

CANADIAN TRAVEL MARKET

Canadian Travellers to Ontario

A Profile Report

January 24, 2008

Prepared by Lang Research Inc. on behalf of:

Ontario Ministry of Tourism, Ontario Tourism Marketing Partnership Corporation, Quebec Ministry of Tourism, Travel Manitoba, Canadian Tourism Commission, Tourism Saskatchewan, Atlantic Canada Tourism Partnership, Alberta Tourism, Parks, Recreation and Culture, Department of Canadian Heritage, Tourism British Columbia, Parks Canada Agency, Government of Yukon, Government of Northwest Territories



Executive Summary

Over the last two years, 27.0% of adult Canadians (4,076,814) took an overnight trip to Ontario from another province. 72.8% (2,942,654) of those who took a trip to Ontario report taking a “pleasure trip” to the province. Overall, 26.1% of the Canadian Pleasure Travellers from other provinces reported taking at least one pleasure trip to Ontario during the past two years. Ontario was the most frequently visited Canadian destination by Canadian Pleasure Travellers who visited another province in Canada.

Those who took a pleasure trip to Ontario are most likely to live in Manitoba, Quebec and the Atlantic Region. Those from Saskatchewan were the least likely to have taken a pleasure trip to Ontario during the last two years.

Canadian Pleasure Travellers who visited Ontario are slightly over-represented among those 55 and older. They are also more likely to have a university degree (37.4%) and report above-average household incomes (\$74,104).

Canadians who visited Ontario from another province are more active than other Canadian Pleasure Travellers in culture and entertainment pursuits while on trips. Relative to other Canadian Pleasure Travellers, they were more likely to have attended a literary or film festival and live art performances (e.g., high art performance, live theatre, musical concerts), to have gambled in a casino and to have taken part in a wine, beer or food tasting while on trips. They are also quite active in outdoor activities while they travel and were especially likely to have exercised, jogged or cycled and to have gone skiing (e.g., cross-country skiing, downhill skiing) during the past two years.

Canadians who visited Ontario prefer vacations that provide intellectual stimulation, learning opportunities (e.g., learn about the history and culture of the destination, to enrich one’s perspective on life), novelty and an opportunity to renew connections with friends. This suggests that Ontario should market itself as a place with novel and intellectually stimulating activities and attractions.

Canadians who took a trip to Ontario are somewhat above-average users of the Internet to plan (66.4%) and book travel (45.2%). They are also somewhat above-average consumers of travel media. They may be most effectively reached through news programming (e.g., news magazine, all news radio stations, news websites). They may also be targeted through business, finance and investing magazines, city lifestyle magazines and intellectual television programming (e.g., history, biography). They are more likely than others to listen to radio stations that feature jazz / big band music and classical music.

Travel Activity and Motivation Survey (TAMS)

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, overnight travel behaviour of one or more nights over the past two years and provides detailed information on Travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e., in terms of media strategies); and
- Provide information on how to fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism	Quebec Ministry of Tourism
Ontario Tourism Marketing Partnership Corporation	Travel Manitoba
Canadian Tourism Commission	Tourism Saskatchewan
Atlantic Canada Tourism Partnership	Parks Canada Agency
Department of Canadian Heritage	Tourism British Columbia
Alberta Tourism, Parks, Recreation and Culture	Government of Yukon
Government of Northwest Territories	Statistics Canada

The survey was conducted in Canada and the United States between January 2006 and June 2006 and it includes only adults (18 years and over). The reference period for the data is 2004 and 2005.

The Canadian database is used in this current report. This survey was conducted by Statistics Canada. 31,699 completed questionnaires were returned. The data have been weighted to project the results to the Canadian population.

This report profiles Canadians who live in other provinces who visited Ontario and compares them with other Canadian Pleasure Travellers (i.e., those who took at least one pleasure trip in the last two years). This report is part of a series of eight reports reviewing the out-of-province travel activities of Canadians to specific destinations within Canada prepared using the Canadian TAMS database.

Canadian Travellers to Ontario

Market Incidence

Over the last two years, 27.0% of adult Canadians (4,076,814) took an overnight trip to Ontario from another province. 72.8% (2,942,654) of those who took a trip to Ontario report taking a “pleasure trip” to the province. Overall, 26.1% of the Canadian Pleasure Travellers from other provinces reported taking at least one pleasure trip to Ontario during the past two years. Among those who took a pleasure trip to Ontario, 36.0% report taking two or more pleasure trips to Ontario.

During the past two years, Ontario was the most frequently visited Canadian destination by Canadian Pleasure Travellers who visited another province in Canada.

Fig. 1 Incidence of Trips¹ to Ontario during the Past Two Years

	Ontario
Number of Out-of-Province Canadians Taking a Trip to Ontario (Any Purpose) ²	4,076,814
Percent of Out-of-Province Canadian Population	27.0%
Number of Out-of-Province Canadians Taking a Pleasure Trip to Ontario ³	2,942,654
Percent of Out-of-Province Canadian Pleasure Travellers ⁴	26.1%
Percent of Canadian Pleasure Travellers Taking Two or More Pleasure Trips to Ontario ⁵	36.0%

- 1 - “Trips” are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - Defined as individuals who took at least one overnight trip to Ontario in the last two years for any purpose.
- 3 - This row reports the number of the Canadians who took a “pleasure trip” to Ontario from another province during the past two years.
- 4 - “Pleasure Travellers” are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years. This row reports the percent of Canadian “Pleasure Travellers” who took a trip to Ontario from another province.
- 5 - This row reports the percent of Canadian Pleasure Travellers who visited Ontario from another province who took two or more pleasure trips to Ontario during the last two years.

Incidence by Region

Those who took a pleasure trip to Ontario are most likely to live in Manitoba, Quebec and the Atlantic Region. Those from Saskatchewan were the least likely to have taken a pleasure trip to Ontario during the last two years.

