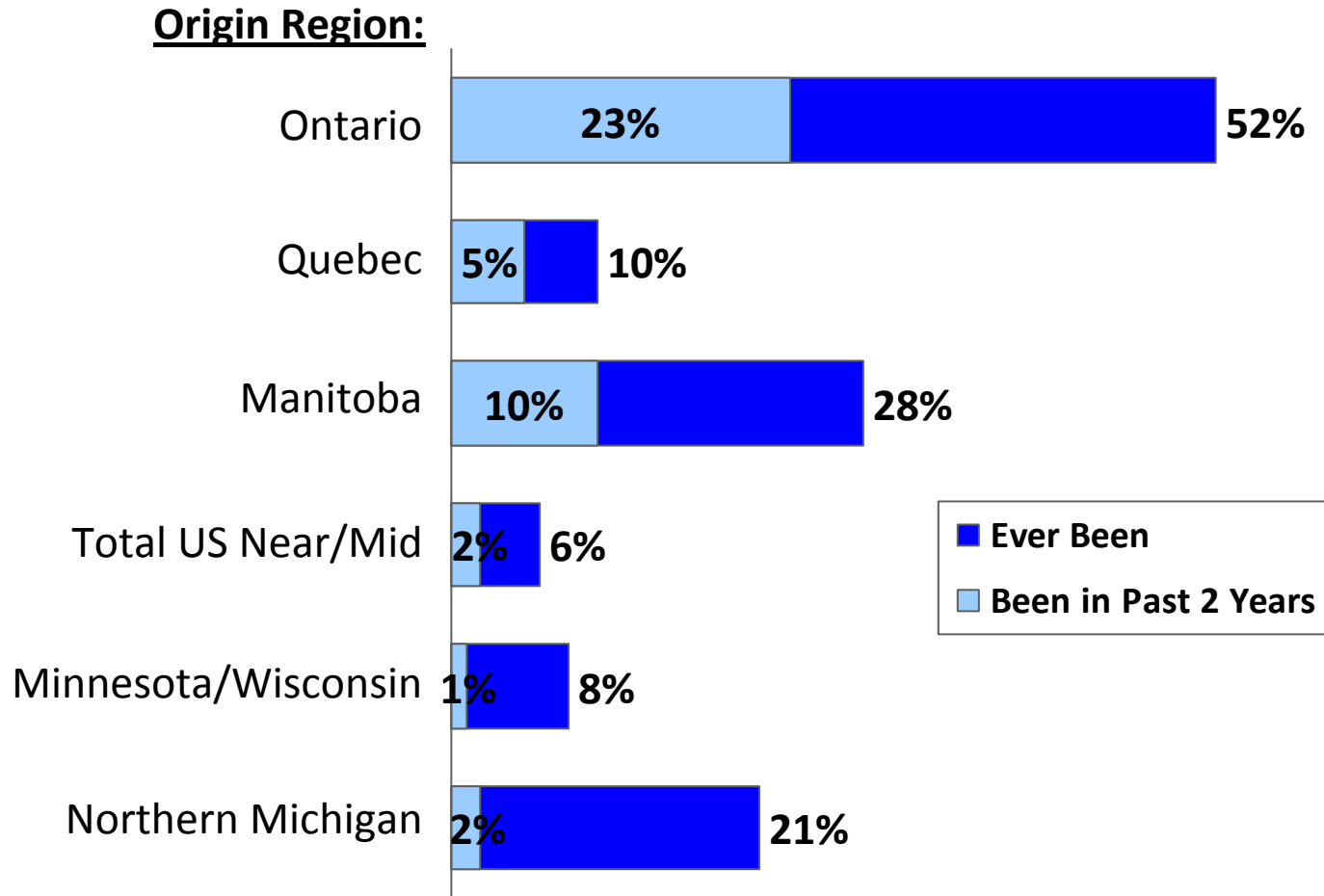
Percent of Adults in Each Case



Q22C. Have you ever taken a pleasure or vacation trip to Northern Ontario?
Q22D. When did you last take a pleasure trip to Northern Ontario?

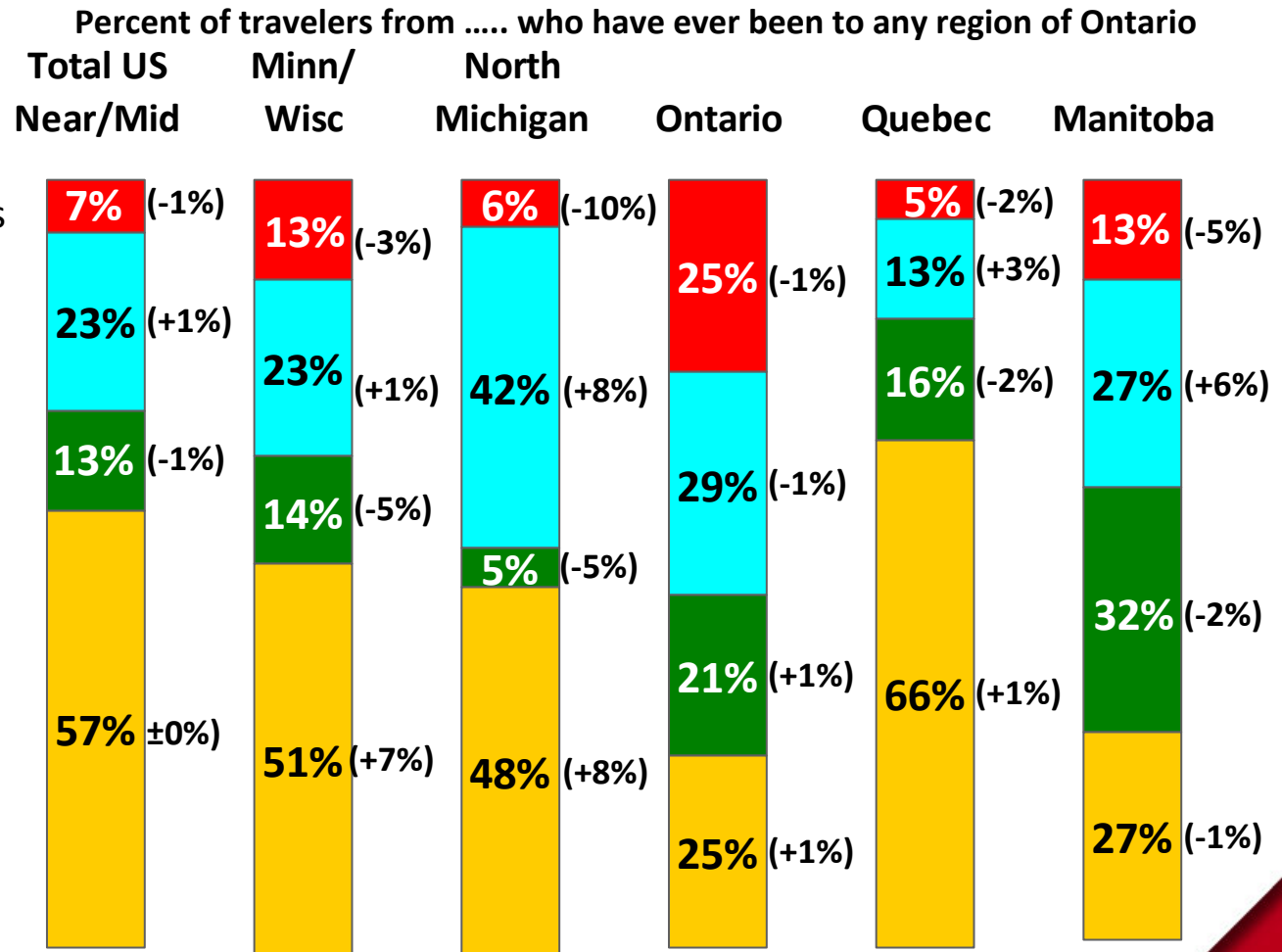
Past Experience With Northern Ontario by Region

