

**Summer 2017
Brand Tracking
Ontario**

Presented to:
Ontario Tourism Marketing Partnership Corporation
August 4, 2017



Methodology



Method

- Online survey
- 30 minute questionnaire
- Fieldwork: June 20- July 12, 2017



Sample Size

- 2002 total respondents
- 807 GTA and 1195 rest of Ontario



Geographic Frame

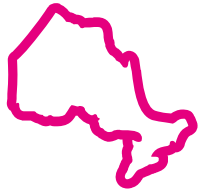
- Ontario



Target group

Overnight pleasure travellers

- Aged 18 yrs.+
- Took an overnight pleasure trip in past two years
- Or, plan to take an overnight pleasure trip in next two years



Ontario holds a strong position among Ontario travellers

What is the impact on the brand?



Growth insights



- Ontario holds a strong position among Ontario travellers for short getaways. It is top of mind, meets their needs, rates highly, is considered more often and stimulates strong interest. Ontario travellers familiarity with Ontario is its weakness and likely the root cause of travellers considering Ontario to be less unique and/or a popular/trendy destination than other travel destinations.
- If attributed to Ontario, the ad campaign could be effective in improving perceptions of Ontario as a dynamic (popular/trendy) destination but would likely have no impact on perceptions of its uniqueness.
- Connecting with Ontario travellers in a meaningful way is critical to driving intent to visit for Ontario. Ontario stands apart within the competitive set based on its meaningfulness and not unexpectedly its salience (unaided awareness). Ontario, however, struggles to differentiate itself compared to the competitive set.

Precise plans for growth



- While the advertising performs well in relation to uniqueness measures this is not translating into perceptions of Ontario as a unique travel destination. In order to address this shortcoming, messaging within the creative will need to highlight Ontario as a unique travel destination in addition to being a dynamic one.

Key Brand Performance Indicators Trended

Ontario

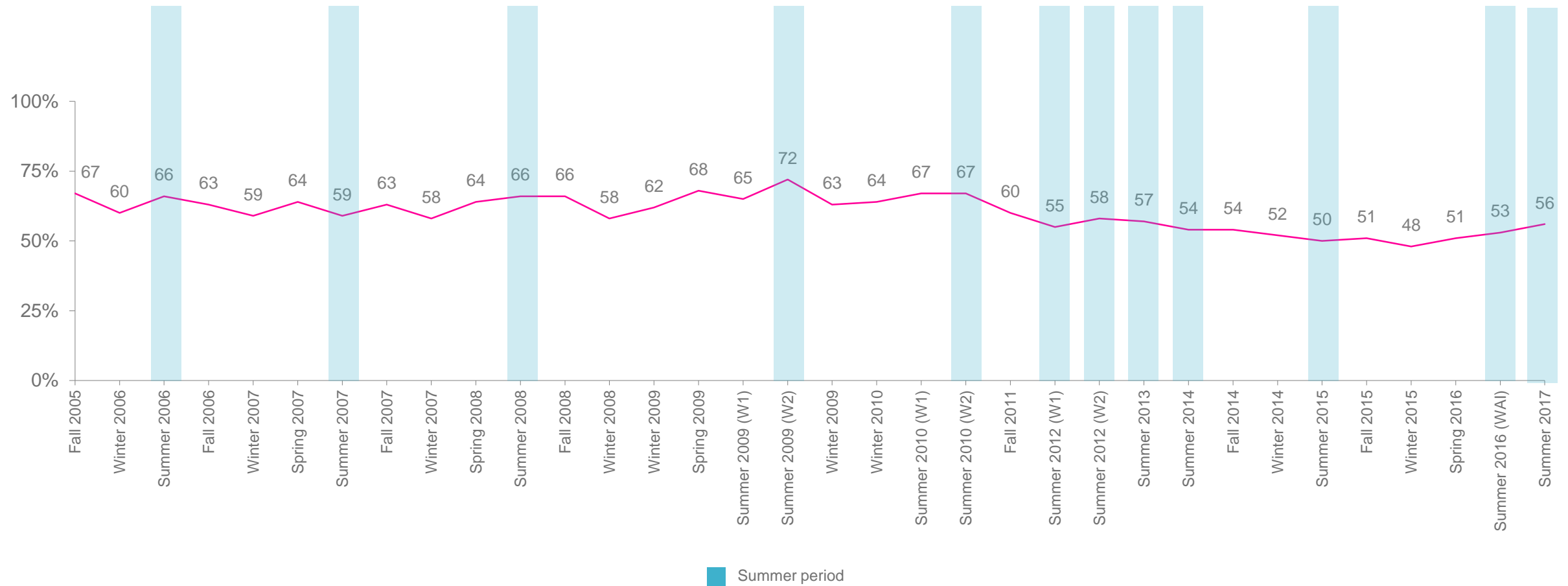
KPI	Summer 2012	Summer 2013	Summer 2014	Summer 2015	Spring 2016	Summer 2016 (WAI)	Summer 2017
Unaided Destination Awareness of Ontario for a Short Trip (%)	58	57	54	50	51	53	56
Unaided Destination Awareness of Ontario for a Longer Trip (%)	19	13	13	9	10	11	14
Travel Intent in Next 12 Months (Top 2 box %)	90	87	86	86	87	88	87
Overall Rating of Ontario	8.3	8.0	7.9	7.9	8.1	8.1	7.9
Brand Pillar - Fun	8.4	8.1	8.0	8.2	8.1	8.0	7.9
Brand Pillar - New & Different	7.9	7.4	7.4	7.6	7.5	7.5	7.4
Brand Pillar - Diverse	8.5	8.3	8.3	8.3	8.3	8.2	8.1

■ Significant increase versus previous period, at 95% statistical confidence

■ Significant decrease versus previous period, at 95% statistical confidence

Total Unaided Awareness of Ontario for a Short Trip

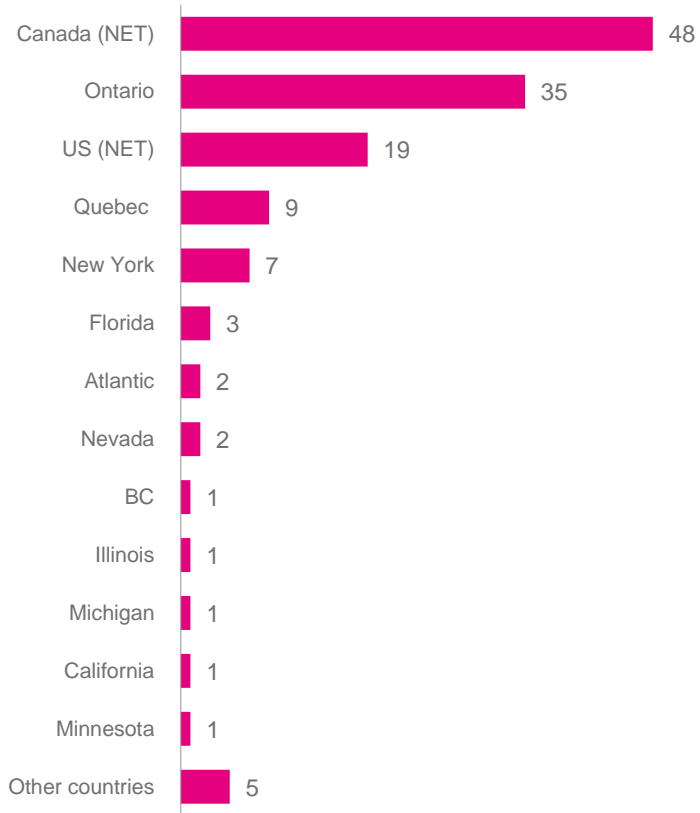
(1-3 nights) Away from Home



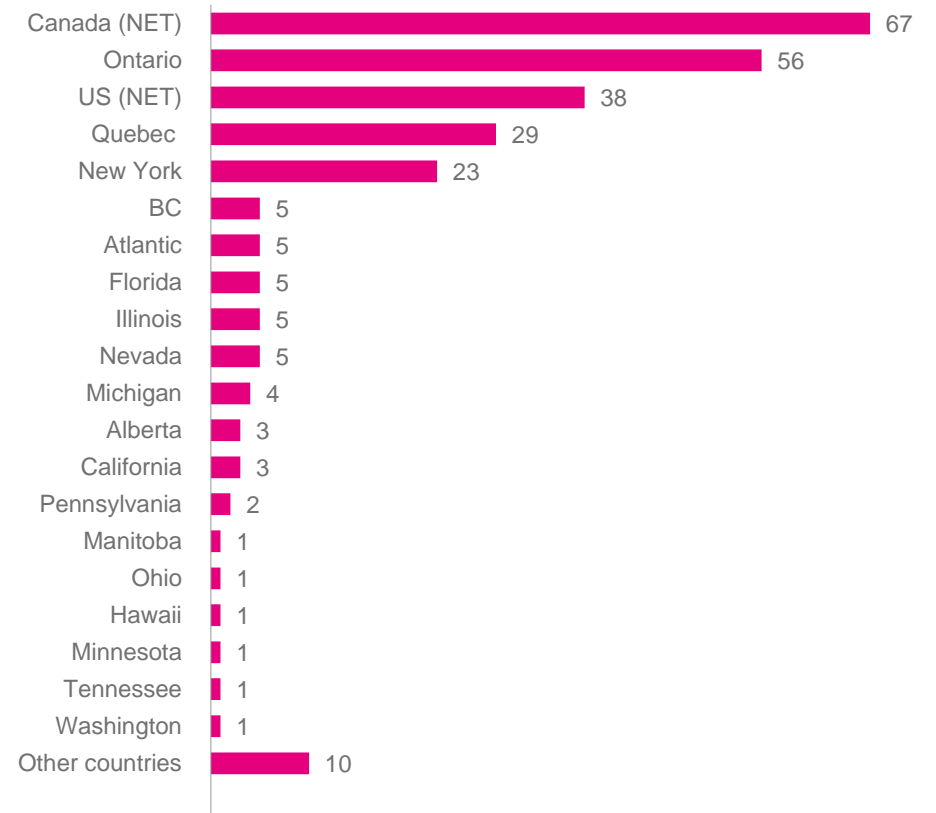
Ontario is top of mind for short getaways (1-3 nights)

