

A man and a woman are walking together, smiling. The man is on the left, wearing a blue and white striped long-sleeved shirt and white pants, pulling a black suitcase. The woman is on the right, wearing a light blue top, a coral cardigan, and white pants, carrying a large, patterned, brown and green bag. They are walking on a light-colored floor against a plain, light background.

Impact Of VFR

Visiting Friends And Relatives

Executive Summary And Implications

Executive Summary

VFR plays a significant role in Ontario tourism, with many Ontarians acting as hosts to out-of-province guests.

- The numbers are large not only when considering volume from other parts of Canada, but also when turning attention to the US and Overseas origin markets.
- Even when one focuses solely on the US Near and Mid Markets, more than 2 million Americans claim to have been hosted by Ontario residents in the past five years. And, these are certainly not isolated occurrences. They take place with some regularity with repeat visitation being the norm.

Ontarians with out-of-province friends and relatives are provincial ambassadors.

- The simple availability of hosts and host accommodation in Ontario clearly places the province in a much more favourable position for stimulating visitation beyond its borders.
- However, Ontario hosts are often the main drivers of these VFR visits - they are the main attraction to the province, and also often initiate these trips by inviting their friends and relatives to visit and, in doing so, promoting the province's tourism attributes.

Executive Summary

Ontarians with out-of-province friends and relatives are provincial ambassadors. (cont'd)

- The influence of Ontario hosts extends beyond initiating the trip itself. Hosts act, to a considerable extent, as “tour directors”, often establishing the itinerary for their guests and strongly influencing the choice of attractions and experiences.
- While past experiences are widely relied upon when planning guest visitation, hosts are very open to other influences, such as advertising and often actively seek information to supplement their own knowledge of the province and any research conducted by their guests themselves. This means that they are open to external marketing influences.
- Visiting guests typically desire a tourism experience over and above the pleasure of spending time with their friends and relatives. Hosts act as key catalysts for this conversion from visitation to tourism, with their influence extending to other parts of the province beyond their own town or city. Moreover, the hosts themselves are quite commonly actively involved in the experience becoming tourists themselves and further boosting the economic impact of the visit.
- The outcome of host involvement is a highly enjoyable guest experience. Hosted visitors express a very high level of satisfaction and intend to return to the province, regardless of point of origin. Certainly there is a desire to visit their hosts once again, but the appeal of the province itself also plays a role. Positive commentary surrounding scenery, entertainment attractions, activities and culinary opportunities suggests sufficient depth of experience to stimulate repeat touristic visitation.

Executive Summary

The economic impact of travel comes not only from the traveler, but also from the Ontario host.

- Hosts are critical drivers of positive economic impact. They often stimulate the trip itself and play a central role in terms of extending length of stay.
- Though guests are often invited by their hosts to visit Ontario, many travelers are spending nights in paid accommodation at least for part of their trips. As a consequence, there are significant spin-offs to the hospitality sector, akin to “pure pleasure trips”. In addition to the expenses visitors are accumulating during their visit, these VFR trips also bring in additional dollars by encouraging host spending. Ontarians spend a considerable amount of money when friends and relatives come to visit, mainly by providing meals (often out of home) and entertainment. In many cases, friend/relative visits also encourage the host to travel out of town with their guests, *creating significant incremental tourism impact*. This is especially true for VFR involving overseas guests.

Executive Summary

Guest origin impacts the type of hosting done in Ontario

- Guests from overseas generally stay the longest and are also most likely to be taken out of town by their hosts to see other Ontario destinations. They are also the most inclined to spend multiple nights in commercial accommodation beyond the nights they spend with their hosts. Not surprisingly, friends and relatives originating from nearby regions in Canada and the US tend toward shorter, but more frequent trips.
- Overseas visitors tend to be better prepared when it comes to researching options for trip activities. This is quite understandable given that these trips tend to be longer and generally more significant than those of friends and relatives visiting from nearby locations. Still, like visitors from Canada and the US, overseas guests rely very heavily on host experience and suggestions to guide their activities while in Ontario.
- In general, it can be said that while overseas visitors differ from both Canadians and Americans in a number of respects, the differences are largely tied to the more substantive nature of their trips and less well-established knowledge of Ontario. Of key importance, the influence of the host on visitation and the trip experience is similarly powerful in all three cases.

Marketing Implications

- There is an argument to be made that current and potential Ontario hosts are already well placed and receptive to the notion of encouraging visits from friends and family. They are also open to playing a central role when it comes to extending the visitation experience into something that has strong tourism/pleasure-travel overtones and, as a consequence, more substantive economic impact.
- In many ways, hosts should be seen as ambassadors who, through their very existence, remove some of the barriers to choosing Ontario. Furthermore, they are key to conveying positive information about, and stimulating interest in, the Ontario pleasure travel offer. They should, therefore, be considered a target for communications with the objective of encouraging and strengthening their ambassador role.
- Marketing and communications might, in fact, go beyond simply raising the profile of this role. There should also, perhaps, be an effort to equip Ontario hosts with the information and inducements they need to more forcefully promote the fuller provincial offer to their friends and family. In other words, one might aspire to better equip hosts to become willing ambassadors capable of exciting their guests about Ontario and directing them to a wide variety of potential experiences.
- Such initiatives might certainly extend to product packaging and value-added offers. For instance, those assuming the role of host and ambassador could be provided with the opportunity to take advantage of host attraction packages and deals that assist them with stimulating the interest of friends and relatives. This would make their ambassador role easier to assume and provide an incentive for all parties to act on their interest.

Marketing Implications (Cont'd)

- The notion of promoting VFR within the host community rather than the potential guest population would seem to make good economic sense. Hosts are, by definition, easier to reach from a simple geographic perspective. Perhaps, more importantly though, they are receptive to the idea of promoting the province and already exhibit the required behaviours. They are already primary catalysts of the decision to choose Ontario and, presumably can be easily persuaded to do so even more effectively if equipped with the necessary information and tools.
- It goes without saying that initiatives directed to raising the awareness profile of hosting and offering incentives to do so would resonate with the large population of Ontario residents who have had past experience with hosting out-of-province friends and relatives. However, the same efforts should also resonate with many Ontarians who have not yet acted on the opportunity to .

NOTE ON REPRESENTATIVENESS OF PANEL SAMPLING:

The Ontario resident sample derived from the TNS Access Panel shows a modest degree of skewing toward those born in Canada. However, the degree of disproportionality is unlikely to have a major impact on the results, particularly given that the overall panel distribution by place of birth is quite closely aligned with Census statistics.

Still, one should be mindful of the fact that panels tend to under-represent recent immigrants for reasons related to language, the immigrant focus on acclimatization to a new country and cultural reticence to participating in consumer panels. As a consequence, the opinions and experiences of recent immigrants as hosts of friends and relatives are possibly under-represented in this survey.

Basic VFR Metrics

Among Ontarians hosting visitors from out-of-province

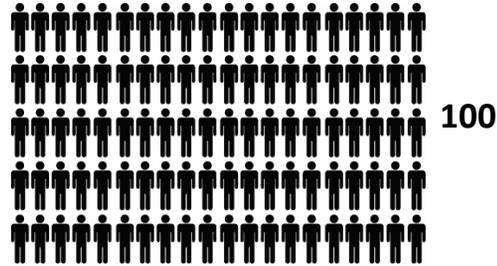
Among US Mid/Near Market residents hosted in Ontario



Involvement With Ontario VFR

US Mid / Near Market - Hosted

Per 100 Mid / Near Market Americans



Total ever visited Ontario



Have friends or relatives in Ontario



Ever hosted by friends or relatives in Ontario



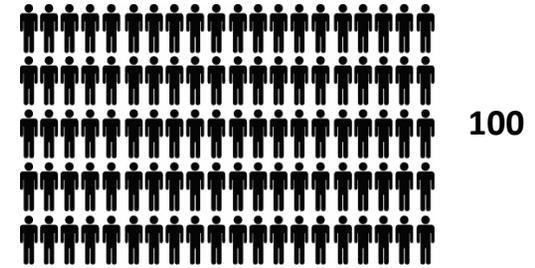
Hosted by friends or relatives in Ontario within past 5 years



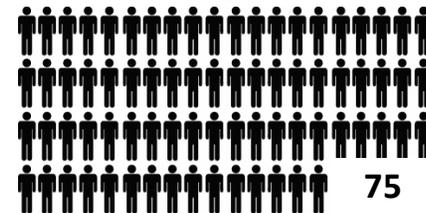
Equates to 2,012,000 Americans in Near & Mid Markets

Ontarians - Hosting

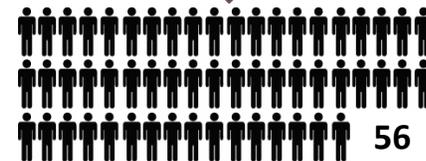
Per 100 Ontarians*



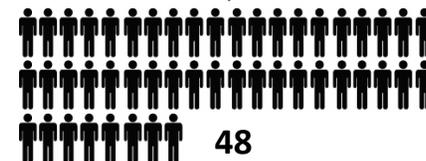
Whether have friends/family outside Ontario