Percent of Adults in Each Case



Q22C. Have you ever taken a pleasure or vacation trip to Northern Ontario?
Q22D. When did you last take a pleasure trip to Northern Ontario?

Familiarity and Interest - Northern Ontario as a Travel Destination (Feb '11)

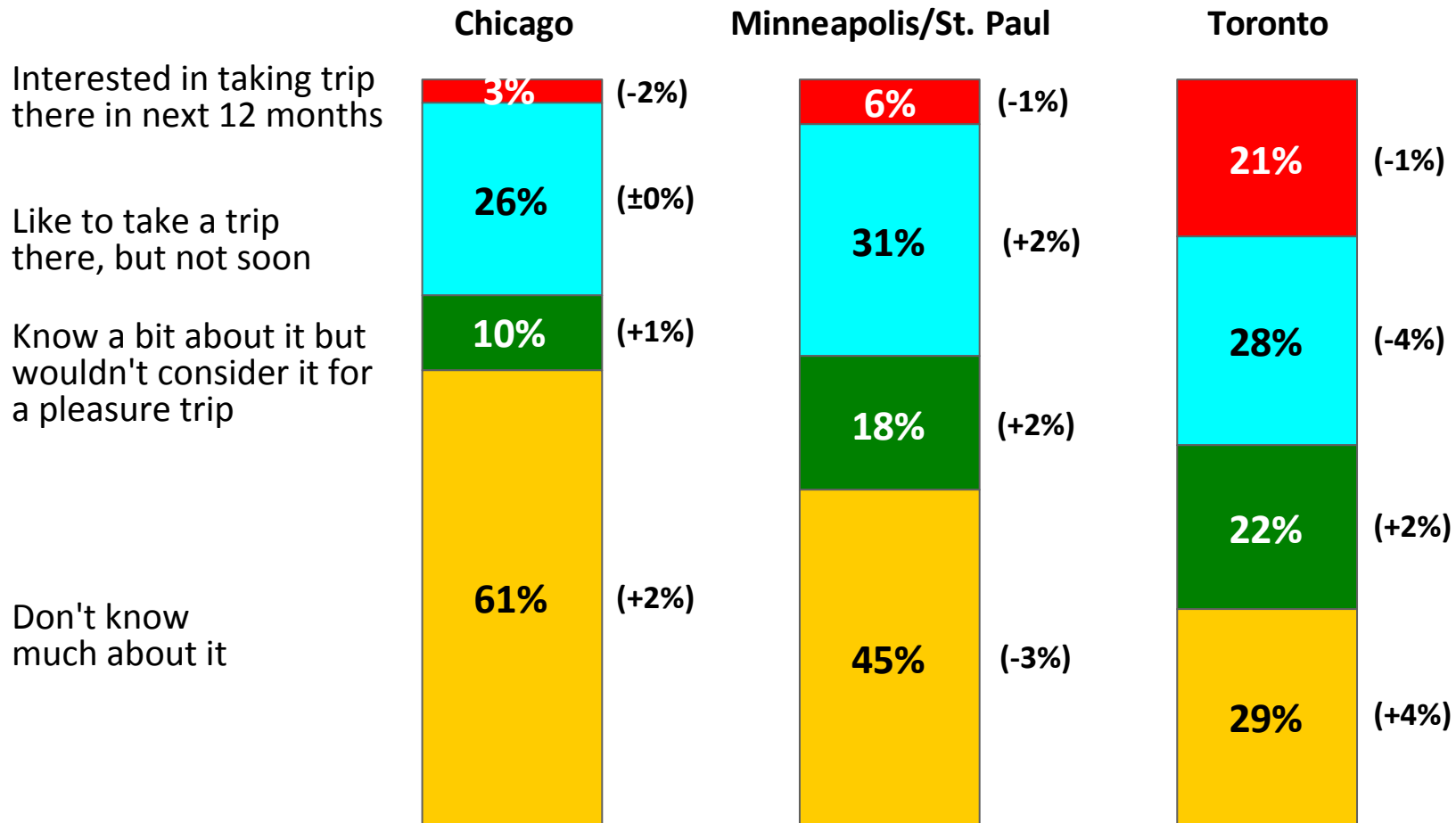


() Figures in brackets = change vs. Feb '10.

Q22F. Which of the following statements best describes your familiarity with, and interest in, Northern Ontario as a destination for pleasure travel?