Top of mind and unaided awareness

Top of mind awareness for short getaway (1-3 nights)

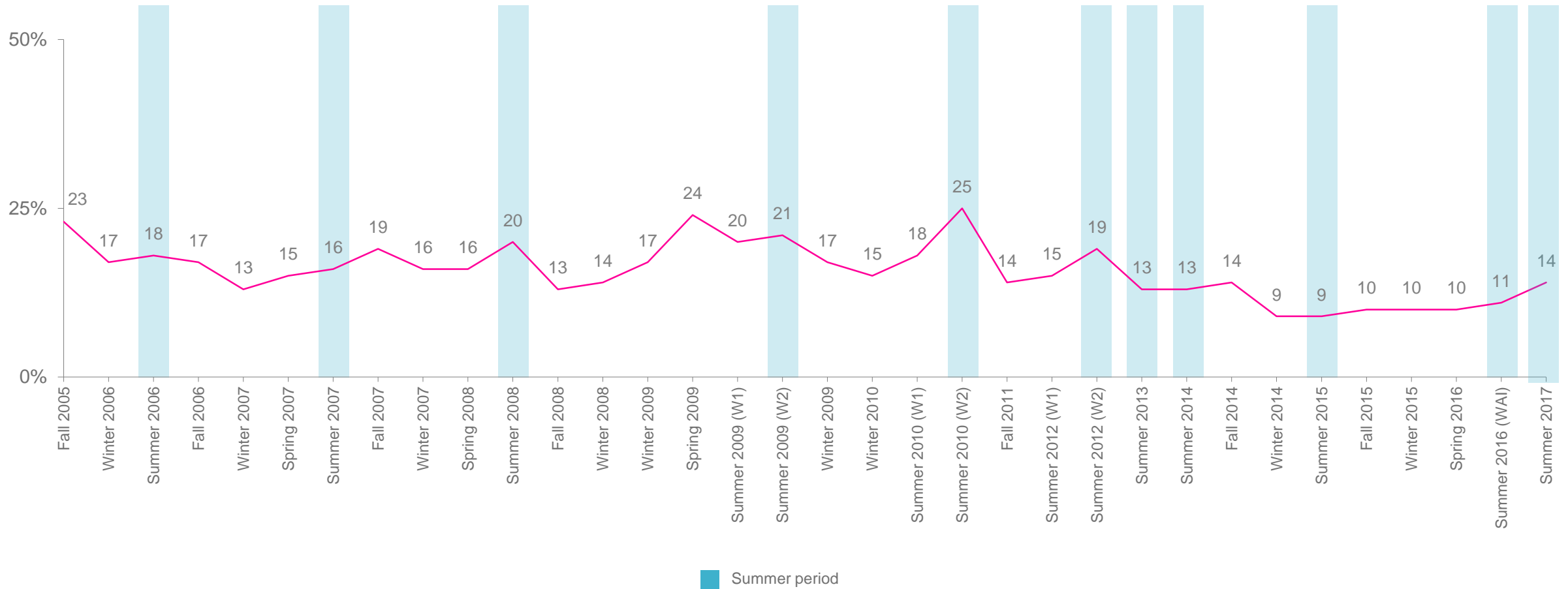


Unaided awareness for short getaway (1-3 nights)



Total Unaided Awareness of Ontario for a Longer Trip

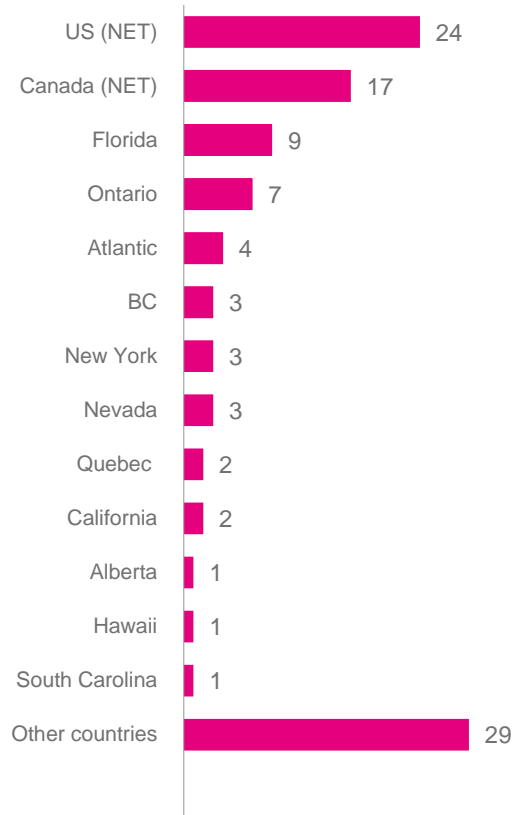
(4+ nights) Away from Home



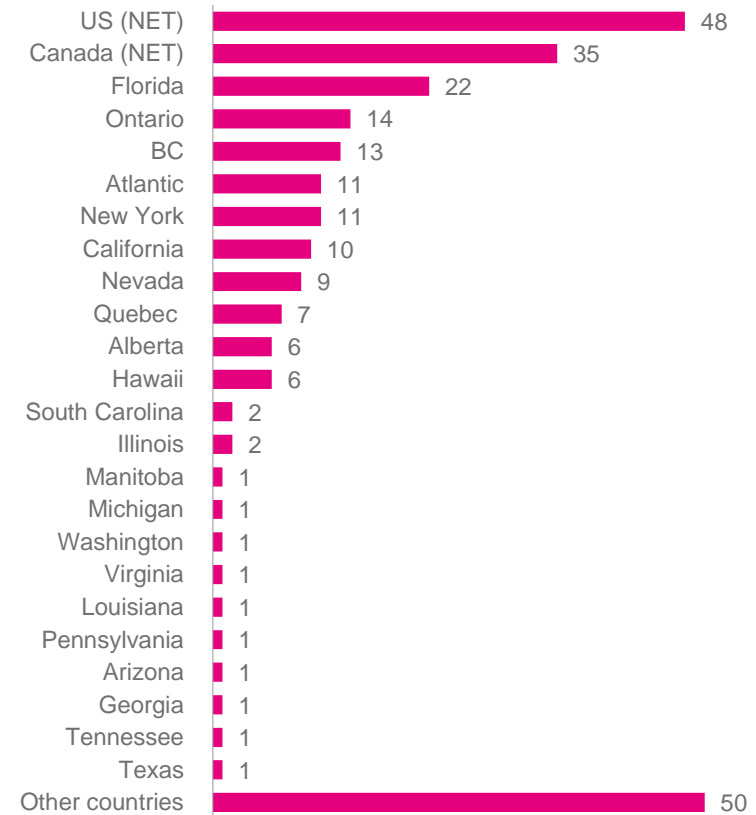
And longer trips (4+ nights), though to a slightly lesser extent

Top of mind and unaided awareness

Top of mind destination for longer trips (4+ nights)



Unaided awareness for longer trips (4+ nights)



Interest in Ontario Travel in the Next 12 Months

Top 2 Box % (Very/Fairly Interested)



Interest in Travel in the Next 12 Months – All Destinations Trended

Top 2 Box % (Very/Fairly Interested)

Top 2 Box %	Summer 2013	Summer 2014	Summer 2015	Spring 2016	Summer 2016 (WAI)	Summer 2017
(Base)	(n=1010)	(n=1009)	(n=1003)	(n=3513)	(n=1210)	(n=XX)
Within Ontario	87	86	86	87	88	87
Quebec	56	61	65	64	67	69
New York State, USA	62	67	70	68	70	62
Michigan, USA	39	39	40	39	39	39
Atlantic Canada	70	74	74	73	75	77
Anywhere else in the USA	73	74	77	78	78	69
Anywhere else in Canada	80	79	81	83	82	90

■ Significant increase versus previous period, at 95% statistical confidence

■ Significant decrease versus previous period, at 95% statistical confidence

Likelihood to Travel in the Next 12 Months – All Destinations Trended (One Night or More)

Top 2 Box % (Definitely/Probably Will Travel)

Top 2 Box %	Summer 2013	Summer 2014	Summer 2015	Spring 2016	Summer 2016 (WAI)	Summer 2017
(Base)	(n=1010)	(n=1009)	(n=1003)	(n=3513)	(n=1210)	(n=XX)
Within Ontario	79	79	77	79	77	77
Quebec	24	32	34	36	34	40
New York State, USA	27	32	32	33	33	33
Michigan, USA	17	19	17	17	16	19
Atlantic Canada	19	21	23	23	23	29
Anywhere else in the USA	40	43	42	42	43	43
Anywhere else in Canada	36	41	41	40	39	57