Fig. 2 Geographic Distribution of Those Who Took a Trip to Ontario

	Population	Estimated Number Who Took a Pleasure Trip to Ontario	Percent of Pleasure Travellers Who Took a Pleasure Trip to Ontario	Percent of Total Population Who Took a Pleasure Trip to Ontario
Canada	15,104,511	2,942,654	26.1%	12.6%
Atlantic Provinces	1,822,494	419,472	33.1%	12.5%
Quebec	5,940,869	1,400,535	33.4%	32.3%
Manitoba	843,107	251,316	42.2%	9.9%
Saskatchewan	706,325	72,874	13.5%	4.3%
Alberta	2,465,540	374,874	18.7%	4.9%
British Columbia	3,326,176	423,584	15.9%	5.5%

Demographic Profile

Canadian Pleasure Travellers who visited Ontario are slightly over-represented among those 55 and older. They are also more likely to have a university degree (37.4%) and household incomes above \$80,000 (37.0%) than the average Canadian Pleasure Traveller (where 29.1% have a university degree and 30.6% report household incomes of \$80,000 or more).

Fig. 3 Demographic Profile of Visitors to Ontario Relative to All Out-of-Province Canadian Pleasure Travellers

Attribute	Size of Market	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario ¹	Pleasure Travellers	Index ²
		2,942,654	8,328,154	11,270,808	100
Gender	Male	49.6%	48.8%	49.0%	101
	Female	50.4%	51.2%	51.0%	99
Age of Respondent	18 to 24	11.9%	13.4%	13.0%	92
	25 to 34	17.8%	20.0%	19.5%	92
	35 to 44	19.4%	20.0%	19.8%	98
	45 to 54	19.5%	21.0%	20.6%	95
	55 to 64	16.6%	13.6%	14.4%	115
	65 Plus	14.7%	12.0%	12.7%	116
Average Age		45.8	44.0	44.5	N/A
Marital Status	Not married	33.0%	32.6%	32.7%	101
	Married	67.0%	67.4%	67.3%	100
Parental Status	No children under 18	74.3%	71.6%	72.3%	103
	Children under 18	25.7%	28.4%	27.7%	93
Education	High school or less	31.2%	40.3%	37.9%	82
	Some post-secondary	10.5%	10.3%	10.4%	101
	Post-secondary diploma/certificate	20.9%	23.2%	22.6%	92
	University degree	37.4%	26.1%	29.1%	129
Household Income	Under \$20,000	5.5%	6.9%	6.6%	83
	\$20,000 to \$39,999	14.3%	17.5%	16.7%	86
	\$40,000 to \$59,999	15.1%	18.3%	17.5%	86
	\$60,000 to \$79,999	16.3%	15.7%	15.9%	103
	\$80,000 to \$99,999	13.6%	10.7%	11.5%	118
	\$100,000 or more	23.4%	17.7%	19.1%	122
	Not stated	11.9%	13.1%	12.8%	93
Average Household Income		\$74,014	\$66,569	\$68,532	N/A

- 1 - "Did Not Take a Trip to Ontario" is defined as an individual who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go to Ontario on any trip.
- 2 - The "Index" is calculated by dividing the percent for those who visited Ontario in each group by the percent of Pleasure Travellers in each group. The Index indicates the extent to which visitors are over or under-represented relative to the average out-of-province Canadian Pleasure Traveller. An index of 100 means the percent of visitors is the same as that of the average out-of-province Canadian Pleasure Traveller. Index values over 100 indicate that visitors are over-represented relative to the average out-of-province Canadian Pleasure Traveller. Index values less than 100 indicate that visitors are under-represented relative to the average out-of-province Canadian Pleasure Traveller.

Travel Activity (During Last Two Years)

Those who visited Ontario during the last two years are frequent travellers with 60.5% taking five or more pleasure trips in the last two years. (Note: 47.0% of Canadian Pleasure Travellers took five or more pleasure trips in the last two years). As such, they were more likely than the average Canadian Pleasure Traveller to have travelled to the United States, the Caribbean, Mexico and overseas destinations.

Those who visited Ontario also frequently took trips to other parts of Canada and especially Quebec (56.8%), British Columbia (35.5%) and Alberta (30.5%). Relative to other Canadian Pleasure Travellers, those who visited Ontario were also especially likely to have travelled in the Atlantic Region during the last two years.

Fig. 4 Percent Travelling to Canada and Other Destinations during Past Two Years

	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market	2,942,654	8,328,154	11,270,808	100
Canada	100.0%	95.0%	96.3%	104
Took a trip within own province / region	82.2%	87.2%	85.9%	96
Took a trip to an adjacent province / region	83.1%	41.4%	52.3%	159
Took a trip to non-adjacent province / region	65.6%	23.1%	34.2%	192
Newfoundland and Labrador	6.7%	3.7%	4.5%	149
Prince Edward Island	12.3%	6.2%	7.8%	158
New Brunswick	20.7%	9.7%	12.6%	165
Nova Scotia	23.3%	11.5%	14.5%	160
Quebec	56.8%	35.6%	41.1%	138
Ontario	100.0%	0.0%	33.0%	303
Manitoba	16.1%	8.7%	10.6%	152
Saskatchewan	16.4%	15.8%	15.9%	103
Alberta	30.5%	36.0%	34.6%	88
British Columbia	35.5%	42.5%	40.7%	87
Yukon	1.4%	1.3%	1.4%	106
Northwest Territories	1.1%	0.9%	0.9%	120
Nunavut	0.6%	0.3%	0.4%	153
United States	54.9%	42.4%	45.7%	120
Mexico	13.9%	11.9%	12.4%	112
Caribbean	17.7%	10.7%	12.5%	142
All other destinations	22.4%	17.0%	18.4%	122

