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Northern Ontario Research Qualitative Branding Assessment

Ontario Tourism Marketing Partnership Corporation and FedNor-Industry Canada

April 20, 2007





Project Objectives

- **Assess consumers' attitudes and perceptions of Northern Ontario to support the Northern Ontario marketing strategy development**
- **More specifically, to:**
 - **Understand perceptions of and motivations to travel to Northern Ontario**
 - **Understand competitive position of Northern Ontario as a tourism destination in the minds of the consumer**
 - **Identify product interests/experiences that can trigger visitation**
 - **Identify barriers to travel to Northern Ontario**
 - **Explore awareness and familiarity with specific Northern Ontario travel experiences**
 - **Identify target segments that provide the best potential for visits to Northern Ontario**



Methodology

- **We conducted a total of 12 focus groups, 2 groups in each of Hamilton, Toronto, Winnipeg, Minneapolis, Chicago and Detroit with a total of 80 participants**
- **Each group was comprised of:**
 - **A mix of male and female participants**
 - **A mix of income categories**
 - **Primary or joint travel decision-makers**
 - **Those who have travelled on an overnight pleasure trip in past 2 years and stayed in commercial accommodation**
 - **A mix of those who have stayed in hotel/motel/resort and those who have stayed at campground/RV park**
 - **A mix of those with kids between 4-16 years of age living at home and those have no kids under 18 living at home**



Methodology

- One group in each city was with those who have travelled to Northern Ontario in the past 5 years on a pleasure trip
 - Referred to as TRAVELLERS in the report
- The other group was with those who have never travelled to Northern Ontario on a pleasure trip in the past 5 years
 - Referred to as NON-TRAVELLERS in the report
- Previous Northern Ontario residents were not included in any of the groups



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Detailed Findings: Northern Ontario's Personality



Northern Ontario's Personality

If Northern Ontario were a person they would be...

➤ **Physical Characteristics:**

- Healthy looking, lean but strong, muscular from hard labour, robust, rugged, bearded/facial hair, good looking

➤ **Dress:**

- Simple, casual, warm, plaid, flannel shirt and jeans, lumberjack jacket (Paul Bunyan type character in U.S.), North Face, working/winter boots





Northern Ontario's Personality

If Northern Ontario were a person they would be...

➤ **Interests:**

- Fishing, hunting, trapping (U.S.)
- Snowmobiling, ATV's, boating, canoeing
- Camping, hiking, x-country skiing
- Bird watching
- Home repair/very handy
- Animal lover, owns a lab
- Ice climbing (U.S.)





Northern Ontario's Personality

If Northern Ontario were a person they would be...

➤ **Personality:**

- Hard working and honest
- Down to earth
- Easy going and laid back
- Welcoming/neighbourly
- Polite and friendly
- Quiet until you get to know them
- Jovial, great sense of humour
- Service oriented/accommodating
- Nature lover





Northern Ontario's Personality

If Northern Ontario were a person they would be...

➤ **Lifestyle:**

- Healthy, but eats big meals... “meat and potatoes kinda guy”
- Simple and conservative yet fun and adventurous
- Drinks beer but knows a good wine
- Family oriented
- Strong outdoor survival skills
- Cooks a great steak
- Can swing an axe and drop a tree on a dime





Northern Ontario's Personality

- Overall, participants in all groups appear to have a very consistent view of Northern Ontario
- As such, it may be difficult to alter this “brand” perception without jeopardizing current core beliefs, which appear to be decidedly positive in nature
- However, it is also clear that non-travellers need more information and more options in order to consider the offering



Features of Northern Ontario

If I had to write a letter to someone who'd never been to Northern Ontario and was considering visiting, I'd tell them...



Features of Northern Ontario (Letters)

- **Minnesota (Non-traveller)** – *“... rent a nice cabin to have a relaxing, peaceful vacation enjoying the wilderness... would be perfect for you if you like to hunt, fish, canoe or hike. There is much beautiful scenery to enjoy...”*
- **Chicago (Non-traveller)** – *“I hope you like clean fresh air and chilly mornings. At night you can see stars beyond your wildest imagination. Bring good hiking shoes and outdoor gear...”*
- **Detroit (Non-traveller)** – *“Based on what I know, it is a large area with woods for hunting and a lot of water for fishing. Some are accessible by boat or plane only. It is not heavily populated and is very pristine, natural area.*



Features of Northern Ontario (Letters)

- **Toronto (Non-traveller)** – *“... we are already dreaming of beautiful sunsets over the pines, early morning canoeing and fishing excursions as well as shopping at the local antique market... we’ll be away from the sound of cell phones, traffic jams and the concrete jungle...”*
- **Winnipeg (Non-traveller)** – *“There are many lakes and rivers that flow through the sedimentary rocks, the air is brisk and fresh... and they’re trees for acres on end”*
- **Hamilton (Non-traveller)** – *“Need a break? Come listen to loons... we can hike during the day and sit around the campfire at night with some nice homemade wine...”*



Features of Northern Ontario (Letters)

- **Minnesota (Traveller)** – *“We may have 10,000 lakes but they have hundreds of thousands and they are cleaner and more pristine, you have to see it to believe it”*
- **Chicago (Traveller)** – *“... If you want peace and quiet or serenity this is one of the most peaceful places on earth, especially if you want to get away from the hustle and bustle of city life...”*
- **Detroit (Traveller)** – *“... I do suggest camping as opposed to staying in a hotel, become one with nature, enjoy the serenity of what the true outdoors has to offer”*



Features of Northern Ontario (Letters)

- **Toronto (Traveller)** – *“You have an extremely stressful career in the big city and need to get away? The further north you go the better. Connect with nature, find yourself and relax!”*
- **Hamilton (Traveller)** – *“... it’s your first time? It won’t be your last. Just getting away from all the smog and pollution should get you excited, but you’re in for a lot more. Make sure you try some white water rafting, hiking through the wilderness and swimming in some of the coldest, yet refreshing water you’ll ever feel. Anyway, relax, enjoy the change of pace and don’t forget to look up at night, you never know what you’ll see”*



Features of Northern Ontario

- **Consistent among travellers and non-travellers and on both sides of the border, certain key words or phrases drive overall perception of Northern Ontario**
- **These key words and phrases are derived from two distinct thought processes...**
 - The RATIONAL - usually based on reason, experience and tangible/physical attributes...
 - The EMOTIONAL – usually based on perception and feel and articulated as a state-of-mind rather than a relationship to a particular event or place
 - However, the two are inextricably linked to each other...



Features of Northern Ontario

Rational Response



Emotional Response



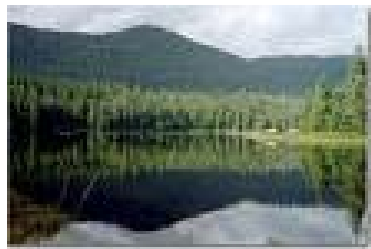
WILDLIFE



NATURAL BEAUTY



OUTDOORSY



CLEAN/PRISTINE



ESCAPE



LAI D BACK



RECONNECTING WITH FAMILY



PURE



Features of Northern Ontario

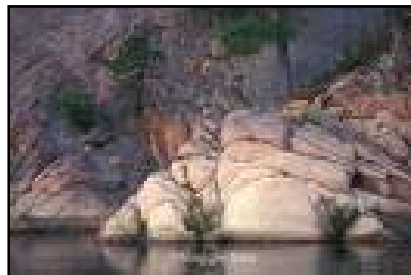
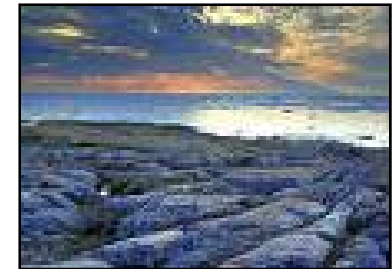
- **Although both are important factors and drive interest in any given destination, there was a strong sense that...**
 - Travellers to Northern Ontario have a stronger emotional attachment to Northern Ontario, and thus seek experiences and places that satisfy this need
 - Non-Travellers are aware of the emotional “potential” of the N. Ontario experience, however they have yet to experience it and are thus more interested in the physical attributes of the region... *“I’m sure it’s beautiful up there and you can just escape the rat race for a bit and totally relax, but I don’t know what there is to do up there, I’m afraid I’d get bored really quick”*



Other Key Features of Northern Ontario

➤ Geography:

- Heavily wooded with older and bigger trees
- Lots of water... lakes, rivers and streams
- Clear blue skies and tons of stars at night/northern lights
- Untouched wilderness
- Vast, large space
- Rugged, undulating terrain
- Rocky outcrops

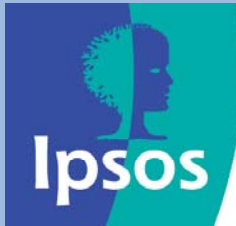


Other Key Features of Northern Ontario

➤ Wildlife:

- An abundance and variety of and very large fish (key differentiator for U.S. outdoorsmen)
- “Exotic” animals (U.S. perception)
- Easy access to animals considered “rare” or hard to find/see in south
- Bear
- Moose
- Wolves
- Birds





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Detailed Findings: Motivations for Travel



Motivations for Travel

Travellers to Northern Ontario...

Prefer...

- Nature
- Outdoor activities (i.e. hiking, fishing, etc.)
- Something new
- Adventure
- Peace and Tranquility
- Alone time

Are not as interested in...

- “Touristy” type places (i.e. beaches or Disney)
- Top-notch accommodations and amenities
- Man made stimuli
- Interaction with people and/or culture



Motivations for Travel

Non-Travellers to Northern Ontario...

Prefer...

- City life, “indoor” activities
(Theatre, fine dining, casinos, etc.)
- Something new
- Relaxation but also excitement... significant fear of being bored
- Getting on a plane
- Nice hotels/amenities

Are not as interested in...

- Nature
- Being outdoors
- Adventure
- Alone time
- Peace and quiet



Motivations for Other Specific Audiences

➤ Those with the kids

- *“Chance to expose them to nature and a different way of life... let’s them know there’s more to do than play video games and listen to their ipod”*

➤ Those without kids

- *“It’s romantic up there, a chance to get-a-way with the husband and have some quality alone time”*
- *“It’s a great place to go with a bunch of buddies... get dropped off by a plane in the middle of nowhere and just hang out, fish and bond”*

➤ Those outside of Ontario

- *“There’s something neat about going to another country or province, it just feels different... it feels like you’re going somewhere”*



Motivations for Travel to Northern Ontario

VISUAL QUEUES THAT RESONATE ...

Travellers - Canada



Camping



Canoeing



Nature/Scenery



Kayak



Rafting



Dining



Northern Train



Science North



Accommodations



Fishing



Northern Lights



History

Travellers – U.S.



Hunting



Shore Lunch

Non-Travellers - Canada

Non-Travellers U.S.



Key Differentiators from other Destinations

For Canadian Participants

- Rock
- Size
- More water, more varied
- Unique topography/geography
- *“It’s not like Northern Manitoba that just has lots of water, there’s no rock or huge old trees here like there is in Ontario”*

For American Participants

- Many are not sure of key differences compared to other parts of Canada, however, compared to Northern US:
- It’s more rugged, isolated, rural, natural, etc.
- It’s untouched & undeveloped
- It’s cleaner
- People are more polite and friendly (True for Canadians in general)



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Detailed Findings: Potential Barriers for Travel



Potential Barriers to Travel

➤ Distance & Accessibility

- In both Canada and the U.S. a 5-6 hour drive appears to be the pain threshold for most, especially families with young children ... *“I can’t take 3 kids in a car for longer than 5-6 hours, they start to lose their minds and that’s not really a vacation for us”...*
- As such participants from Winnipeg appear to be more comfortable with a trip to Northern Ontario than any other group, while those from Chicago may be less so
- For many, excessive distance implies air travel... *“Anything beyond 5-6 hours and I’m taking a plane... I don’t want to spend half my vacation in a car driving”*



Potential Barriers to Travel

➤ **Distance & Accessibility (cont'd):**

- However, for a select few, driving is part of the trip... *“it’s alright, you get to stop in small little towns along the way and see things you otherwise wouldn’t see”*
- Uncertainty about distance between major cities/essential services... *“How far before I reach another city with hotels or hospitals... I just don’t know”*



Potential Barriers to Travel

➤ Passports and Border Issues (U.S. Participants)

- Affordability becomes an issue when you have to buy passports for 4-5 family members... *“To go to Canada, I’d have to buy passports for myself, my wife and two of my three kids... it adds up”*
- Misinterpretation of border regulations is rampant... *“I’m pretty sure you need a passport to get across right now”*
- Long line-ups at border... *“What used to take a half hour at the border can take 1-2 hours or more and they’re real tough on you now... I needed a letter from my wife to get my kids across... it’s even worse coming back in”*
- Help wanted... *“If they had a program that sped up the process of getting passports and provided a bit of discount, that would improve my chances of going there”*



Potential Barriers to Travel

➤ Cost

- Airfare even within Ontario/Canada is expensive... *“It’s cheaper to fly to Europe than it is to fly from Toronto to Thunder Bay”*
- Gas prices... *“at a buck a litre, it’s pricey to go anywhere”*
- Exchange rate... *“Your dollar is a lot higher than it used to be, it’s no longer a bargain to go to Canada”*

➤ Perceived lack of quality accommodations and amenities

- *“I’d like to experience the natural beauty and untouched wilderness up there, but I don’t sleep in tents, I need a half decent hotel, some shopping, good food, maybe a movie theatre”*
- *“It’d be nice if they could package the outdoorsy stuff with a really nice lodge or hotel, so you could adventure seek during the day, but have a real good meal and a nice warm bed at night”*



Potential Barriers to Travel

**THE BIGGEST SINGLE BARRIER
AMONG NON-TRAVELLERS
SPECIFICALLY IS...**

***AN OVERALL LACK OF AWARENES
ABOUT THE OFFERING***



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Executive Summary



Executive Summary

- **Perceptions of Northern Ontario are incredibly similar across all markets and among travellers and non-travellers, for many...**
 - it is perceived to be a land of rugged, natural, untouched beauty with tons of lakes, old growth forest and wildlife
 - it is known for fishing, hunting, boating, hiking, camping and any other outdoor activity you can think of
 - the people are perceived to be down-to-earth, laid back and friendly, living simpler lives in tune with the rhythms of nature



Executive Summary

- **However, awareness among non-travellers is low**
 - Many just do not know what else there is to do “up there” other than fish and hunt
 - However, people appear willing to consider the region, if the right information is provided
 - Uncertainty regarding accommodations, amenities, variety of non-outdoor activities, etc., is a major concern



Executive Summary

➤ **Competition is stiff**

- Some non-travellers on both sides of the border appear to be looking for more traditional vacations (i.e. all inclusive Caribbean) and feel it is necessary to “get on a plane” for a vacation
- Some are just not the outdoorsy type
- Nonetheless, others agree the region likely offers something that would be difficult to find elsewhere on the continent... for example people perceive the region to be MORE untouched, MORE rugged, etc. than other northern regions of Canada and the U.S.



Executive Summary

- **Motivations for travel are relatively consistent across all markets, however...**
 - Current travellers return in large part due to their emotional attachment to the region – they are often escaping the big city or looking for an opportunity to reconnect with loved ones
 - Non-travellers can imagine a more relaxed, peaceful experience, but are concerned that there may not be a lot to do for those not totally immersed in nature and/or outdoor activities and as such they want to know what else it has to offer



Executive Summary

- **Aside from a general lack of awareness, other potential barriers to travelling to Northern Ontario include:**
 - Distance & Accessibility – How/too far? How/too long?
 - Passports and Border Issues for U.S. Participants – expensive and time consuming
 - Cost – gas prices, exchange rate, airfare
 - Perceived lack of quality accommodations and amenities



Executive Summary

- **Qualitatively, those most likely to plan a trip appear to be...**
 - Outdoorsmen (hunters, fishermen, campers, etc.)
 - Nature lovers
 - The adventurous
 - Those with children looking for something “different” to do, (i.e. not Disney)
 - Empty-nesters or couples with no children looking for a romantic get-a-way



Implications & Recommendations

- **Overall, more communication is required**
 - *“It’s (Northern Ontario) not on my radar screen simply because I never hear anything about it... I just don’t know enough about what they have to offer to ever consider a trip up there”*
- **Nonetheless, perceptions of Northern Ontario are similar across all target audiences and appear to be centred around nature and outdoors**
- **As such, communications should reinforce those perceptions but also strive to expand the offering**



Implications & Recommendations

Communications should also...

➤ be very visual:

- STANDARD - Nature combined with a variety of outdoor activities
- NEW – History, Art, Culture, Top-notch accommodations, Variety

➤ have certain key messages:

- Easily accessible (especially in US)
- Value for money / packages available
- More to do than just outdoorsy stuff (especially among non-travellers)



Implications & Recommendations

- **Many want to see a combination of outdoor adventure and medium to high-end accommodations and amenities**
 - *“I’m not much of a fishermen or hunter, but I like hiking and nice scenery, but I’d also like to stay at a nice hotel and have some options for good food, wine, night life, or shopping... that’d be the best of both worlds”*
- **All inclusive or menuing type packages are also attractive**
 - *“I don’t know a lot about Northern Ontario so it’d be nice if they offered a package where I could stay at a central location and then take day trips and do some of the traditional stuff... it’d be nice to have a choice of things to do from a larger list”*



For more information

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