■ Significant increase versus previous period, at 95% statistical confidence

■ Significant decrease versus previous period, at 95% statistical confidence

Average Rating

(10-point scale) All Destinations – Trended

Top 2 Box %	Summer 2013	Summer 2014	Fall 2014	Winter 2014	Summer 2015	Fall 2015	Winter 2015	Spring 2016	Summer 2016 (WAI)	Summer 2017
Ontario, Canada	8.0	7.9	8.2	7.9	7.9	8.1	7.9	8.1	8.1	7.9
New York State, USA	7.3	7.6	7.6	7.5	7.6	7.6	7.4	7.6	7.5	7.1
Quebec, Canada	6.9	7.1	7.3	7.3	7.4	7.5	7.3	7.4	7.4	7.3
Michigan, USA	6.0	6.1	6.2	6.0	6.2	6.3	6.1	6.1	5.9	5.7

■ Significant increase versus previous period, at 95% statistical confidence

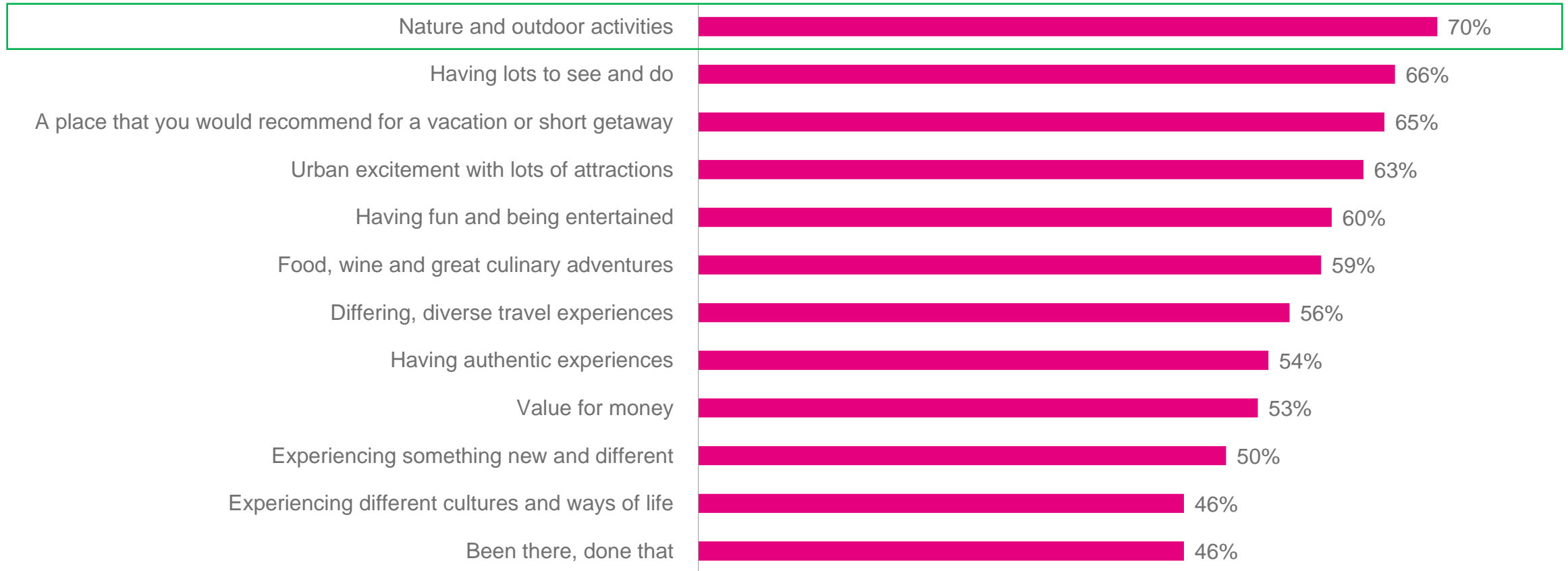
■ Significant decrease versus previous period, at 95% statistical confidence

Travellers associate Ontario with many of the key features required in a travel destination such as fun, exciting, authentic, etc.



Ratings of Ontario as a travel destination

% Top 3 Box

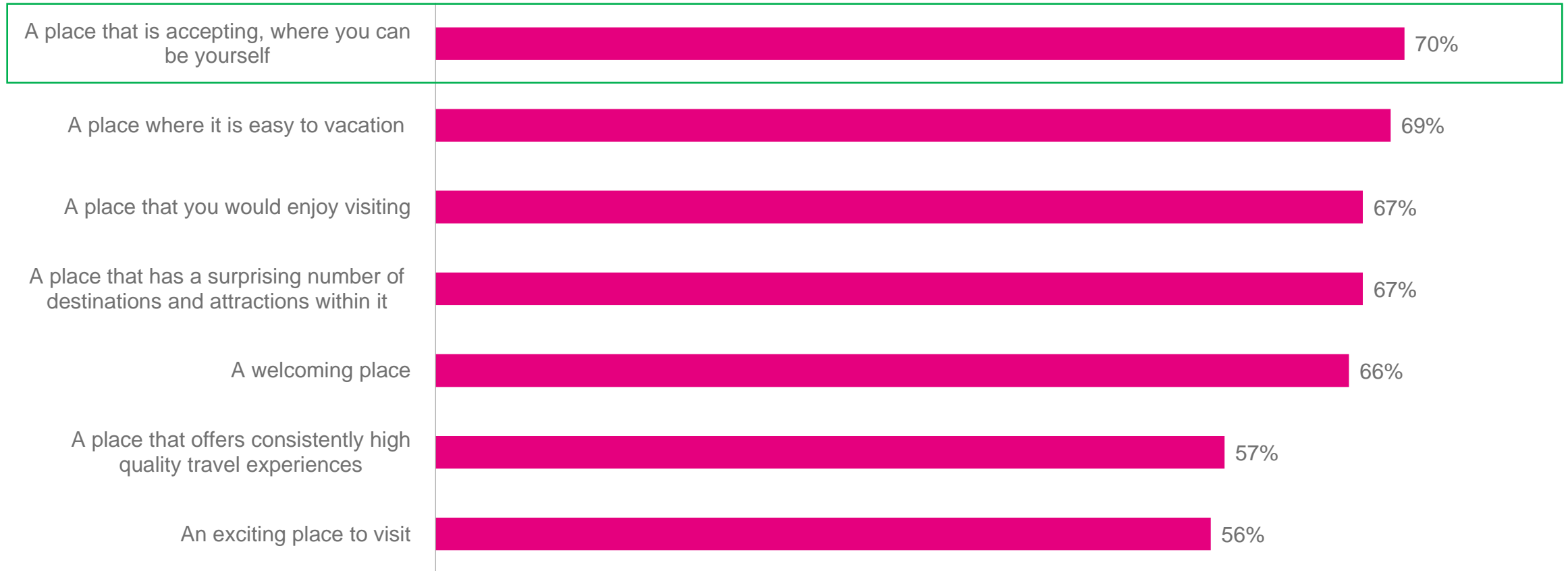


And, with a place that is accepting, welcoming and easy to vacation in



Ratings of Ontario as a travel destination

% Top 3 Box

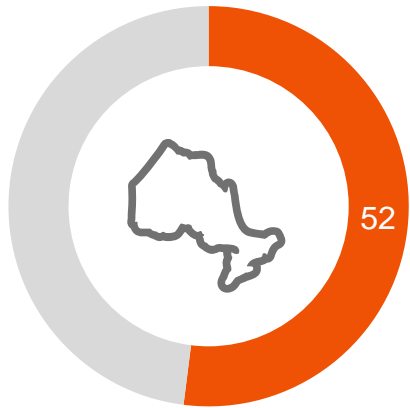


Ontario travellers have a strong emotional connection to Ontario, they love it

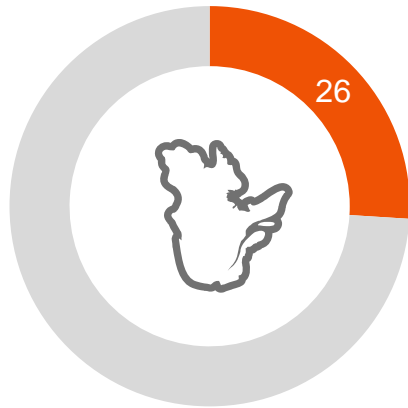


Feelings about destination

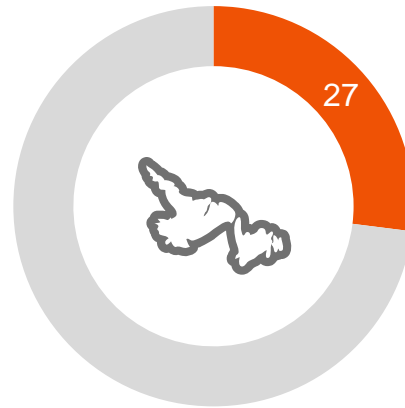
Ontario, Canada



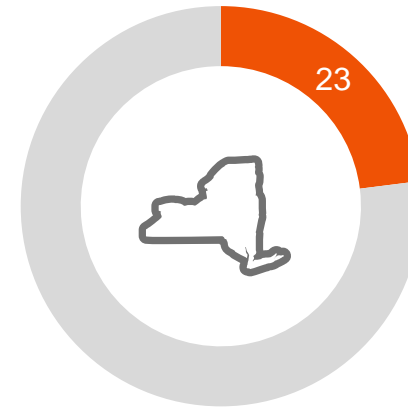
Quebec, Canada



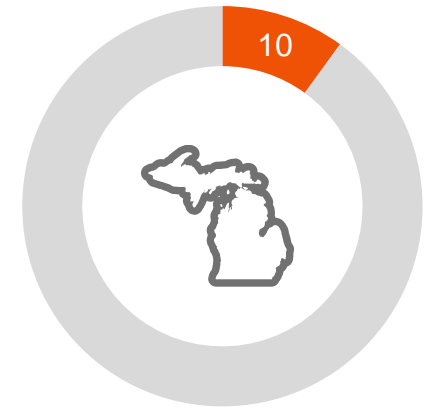
Newfoundland & Labrador, Canada



New York State, USA



Michigan, USA



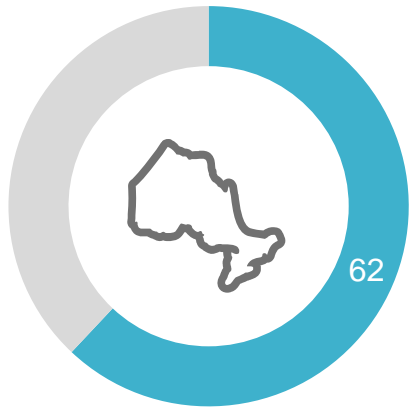
■ I love it (+4 or +5)