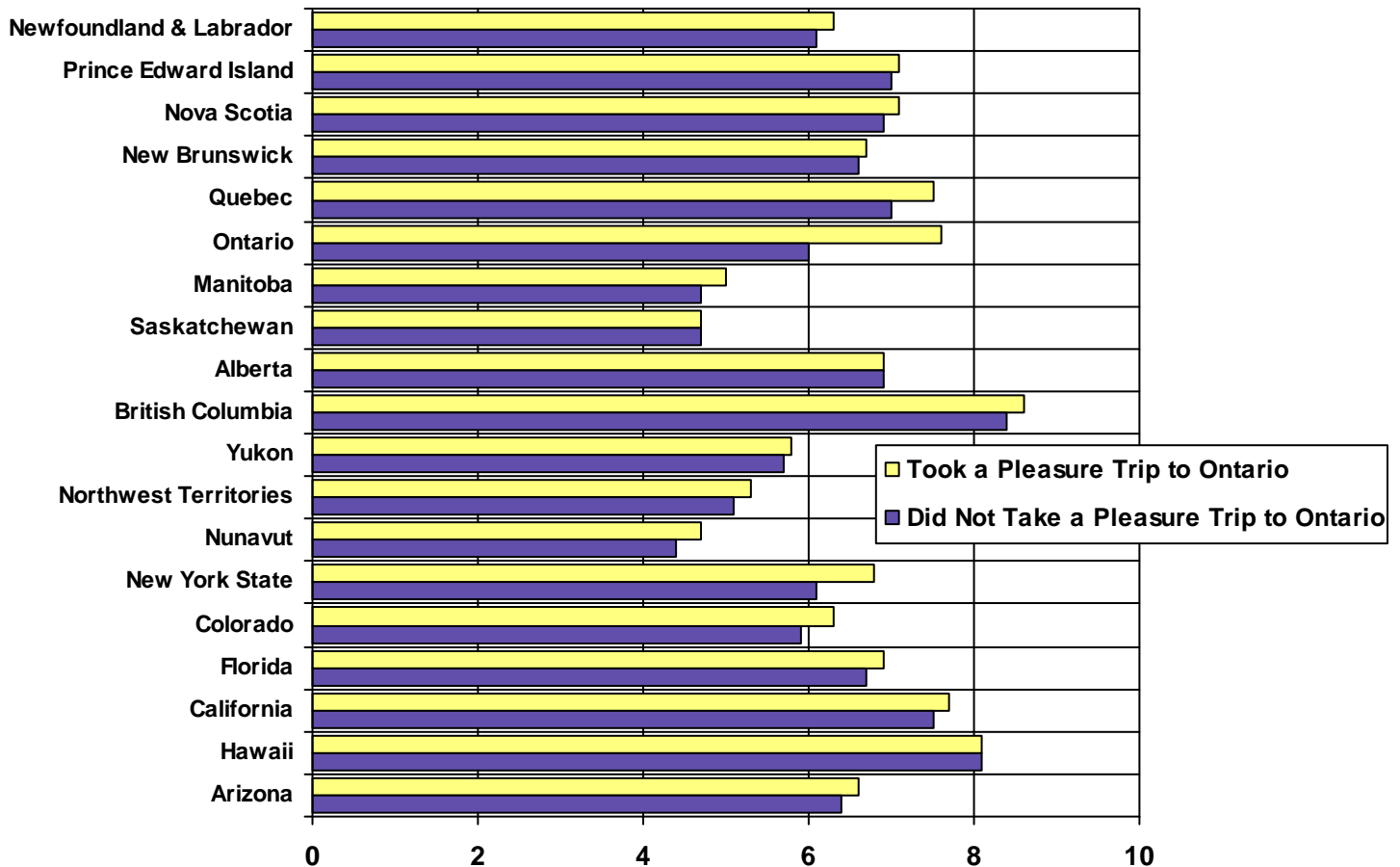
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

The respondents were asked to rate the appeal of each of Canada's provinces and territories on a ten-point appeal scale where "10" is "Very Appealing" and "1" is "Very Unappealing". They were also asked to rate selected U.S. states (New York State, Colorado, Florida, California, Hawaii and Arizona) to provide a frame of reference.

Canadian Travellers who visited Ontario have a more favourable impression of Ontario and Quebec than do other Canadian Pleasure Travellers; perhaps, in part, reflecting the fact that most of the visitors to Ontario are from Quebec. However, British Columbia (8.6) was perceived as the most appealing Canadian destination, followed by Ontario (7.6) and Quebec (7.5).

New York State and Colorado were also perceived as more attractive destinations by travellers to Ontario than by other Canadian Pleasure Travellers. Hawaii (8.1) was considered the most appealing U.S. destination of the six assessed.

Fig. 5 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



Culture and Entertainment Activities Pursued While on Trips

Canadians who visited Ontario from another province are somewhat more active than other Canadian Pleasure Travellers in culture and entertainment pursuits while on trips. The most frequent activities undertaken include shopping and dining and visits to historical sites, museums and art galleries. However, relative to the average Canadian Pleasure Traveller, Ontario visitors were much more likely to have attended a literary or film festival, live art performances (e.g., high art performance, live theatre, musical concerts) and to have visited a science and technology exhibit while travelling during the past two years. They were also more likely to have taken part in a wine, beer or food tasting, gambled in a casino, and to have visited a health spa and garden-themed attraction while on trips.

