

U.S. TRAVEL MARKET

U.S. 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, 8.2% of adult Americans (14,067,041) took an overnight pleasure trip to Ontario. This represents 6.4% of U.S. Pleasure Travellers. 32.2% of the U.S. Pleasure Travellers who visited Ontario took two or more pleasure trips to Ontario in the last two years. Ontario was by far the most frequently visited Canadian destination by U.S. Pleasure Travellers during the last two years.

Ontario visitors are most likely to live in a border state such as Michigan, New York and Wisconsin or nearby states such as Pennsylvania, Ohio and Vermont. As expected, the likelihood of a visit to Ontario declines as the distance from Ontario increases. Ontario visitors are also over-represented among those living in larger urban centers.

Those who took a trip to Ontario in the last two years are predominantly married and over-represented among those 55 and older. They are more affluent than the average U.S. Pleasure Traveller and more likely to have post-secondary education (68.0% versus 58.2% for the average U.S. Pleasure Traveller). They also have above-average household incomes (\$87,150 versus \$74,303 for the average U.S. Pleasure Traveller). Accordingly, Ontario visitors are over-represented among affluent, mature couples.

Those who visited Ontario are much more likely than other U.S. Travellers to have attended theatre, film and music festivals, high art performances and professional sporting events while on trips. They are also more likely to have taken part in participatory cultural activities (e.g., participatory historical activities, aboriginal cultural experiences, archaeological digs and sites) while travelling. They were more than twice as likely to have skied (e.g., cross-country skiing, downhill skiing) and more likely than the average U.S. Pleasure Traveller to have gone golfing, horseback riding, sailing and surfing and cycling while on trips. They prefer luxury accommodation and fine cuisine. They were also more likely to have taken winery tours, city tours and cruises on the St. Lawrence River or Great Lakes during the past two years.

Ontario visitors prefer intellectually stimulating vacations that offer opportunities to learn, a distinctive culture and novelty. This indicates that Ontario should promote its cultural distinctiveness to the American marketplace.

Those who visited Ontario are above-average users of the Internet to research (76.5%) and book travel (57.0%). They are also above-average consumers of travel media. They may be most effectively targeted through intellectual television programs (i.e., history, biography, science and nature), news and current events programming and business, finance and investment magazines. They may also be effectively reached through classical music, multicultural, jazz / big band and all sports radio stations.

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 U.S. database is used in this current report. This survey was conducted by mail with an established U.S. mail panel. 60,649 completed questionnaires were returned. The mail panel response rate for this survey was 71.3%. The data have been weighted to project the results to the United States population.

This report profiles those who took a trip to Ontario during the past two years and compares them with other U.S. Pleasure Travellers (i.e., took at least one pleasure trip in the last two years). This report is part of a series of eight reports reviewing U.S. travellers to specific destinations within Canada prepared using the U.S. TAMS

database.

U.S. Travellers to Ontario

Market Incidence

Over the last two years, 8.2% of adult Americans (14,067,041) took an overnight trip to Ontario. This represents 6.4% of U.S. Pleasure Travellers. 32.2% of the U.S. Pleasure Travellers reported taking two or more pleasure trips to Ontario in the last two years. Ontario was by far the most frequently visited Canadian destination by U.S. Pleasure Travellers during the last two years.

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

	Ontario
Number of Americans Taking a Trip to Ontario ²	14,067,041
Percent of U.S. Pleasure Travellers ³	8.2%
Percent of U.S. Population ⁴	6.4%
Percent of Visitors Taking Two or More Pleasure Trips to Ontario ⁵	32.2%

- 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 - "Pleasure Travellers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This row reports the percent of Pleasure Travellers who took a trip to Ontario.
- 4 - This row reports the percent of the Total U.S. Adult Market who took a trip to Ontario during the past two years.
- 5 - This row reports the percent of U.S. Pleasure Travellers who visited Ontario who took two or more pleasure trips to Ontario during the last two years.

Incidence by Region, State and Population Size

Relative to the average U.S. Pleasure Traveller, those who took a trip to Ontario are over-represented among those living in the Middle Atlantic and East North Central regions of the United States. They are somewhat more likely to live in large cities (population 500,000 or more) than in mid-sized and smaller communities.

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

	Total Population	Estimated Number Who Took a Trip to Ontario	Percent of Pleasure Travellers in Region Who Took a Trip to Ontario	Percent of Total Regional Population Who Took a Trip to Ontario
United States	222,846,268	14,067,041	8.2%	6.4%
New England	11,095,629	707,116	8.3%	6.4%
Middle Atlantic	31,005,526	3,458,603	15.0%	11.3%
East North Central	34,621,254	4,618,514	17.3%	13.4%
West North Central	15,024,360	840,223	7.0%	5.7%
South Atlantic	42,602,998	1,917,411	6.0%	4.5%
East South Central	13,597,436	461,144	4.8%	3.4%
West South Central	24,853,901	557,229	3.1%	2.3%
Mountain	15,030,720	450,996	3.7%	3.0%
Pacific	34,529,689	1,038,815	3.7%	3.0%
Alaska	484,754	16,991	4.0%	3.5%
Not Available	745,757	27,625	4.5%	3.7%
Less than 100,000	29,429,442	1,224,581	5.9%	4.2%
100,000 to 499,999	36,551,501	1,906,232	7.0%	5.3%
500,000 to 1,999,999	52,335,815	3,427,215	8.6%	6.6%
2,000,000 or more	103,783,753	7,481,389	9.1%	7.3%

Those who visited Ontario are most likely to live in a border state such as Michigan, New York and Wisconsin although the percent travelling to Ontario is also quite high among residents of nearby states such as Pennsylvania, Ohio and Vermont, as well as Connecticut and Delaware. As would be expected, the likelihood of a visit to Ontario declines as the distance of the state from Ontario increases (see Fig. 3 on next page).