Familiarity and Interest - Northern Ontario as a Travel Destination (Feb '11) – Key Cities

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



() Figures in brackets = change vs. Feb '10.

Q22F. Which of the following statements best describes your familiarity with, and interest in, Northern Ontario as a destination for pleasure travel?

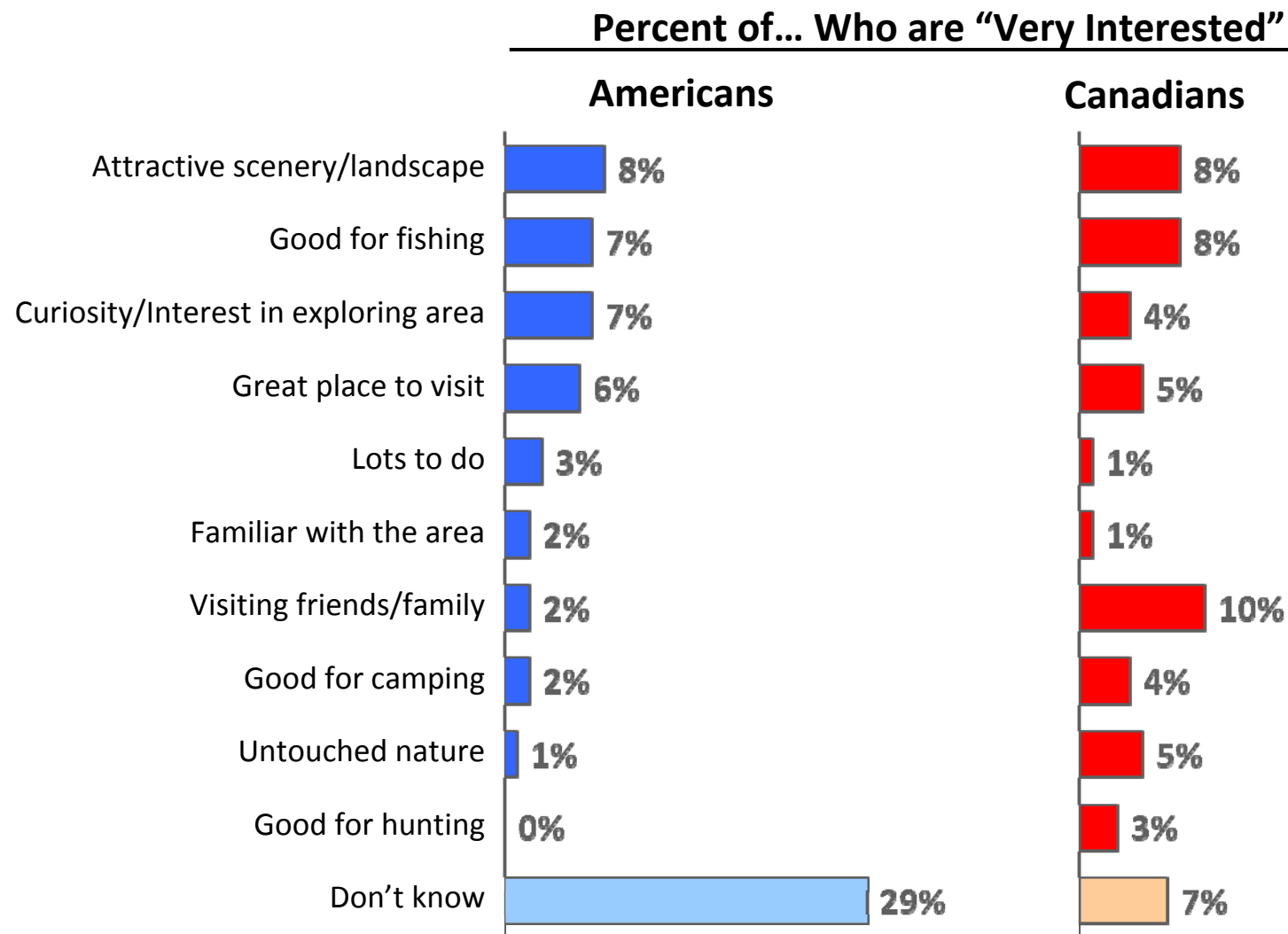
Interest in Visiting Northern Ontario in Next Two Years

Percent Of Residents In Each Case Stating
“Very Interested”