Ontario meets their travel needs better than other destinations

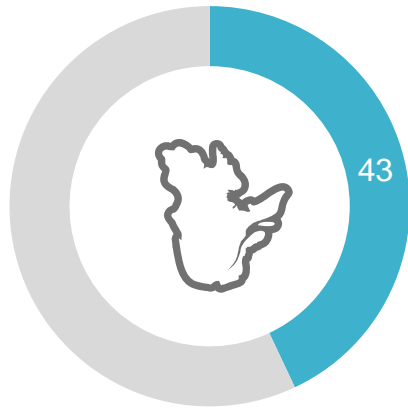


Meets travel needs

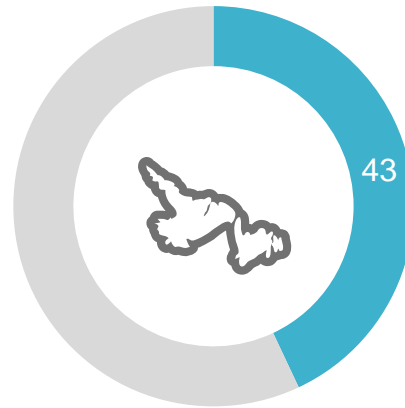
Ontario, Canada



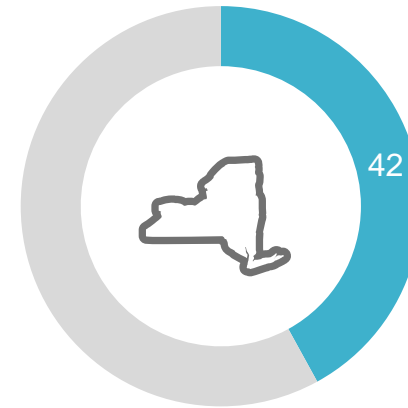
Quebec, Canada



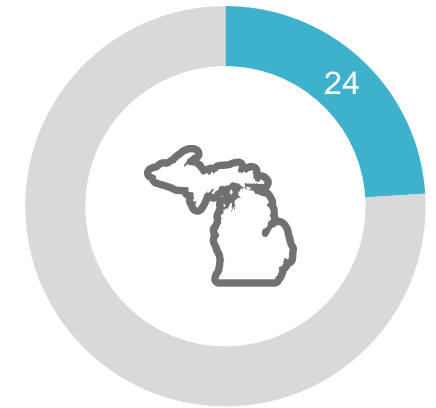
Newfoundland & Labrador, Canada



New York State, USA



Michigan, USA



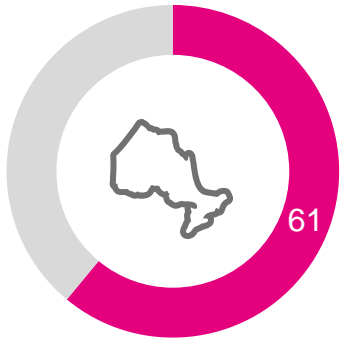
■ Meets needs very well (8-10)

And travellers consider it better than many alternative destinations

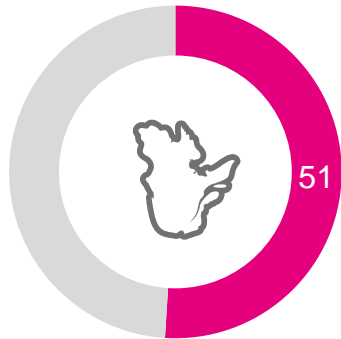


Rating of travel destination

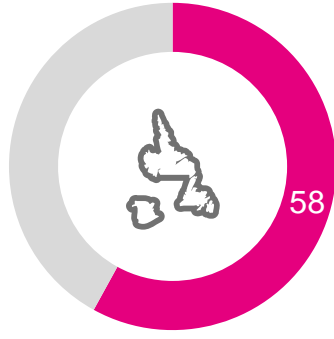
Ontario, Canada



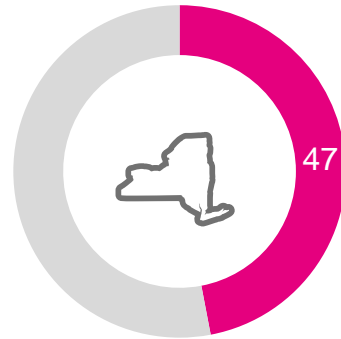
Quebec, Canada



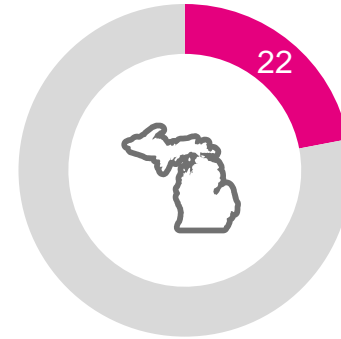
Atlantic Canada



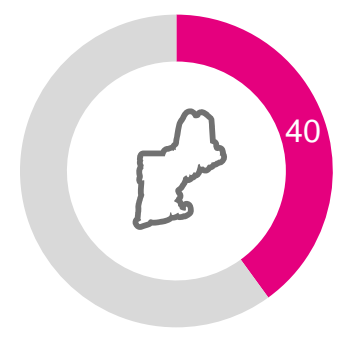
New York State, USA



Michigan, USA



New England, USA

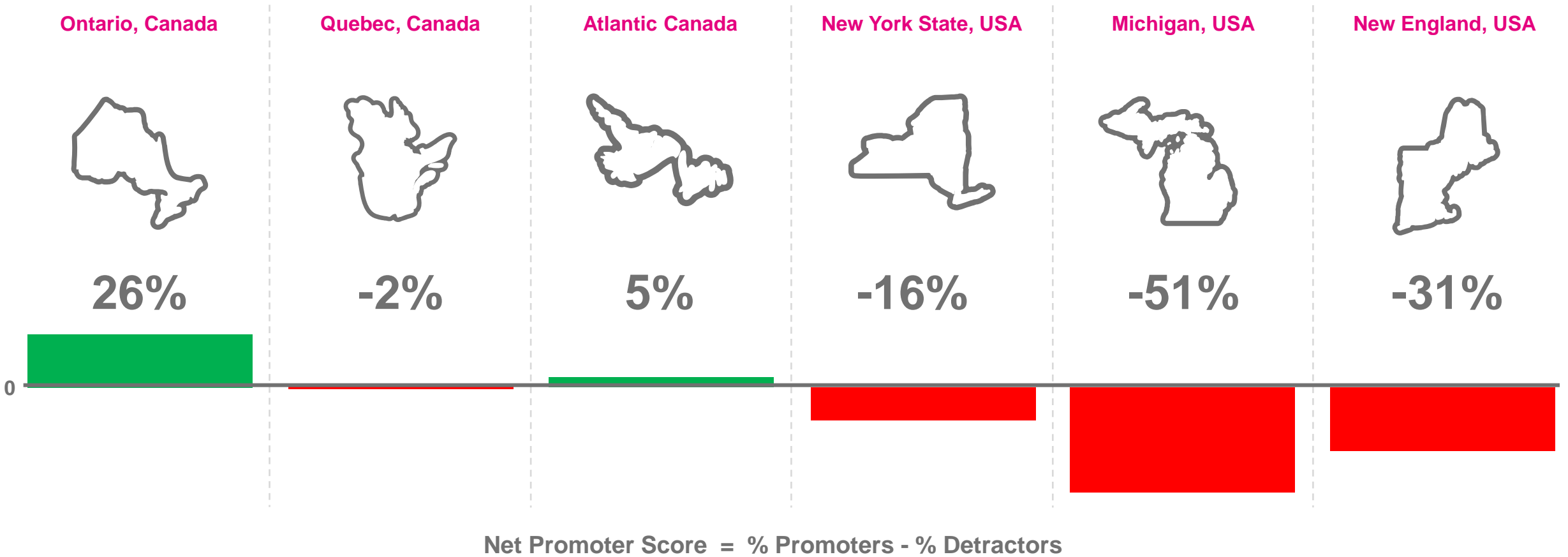


■ Excellent (8-10)