Fig. 3 Those Who Took a Trip to Ontario by U.S. State

Region	State	Population of State	Estimated Number Taking Trip to Ontario	Percent of Pleasure Travellers in State	Percent of State Population
United States	All States	222,846,268	14,067,041	8.2%	6.4%
New England	Connecticut	2,685,692	245,043	11.9%	9.1%
	Maine	1,047,770	56,258	7.8%	5.4%
	Massachusetts	4,423,562	222,734	6.4%	5.0%
	New Hampshire	1,604,344	87,192	7.3%	5.5%
	Rhode Island	837,445	35,459	5.1%	4.2%
	Vermont	496,816	60,431	15.8%	12.2%
Middle Atlantic	New Jersey	6,708,501	463,623	8.9%	6.9%
	New York	14,727,054	1,928,232	17.5%	13.2%
	Pennsylvania	9,569,972	1,066,748	15.6%	11.3%
East North Central	Illinois	9,521,097	711,013	9.6%	7.6%
	Indiana	4,717,624	354,617	9.9%	7.5%
	Michigan	7,709,890	1,921,222	32.0%	25.1%
	Ohio	8,412,962	1,286,483	20.8%	15.4%
	Wisconsin	4,259,682	345,179	10.0%	8.1%
West North Central	Iowa	2,262,393	123,457	6.9%	5.6%
	Kansas	2,304,474	59,329	3.4%	2.6%
	Minnesota	3,946,220	439,865	13.0%	11.2%
	Missouri	4,138,758	134,967	4.2%	3.3%
	Nebraska	1,304,361	46,918	4.5%	3.6%
	North Dakota	488,140	20,382	5.0%	4.2%
	South Dakota	580,015	15,304	3.4%	2.9%
South Atlantic	Delaware	646,427	75,932	15.5%	11.7%
	District of Columbia	521,285	27,224	7.8%	5.2%
	Florida	13,937,467	646,260	6.0%	4.6%
	Georgia	6,668,302	272,967	5.4%	4.1%
	Maryland	3,428,206	227,241	8.5%	6.6%
	North Carolina	6,651,453	155,513	3.2%	2.3%
	South Carolina	3,241,944	110,745	4.7%	3.4%
	Virginia	5,957,159	326,614	7.1%	5.6%
	West Virginia	1,550,755	74,915	8.6%	4.8%
East South Central	Alabama	3,431,591	46,297	1.9%	1.3%
	Kentucky	3,447,277	163,293	6.7%	4.7%
	Mississippi	2,156,793	42,240	3.1%	2.0%
	Tennessee	4,561,775	209,314	6.3%	4.7%
West South Central	Arkansas	2,103,346	41,229	2.9%	2.0%
	Louisiana	3,367,908	59,894	2.7%	2.0%
	Oklahoma	2,643,565	28,582	1.5%	1.1%
	Texas	16,739,082	427,524	3.4%	2.6%
Mountain	Arizona	4,451,660	134,173	3.8%	3.1%
	Colorado	3,501,822	111,622	3.9%	3.2%
	Idaho	1,044,920	18,233	2.2%	1.7%
	Montana	726,027	11,272	1.9%	1.6%
	Nevada	1,809,582	71,580	4.9%	4.0%
	New Mexico	1,433,596	50,271	4.6%	3.5%
	Utah	1,671,322	40,984	2.9%	2.6%
	Wyoming	391,790	12,861	3.9%	3.3%
Pacific	Alaska	484,754	16,991	4.0%	3.5%
	California	26,965,837	886,275	4.0%	3.3%
	Oregon	2,793,303	56,513	2.6%	2.0%
	Washington	4,770,549	96,028	2.5%	2.0%

less than 100 indicate that visitors are under-represented relative to the average U.S. Pleasure Traveller.

Travel Activity (During Last Two Years)

Those who visited Ontario during the last two years are frequent travellers with 58.4% taking five or more pleasure trips in the last two years. (Note: 42.4% of U.S. Pleasure Travellers took five or more pleasure trips in the last two years). They were much more likely than the average U.S. Pleasure Traveller to have taken trips within the United States as well as to Mexico, the Caribbean and overseas destinations.

They were also frequent visitors to other Canadian destinations and especially Quebec (19.2%) and British Columbia (9.5%). Relative to the average U.S. Pleasure Traveller, they were particularly likely to have also visited the Atlantic Region, Manitoba and Saskatchewan during the last two years.

Fig. 5 Percent Travelling to Canada and Other Destinations during Past Two Years

	Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market	14,067,041	156,443,200	170,510,241	100
All destinations	100.0%	84.0%	85.3%	117
Canada	100.0%	6.9%	14.6%	687
Newfoundland and Labrador	2.2%	0.3%	0.4%	538
Prince Edward Island	3.4%	0.4%	0.6%	549
New Brunswick	4.2%	0.5%	0.8%	511
Nova Scotia	5.9%	0.9%	1.3%	444
Quebec	19.2%	1.6%	3.1%	620
Ontario	100.0%	0.0%	8.3%	1211
Manitoba	3.5%	0.3%	0.5%	657
Saskatchewan	2.7%	0.3%	0.5%	554
Alberta	4.7%	0.9%	1.2%	395
British Columbia	9.5%	3.6%	4.1%	231
Yukon	2.0%	0.4%	0.6%	346
Northwest Territories	1.5%	0.3%	0.4%	385
Nunavut	0.3%	0.0%	0.0%	731
Own State	84.2%	79.2%	79.6%	106
Other parts of the U.S.	96.0%	90.0%	90.5%	106
Mexico	20.3%	13.0%	13.6%	150
Caribbean	22.6%	11.8%	12.7%	177
All other destinations	16.2%	8.9%	9.5%	170