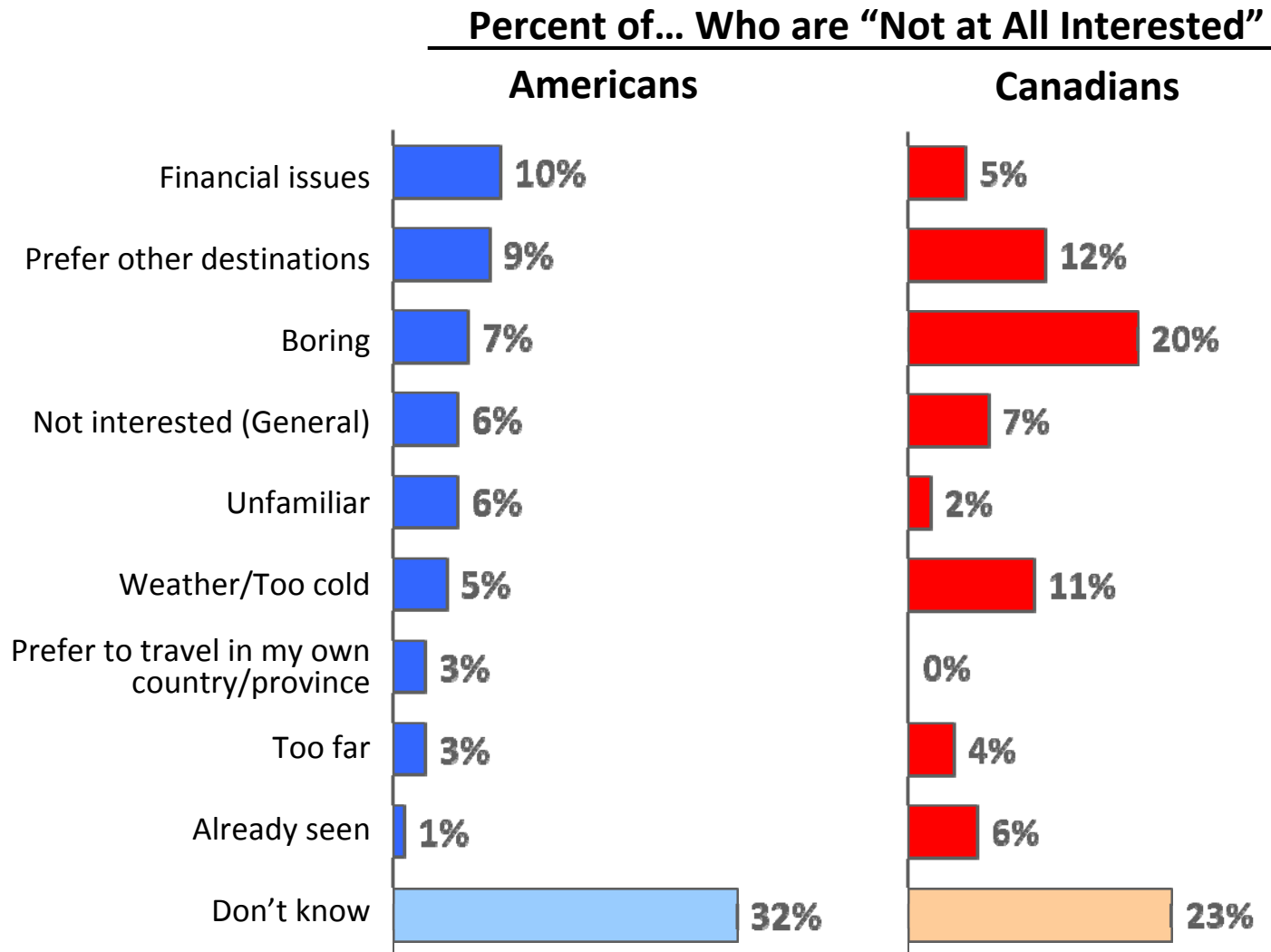
		<u>Feb '09</u>	<u>Feb '10</u>	<u>Feb '11</u>	<u>Change Feb '10 to '11</u>
Total US Near & Mid	%	4	5	4	-1
Minnesota/Wisconsin	%	3	7	3	-4
North Michigan	%	7	6	6	0
Ontario	%	24	24	24	0
Quebec	%	2	5	4	-1
Manitoba	%	12	11	8	-3
Chicago	%	4	4	2	-2
Minneapolis/St. Paul	%	5	2	5	-3
Toronto	%	21	23	22	-1

Q22H. Overall, how much interest do you have in visiting Northern Ontario within the next 2 years or so?

Reasons for Being “Very Interested” in Visiting Northern Ontario



Reasons for Having “No Interested” in Visiting Northern Ontario



Q22I. What reasons do you have for feeling this way?

Rating Northern Ontario for Specific Imagery Characteristics

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

	Americans				Canadians			
	Feb '09	Feb '10	Feb '11	Change Feb '10 to Feb '11	Feb '09	Feb '10	Feb '11	Change Feb '10 to Feb '11
Enjoy nature/outdoors	7.0	7.1	7.0	-0.1	8.1	8.4	8.3	-0.1
Good value for money	6.1	6.1	6.1	0.0	6.8	7.3	7.0	-0.3
Lots to see and do	6.2	6.2	6.2	0.0	6.8	7.1	7.1	0.0
Friendly	6.4	6.5	6.5	0.0	7.3	7.6	7.6	0.0
Clean & unpolluted environment	7.0	7.0	6.9	-0.1	7.6	8.1	7.9	-0.2
For fishing	n/a	6.9	6.8	-0.1	n/a	8.2	8.1	-0.1
For hunting	n/a	6.6	6.6	0.0	n/a	7.8	7.7	-0.1
Destinations you can drive to	5.7	5.7	5.7	0.0	6.6	7.0	6.8	-0.2
Good for resort trip	6.1	6.2	6.1	-0.1	6.9	7.2	7.1	-0.1
Offers different or unique experience	6.5	6.7	6.6	-0.1	7.2	7.6	7.6	0.0
Having fun & being entertained	6.1	6.1	6.0	-0.1	6.5	6.8	6.8	0.0
Good for touring trip	6.3	6.3	6.2	-0.1	7.1	7.6	7.4	-0.2
Overall rating for pleasure travel	6.2	6.1	6.2	+0.1	7.1	7.2	7.2	0.0

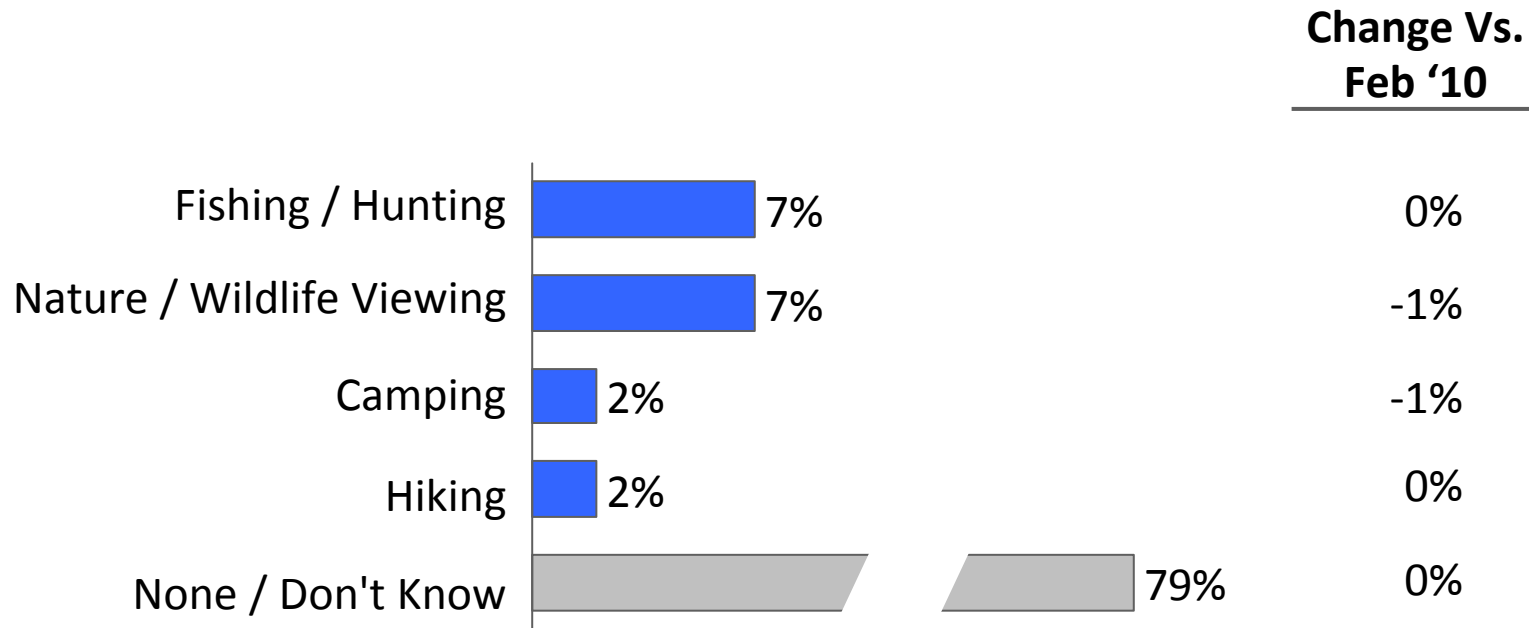
* Average rating on 10-point scale.