They are more likely to recommend Ontario for a short getaway



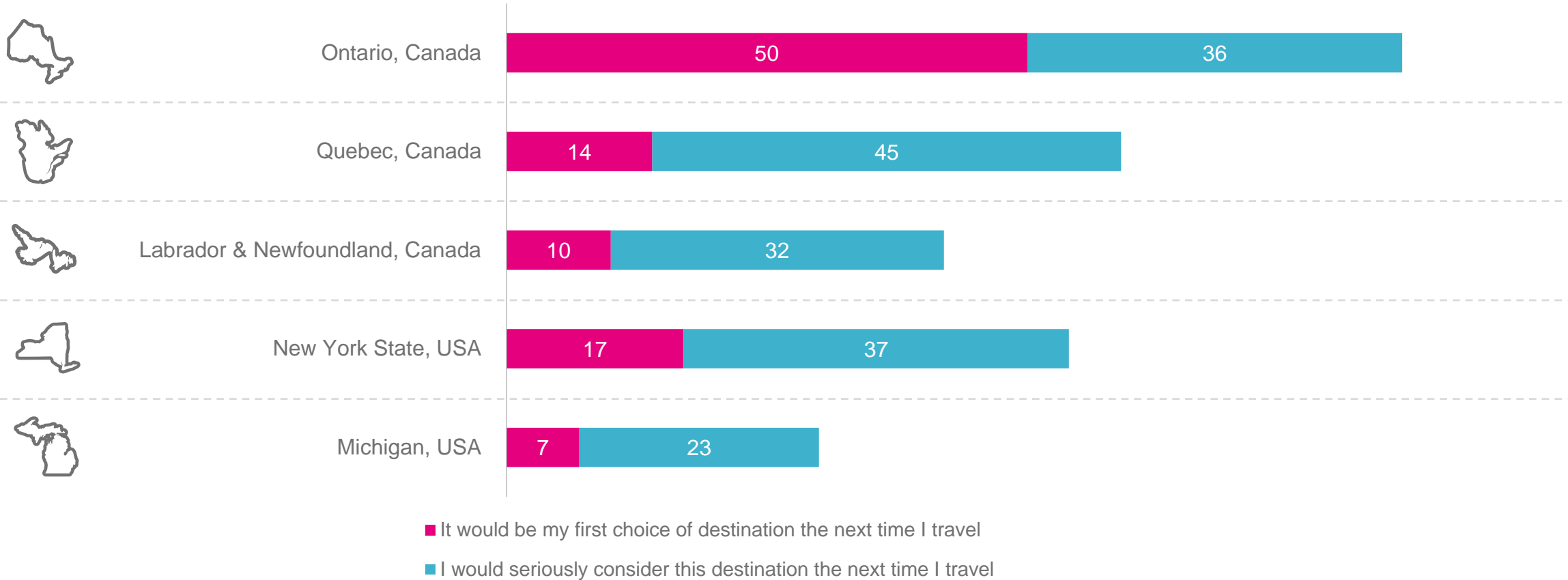
NPS



Also, more likely to consider Ontario the next time they travel



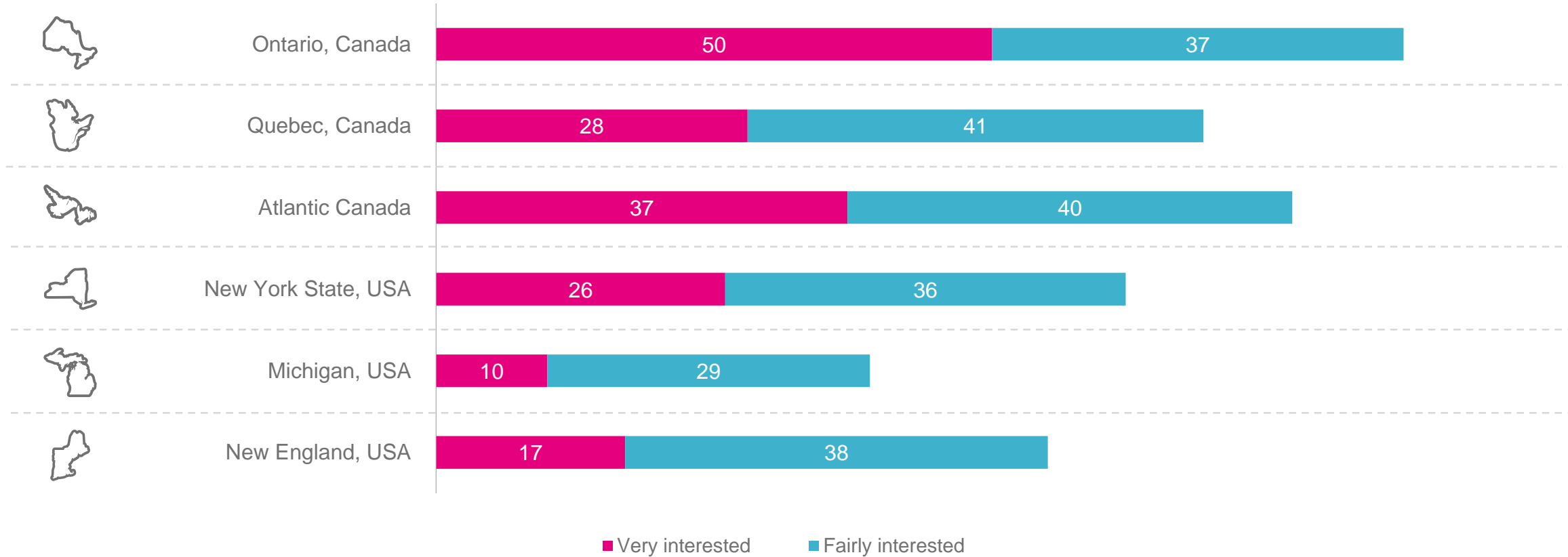
Consideration



And, have a stronger interest in travel within Ontario over the next twelve months



Interest in travel in the next 12 months

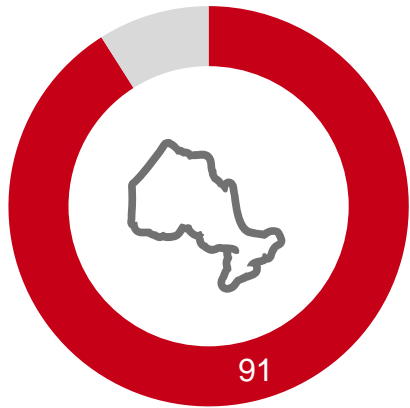


Ontario travellers express very high familiarity with Ontario – having travelled within Ontario multiple times

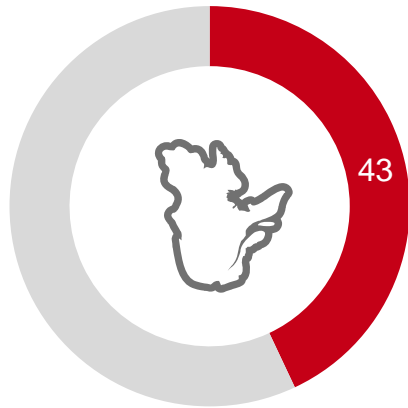


Have travelled to this destination multiple times

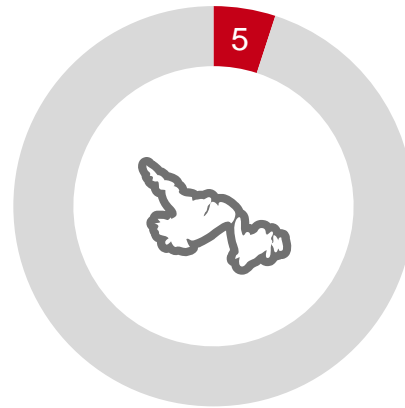
Ontario, Canada



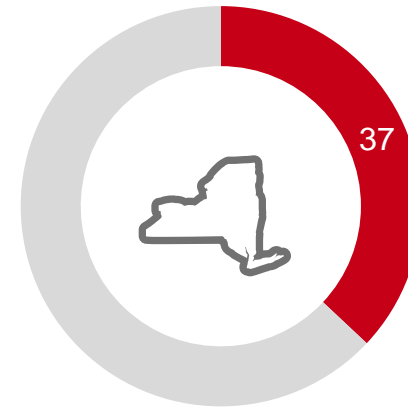
Quebec, Canada



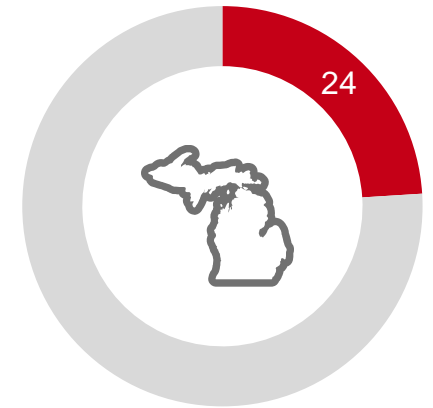
Newfoundland & Labrador, Canada



New York State, USA



Michigan, USA



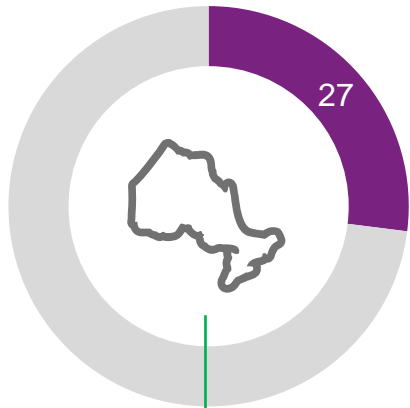
■ I've travelled to this destination multiple times