Fig. 6 Culture and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market	2,942,654	8,328,154	11,270,808	100
Shopping & Dining	89.2%	82.4%	84.2%	106
Historical Sites, Museums & Art Galleries	69.7%	53.6%	57.8%	121
Theme Parks & Exhibits	43.3%	39.2%	40.3%	107
Fairs & Festivals	42.9%	34.3%	36.5%	117
Musical Concerts, Festivals & Attractions	37.9%	30.6%	32.5%	117
Wine, Beer & Food Tastings	31.6%	20.9%	23.7%	133
Science & Technology Exhibits	30.9%	19.7%	22.7%	136
Casinos	28.6%	20.7%	22.8%	126
Live Theatre	26.7%	15.5%	18.4%	145
Garden Theme Attractions	22.8%	16.3%	18.0%	127
Agro-Tourism	18.3%	15.3%	16.1%	114
Professional Sporting Events	16.6%	13.8%	14.5%	114
High Art Performances	14.9%	8.9%	10.5%	142
Comedy Festivals & Clubs	14.0%	10.0%	11.0%	126
Spas	13.5%	9.4%	10.5%	129
Aboriginal Cultural Experiences	13.2%	11.3%	11.8%	112
Amateur Tournaments	12.2%	11.3%	11.5%	106
Participatory Historical Activities	9.4%	6.9%	7.6%	124
Equestrian & Western Events	8.0%	6.8%	7.1%	113
Literary & Film Festivals	4.9%	1.9%	2.7%	183
National & International Sporting Events	3.6%	3.3%	3.4%	106

Culture and Entertainment Activities Pursued While Not on Trips

Canadian Pleasure Travellers who took a pleasure trip to Ontario from another province tend to be quite sophisticated in terms of their cultural pursuits while NOT travelling. They frequently dine in local restaurants and attend local festivals or fairs. Relative to other Canadian Pleasure Travellers, those who visited Ontario are especially likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts, live theatre, jazz clubs) and to visit local museums and art galleries. On the other hand, they are less likely to gamble in local casinos or go to local rodeos.

Fig. 7 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market	2,942,654	8,328,154	11,270,808	100
Going out to eat in restaurants	93.1%	91.3%	91.8%	101
Going to festivals or fairs	63.4%	60.4%	61.1%	104
Going to historic sites or heritage buildings	45.2%	38.0%	39.9%	113
Going to amateur sporting events	42.8%	43.6%	43.4%	99
Going to live theatre	41.0%	30.2%	33.0%	124
Going to art galleries or art shows	40.2%	27.6%	30.9%	130
Going to pick-your-own farms or farmers' market	39.2%	38.6%	38.7%	101
Going to museums	39.1%	28.9%	31.6%	124
Going to zoos or aquariums	33.6%	31.0%	31.7%	106
Going dancing	33.5%	29.6%	30.6%	109
Going to botanical gardens	32.9%	25.6%	27.5%	120
Going to professional sporting events	32.4%	29.9%	30.6%	106
Going to bars with live pop or rock bands	29.8%	26.8%	27.5%	108
Going to amusement or theme parks	28.4%	27.2%	27.5%	103
Going to rock music concerts	24.0%	21.3%	22.0%	109
Going to classical music concerts	21.8%	14.5%	16.4%	133
Going to day spas	16.7%	13.1%	14.1%	119
Going to gamble in casinos	15.0%	15.7%	15.5%	97
Staying overnight in a hotel or B&B in own city	12.1%	9.4%	10.1%	120
Going to jazz clubs	10.7%	5.9%	7.2%	149
Going to the ballet	10.4%	5.5%	6.8%	153
Going to the opera	9.1%	5.2%	6.2%	146
Going to rodeos	7.8%	11.4%	10.4%	75

Outdoor Activities Pursued While on Trips

Canadians Pleasure Travellers who visited Ontario were also quite active in outdoor activities while on trips during the past two years. Relative to the average out-of-province, Canadian Pleasure Traveller, they were especially likely to have gone exercising, jogging, cycling, sailing and surfing, freshwater scuba diving and snorkeling and skiing (e.g., cross-country skiing, downhill skiing) while on trips.

Fig. 8 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

Size of Market	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
	2,942,654	8,328,154	11,270,808	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	52.8%	46.9%	48.4%	109
Wildlife Viewing	49.0%	41.0%	43.1%	114
Boating & Swimming (e.g., motorboating, swimming in lakes)	44.0%	37.1%	38.9%	113
Hiking, Climbing & Paddling	40.8%	33.1%	35.1%	116
Sports & Games (e.g., tennis, board games)	24.2%	20.8%	21.7%	112
Fishing	23.3%	23.7%	23.6%	99
Golfing	20.3%	16.8%	17.7%	115
Exercising & Jogging	20.1%	13.8%	15.5%	130
Cycling	18.1%	13.3%	14.6%	124
Downhill Skiing & Snowboarding	17.5%	13.8%	14.7%	119
Skating (e.g., ice skating, rollerblading)	15.7%	11.7%	12.7%	123
Cross-country Skiing & Snowshoeing	13.5%	9.5%	10.6%	128
Team Sports (e.g., hockey, baseball)	12.0%	10.6%	10.9%	109
Snowmobiling & ATVing	11.7%	12.7%	12.5%	94
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	7.9%	5.5%	6.1%	130
Horseback Riding	5.0%	5.0%	5.0%	100
Hunting	4.9%	6.1%	5.8%	85
Motorcycling	4.1%	3.2%	3.5%	119
Freshwater Scuba & Snorkeling	3.5%	2.1%	2.5%	141
Wilderness Activities (e.g., wilderness skills course)	2.6%	2.2%	2.3%	114
Extreme Air Sports (e.g., parachuting)	2.0%	1.0%	1.3%	155

Outdoor Activities Pursued While Not on Trips

When NOT travelling, Canadians who visited Ontario continue to be highly active in outdoor activities. They frequently go on day outings to local parks, picnic, exercise, swim, hike and garden while not travelling. Relative to the average Canadian Pleasure Traveller, visitors to Ontario are more likely to go skiing (e.g., downhill skiing, cross-country skiing, snowboarding), canoeing and kayaking and to play racquet sports (e.g., tennis) while not on trips. On the other hand, they are less likely than others to go camping, hunting and fishing or to ride ATV's or snowmobiles.