Ever hosted out-of-province friends/family



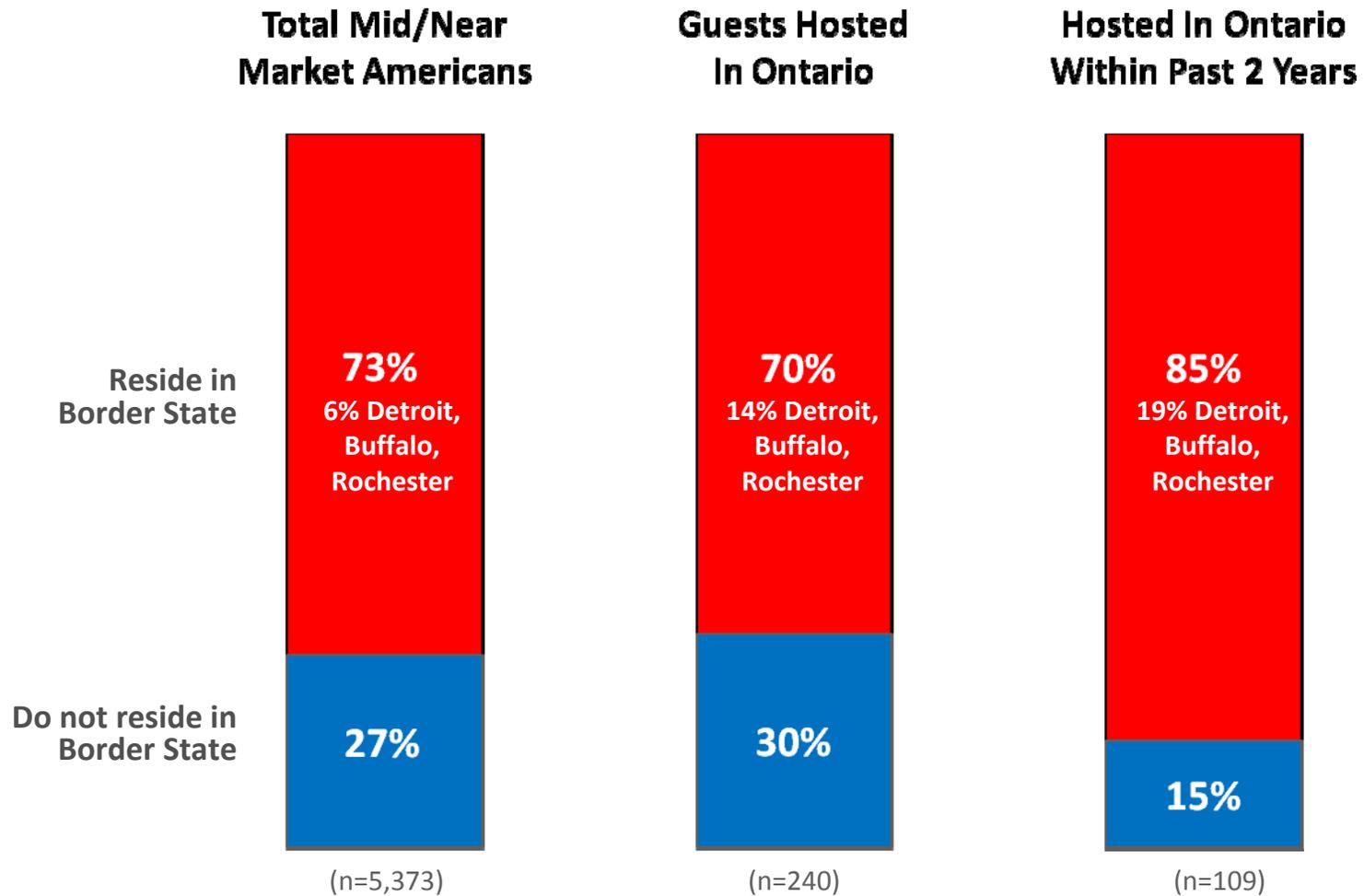
Hosted in past 5 years



Equates to 4,478,000 Ontario Residents

* In each case limited to adults qualifying as travelers in keeping with qualification criteria for study as a whole.

Proximity Of Mid/Near Market Americans Hosted In Ontario



Q2VFR. Have you ever been hosted by friends or relatives who live in Ontario?

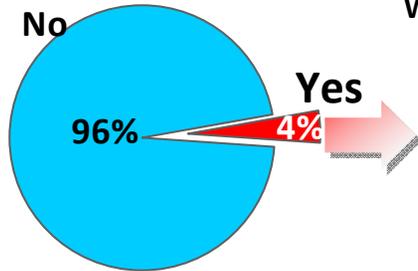
Q3VFR. When was the last time you were hosted by friends or relatives who live in Ontario?



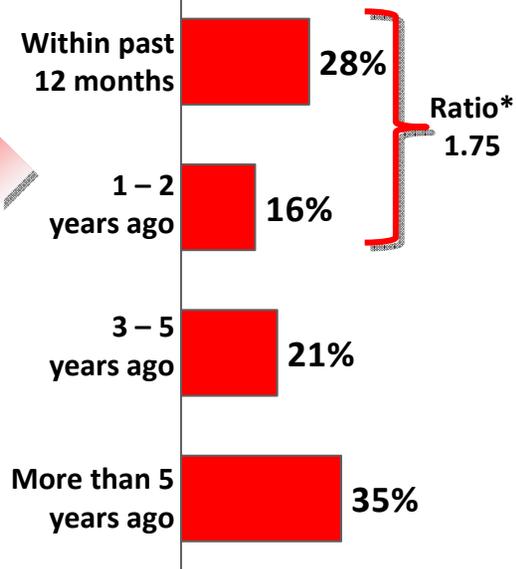
Timing Of Last Ontario VFR Experience

Total Mid / Near Market Americans

Whether ever hosted by friends/relatives in Ontario



Time last hosted by friends/relatives

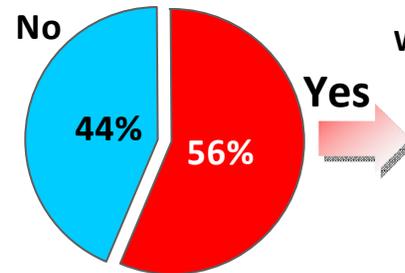


Ratio* 1.75

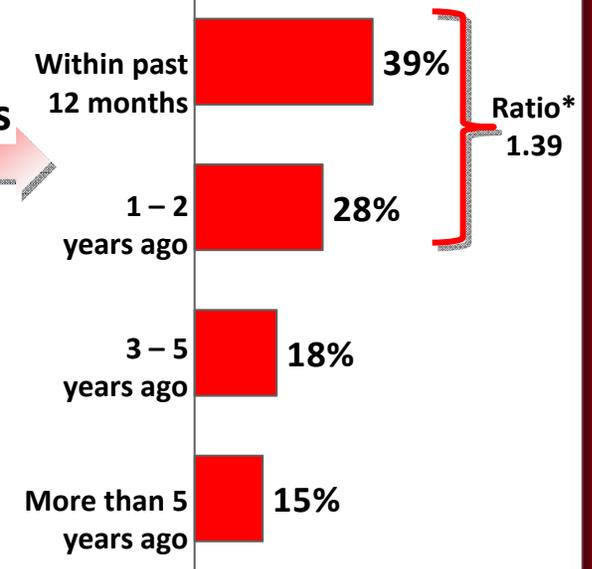
(n=240)

Total Ontarians

Whether have ever hosted friends/relatives from outside Ontario



Time last hosted friends/relatives from outside Ontario



Ratio* 1.39

(n=286)

Q1VFR. Do you or other members of your household have friends or relatives who live in other provinces or countries? (U.S.) Do you have any friends or relatives who currently reside in Ontario?

Q2VFR. Have you ever hosted friends or relatives who came to visit Ontario from other provinces or countries? (U.S.) Have you ever been hosted by friends or relatives who live in Ontario?