This familiarity helps to explain why Ontario travellers are less likely to consider Ontario a unique travel destination



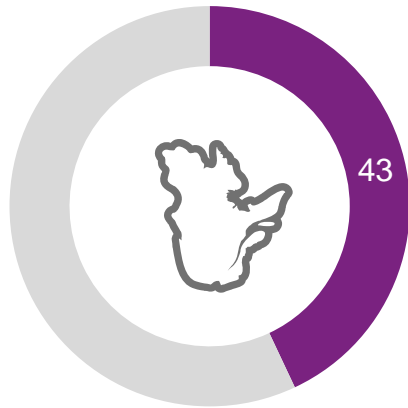
Uniqueness of destination

Ontario, Canada

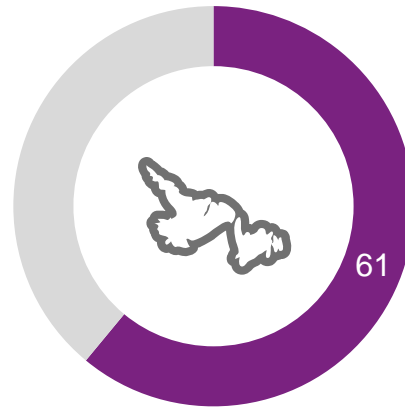


Seen any ad (30%)
Did not see ad (26%)

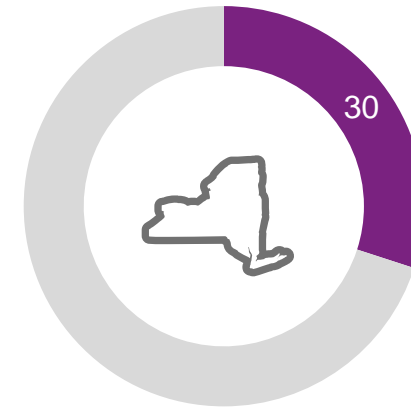
Quebec, Canada



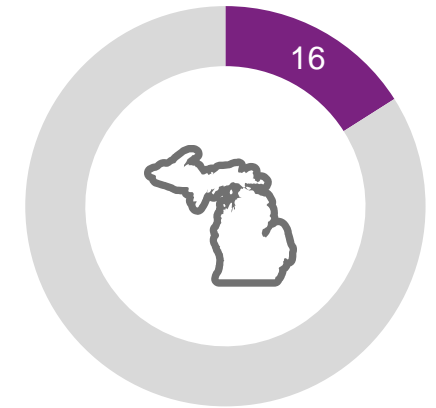
Newfoundland & Labrador, Canada



New York State, USA



Michigan, USA



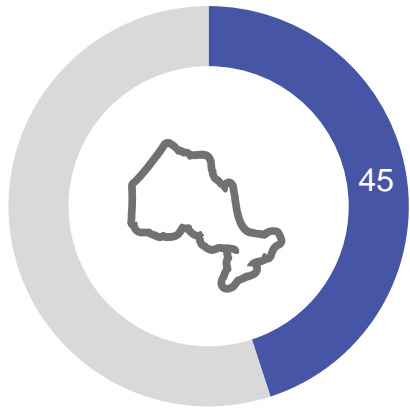
Very different (8-10)

And less likely to consider Ontario a popular/trendy travel destination

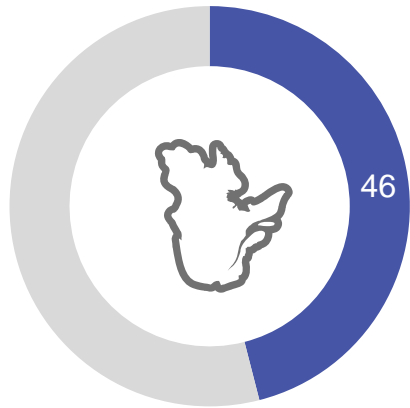


Popularity of destination

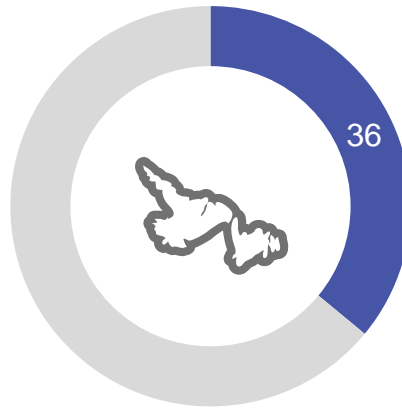
Ontario, Canada



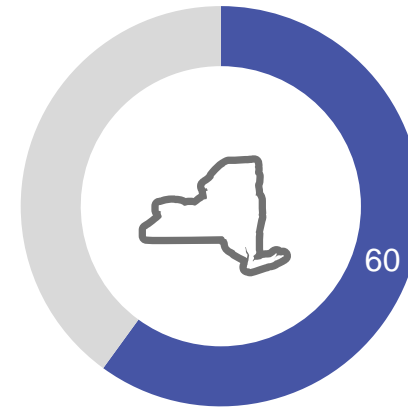
Quebec, Canada



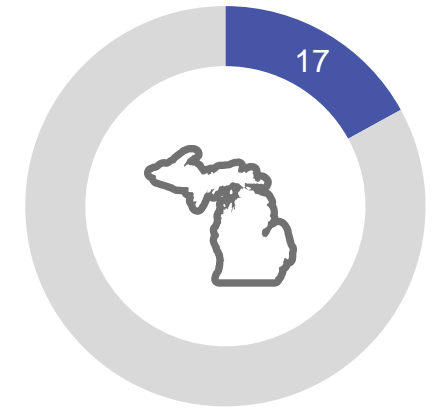
Newfoundland & Labrador, Canada



New York State, USA



Michigan, USA

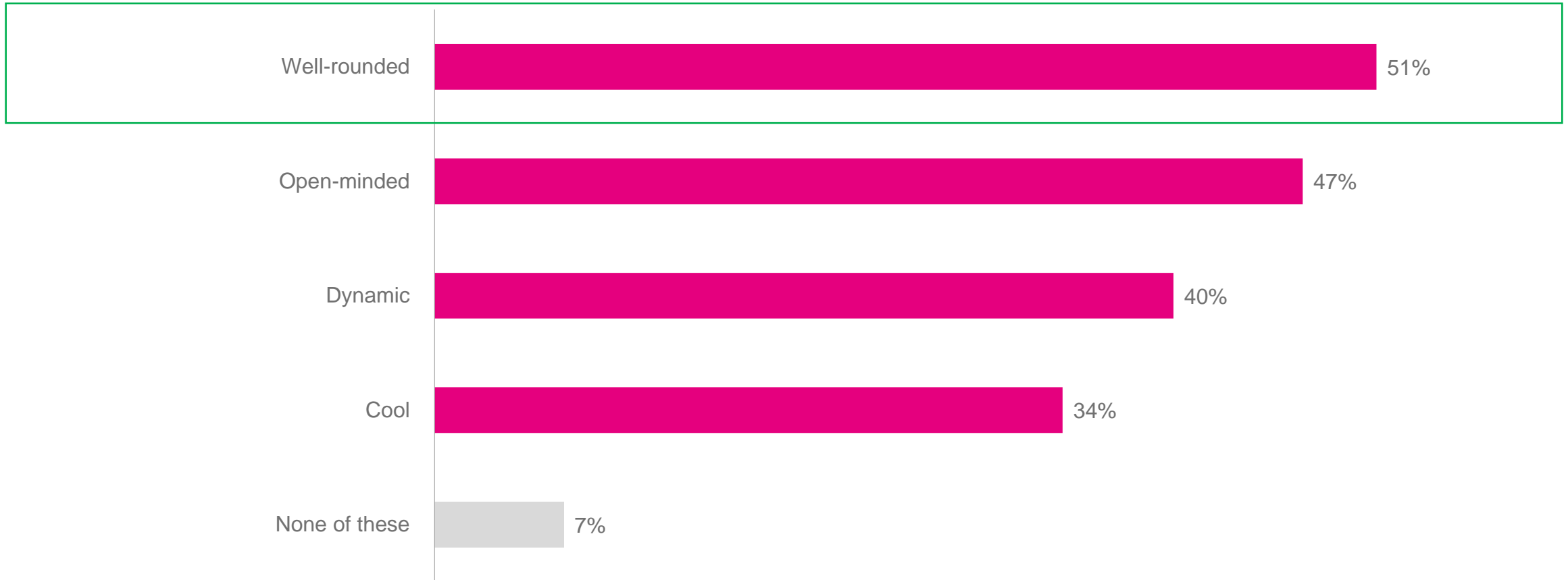


■ Extremely popular/trendy (8-10)