Fig. 9 Outdoor Activities Pursued While NOT on Trips

	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market	2,942,654	8,328,154	11,270,808	100
Day outing to a park	68.6%	67.7%	67.9%	101
Exercising at home or at a fitness club	64.3%	58.5%	60.0%	107
Swimming	63.1%	56.5%	58.2%	108
Gardening	58.2%	58.7%	58.5%	99
Picnicking	55.9%	56.5%	56.4%	99
Hiking	55.5%	53.7%	54.2%	102
Cycling	48.4%	45.6%	46.3%	104
Camping	38.2%	45.1%	43.3%	88
Ice-skating	30.9%	29.4%	29.8%	104
Golfing	28.6%	28.3%	28.4%	101
Fishing	28.2%	32.0%	31.0%	91
Playing team sports	24.7%	23.2%	23.6%	105
Jogging	24.6%	23.7%	23.9%	103
Sailing or other boating	22.7%	22.8%	22.8%	100
Playing racquet sports (e.g., tennis or badminton)	21.5%	19.1%	19.7%	109
Downhill skiing	20.1%	16.4%	17.3%	116
Canoeing or kayaking	17.8%	15.6%	16.2%	110
Cross-country skiing	16.6%	13.9%	14.6%	114
Rollerblading	16.4%	14.6%	15.1%	109
Riding an all-terrain vehicle (ATV)	14.0%	18.2%	17.1%	82
Snowmobiling	9.2%	12.0%	11.3%	81
Horseback riding	8.5%	7.5%	7.8%	109
Hunting	8.5%	9.9%	9.5%	89
Snowboarding	6.0%	5.9%	6.0%	101
Skateboarding	1.3%	1.8%	1.6%	79

Accommodation Stayed In While on Trips

Public and private campgrounds and resorts (e.g., seaside resorts, lakeside / riverside resorts, ski or mountain resorts) were the most popular accommodation used by Canadian Pleasure Travellers who visited Ontario during the last two years. However, relative to the average Canadian Pleasure Traveller from other provinces, visitors to Ontario were especially likely to have stayed at lakeside or riverside resorts, ski or mountain resorts and accommodation that specialize in fine cuisine (e.g., country inn or resort with gourmet dining, wine tasting school). They were also more likely to have stayed at a remote wilderness lodge or outpost during the past two years.

Fig. 10 Accommodation Stayed In While on Trips

	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market	2,942,654	8,328,154	11,270,808	100
A Public Campground in a National, State, Provincial or Municipal Park	29.0%	29.4%	29.3%	99
Lakeside / Riverside Resort	27.8%	21.0%	22.8%	122
Seaside Resort	26.0%	20.5%	21.9%	118
A Private Campground	21.1%	21.6%	21.4%	98
Ski Resort or Mountain Resort	16.6%	13.4%	14.3%	117
A Camp Site in a Wilderness Setting (Not a Campground)	9.4%	9.9%	9.8%	97
Health Spa	8.8%	6.2%	6.9%	128
Country Inn or Resort with Gourmet Restaurant	8.0%	4.5%	5.4%	148
Wilderness Lodge You Can Drive to by Car	7.3%	5.8%	6.2%	118
A Motor Home or RV while Travelling or Touring (Not a Camping Trip)	6.2%	5.2%	5.5%	114
Farm or Guest Ranch	3.5%	3.4%	3.4%	102
Remote or Fly-In Wilderness Lodge	2.1%	1.5%	1.7%	126
On a Houseboat	2.0%	1.5%	1.7%	120
Wine Tasting School	0.7%	0.1%	0.3%	271
Remote or Fly-In Wilderness Outpost	0.3%	0.4%	0.4%	79
Cooking School	0.3%	0.3%	0.3%	95

Tours and Cruises Taken During Past Two Years

Those who visited Ontario were much more likely than the average Canadian Pleasure Traveller to have taken tours and cruises during the last two years. Sameday tours (both organized and self-guided), city tours, scenic country drives and multi-location, self-guided tours were the most popular tour types taken by Ontario visitors. However, relative to other Canadian Pleasure Travellers, Ontario visitors were especially likely to have taken tours of wineries and casinos, overnight single and multi-location organized tours and fresh water cruises (e.g., a cruise on the St. Lawrence River or the Great Lakes). This suggests that the marketing of Ontario to other Canadian travellers should emphasize the opportunities for tours within the province.