Q22L. On a scale from 1 to 10 on which 1 means "very poor" and 10 means "excellent", how would you rate Northern Ontario overall as a pleasure travel destination?

Q22M. We would like you to rate Northern Ontario as a pleasure travel destination for some specific characteristics. As before, please use a scale from 1 to 10. The higher the score, the more positively you feel about the destination.

Unprompted Awareness of Specific Things to See And Do in Northern Ontario (Feb '11)

Percent of Americans aware of Ontario

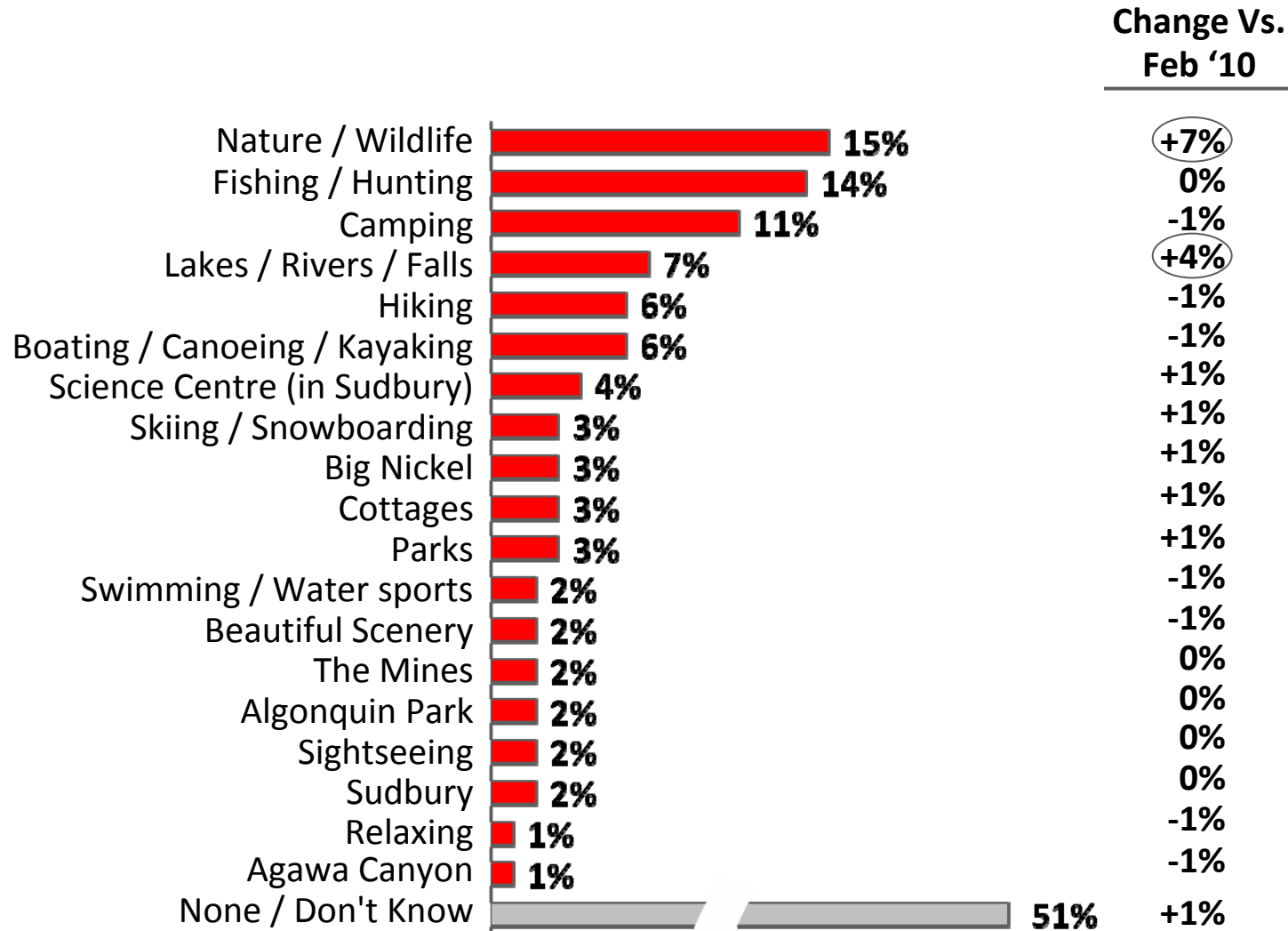


Percent Stating "Don't Know"	
Minnesota/Wisconsin	49%
Northern Michigan	37%
Chicago	56%
Minneapolis/St. Paul	47%



Unprompted Awareness of Specific Things to See And Do in Northern Ontario (Feb '11)