Or, to describe it as cool

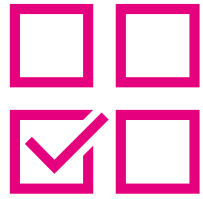


Words to describe Ontario

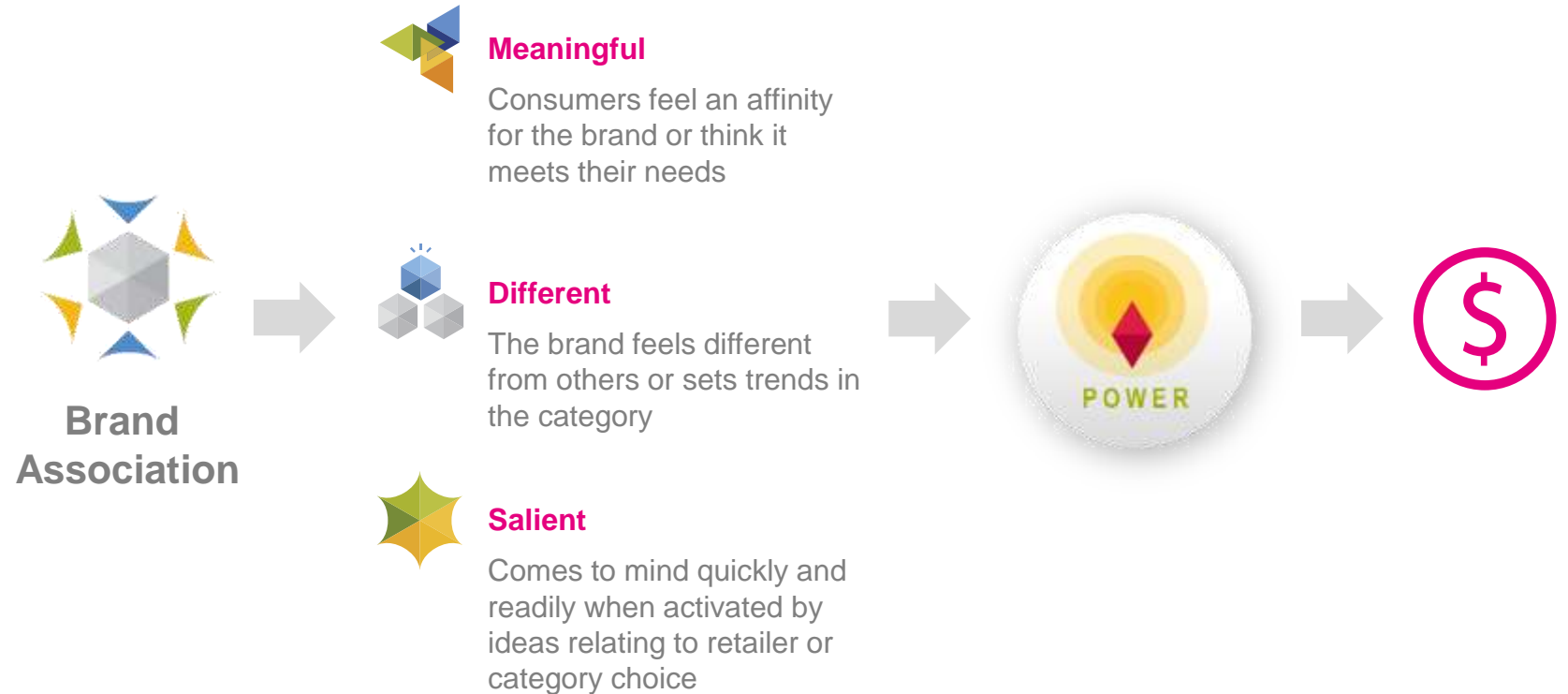


If Ontario is meaningfully different, travellers are more likely to travel within Ontario

What is the Meaningful Different Framework - Kantar Millward Brown's Brand Equity Model

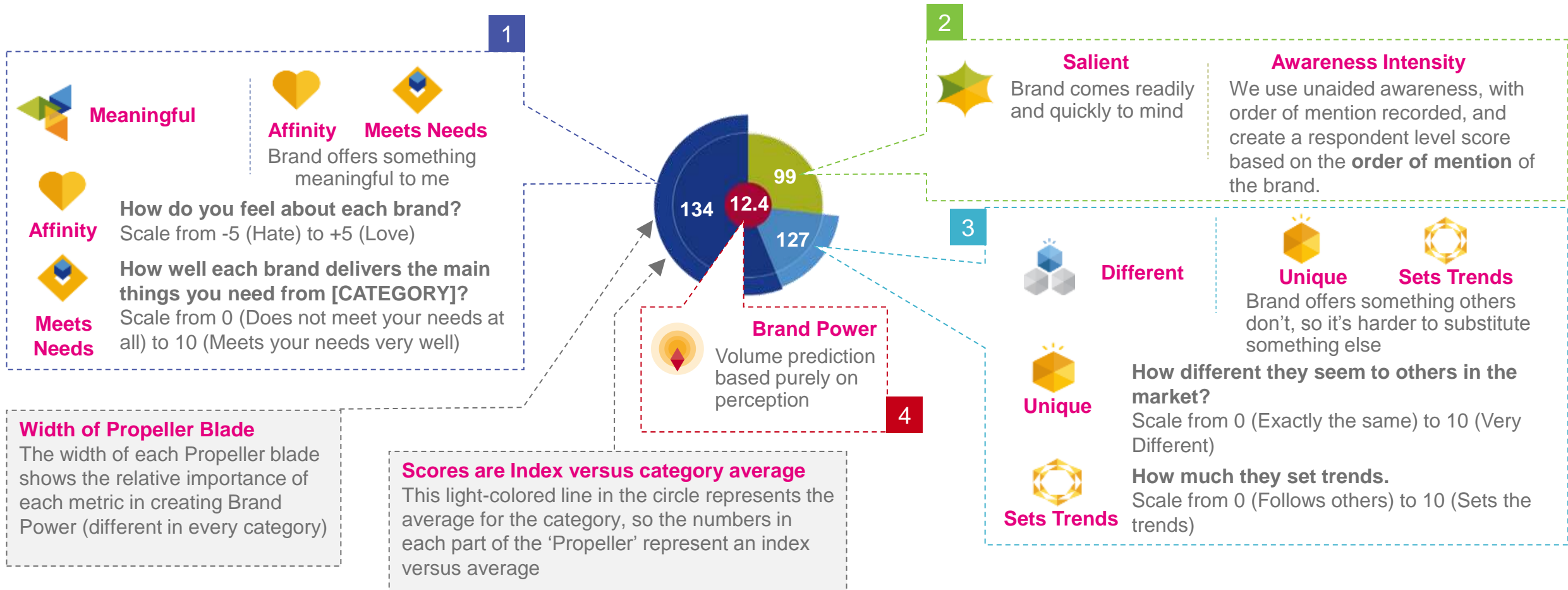


If your brand is meaningfully different, customers will be more likely to choose your brand



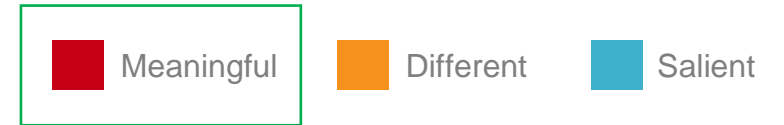
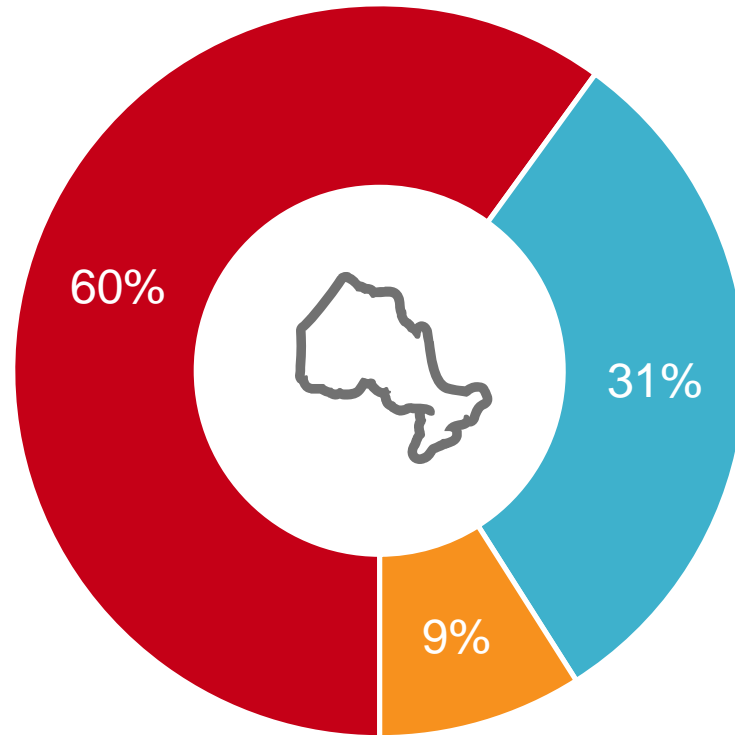
A simple way to measure and read how Ontario is performing relative to other destinations

Key data points – the propeller



Meaning is the strongest driver of Brand Power for Ontario, followed by Salience. Connecting with tourists' needs in a meaningful way is critical to driving intent to visit

Importance of Meaningful, Different and Salient for Ontario travellers

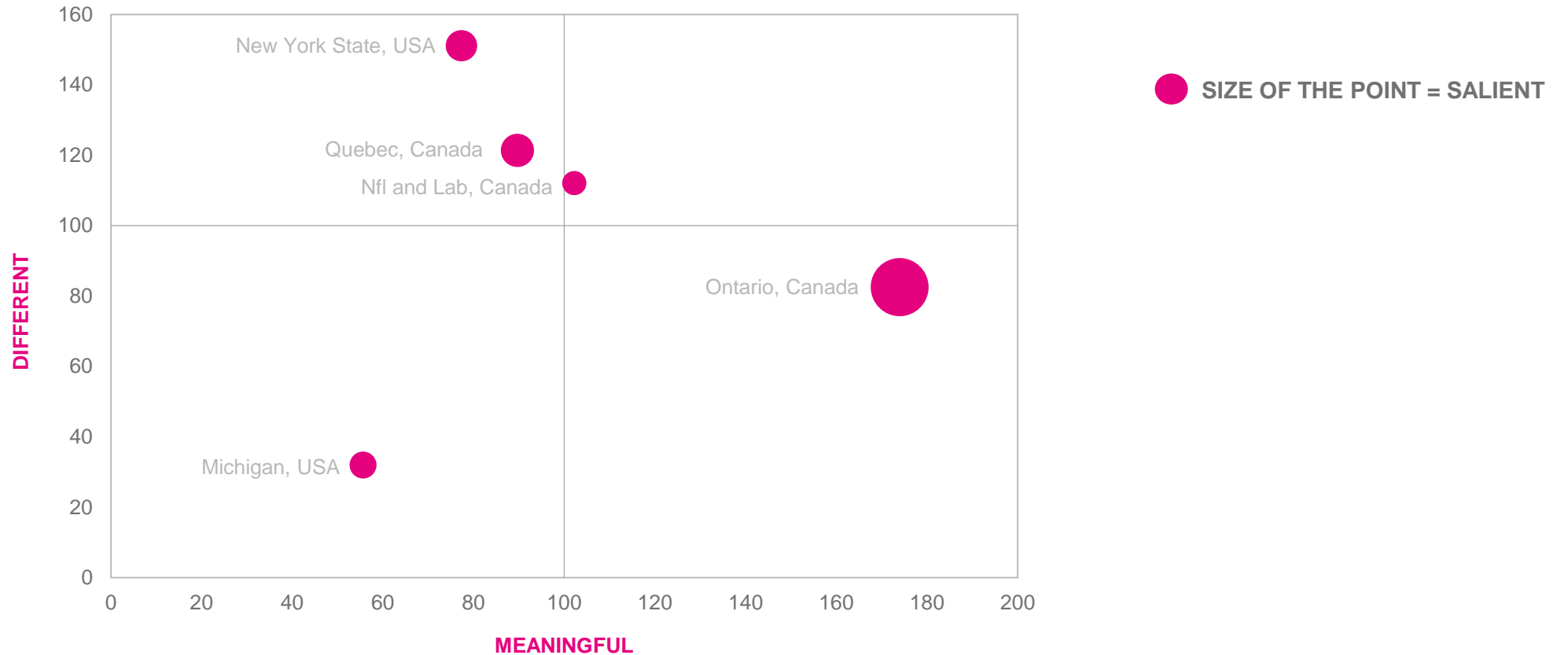


Ontario stands apart within the competitive set based on its Meaningfulness



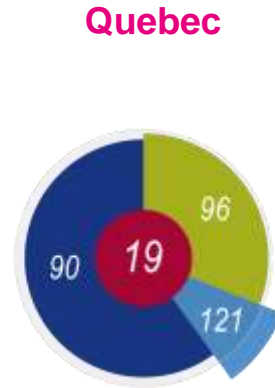
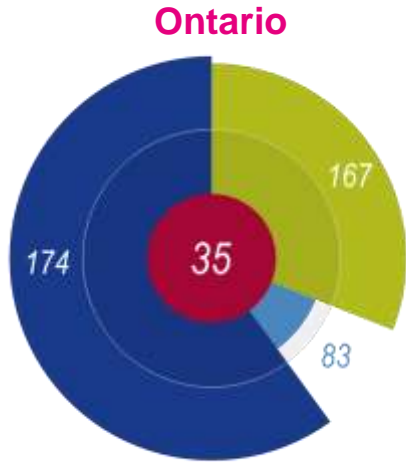
Brand Health map – short getaways

MEANINGFUL vs. DIFFERENT vs. SALIENT

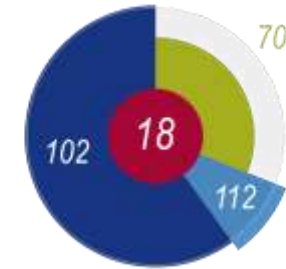


It holds a leadership position for short getaways among the competitive set because Ontario is most Meaningful and Salient.

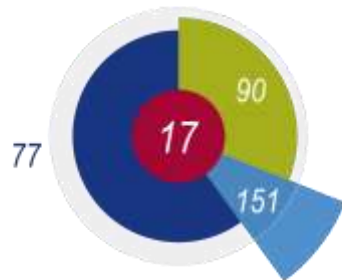
Brand Health



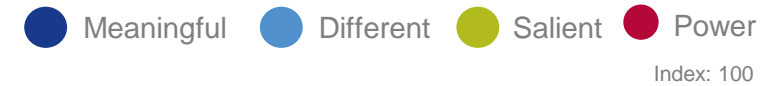
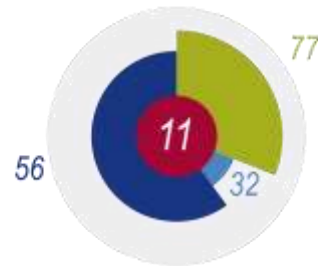
Newfoundland & Labrador



New York State



Michigan



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August 4, 2017



8

Appendix

Respondent Profile

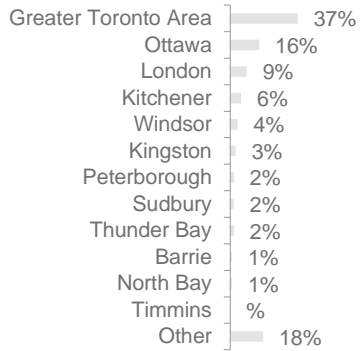


Gender

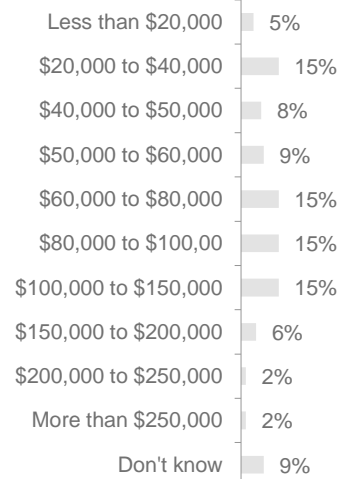


■ Male ■ Female

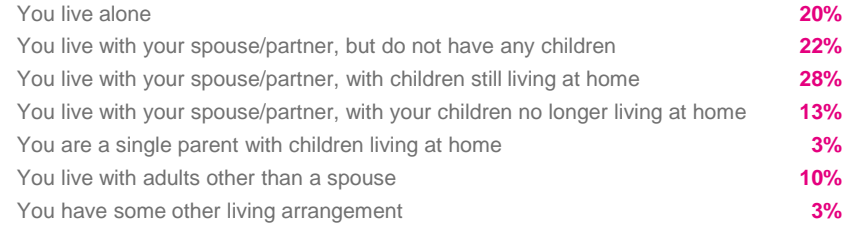
City



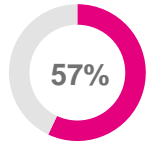
Annual household income



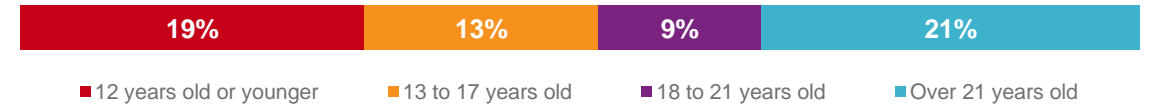
Household composition



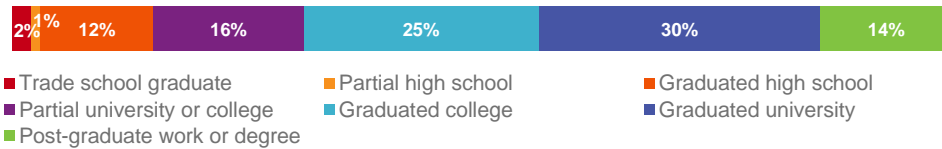
Couples that travel with children



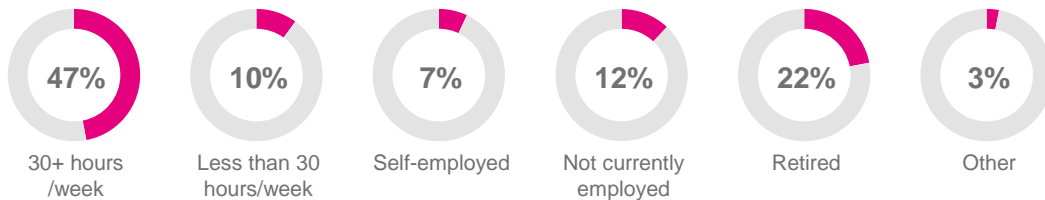
Children in household



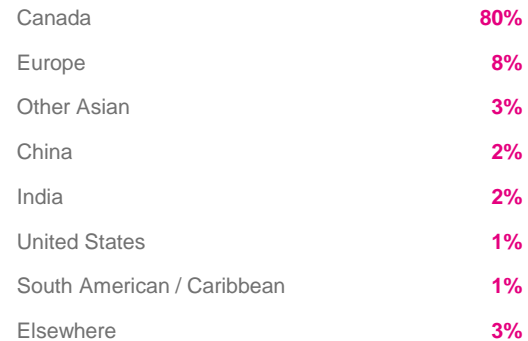
Level of education



Employment status



Country of origin



Immigration to Canada