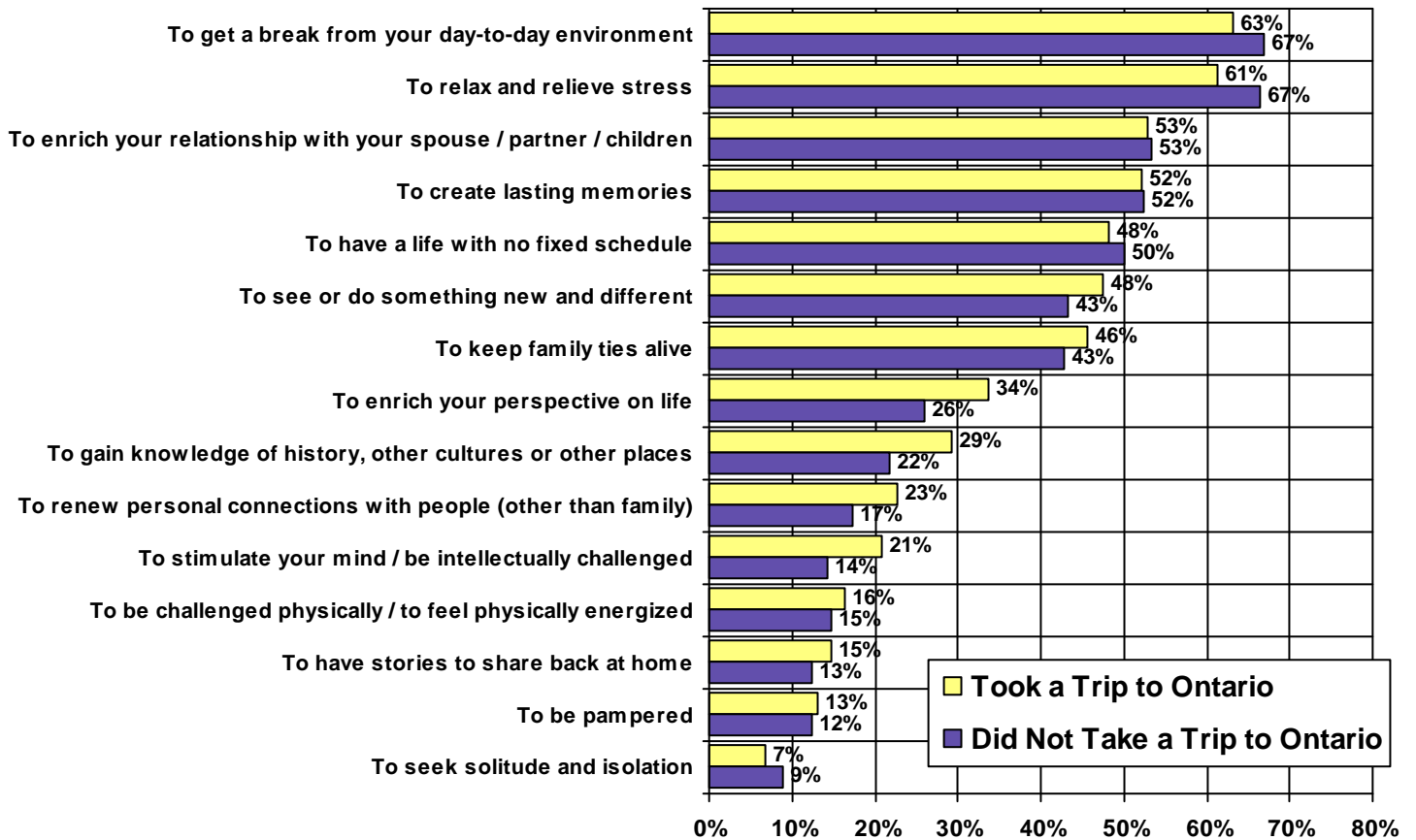
Fig. 11 Tours and Cruises Taken During Past Two Years

	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market	2,942,654	8,328,154	11,270,808	100
A self-guided, sameday tour while on an overnight trip	34.4%	26.0%	28.2%	122
Around the city	28.5%	19.9%	22.1%	129
Around the countryside - scenic drives	26.6%	20.0%	21.8%	122
An organized, sameday, guided tour while on an overnight trip	25.5%	19.8%	21.3%	120
A self-guided, overnight tour where you stayed in different locations	24.6%	17.8%	19.6%	126
Wilderness tour	16.3%	12.7%	13.7%	120
On the water (sightseeing cruise)	15.6%	11.0%	12.2%	128
An organized, overnight, guided tour where you stayed in different locations	13.3%	8.7%	9.9%	134
An organized, overnight, guided tour where you stayed in a single location	10.0%	6.5%	7.4%	135
Some other type of tour	9.9%	9.8%	9.8%	101
To a casino	9.0%	4.2%	5.4%	165
To a winery	8.9%	4.2%	5.4%	165
Caribbean ocean cruise	7.1%	3.3%	4.3%	164
Ocean cruise - Other	4.9%	2.7%	3.3%	149
Cruise on the St. Lawrence River	4.0%	1.7%	2.3%	176
To a factory	3.4%	2.5%	2.7%	125
Cruise on another lake or river	3.2%	1.7%	2.1%	153
In the air as a pilot or passenger of an airplane or helicopter	3.0%	1.5%	1.9%	157
Alaskan ocean cruise	2.0%	1.6%	1.7%	117
Some other type of cruise	1.4%	1.5%	1.5%	92
Great Lakes cruise	1.1%	0.2%	0.4%	254
Submarine cruise	0.2%	0.1%	0.1%	115

Benefits Sought While on Vacation

As with most Canadian Pleasure Travellers, Ontario visitors take vacations to get a break from their day-to-day environment, relax and relieve stress, to create lasting memories and to enrich their relationship with family members. However, relative to other Canadian Pleasure Travellers, Canadians who visited Ontario are likely to prefer vacations that provide intellectual stimulation, learning opportunities (e.g., learn about the history and culture of the destination, to enrich one’s perspective on life), novelty (e.g., to see and do something new) and opportunities to renew connections with friends. On the other hand, Ontario visitors are less likely to pursue vacations that allow them to seek solitude and isolation or to just relax and relieve stress. This suggests that Ontario should market itself as a place with lots of novel and intellectually stimulating things to see and do.