Percent of Canadians



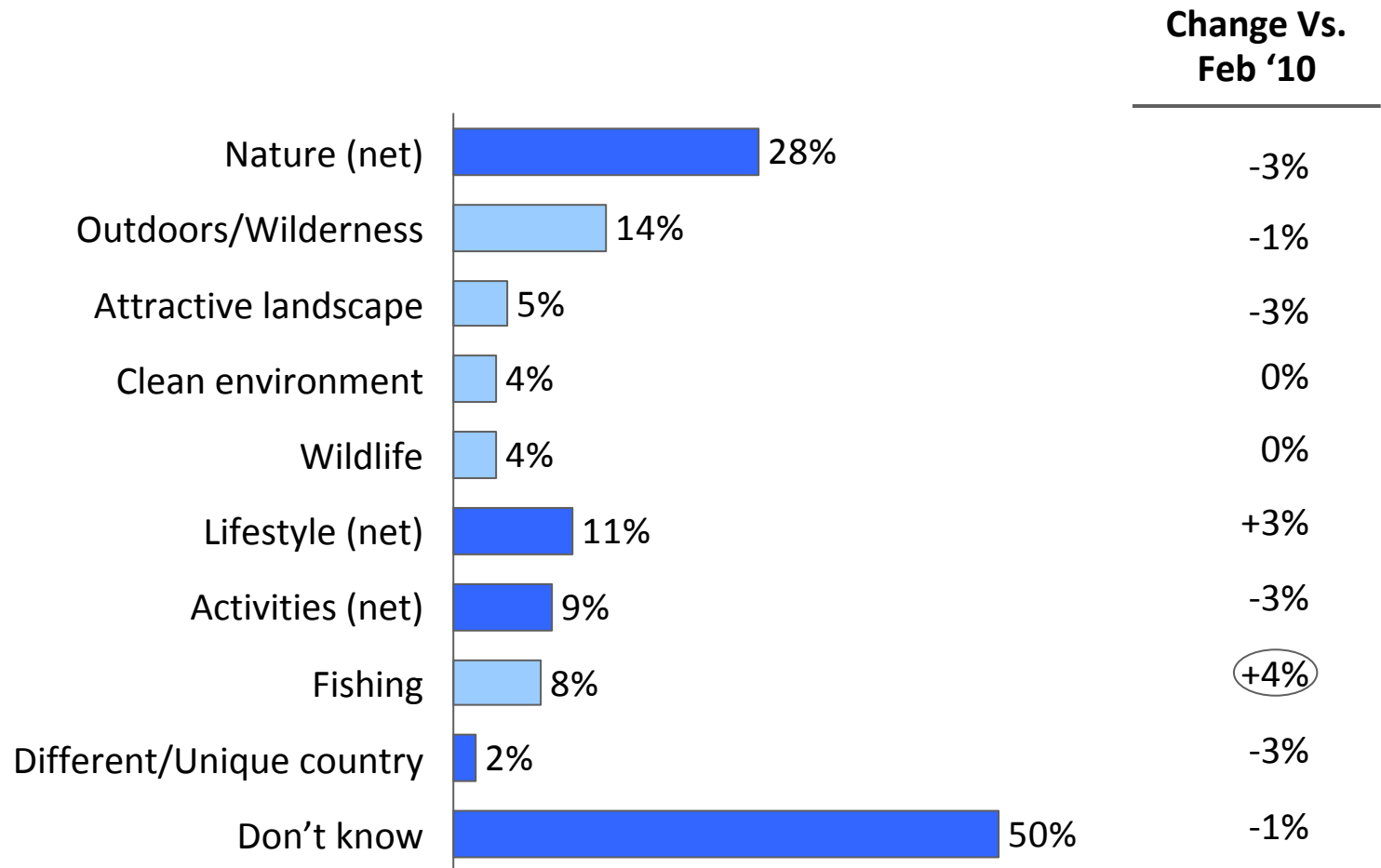
○ Significant increase at 95% versus Feb '10

Q22B. Are there any specific things to see and do in Northern Ontario that come to mind?



Experiences That Make Visiting Northern Ontario “Unique & Different”

Percent of Americans rating Northern Ontario Highly for being “Unique & Different”



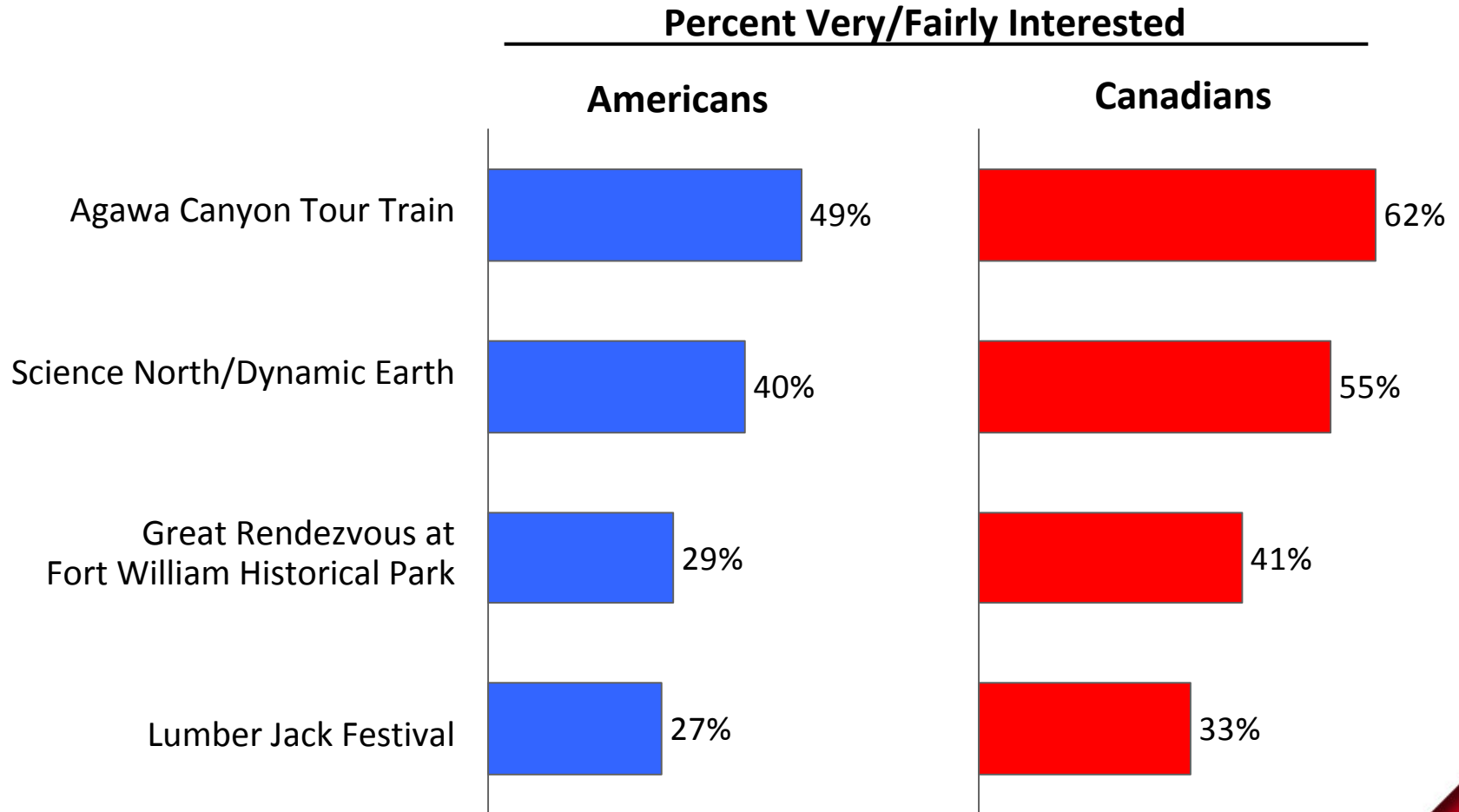
○ Significant increase at 95% versus Feb '10

Q220. In your view, what experiences does Northern Ontario offer that are unique and different?



Interest in Specific Northern Ontario Attractions (Feb '11)

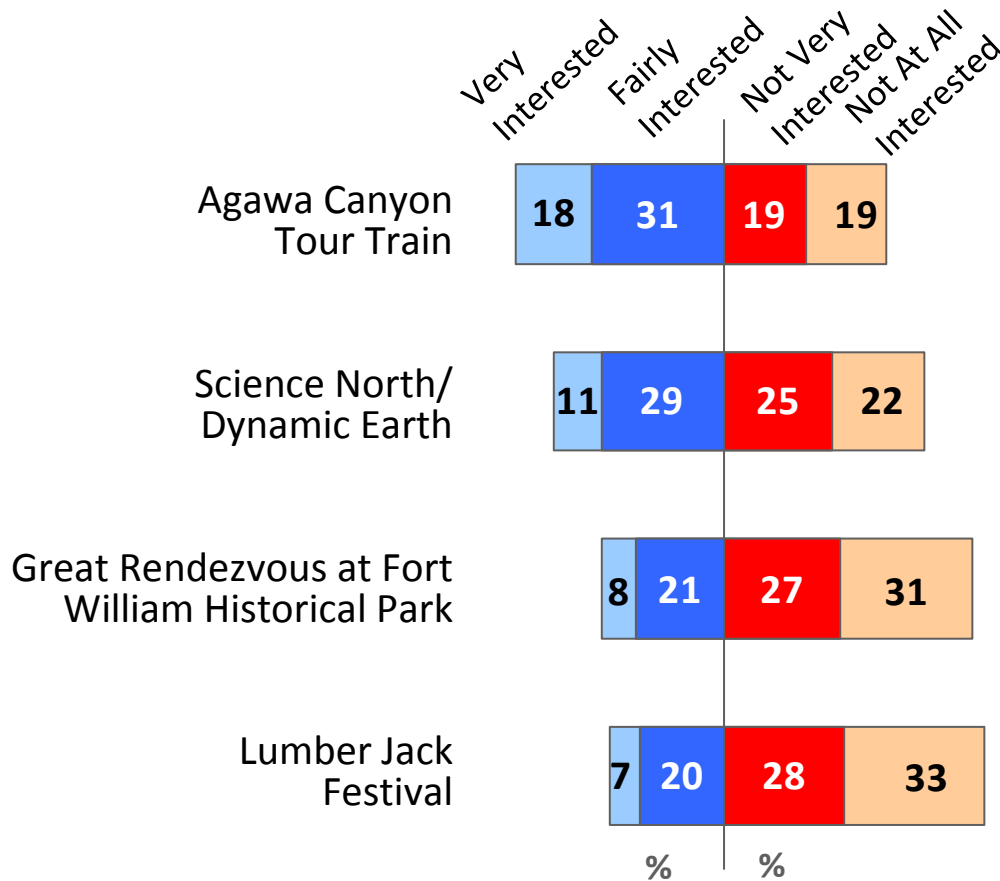
Percent of those familiar with Northern Ontario



Q22P. Northern Ontario offers a number of different attractions and events for visitors. Some of these are described below. In each case, please use the scale provided to indicate your interest in visiting Northern Ontario within the next two years or so in order to experience the attraction or event.

Interest in Specific Northern Ontario Attractions (Feb '11)

Percent of Americans familiar with Northern Ontario

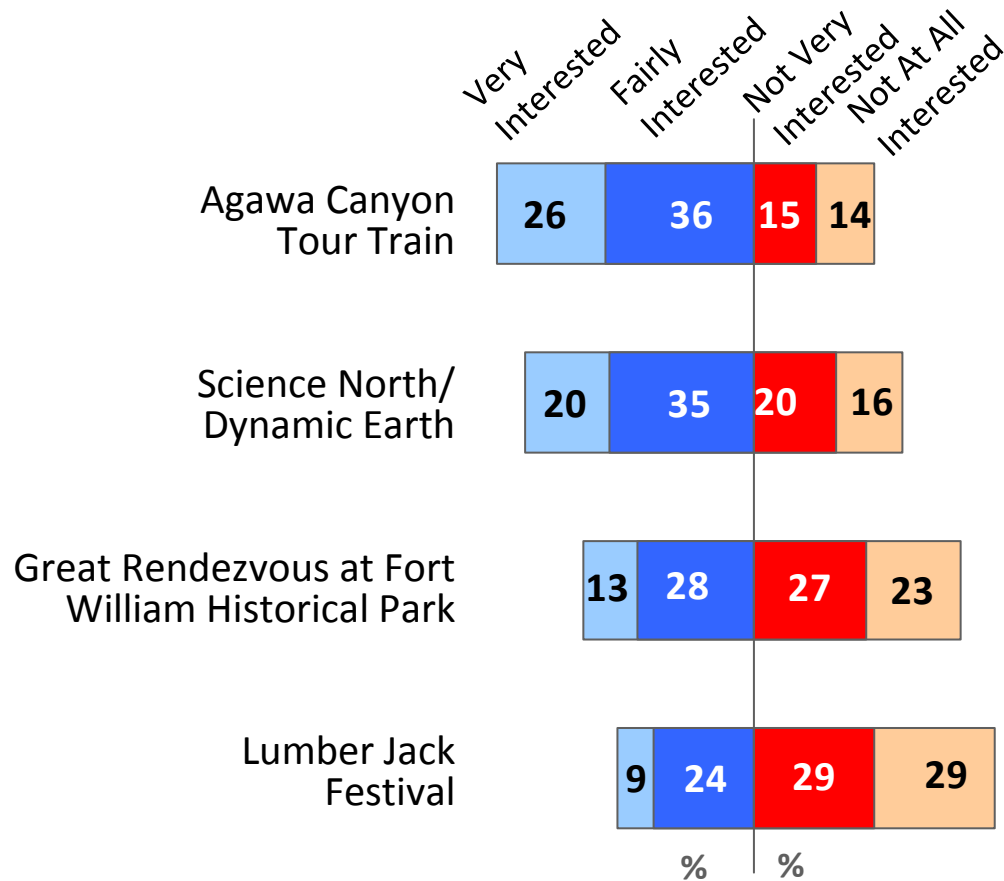


Percent Stating "Very Interested" In...			
Minn/Wisc	North Michigan	Chicago	Minneapolis /St. Paul
18	20	21	20
11	2	8	11
7	1	4	6
6	5	4	7

Q22P. Northern Ontario offers a number of different attractions and events for visitors. Some of these are described below. In each case, please use the scale provided to indicate your interest in visiting Northern Ontario within the next two years or so in order to experience the attraction or event.

Interest in Specific Northern Ontario Attractions (Feb '11)

Percent of **Canadians** familiar with Northern Ontario



Percent Stating "Very Interested" In...		
Ontario	Quebec	Manitoba
29	18	14
23	11	9
15	9	8
11	7	3

Q22P. Northern Ontario offers a number of different attractions and events for visitors. Some of these are described below. In each case, please use the scale provided to indicate your interest in visiting Northern Ontario within the next two years or so in order to experience the attraction or event.

Summary and Implications

Executive Summary

The Traveling Population

- General travel interest (next 12 months) among Americans has remained flat over the past year after experiencing a significant decline in 2009. Interest among Canadians remains steady and buoyant .
 - The continuing economic malaise in the US, especially in some of the near border regions, has drawn increasing numbers of consumers out of the travel market over the past few years. Those who have not traveled and have no intention of doing so represent a larger segment of the US population than was the case before the recession.
 - The same phenomenon is not evident in Canada.

Ontario Travel Intentions

- Results from the most recent wave of travel intentions tracking are generally positive for Ontario, despite the fact that the US source market remains rather soft overall.
- The province has retained its standing both in terms of intended behaviour and perceptions. And there remains opportunity for growth through effective positioning of Ontario's relative strengths to pools of receptive travelers in the US.
- Interest in Ontario as a potential destination has generally held steady for both the Spring and Summer seasons, with signs of improvement in some respects.
 - Gains are evident in specific markets and there are signs that Americans considering Ontario may be more open to repeat visitation.

Implications

- Despite current robustness of the domestic market, it is recommended a strategy to retain the interest and enthusiasm of domestic travelers be pursued. Particularly given current exchange rates and national economic fortunes, growing interest in external destinations, particularly the US, has the potential to draw revenue from Ontario in advance of any reciprocal growth in inbound volume.
- Domestically, areas of emphasis should include:
 - Bolstering “unique and different” as counterbalance to “familiarity”;
 - Leveraging tourism regions as a means of underscoring perceptions of diversity, uniqueness and the capacity to deliver new experiences;
 - Emphasizing value without undermining perceptions of quality;
- Looking beyond the domestic market, there is a need to lay the ground work for stimulating future momentum in the US. Ontario has reasonable base support among Americans at the present time, but should seek to prepare itself to ride the wave of growth when the US economy improves. While Ontario’s traditional US source markets will remain important in this context, some attention might also be paid, selectively, to non-traditional American markets that are likely to recover more quickly and in a more sustained fashion.

Implications (cont'd)

- Americans must be encouraged to go beyond Ontario's practical benefits as a potential destination and to appreciate its scenic beauty in combination with a range of historical, cultural and entertainment options that provide tangible evidence of diversity of experience and distinctiveness versus regional competitors. The goal should be to attract curiosity and to convert practical interest to emotive desire.
- One should also consider the possibility that fundamental structural change has taken place in Ontario's US source markets. While the traditional near-border regions will remain important, some attention might also be paid to exploring possibilities in non-traditional US markets that are likely to recover more quickly and in a sustained fashion. Here too, one might ask whether Ontario's new regional destinations can act as a platform for matching the needs of target groups to specific, compelling elements of the province's offering.
- Northern Ontario seems to represent a special case. If the objective is to raise the region's tourism profile and breadth of appeal in a general sense, much remains to be done to stimulate appreciation of a fuller offer beyond basic perceptions of pristine nature and the outdoors.
- However, one could also contemplate a niche targeting strategy that focuses attention only on those specific interest groups closely aligned with the core offer and the activities associated with it (fishing, hunting, camping, hiking, canoeing/kayaking, etc.). In this case, a broader pallet of experiences, though still relevant from the perspective of encouraging an extended stay, becomes less important with respect to motivation. Such a strategy implies, though, that the geographic scope of potential origin markets be considered in more expansive terms – that is, endeavor to cast the net more widely, but selectively.



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