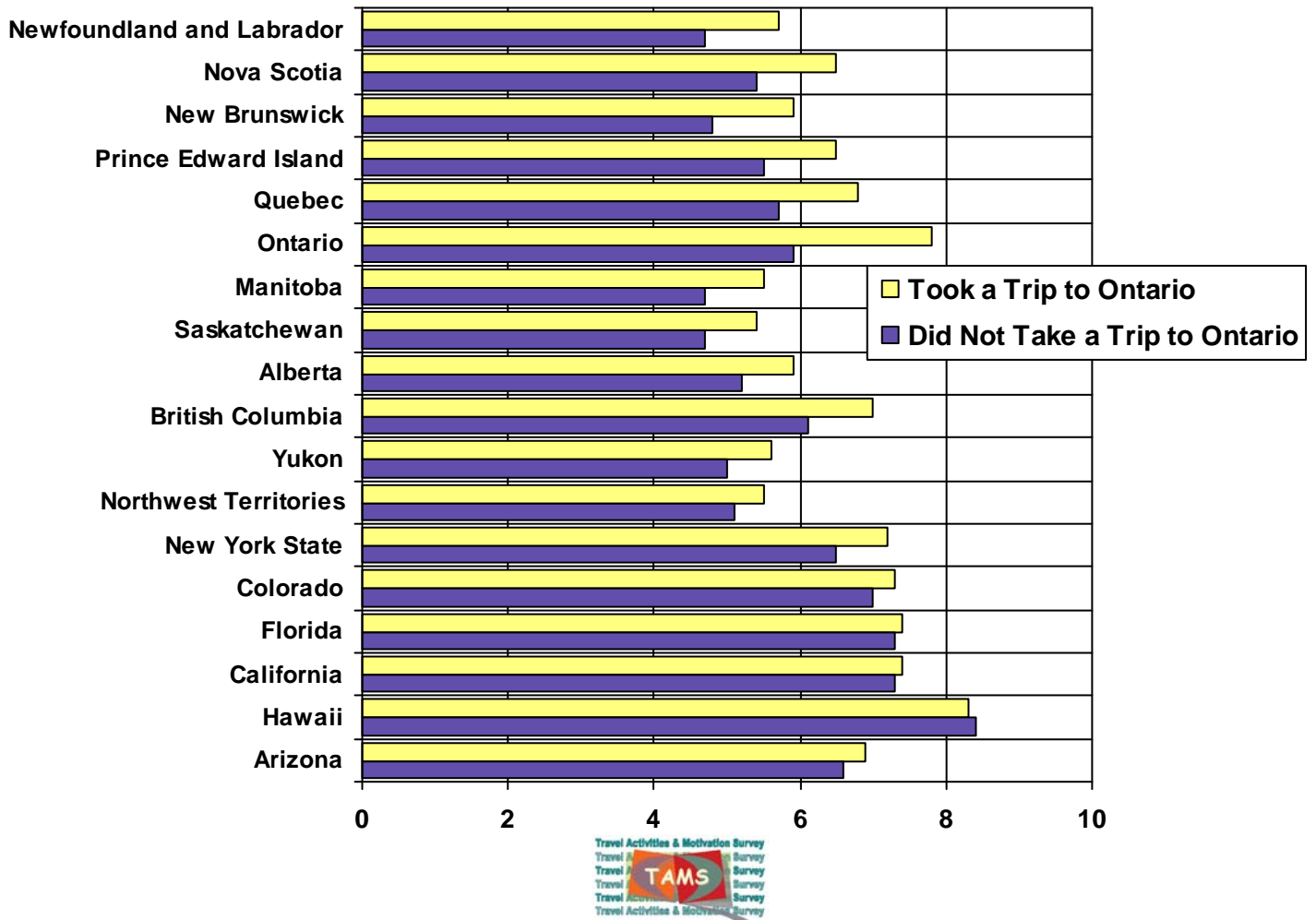
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Travellers who visited Ontario have a much more favourable impression of all Canadian destinations than the average U.S. Pleasure Traveller, and in particular, Ontario, Quebec, the Atlantic Region and British Columbia. Ontario (7.8) received the highest rating of the Canadian destinations, followed by British Columbia (7.0) and Quebec (6.8).

While U.S. Pleasure Travellers who visited Ontario also have a favourable impression of the six U.S. reference states, their appeal ratings are comparable to that of other U.S. Pleasure Travellers with the exception of New York State. Hawaii (8.4) received the highest appeal rating among all of the destinations.

Fig. 6 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

U.S. Pleasure Travellers who visited Ontario are much more active than the average U.S. Pleasure Traveller in culture and entertainment pursuits while on trips. The most frequent activities undertaken include shopping and dining, visits to historical sites, museums and art galleries and visits to casinos, live theatre and comedy clubs. However, relative to the average U.S. Pleasure Traveller, visitors to Ontario were much more likely to attend theatre, film and music festivals, high art performances and professional sporting events while on trips during the past two years. They were also more likely to have taken part in participatory, cultural activities (e.g., participatory historical activities, aboriginal cultural experiences, archaeological digs and sites) while on trips. These interests suggest that this is an intellectual and sophisticated travel segment.

Fig. 7 Culture and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market	14,067,041	156,443,200	170,510,241	100
Shopping and Dining	85.2%	77.0%	77.7%	110
Historical Sites, Museums & Art Galleries	71.1%	51.9%	53.5%	133
Casino, Theatre and Comedy Clubs	62.3%	43.9%	45.4%	137
Theme Parks & Exhibits	58.3%	48.1%	49.0%	119
Fairs and Festivals	54.9%	39.7%	41.0%	134
Fine Dining and Spas	45.0%	31.9%	33.0%	137
Wine, Beer and Food Tastings	39.8%	21.4%	22.9%	173
Science and Technology Exhibits	38.8%	23.5%	24.8%	157
Professional Sporting Events	26.2%	15.2%	16.1%	163
Garden Theme Attractions	25.7%	12.6%	13.7%	188
Equestrian & Western Events	22.2%	14.8%	15.5%	144
Agro-Tourism	21.3%	12.8%	13.5%	158
Rock Concerts and Recreational Dancing	20.9%	14.7%	15.3%	137
High Art Performances	20.2%	10.1%	10.9%	184
Theatre, Film & Musical Festivals	16.3%	7.6%	8.3%	196
Aboriginal Cultural experiences	15.0%	8.0%	8.6%	175
Amateur Tournaments	11.5%	7.3%	7.7%	150
Archaeological Digs & Sites	10.0%	5.1%	5.5%	182
Participatory Historical Activities	8.4%	3.5%	3.9%	213
National & International Sporting Events	4.3%	1.6%	1.9%	232

Culture and Entertainment Activities Pursued While Not on Trips

U.S. Pleasure Travellers who visited Ontario are also quite active in cultural pursuits while NOT travelling. This segment frequently dines in local restaurants and visits local festivals or fairs. Relative to the average U.S. Pleasure Traveller, they are also much more likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts, live theatre, jazz clubs) and to visit botanical gardens. They also are more likely to visit local museums, art galleries and art shows and local historic or heritage buildings, as well as professional sporting events while not travelling.

Fig. 8 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market	14,067,041	156,443,200	170,510,241	100
Going out to eat in restaurants	94.8%	92.7%	92.8%	102
Going to festivals or fairs	72.7%	64.8%	65.5%	111
Going to historic sites or heritage buildings	51.5%	39.1%	40.1%	128
Going to zoos or aquariums	50.9%	45.2%	45.6%	112
Going to museums	49.0%	36.4%	37.5%	131
Going to amateur sporting events	45.9%	39.3%	39.9%	115
Going to professional sporting events	43.6%	34.1%	34.9%	125
Going to live theatre	41.5%	28.1%	29.2%	142
Going to amusement or theme parks	41.4%	37.8%	38.1%	109
Going to art galleries or art shows	40.0%	26.7%	27.8%	144
Going to pick-your-own farms or farmers' market	36.1%	31.2%	31.6%	114
Going to gamble in casinos	35.0%	27.4%	28.0%	125
Going to botanical gardens	28.6%	19.2%	20.0%	143
Going to bars with live pop or rock bands	27.5%	23.2%	23.6%	117
Going to rock music concerts	25.2%	20.9%	21.3%	118
Going to classical music concerts	24.5%	14.0%	14.9%	164
Going dancing	24.3%	20.5%	20.8%	117
Staying overnight in a hotel or B&B in your own city	14.1%	10.2%	10.6%	133
Going to day spas	12.3%	10.1%	10.3%	120
Going to jazz clubs	12.2%	7.5%	7.9%	155
Going to the ballet	11.3%	6.7%	7.0%	160
Going to the opera	10.4%	5.3%	5.7%	181
Going to rodeos	7.5%	8.3%	8.2%	92

Outdoor Activities Pursued While on Trips

Despite the maturity of this travel segment, those who visited Quebec were much more active than the average U.S. Pleasure Traveller in outdoor activities while on trips during the past two years. Relative to the average U.S. Pleasure Traveller, they were twice as likely to have gone skiing (e.g., cross-country skiing, downhill skiing); partially reflecting the fact that the majority live in the northern U.S. states close to Ontario. They were also much more likely than the average U.S. Pleasure Traveller to have gone golfing, horseback riding, sailing and surfing and cycling while on trips during the past two years.

Fig. 9 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market	14,067,041	156,443,200	170,510,241	100
Wildlife Viewing	48.8%	33.7%	34.9%	140
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	47.2%	38.9%	39.6%	119
Hiking, Climbing & Paddling	32.5%	22.7%	23.5%	139
Boating & Swimming (e.g., motorboating, swimming in lakes)	31.7%	20.1%	21.0%	151
Games & Individual Sports (e.g., tennis, board games)	28.9%	21.6%	22.2%	130
Fishing	25.1%	18.2%	18.8%	134
Exercising & Jogging	21.5%	13.4%	14.1%	153
Golfing	16.7%	10.1%	10.7%	156
Downhill Skiing & Snowboarding	12.8%	7.6%	8.0%	159
Cycling	11.0%	5.9%	6.3%	174
Team Sports (e.g., football, baseball, basketball)	10.6%	7.6%	7.9%	135
Horseback Riding	10.4%	5.8%	6.2%	169
Snowmobiling & ATVing	9.9%	6.9%	7.1%	139
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	9.3%	4.4%	4.8%	195
Board & Blade (e.g., skateboarding, ice-skating)	8.7%	3.6%	4.0%	217
Hunting	7.3%	5.2%	5.4%	136
Scuba & Snorkeling	6.3%	3.9%	4.1%	155
Cross-country Skiing & Snowshoeing	4.7%	1.6%	1.9%	251
Extreme Air Sports (e.g., parachuting, bungee jumping)	4.2%	1.5%	1.7%	244
Motorcycling	3.6%	3.0%	3.1%	117
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.1%	0.3%	0.3%	317

Accommodation Stayed In While on Trips

Those who visited Ontario were most likely to have stayed in resorts (e.g., seaside resorts, lakeside / riverside resorts, ski or mountain resorts) during the last two years. Relative to the average U.S. Pleasure Traveller, they were also more likely to have stayed at accommodation that specializes in fine cuisine (e.g., country inn or resort with gourmet dining, cooking or wine tasting school). They are also more likely than other U.S. Pleasure Travellers to have stayed in remote wilderness lodges or outposts.

Fig. 11 Accommodation Stayed In While on Trips

	Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market	14,067,041	156,443,200	170,510,241	100
Seaside Resort	24.4%	17.8%	18.3%	133
Lakeside / Riverside Resort	23.6%	11.4%	12.4%	190
A Public Campground in a National, State, Provincial or Municipal Park	20.7%	16.6%	16.9%	122
A Private Campground	14.2%	9.8%	10.2%	140
Ski Resort or Mountain Resort	13.0%	8.6%	9.0%	145
Wilderness Lodge You Can Drive to by Car	7.0%	3.2%	3.5%	201
A Motor Home or RV while Travelling or Touring (Not a Camping Trip)	7.0%	4.0%	4.2%	164
A Camp Site in a Wilderness Setting (Not a Campground)	6.0%	4.6%	4.7%	127
Health Spa	5.4%	2.9%	3.1%	171
Country Inn or Resort with Gourmet Restaurant	4.4%	1.8%	2.0%	220
Farm or Guest Ranch	3.5%	1.9%	2.0%	176
Remote or Fly-In Wilderness Lodge	3.2%	0.6%	0.8%	394
On a Houseboat	3.0%	1.3%	1.4%	208
Remote or Fly-In Wilderness Outpost	1.9%	0.3%	0.4%	438
Cooking School	1.7%	0.5%	0.6%	291
Wine Tasting School	1.4%	0.3%	0.4%	325

Tours and Cruises Taken During Past Two Years

Those who visited Ontario were much more likely than the average U.S. Pleasure Traveller to have taken tours and cruises during the last two years. Sameday tours (both organized and self-guided) and city tours were the most popular. However, relative to the average U.S. Pleasure Traveller, those who visited Ontario were especially likely to have taken tours of wineries and cruises on the St. Lawrence River or Great Lakes. This segment was also more likely than others to have taken tours of factories or casinos, multi-location overnight tours, wilderness tours and air tours in a plane or helicopter. This suggests that the marketing of Ontario to U.S. travellers should emphasize opportunities for winery tours, city tours and other sightseeing tours and cruises.

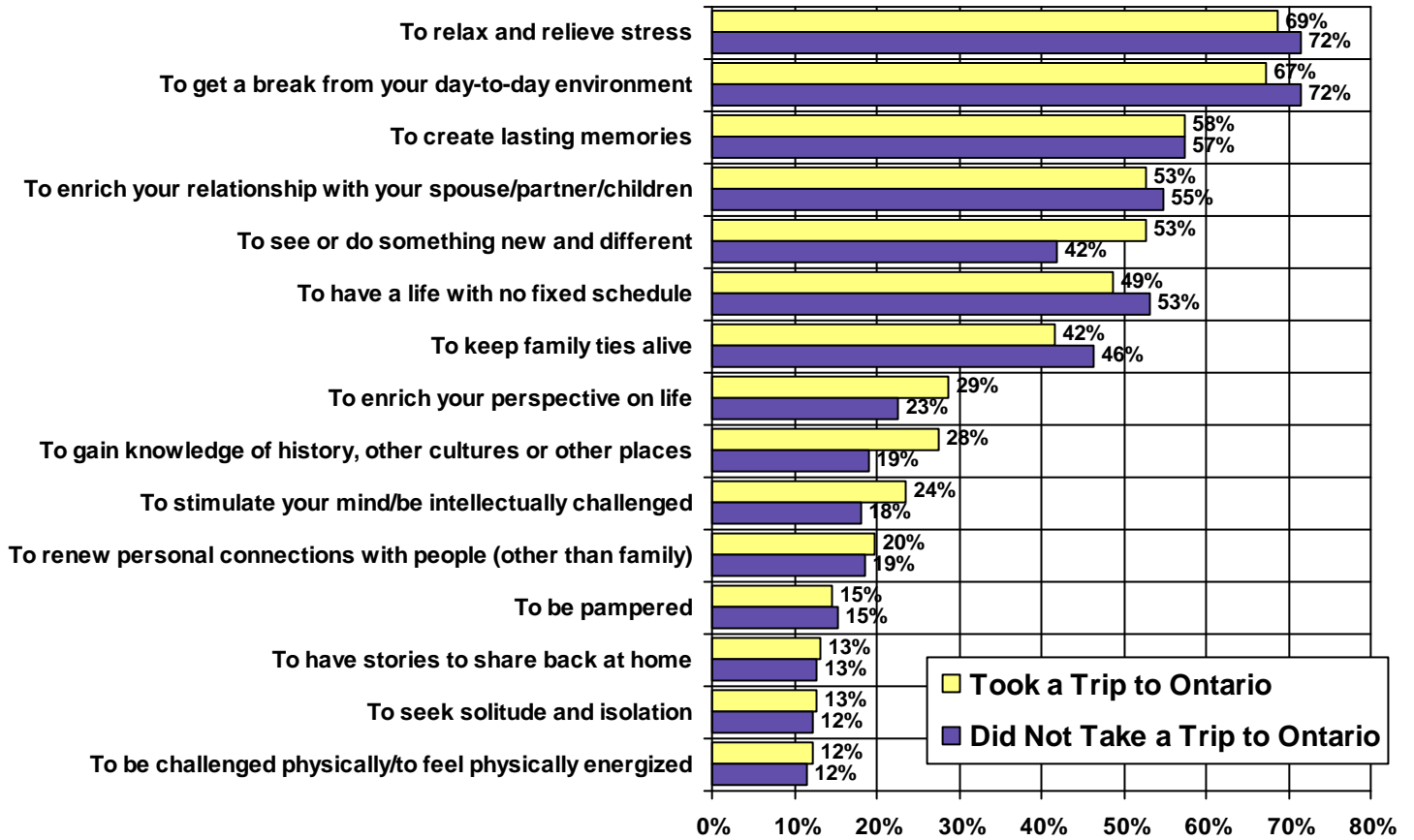
Fig. 12 Tours and Cruises Taken During Past Two Years

	Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market	14,067,041	156,443,200	170,510,241	100
A self-guided, sameday tour while on an overnight trip	29.0%	18.3%	19.2%	151
An organized, sameday, guided tour while on an overnight trip	28.5%	17.6%	18.5%	154
Around the city	26.8%	14.8%	15.8%	170
Around the country side - scenic drives	22.1%	12.3%	13.1%	168
A self-guided, overnight tour where you stayed in different locations	18.6%	9.6%	10.4%	179
An organized, overnight, guided tour where you stayed in different locations	16.8%	7.1%	7.9%	214
On the water (sightseeing cruise)	15.6%	7.1%	7.8%	201
Caribbean ocean cruise	14.4%	8.5%	9.0%	160
An organized, overnight, guided tour where you stayed in a single location	13.2%	6.1%	6.7%	197
Some other type of tour	12.9%	8.5%	8.8%	146
Wilderness tour	11.9%	7.0%	7.4%	160
To a casino	10.7%	4.4%	4.9%	219
To a winery	9.2%	3.1%	3.6%	257
Ocean cruise - Other	7.3%	4.6%	4.8%	151
Cruise on another lake or river	4.9%	1.7%	2.0%	250
To a factory	4.7%	1.6%	1.8%	260
Alaskan ocean cruise	4.7%	2.3%	2.5%	189
Some other type of cruise	4.0%	1.5%	1.7%	231
In the air as a pilot or passenger of an airplane or helicopter	3.5%	1.2%	1.4%	252
Great Lakes cruise	1.8%	0.3%	0.4%	452
Cruise on the St. Lawrence River	1.7%	0.2%	0.3%	612
Submarine cruise	0.7%	0.2%	0.2%	291

Benefits Sought While on Vacation

As with most U.S. Pleasure Travellers, those who visited Ontario take a vacation to get a break from their day-to-day environment, relax and relieve stress, create lasting memories and enrich family relationships. However, relative to other U.S. Pleasure Travellers, those who visited Ontario are especially likely to seek vacations that provide intellectual stimulation, learning opportunities (e.g., learn about the history and culture of the destination) and novelty (i.e., to see and do something new). This suggests that Ontario should promote its distinctive culture and opportunities for cultural enrichment and learning to the American travel market.

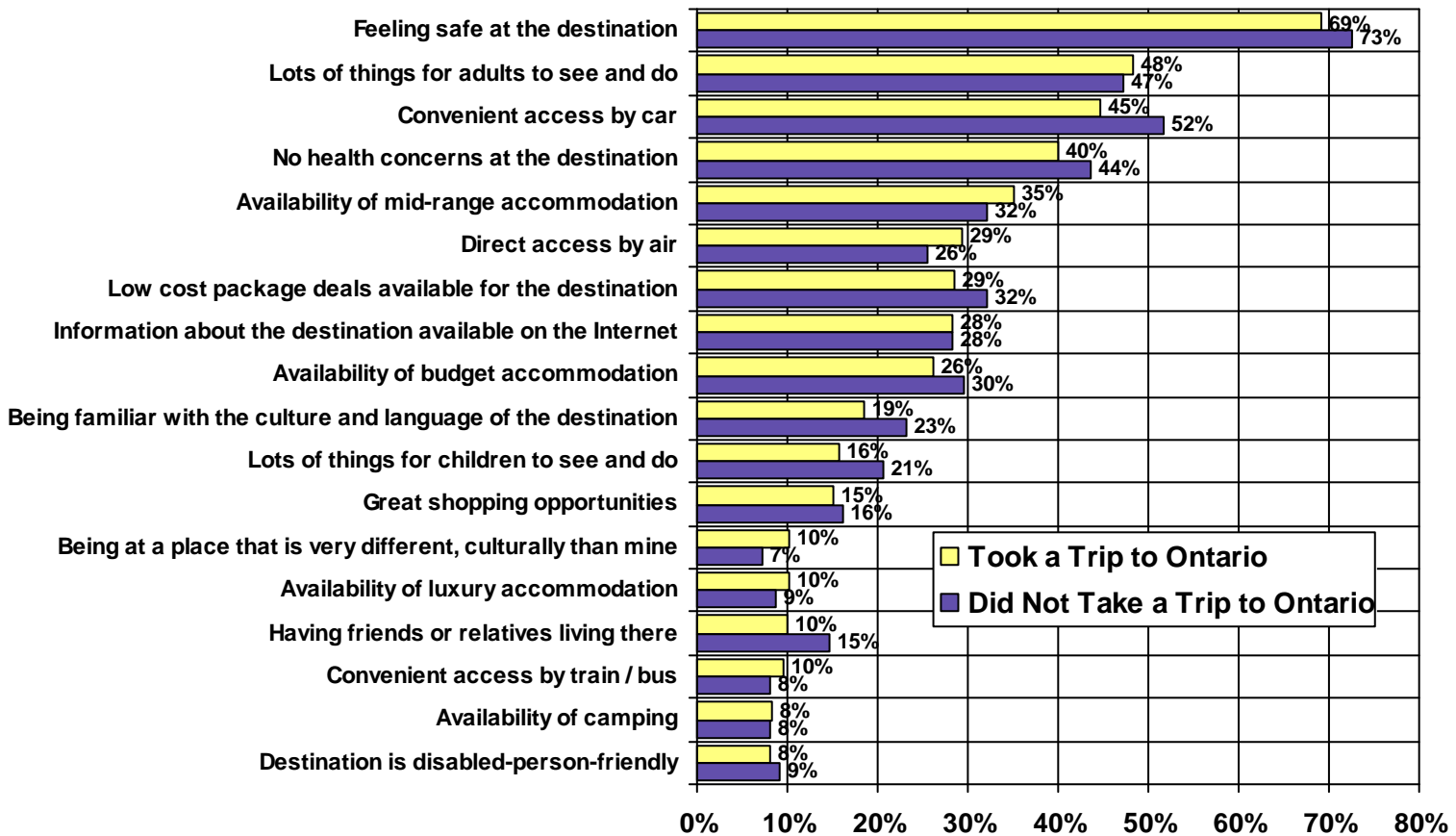
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most U.S. Pleasure Travellers, Americans who visited Ontario consider it important that they feel safe at a destination. However, relative to other U.S. Pleasure Travellers, Ontario visitors are more likely to consider it important that a destination has a distinct culture, luxury accommodation and is directly accessible by air. By contrast, they are less concerned whether the destination has family or friends living nearby, lots of activities for children to see and do, a familiar culture and language, budget-priced accommodation and convenient access by car.

Fig. 14 Importance of Destination Attributes (% Rating Each Attribute as “Highly Important”)



How Destinations Are Selected

Similar to the average U.S. Pleasure Traveller, the majority of those who have taken a trip to Ontario in the past two years start planning vacations with a desired destination in mind. However, Ontario visitors are slightly more likely than the average U.S. Pleasure Traveller to begin planning trips by first considering what activities they would like to do. This well-travelled segment may also exhibit an above-average response to discount vacation packages.

Fig. 15 How Destinations Are Selected (Summer and Winter Vacations)

	Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market	14,067,041	156,443,200	170,510,241	100
Summer				
Started with a desired destination in mind	60.0%	58.0%	58.2%	103
Started by considering specific activities wanted to do	11.3%	9.8%	9.9%	114
Started with a certain type of vacation experience in mind	17.5%	17.3%	17.3%	101
Looked for packaged deals - no destination in mind	1.6%	1.1%	1.1%	145
Considered something else first	3.7%	4.7%	4.6%	82
Don't know / Other	5.9%	9.2%	8.9%	66
Winter				
Started with a desired destination in mind	59.9%	58.8%	58.9%	102
Started by considering specific activities wanted to do	12.7%	11.1%	11.3%	113
Started with a certain type of vacation experience in mind	15.7%	14.7%	14.8%	106
Looked for packaged deals - no destination in mind	2.5%	1.3%	1.4%	175
Considered something else first	3.7%	5.5%	5.3%	69
Don't know / Other	5.5%	8.6%	8.3%	66

Trip Planning and Information Sources Consulted

Similar to the average U.S. Pleasure Traveller, most of those who took a trip to Ontario are responsible for planning their trips either on their own (43.1%) or with someone else (17.0%). When making vacation plans, visitors to Ontario consult a wider variety of sources than the average U.S. Pleasure Traveller. The majority use Internet websites, past experience and word-of-mouth as sources to plan travel. However, relative to the average U.S. Pleasure Traveller, visitors to Ontario are more likely to obtain travel information from travel guidebooks such as Fodor's, television programs and advertising, newspaper and magazine articles and advertising, automobile clubs such as AAA and the official travel brochures and information centers of specific states or provinces.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
	Size of Market	14,067,041	156,443,200	170,510,241	100
Who Plans Trips?	Respondent plans trips	42.3%	38.9%	39.2%	108
	Trip planning a shared responsibility	17.8%	17.6%	17.6%	101
	Someone else plans trips	39.8%	43.5%	43.2%	92
Information Sources Consulted	An Internet website	81.7%	75.4%	76.0%	107
	Past experience / Been there before	58.2%	54.1%	54.5%	107
	Advice of others / Word-of-mouth	50.4%	44.9%	45.4%	111
	Maps	42.9%	31.7%	32.7%	131
	An auto club such as AAA	36.4%	22.8%	24.0%	152
	Official travel guides or brochures from state / province	32.9%	19.4%	20.6%	160
	Visitor information centres	30.0%	19.5%	20.4%	147
	Articles in newspapers / magazines	27.3%	17.3%	18.1%	151
	A travel agent	27.1%	17.8%	18.6%	145
	Travel information received in the mail	24.4%	14.9%	15.8%	155
	Travel guide books such as Fodor's	21.4%	11.1%	12.0%	178
	Advertisements in newspapers / magazines	17.2%	10.3%	10.9%	158
	Programs on television	12.3%	6.6%	7.1%	172
	An electronic newsletter or magazine received by e-mail	9.3%	5.7%	6.0%	155
	Advertisements on television	6.5%	3.7%	4.0%	163
Visits to trade, travel or sports shows	5.0%	2.2%	2.4%	206	

Use of the Internet to Plan and Arrange Trips

Those who took a trip to Ontario are above-average users of the Internet to research (76.5%) and book travel (57.0%). The majority use travel planning / booking websites (e.g., Expedia), hotel or resort websites and airline websites. However, visitors to Ontario are more likely than other U.S. Pleasure Travellers to visit the website of a specific region, country or city. As with most travellers, they most often use the Internet to purchase airline tickets and accommodation. However, visitors to Ontario are also more likely than others to use the Internet to rent vehicles, purchase travel packages and arrange for travel by rail, bus or boat / ship.

Fig. 17 Use of the Internet to Plan and Book Travel

		Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market		14,067,041	156,443,200	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	23.5%	31.6%	31.0%	76
	Uses Internet to plan trips only	19.5%	20.2%	20.1%	97
	Uses Internet to book part of trip	57.0%	48.2%	48.9%	116
Types of Websites Consulted	A travel planning / booking website	62.9%	54.9%	55.6%	113
	A website of a hotel or resort	59.6%	52.7%	53.3%	112
	An airline website	54.4%	44.7%	45.6%	119
	A tourism website of a country / region / city	46.6%	33.9%	35.1%	133
	A website of an attraction	39.7%	32.7%	33.4%	119
	Some other website	28.8%	24.7%	25.1%	115
	A cruise line website	16.9%	12.0%	12.4%	136
	A motorcoach website	2.4%	1.2%	1.3%	177
Parts of Trips Booked Over The Internet	Accommodation	78.8%	71.1%	71.9%	110
	Air tickets	75.9%	70.0%	70.6%	108
	Car rental	48.0%	36.9%	38.0%	126
	Tickets or fees for specific activities or attractions	32.3%	25.7%	26.3%	123
	A package containing two or more items	21.8%	17.4%	17.8%	123
	Tickets for rail, bus or boat / ship fares	17.4%	11.3%	11.9%	147
	Other	3.2%	2.9%	2.9%	110

Media Consumption Habits

Americans who travelled to Ontario are above-average consumers of travel media including the travel sections of newspapers, travel magazines, travel programs on television and travel websites. Reflecting their interest in learning, they may also be effectively reached through intellectual television programs (i.e., programs about biographies, history, science and nature), news programming (e.g., news / talk / information radio stations, Internet news sites) and business, finance and investment magazines. They may also be effectively reached through classical music, multicultural, jazz / big band and all sports radio stations.

Fig. 18 Media Consumption Habits

		Took a Trip to Ontario	Did Not Take a Trip to Ontario	Pleasure Travellers	Index
Size of Market		5,276,757	165,233,484	170,510,241	100
Newspaper Readership	Reads daily newspaper	68.9%	59.6%	59.9%	115
	Reads weekend edition of newspaper	60.3%	55.4%	55.5%	109
	Reads local neighbourhood or community newspapers	56.5%	49.3%	49.5%	114
	Reads other types of newspapers	20.8%	13.6%	13.9%	150
	Frequently or occasionally reads travel section of daily newspaper	58.1%	42.5%	43.0%	135
	Frequently or occasionally reads travel section of weekend newspaper	63.6%	48.9%	49.3%	129
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Conde Nast)	20.3%	9.8%	10.6%	191
	Magazines about your city	11.9%	6.5%	6.9%	172
	Business, finance and investing	21.9%	13.3%	14.0%	157
	Photography and video	5.9%	3.7%	3.9%	152
	Outdoor activities / sports	15.2%	10.3%	10.7%	142
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	39.5%	28.0%	28.9%	137
	Biography	36.7%	32.5%	32.9%	112
	History	50.1%	44.5%	45.0%	111
	Science & nature shows	40.2%	36.5%	36.8%	109
	Shopping channels	8.4%	7.7%	7.7%	108
Type of Radio Programs Listened To (Top 5 Indexed)	Classical music	19.9%	13.6%	14.1%	141
	Multicultural	6.6%	4.6%	4.7%	140
	Jazz / Big band	13.4%	9.7%	10.0%	134
	All sports	15.8%	11.6%	11.9%	132
	News / Talk / Information	40.7%	31.7%	32.4%	126
Types of Websites Visited (Top 5 Indexed)	Travel	60.9%	46.8%	48.0%	127
	Network news sites (e.g., CNN)	44.6%	38.1%	38.7%	115
	Newspaper sites	34.0%	29.2%	29.6%	115
	Sports	33.0%	29.7%	30.0%	110
	Weather	64.2%	58.0%	58.5%	110

Appendix One		
U.S. TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse - Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	Went to Local Outdoor Cafes
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and/or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Food/Drink Festivals	Circus
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Wax Museums
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
Theatre, Film & Musical Festivals	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
Tastings	Went to Wineries for Day Visits and Tasting	Cooking/Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casino, Theatre & Comedy Clubs	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National/Provincial Park
	Curatorial Tours	
National & International Sporting Events	National/International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

Appendix One		
U.S. TAMS 2006 Culture and Entertainment Segmentation		
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Rock Concerts & Dancing	Rock & Roll / Popular Music Concert	Recreational Dancing
Archaeological Digs & Sites	Archaeological Digs	Paleontological / Archaeological Sites
Equestrian & Western Events	Equine (Horse) Competitions	Country / Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
Fine Dining & Spas	High-End Restaurants with an International Reputation	Day Visit to a Health and Wellness Spa while on an Overnight Trip
	Other High-End Restaurants	
Agro-Tourism	Dining At A Farm	Harvesting and / or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	Entertainment Farms (e.g., Corn Maze, Petting Barnyard)
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related