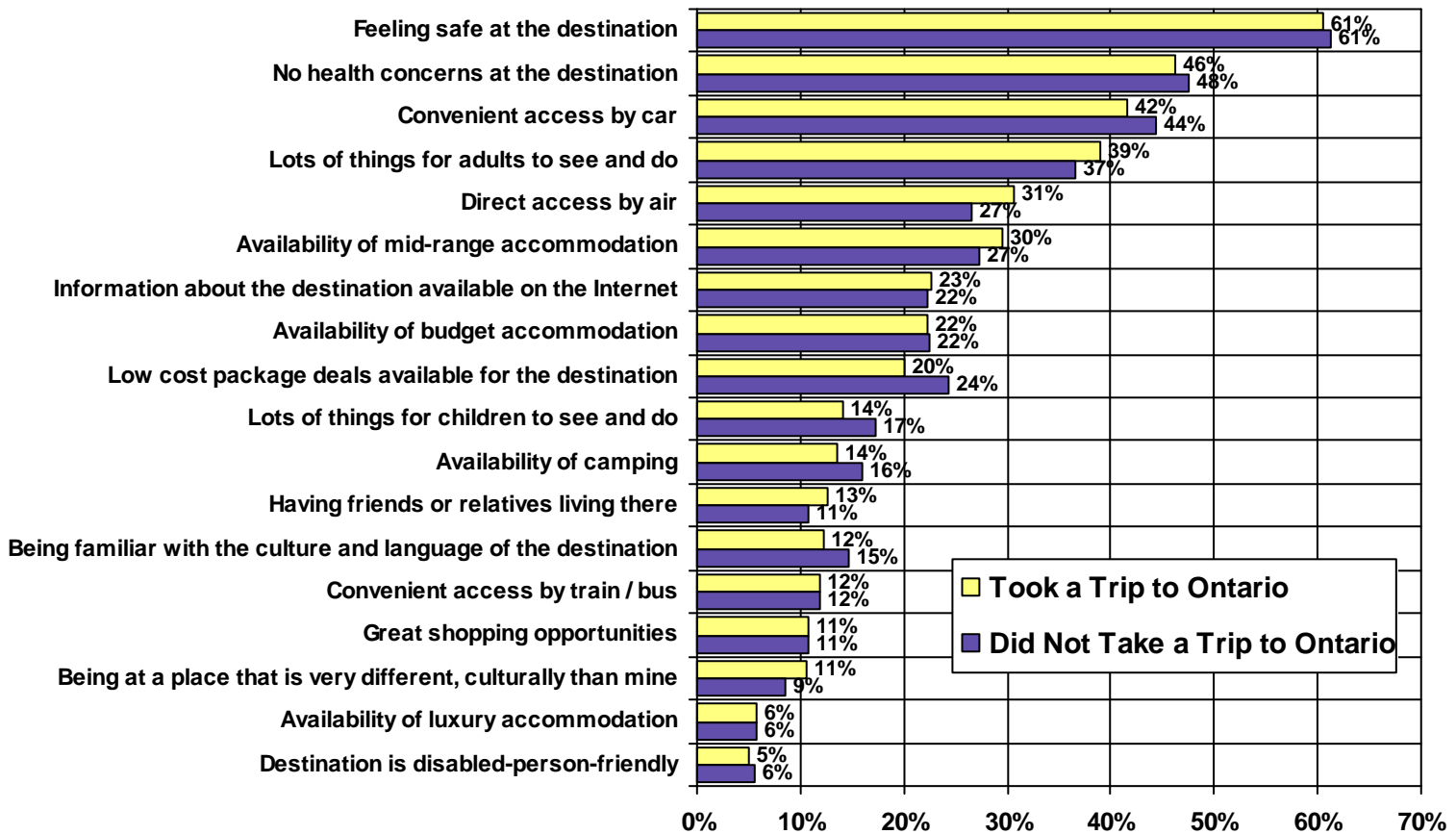
Fig.12 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travellers, those who visited Ontario consider it important that they feel safe at a destination. However, relative to other Canadian Pleasure Travellers, visitors to Ontario consider it more important that a destination has a distinct culture, family and friends living nearby, offers mid-range priced accommodation and is directly accessible by air. On the other hand, they are less concerned whether the destination has lots of activities for children to see and do, a familiar culture and language, camping and low-cost, vacation packages available.

Fig. 13 Importance of Destination Attributes (% Rating Each Attribute as “Highly Important”)



How Destinations Are Selected

Similar to the average Canadian Pleasure Traveller, the majority of Ontario visitors start planning vacations with a particular destination in mind. However, those who have visited Ontario in the last two years may be more responsive than others to vacation package deals for summer travel.

Fig. 14 How Destinations Are Selected (Summer and Winter Vacations)

	Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market	2,942,654	8,328,154	11,270,808	100
Summer				
Started with a desired destination in mind	49.0%	46.5%	47.2%	104
Started by considering specific activities wanted to do	14.5%	15.1%	15.0%	97
Started with a certain type of vacation experience in mind	23.1%	23.9%	23.7%	97
Looked for packaged deals - no destination in mind	1.8%	0.9%	1.1%	156
Considered something else first	4.5%	4.9%	4.8%	93
Don't know / Other	7.3%	8.7%	8.3%	88
Winter				
Started with a desired destination in mind	49.0%	47.0%	47.6%	103
Started by considering specific activities wanted to do	16.0%	16.3%	16.2%	98
Started with a certain type of vacation experience in mind	19.7%	20.2%	20.0%	98
Looked for packaged deals - no destination in mind	3.1%	3.0%	3.0%	103
Considered something else first	5.0%	5.4%	5.2%	95
Don't know / Other	7.2%	8.2%	7.9%	91

Trip Planning and Information Sources Consulted

Similar to the average Canadian Pleasure Traveller, most of those who took a trip to Ontario were responsible for planning their trips either on their own (47.0%) or with someone else (14.6%). When making vacation plans, Ontario visitors tend to consult a wider variety of sources than the average Canadian Pleasure Traveller. The majority use Internet websites, past experience and word-of-mouth as sources to plan travel.

However, Canadians who took a trip to Ontario are more likely than others to obtain travel information from automobile clubs such as CAA, the official travel brochures and information centers of specific states or provinces, travel guidebooks such as Fodor's, and newspaper and magazine articles.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market		2,942,654	8,328,154	11,270,808	100
Who Plans Trips?	Respondent plans trips	47.0%	40.9%	42.5%	111
	Trip planning a shared responsibility	14.6%	16.0%	15.7%	93
	Someone else plans trips	38.4%	43.1%	41.8%	92
Information Sources Consulted	An Internet website	70.5%	60.0%	62.9%	112
	Advice of others / Word-of-mouth	55.2%	50.0%	51.4%	107
	Past experience / Been there before	50.5%	48.8%	49.3%	102
	A travel agent	38.3%	30.9%	33.0%	116
	Maps	37.3%	30.7%	32.5%	115
	Official travel guides or brochures from state / province	34.9%	24.7%	27.5%	127
	Visitor information centres	30.3%	23.1%	25.0%	121
	Articles in newspapers / magazines	26.0%	18.5%	20.6%	127
	An auto club such as CAA	22.4%	14.4%	16.6%	135
	Advertisements in newspapers / magazines	16.2%	13.5%	14.2%	114
	Travel guide books such as Fodor's	16.1%	12.7%	13.6%	118
	Travel information received in the mail	11.1%	8.9%	9.5%	117
	Programs on television	8.9%	8.0%	8.2%	109
	An electronic newsletter or magazine received by e-mail	5.4%	3.4%	3.9%	137
	Advertisements on television	5.0%	5.8%	5.6%	89
Visits to trade, travel or sports shows	4.0%	3.0%	3.2%	123	

Use of the Internet to Plan and Arrange Trips

Canadians who took a trip to Ontario are somewhat above-average users of the Internet to plan (66.4%) and book travel (45.2%). The majority use hotel or resort websites, airline websites and the tourism websites of specific countries, regions or cities to plan their travel. However, they are more likely than other Canadian Pleasure Travellers to visit the websites of specific attractions and cruise lines. As with most Canadian Pleasure Travellers, Ontario visitors most often use the Internet to purchase airline tickets and accommodation. However, relative to the average Canadian Pleasure Traveller, they are more likely than others to use the Internet to rent cars or to purchase tickets for specific activities or attractions.

Fig. 16 Use of the Internet to Plan and Book Travel

		Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
Size of Market		2,942,654	8,328,154	11,270,808	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	33.6%	46.3%	43.0%	78
	Uses Internet to plan trips only	21.2%	22.0%	21.8%	97
	Uses Internet to book part of trip	45.2%	31.7%	35.2%	128
Types of Websites Consulted	A website of a hotel or resort	57.8%	54.4%	55.5%	104
	An airline website	55.4%	42.7%	46.6%	119
	A tourism website of a country / region / city	53.9%	48.2%	49.9%	108
	A travel planning / booking website	46.4%	40.1%	42.0%	110
	A website of an attraction	37.6%	31.9%	33.7%	112
	Some other website	26.8%	27.5%	27.3%	98
	A cruise line website	9.4%	6.3%	7.2%	130
	A motorcoach website	2.8%	2.4%	2.5%	111
Parts of Trips Booked Over The Internet	Air tickets	77.8%	66.7%	70.4%	110
	Accommodation	68.4%	65.7%	66.6%	103
	Car rental	30.0%	22.7%	25.1%	119
	Tickets or fees for specific activities or attractions	25.2%	21.8%	23.0%	110
	Tickets for rail, bus or boat / ship fares	14.6%	13.5%	13.8%	105
	A package containing two or more items	14.0%	15.3%	14.8%	94
	Other	4.0%	4.8%	4.5%	88

Media Consumption Habits

Canadians who travelled to Ontario are slightly above-average consumers of travel media including travel sections of the newspapers, travel magazines, travel programs on television and travel websites. However, this travel segment may also be effectively reached through news magazine, news / information / talk radio stations and news websites. They may also be targeted through business, finance and investing magazines, city lifestyle magazines and intellectual television programming (e.g., history, biography). They are more likely than others to listen to radio stations that feature jazz / big band music and classical music.

Fig. 17 Media Consumption Habits

		Took a Pleasure Trip to Ontario	Did Not Take a Pleasure Trip to Ontario	Pleasure Travellers	Index
	Size of Market	2,942,654	8,328,154	11,270,808	100
Newspaper Readership	Reads daily newspaper	88.7%	87.0%	87.4%	101
	Reads weekend edition of newspaper	89.0%	86.8%	87.4%	102
	Reads local neighbourhood or community newspapers	59.3%	62.0%	61.3%	97
	Reads other types of newspapers	19.6%	17.4%	18.0%	109
	Frequently or occasionally reads travel section of daily newspaper	50.1%	43.7%	45.4%	110
	Frequently or occasionally reads travel section of weekend newspaper	54.2%	44.0%	46.7%	116
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Condé Nast)	17.5%	11.9%	13.4%	131
	Business, finance and investing	20.1%	13.9%	15.5%	130
	News magazine	29.5%	22.2%	24.1%	122
	Magazines about your city	13.0%	10.1%	10.8%	120
	Science and geography	19.0%	15.9%	16.7%	114
Type of Television Programs Watched (Top 5 Indexed)	Shopping channels	4.2%	3.3%	3.6%	117
	History	46.1%	40.4%	41.9%	110
	Biography	45.2%	40.3%	41.6%	109
	Travel shows	34.6%	32.2%	32.8%	105
	Late night talk shows	34.3%	32.1%	32.7%	105
Type of Radio Programs Listened To (Top 5 Indexed)	Jazz / Big band	10.5%	7.1%	8.0%	131
	Classical music	22.0%	15.2%	17.0%	129
	Multicultural	11.8%	8.7%	9.5%	125
	News / Talk / Information	45.6%	37.0%	39.3%	116
	Soft music / Adult contemporary	28.2%	23.9%	25.0%	113
Types of Websites Visited (Top 5 Indexed)	Network news sites (e.g., CBC, CNN)	40.2%	34.6%	36.1%	111
	Newspaper sites	32.1%	27.7%	28.9%	111
	Travel	56.2%	48.7%	50.7%	111
	Magazine sites	17.9%	16.0%	16.5%	108
	House and home	29.7%	27.5%	28.1%	106

Appendix One

Canadian TAMS 2006 Culture and Entertainment Segmentation

Activity Segment	Activities in Segment	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows