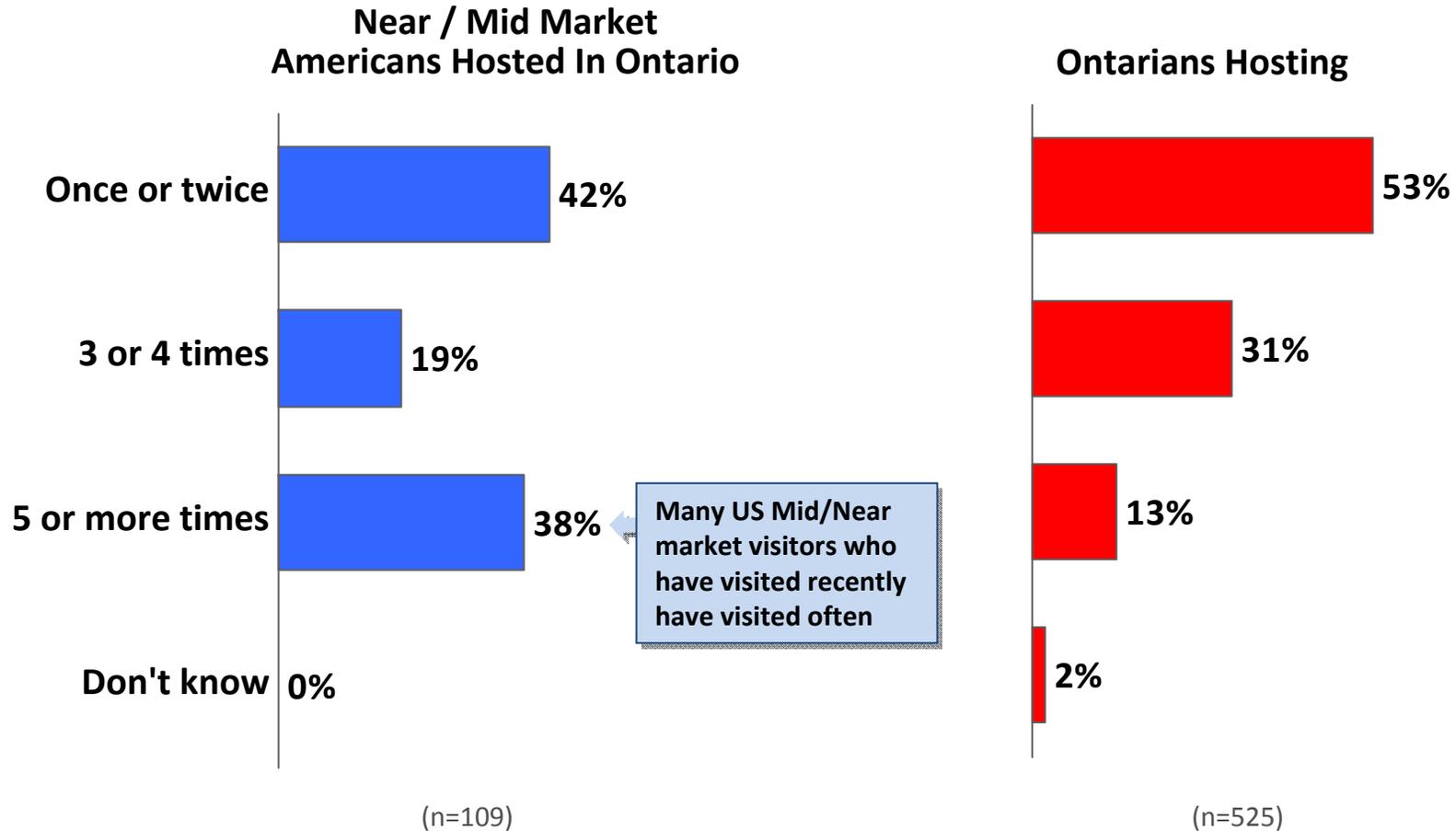
Q3VFR. When was the last time you hosted friends or relatives from other countries or provinces? (U.S.) When was the last time you were hosted by friends or relatives who live in Ontario?

* Ratio of visits within past 12 months to 1-2 years ago.

Number Of Hosted Visits In Past 2 Years

Among those hosted/hosting within past 2 years

Number Of Visits



Q4VFR. Just thinking about the past two years, on approximately how many separate occasions have you hosted friends or relatives on a visit to Ontario from other provinces or countries? (U.S.) Just thinking about the past two years, on approximately how many separate occasions have you been hosted by friends or relatives while on a visit to Ontario?

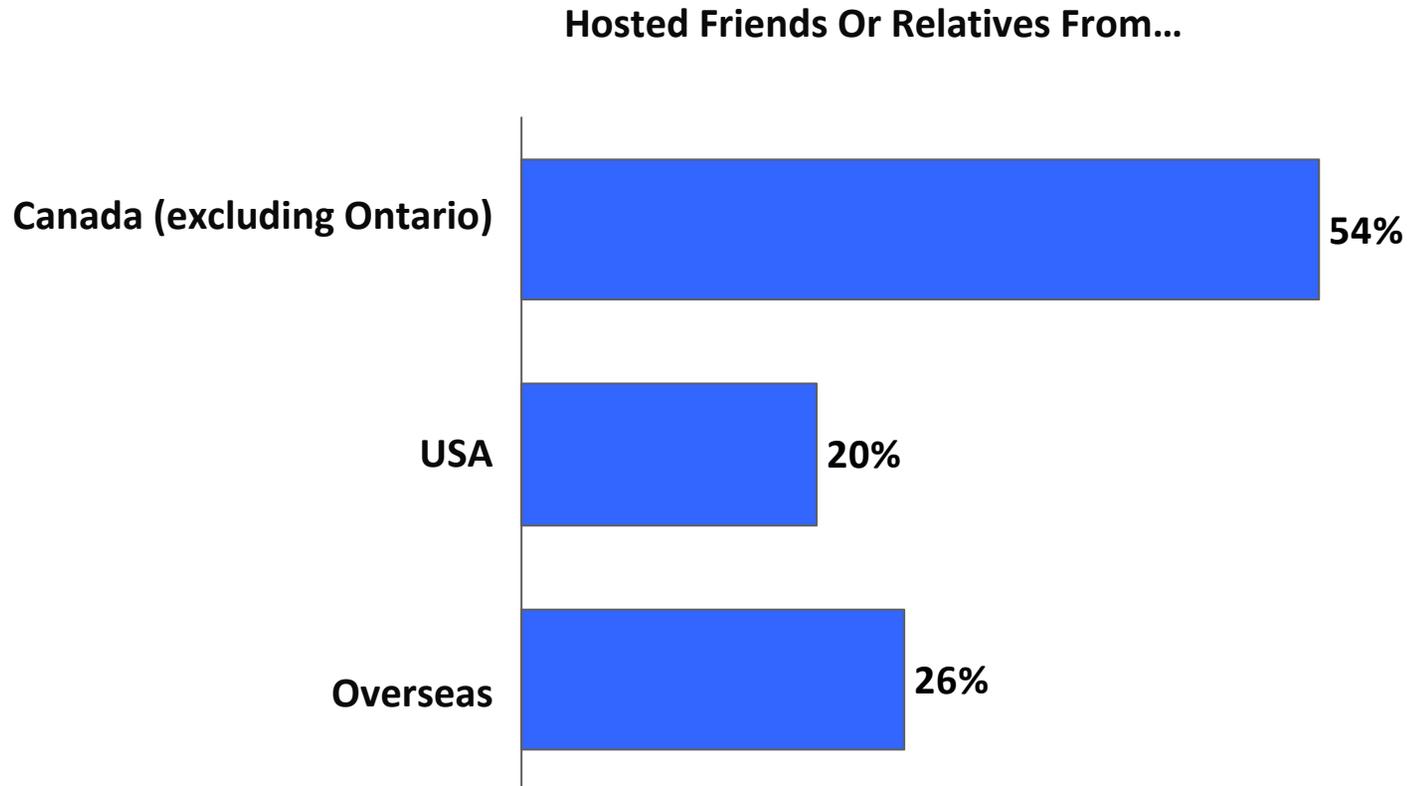




The Experience of Ontario Hosts

Origin Markets Of Guests Hosted

Among Ontarians hosting friends/family from other provinces in past 5 years



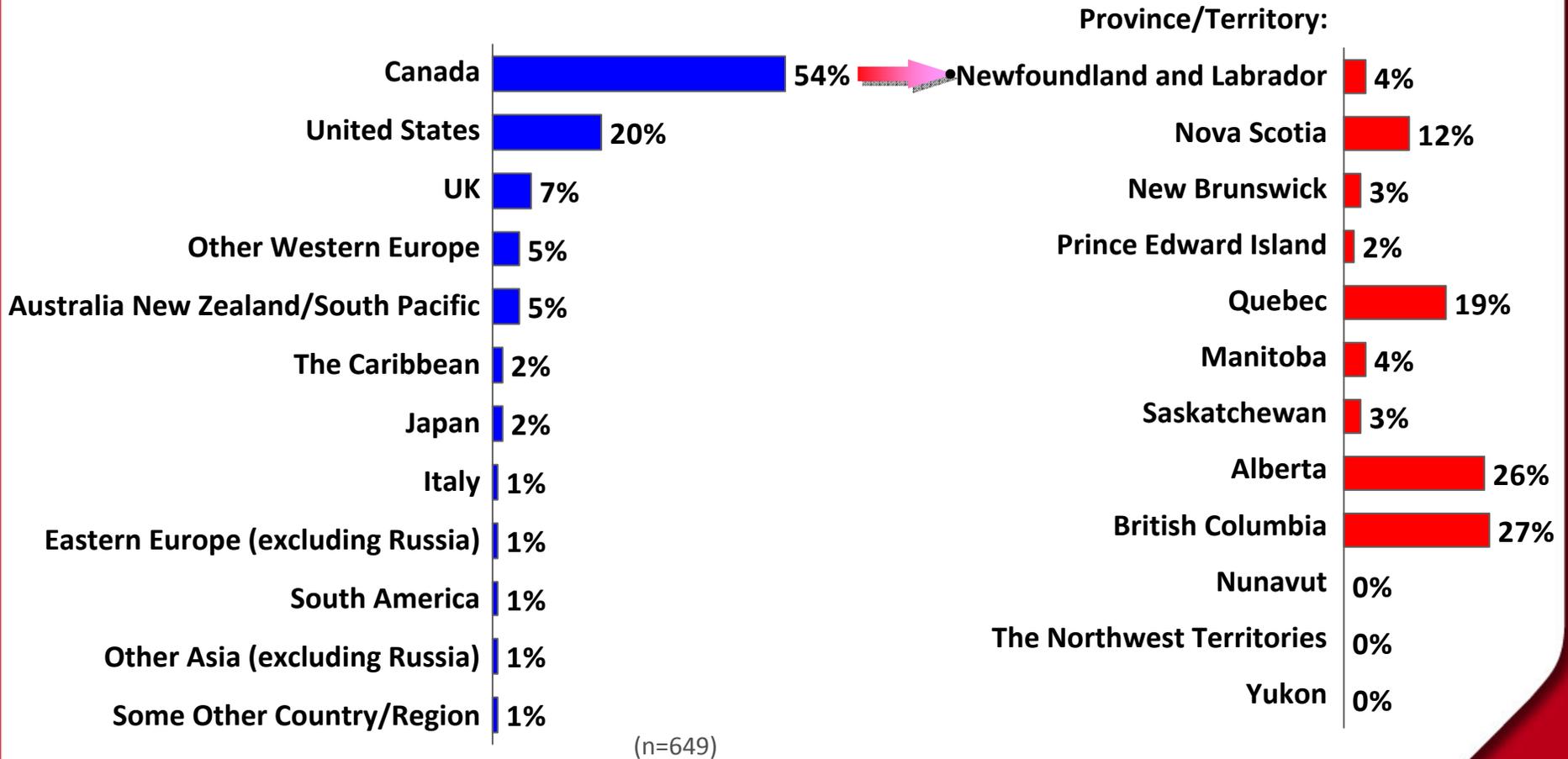
Q6AVFR. Again thinking about the last visit you hosted, in which of the following countries did the friends or relatives you last hosted reside at the time their visit took place?

Base: Ontarians hosting friends/relatives from outside of Ontario within past 5 years (n=649)

Country Of Residence Of Friends/Relatives Last Hosted

Among Ontarians hosting friends/relatives from out-of-province within past 5 years

Ontarians



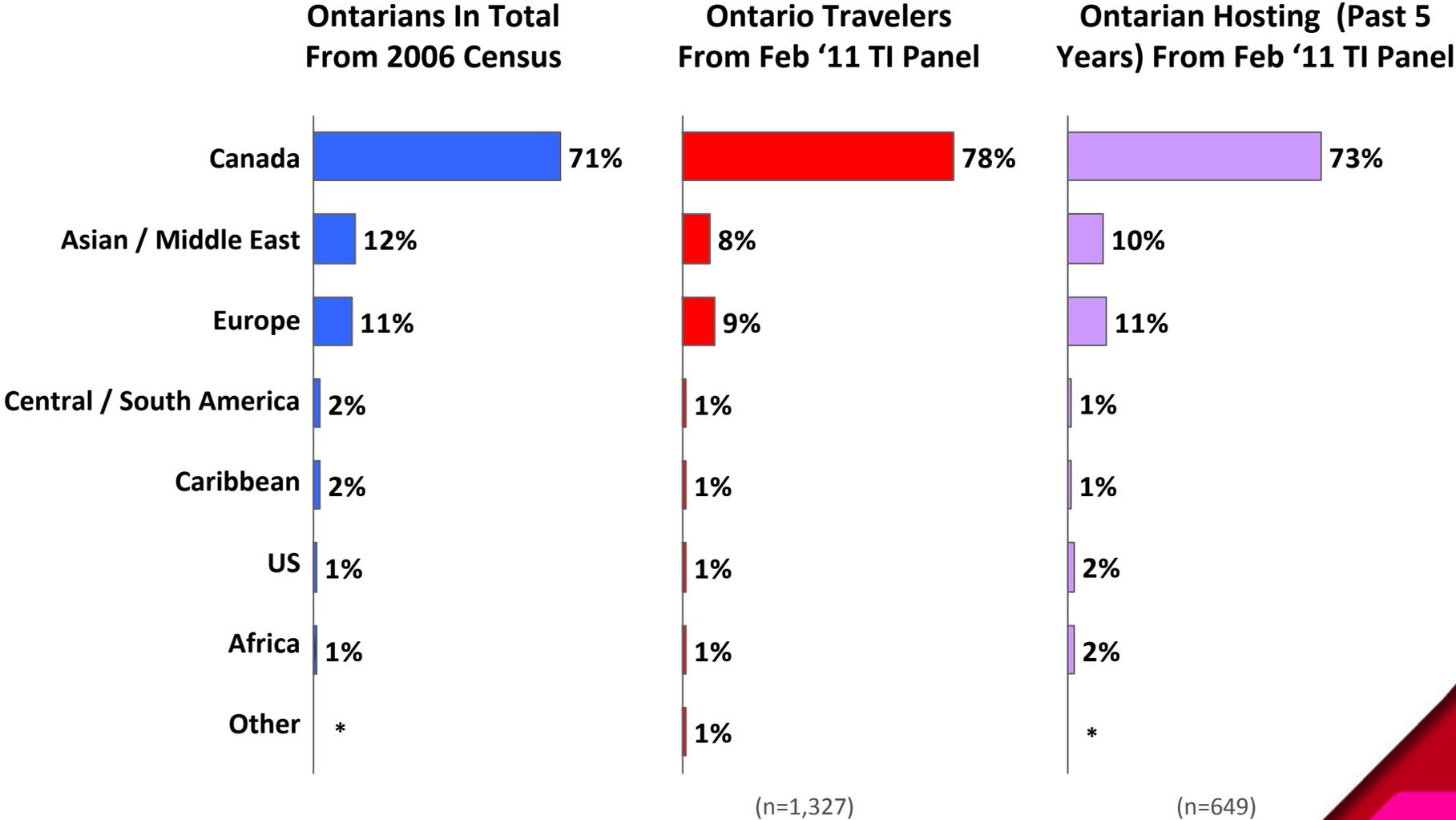
Q6AVFR. Again thinking about the last visit you hosted, in which of the following countries did the friends or relatives you last hosted reside at the time their visit took place?

Q6BVFR. In what Canadian province or territory did these friends or relatives reside at the time of their visit?



Country Of Origin Of Ontario Hosts

Alignment of panel and Census data

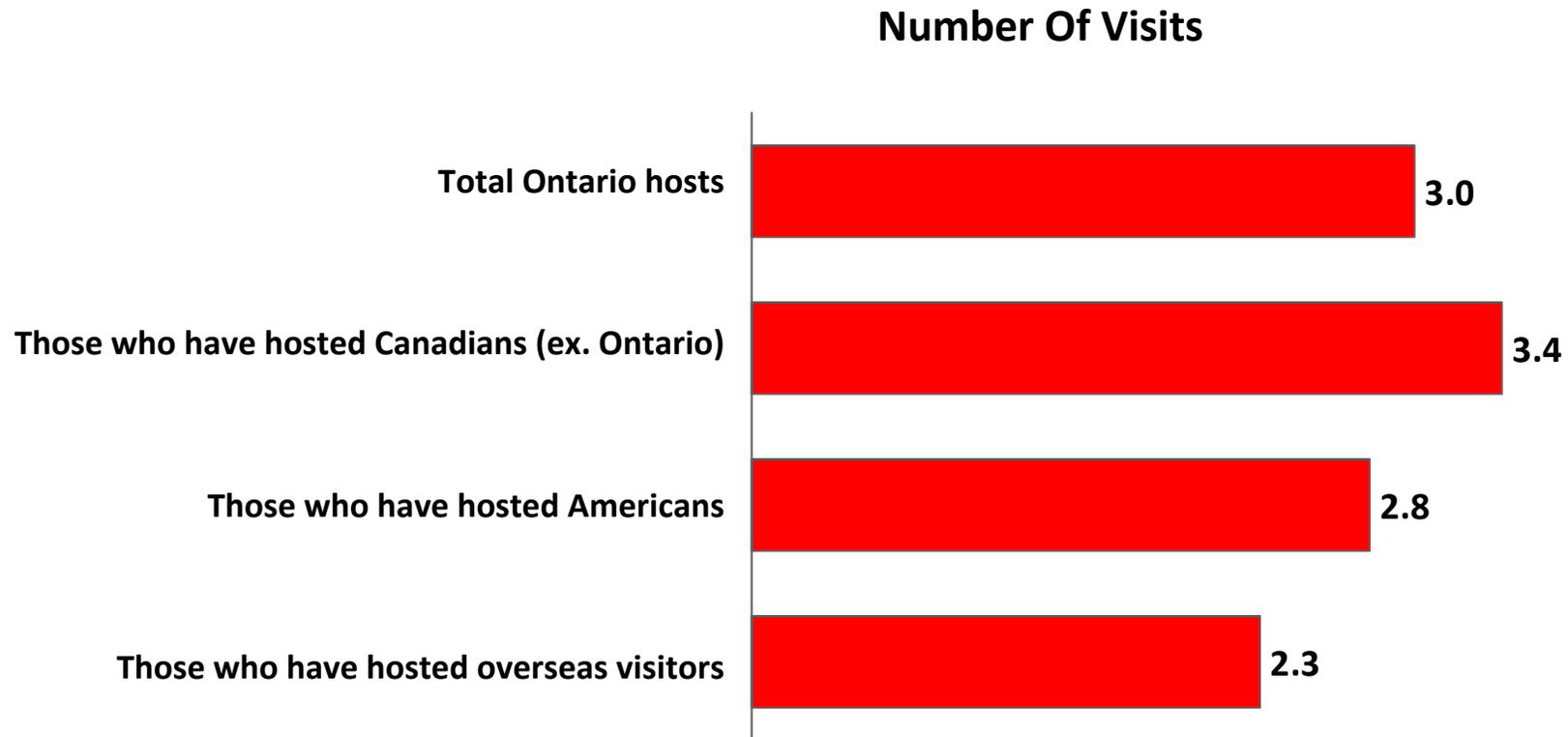


* Less than 0.5%



Average Number Of Hosted Visits In Past 2 Years

Among those hosting within past 2 years

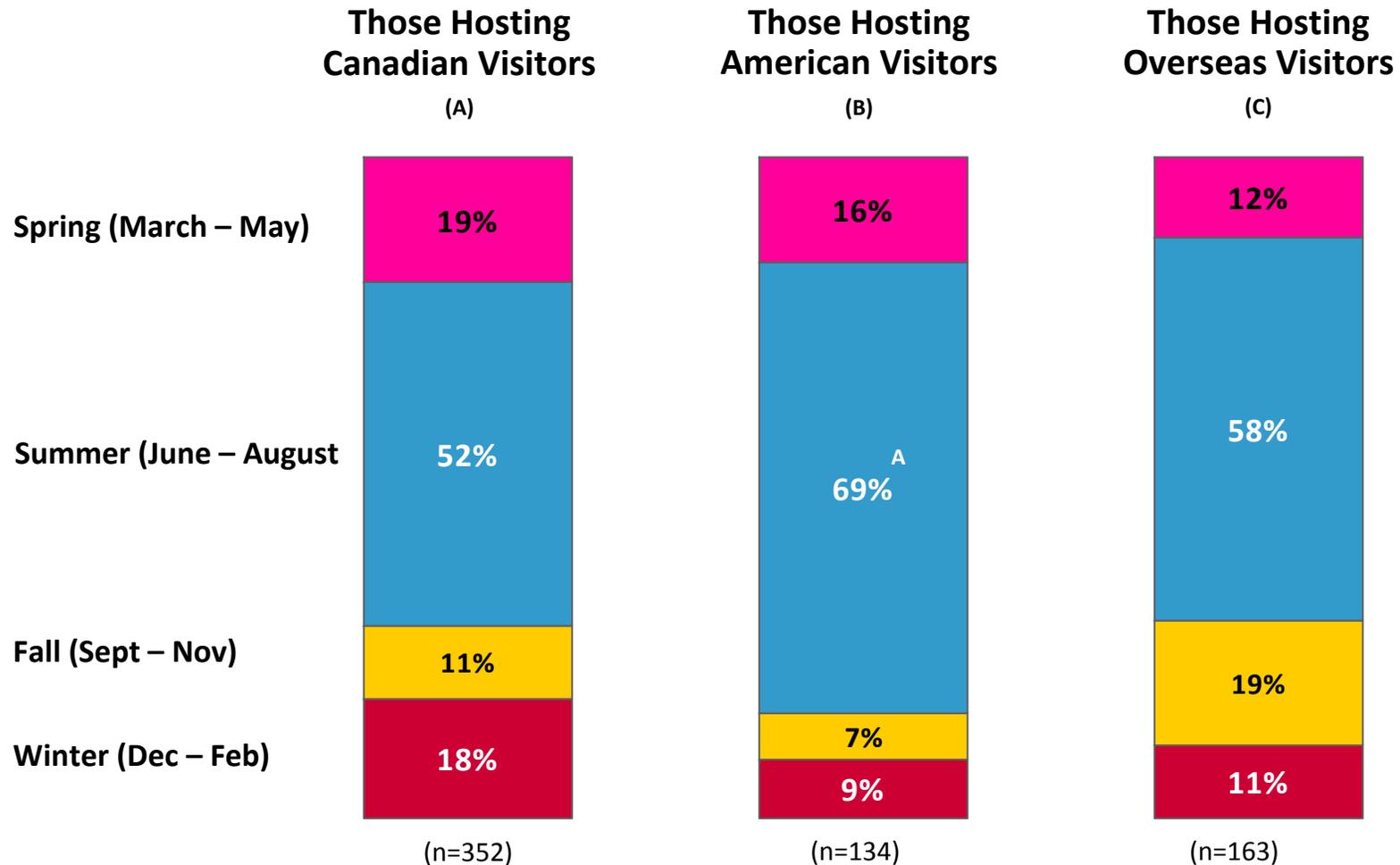


(n=525)

Q4VFR. Just thinking about the past two years, on approximately how many separate occasions have you hosted friends or relatives on a visit to Ontario from other provinces or countries?

Season When Last Hosted Out-Of-Province Visitors

Among those hosted/hosting within past 5 years



Q5VFR. During which season did you last host friends or relatives from other provinces or countries?

Note: Letters beside the percentage figure indicate a significant difference (95%) from the group(s) the letter(s) represents.

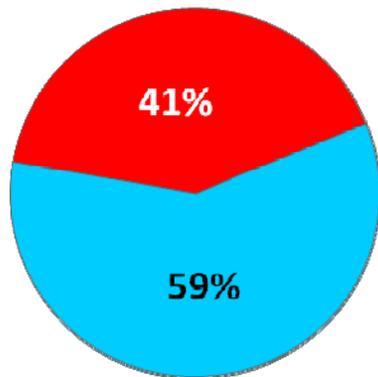


Who Initiated Last VFR Visit?

Among those hosting within past 5 years

Those Hosting Canadians

Came because of
my invitation

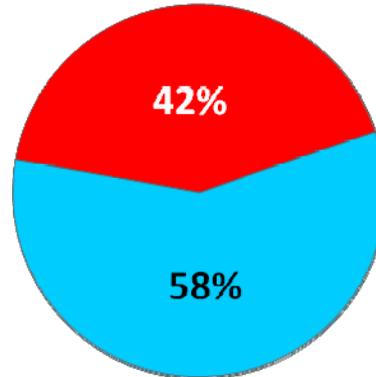


They had planned to
come on their own

(n=352)

Those Hosting Americans

Came because of
my invitation

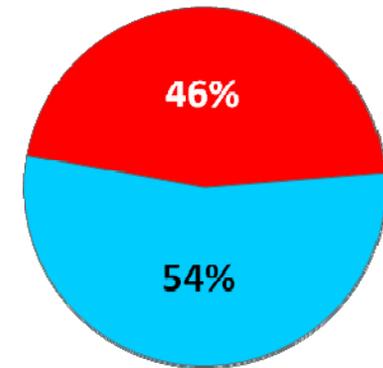


They had planned to
come on their own

(n=134)

Those Hosting Overseas Visitors

Came because of
my invitation



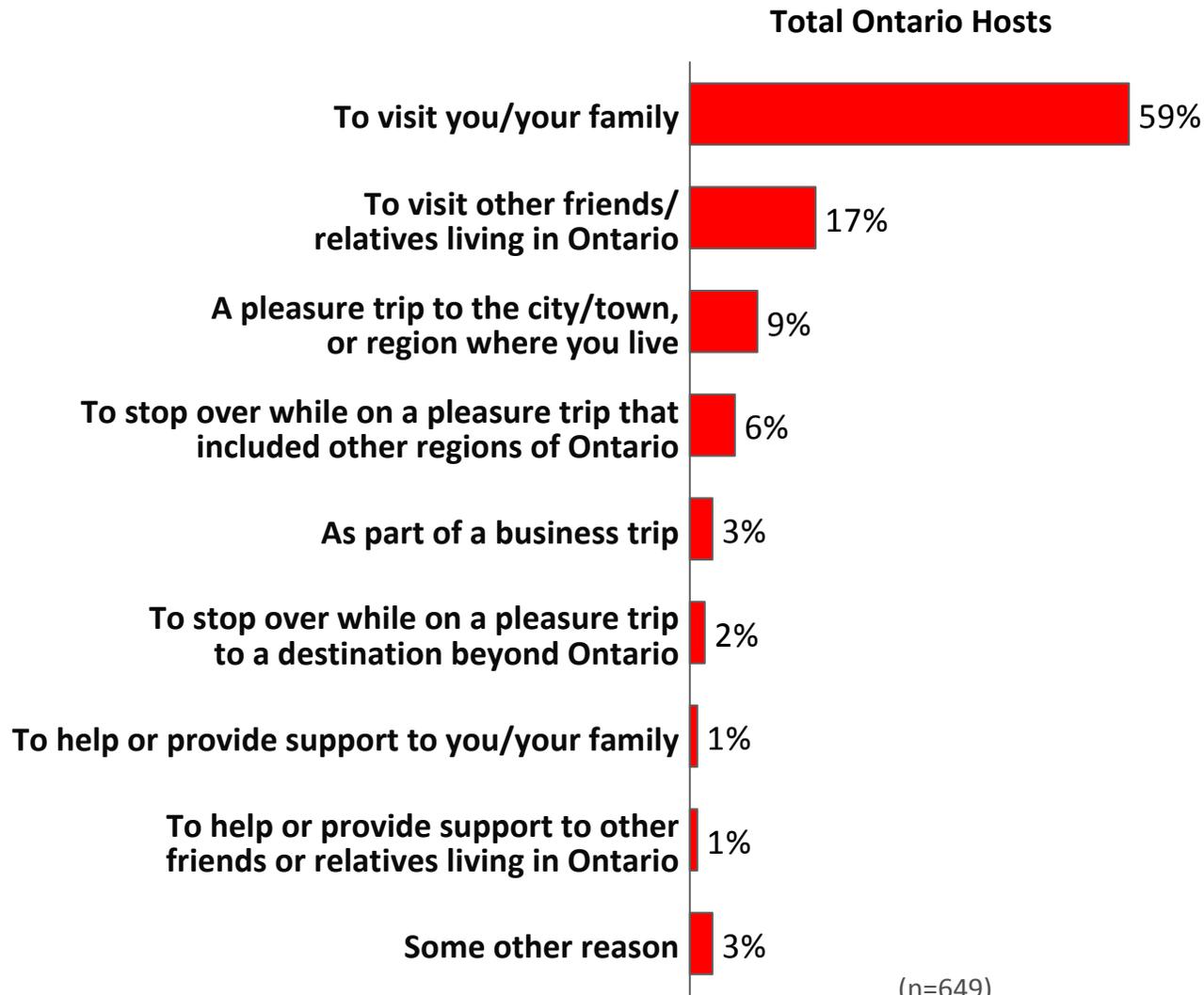
They had planned to
come on their own

(n=163)

Q8VFR. Did your friends/relatives come to your city/town because you invited them, or were they planning to come on their own?

Primary Reason For Last Hosted Visit To Ontario

Among those hosting within past 5 years



Difference From Total Among Those Last Hosting ...		
Canadians	Americans	Overseas Visitors
+1	-5	0
-1	+4	-3
-3	0	+5
+2	-5	+1
0	0	-2
-1	+3	+1
+1	0	-1
0	0	0
0	+1	0

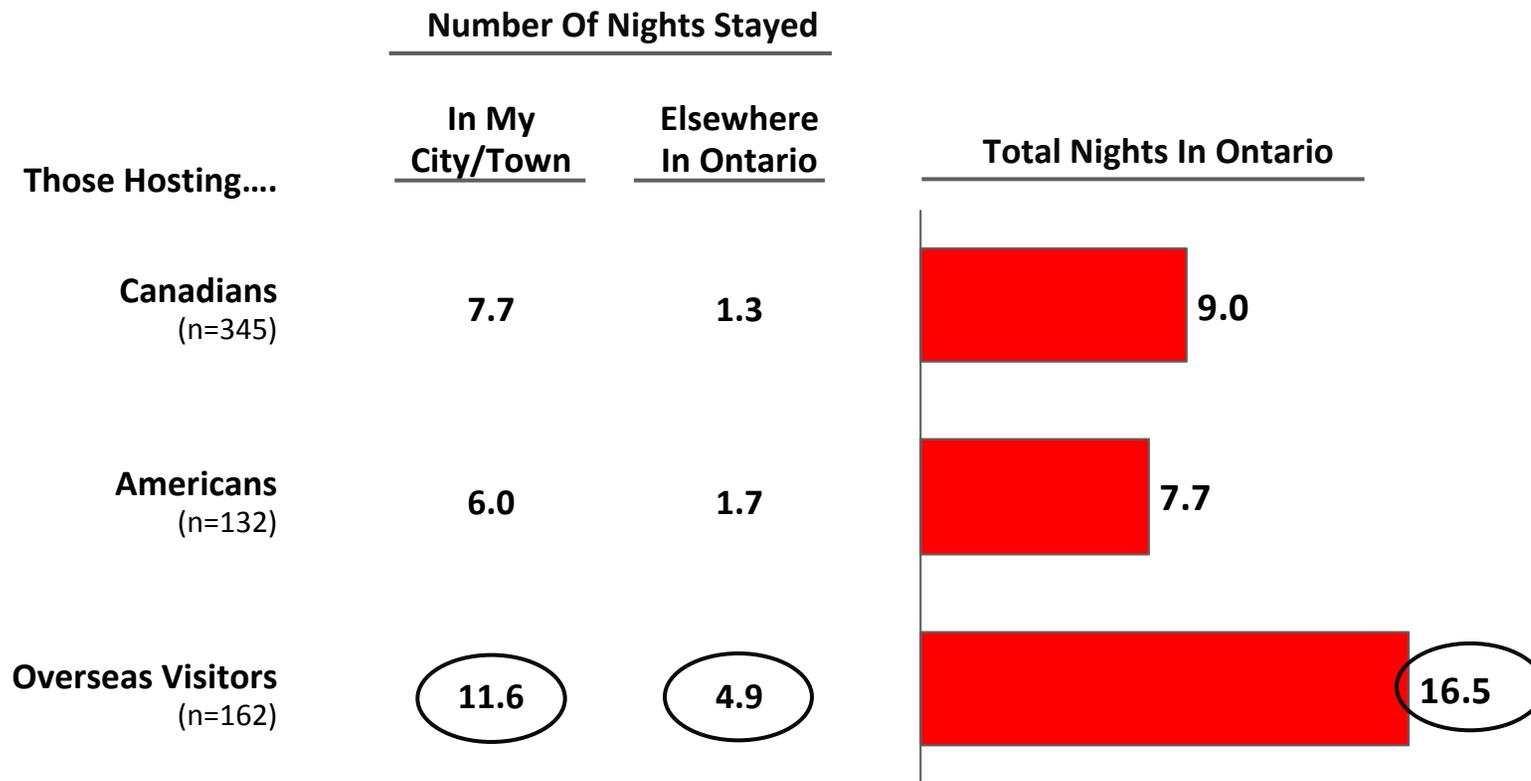


Statistically significant difference at 95%.

Q7VFR. What was the primary reason for their visit to your city/town?

Average Length Of Last Overnight Trip Hosted

Among those hosting within past 5 years and overnight stay on last trip



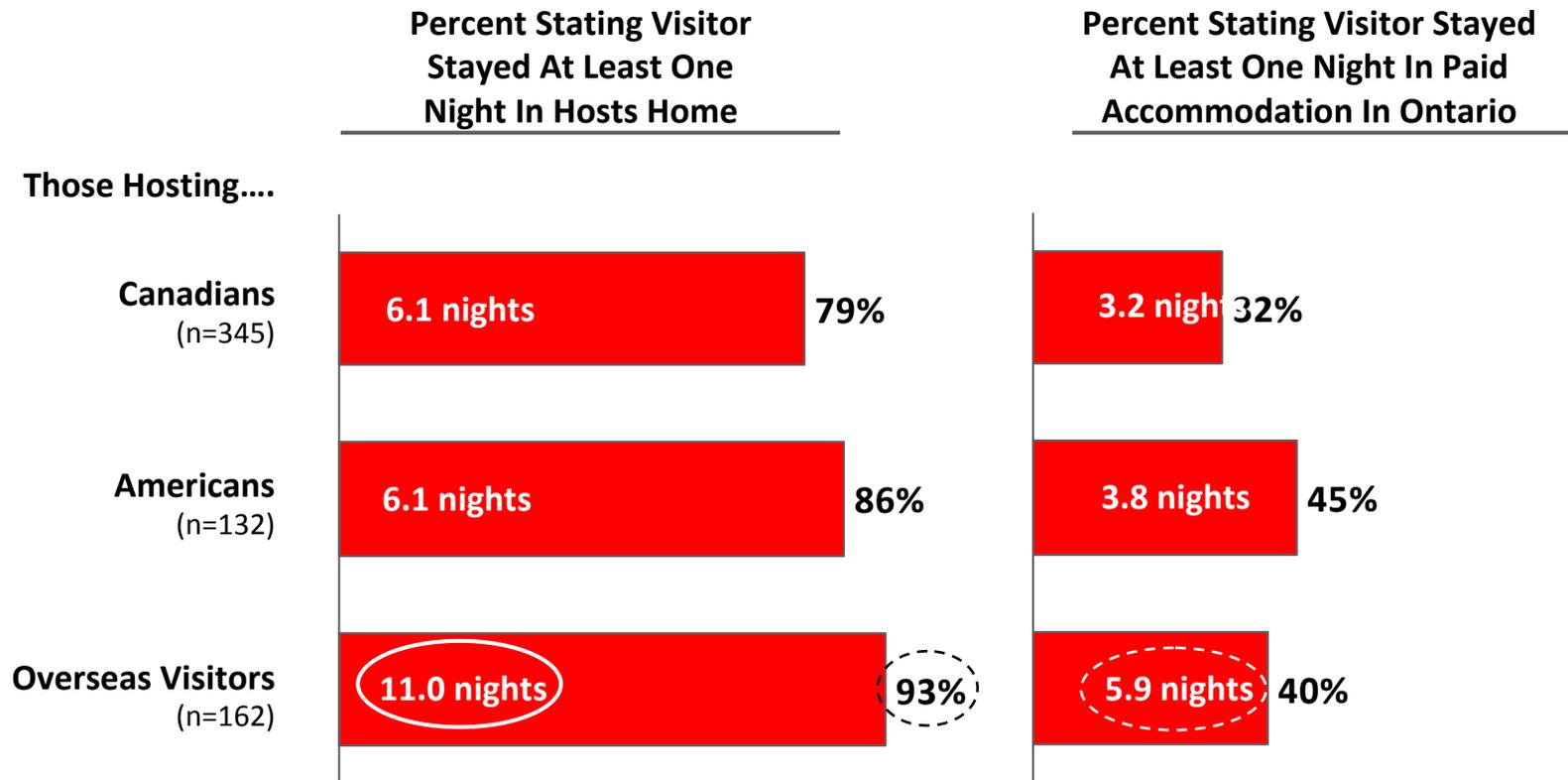
Statistically significant difference from other two groups at 95%.

Q9VFR. To the best of your knowledge, how long did your friends/relatives stay in Ontario?

Q10VFR. You mentioned that your friends/relatives stayed in Ontario for <X> nights. For how many of these nights did they stay in your city/town specifically?

Accommodation Chosen On Last Trip

Among those who last hosted those on an overnight trip taken in past 5 years



Statistically significant difference from other two groupings at 95%



Statistically significant difference from those hosting Canadians at 95%

Q12VFR. How many nights did they stay at your (their) home?

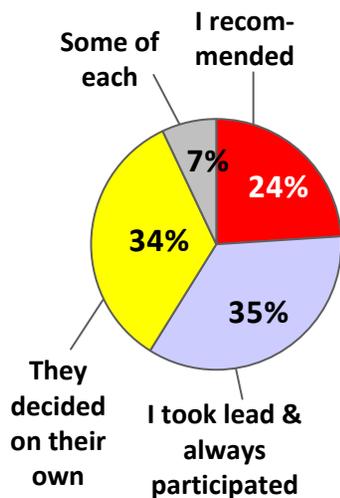
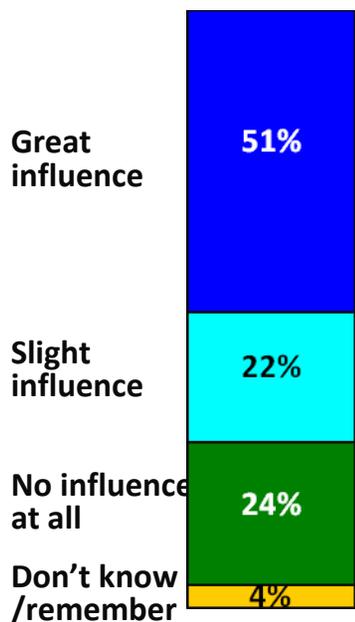
Q14VFR. Approximately how many nights would you say they stayed in some other, paid accommodation while on their trip to Ontario? /

My Influence On Friend/Relative Trip Destination & Activities

Those Hosting Canadians

Influence of opportunity to stay in my home on decision to visit

My influence on specific activities chosen



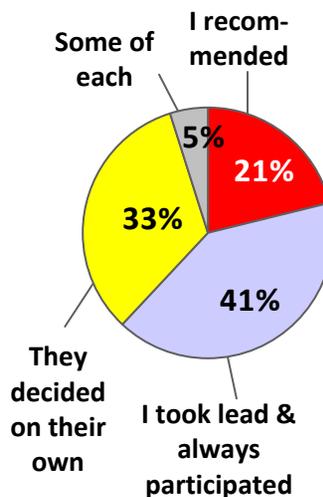
(Among those who last hosted friends or relative: n=283)

(Among those who last hosted in past 5 years: n=283)

Those Hosting Americans

Influence of opportunity to stay in my home on decision to visit

My influence on specific activities chosen



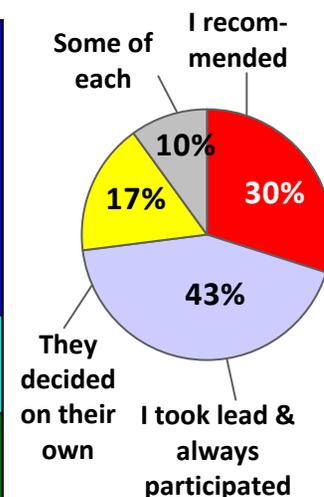
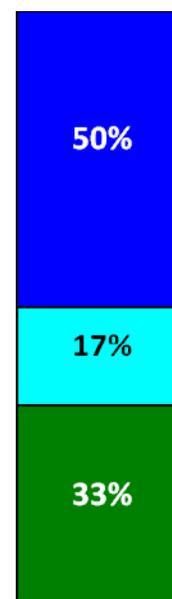
(n=107)

(n=134)

Those Hosting Overseas

Influence of opportunity to stay in my home on decision to visit

My influence on specific activities chosen



(n=152)

(n=163)

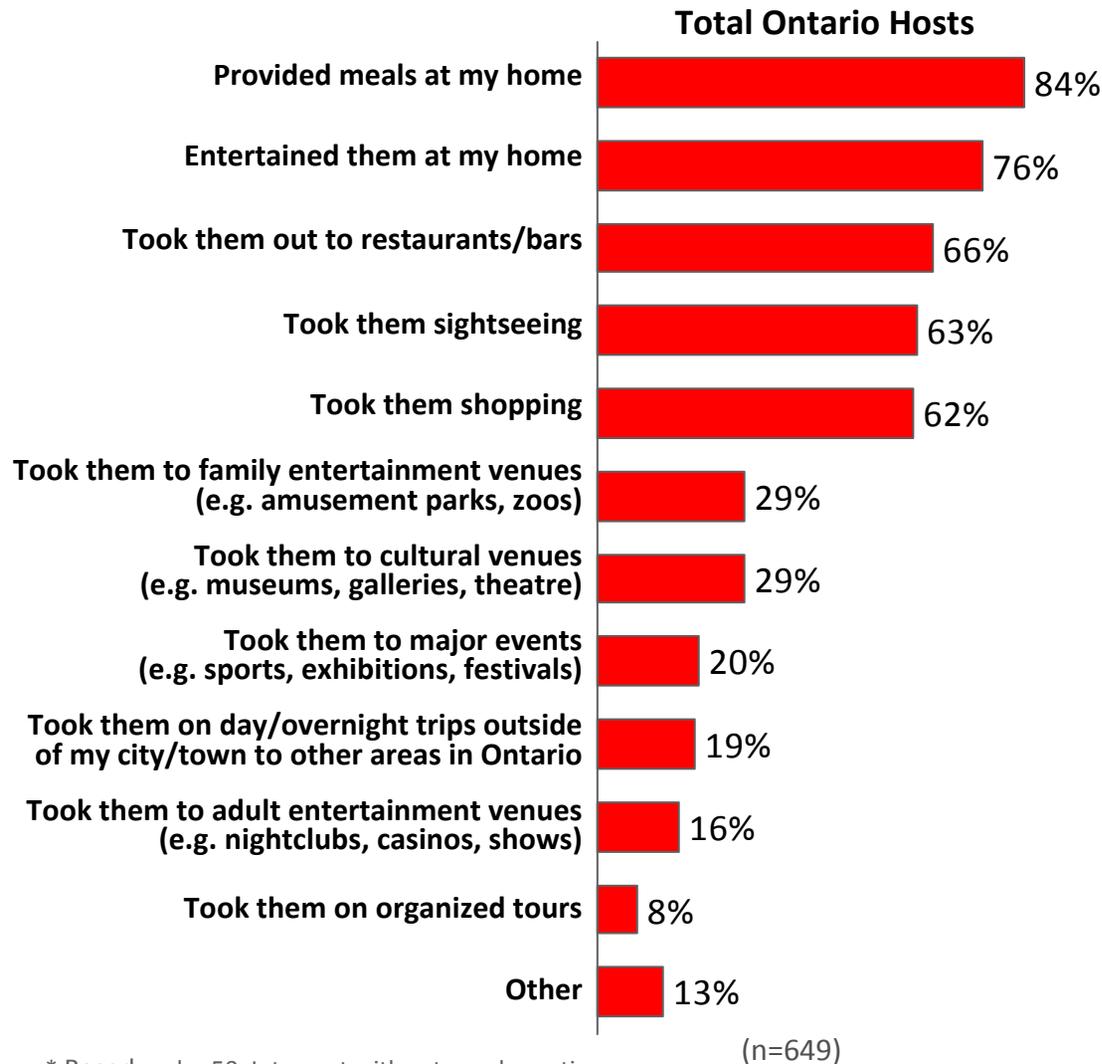
Q15VFR. To what extent did the opportunity to stay with you influence their decision to visit your city/town?

Q17VFR. Did they ever participate in activities without you?

Q18VFR. Did you recommend specific activities to do or places to go, or did they decide on their own what to do/where to go?

Activities During Last Friend/Relative Visit

Among those hosting in past 5 years



Difference From Total Among Those Last Hosting ...		
Canadians	Americans	Overseas Visitors
-3	+6	+3
-6	+16	+1
-5	-2	+11
-6	+1	+13
-3	-2	+7
-2	-12	+15
-7	+6	+8
-4	+1	+8
-6	-2	+12
-3	-4	+10
+3	-7	+1
+1	-1	-3

(n=35)* (n=34)* (n=136)

* Based under 50, Interpret with extremely caution.

Statistically significant difference at 95%.

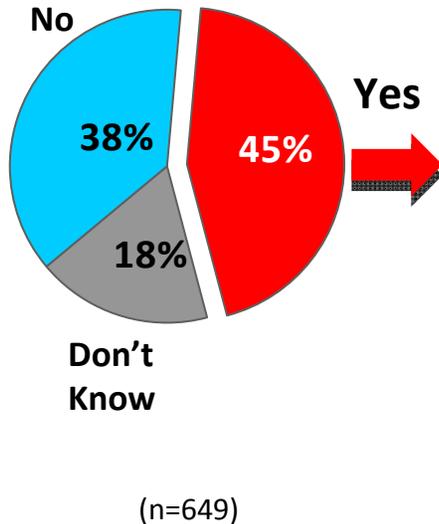
Q16VFR. What did you do with your friends/ relatives while hosting them? Please select all answers that apply.



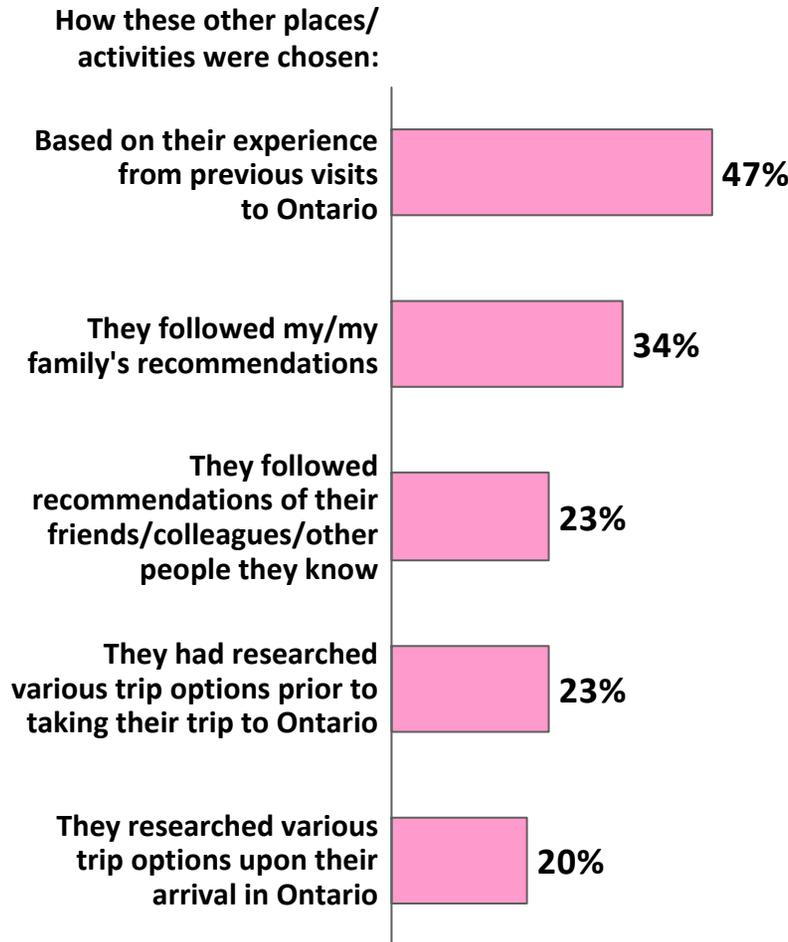
Planning Of Activities In Ontario Beyond Host Town During Visit

Among those hosting in past five years

Whether visited other places in Ontario for activities without hosts:



Total Ontario Hosts



	Difference From Total Among Those Last Hosting ...		
	Canadians	Americans	Overseas Visitors
Based on their experience from previous visits to Ontario	+8	+2	-19
They followed my/my family's recommendations	-8	+1	+13
They followed recommendations of their friends/colleagues/other people they know	+3	-1	-6
They had researched various trip options prior to taking their trip to Ontario	-2	-8	+13
They researched various trip options upon their arrival in Ontario	-5	-5	+15

■ Statistically significant difference at 95%.

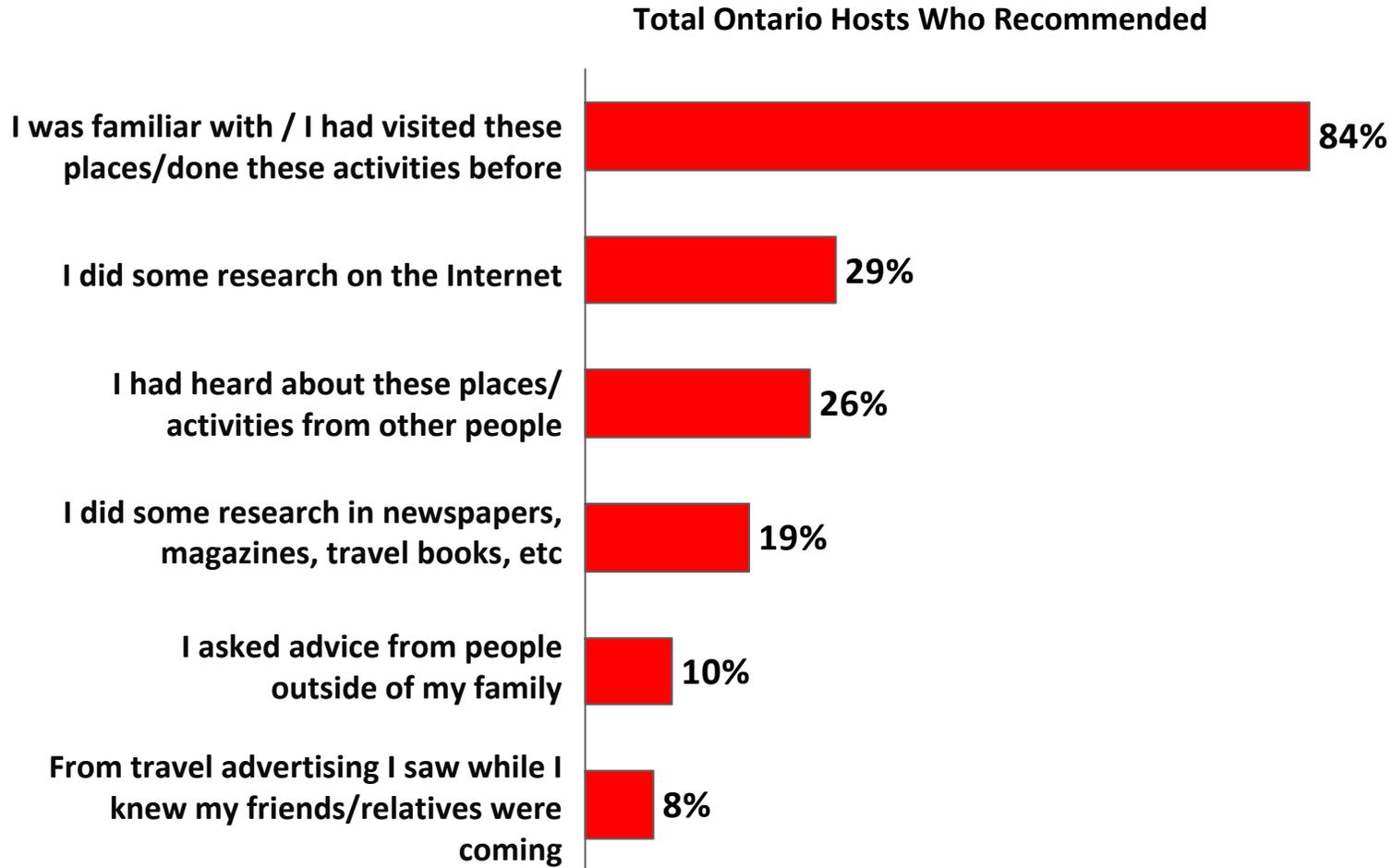
Q19VFR. Total best of your knowledge did your friends or relatives visit any other places in Ontario outside of the city/town where you live without you/your family participating on these trips>

Q20VFR. How did your friends or relatives plan these trips to other parts of Ontario outside the city/town/ where you live?



How Hosts Decided What To Recommend

Among hosts whose guests participated in activities based on host recommendations



(n=199)

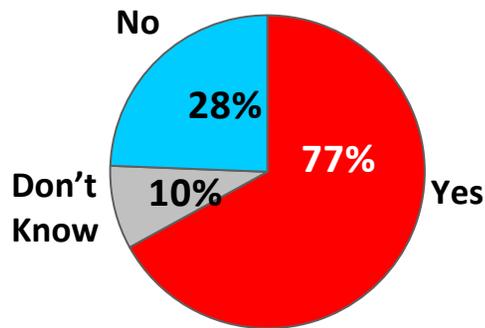
Q21VRF. You mentioned that your friends or relatives followed your recommendations when planning their activities within Ontario. How did you decide on what to recommend?

Expenditure On Friends/Relatives For Last Visit To Ontario

Among those hosting in past 5 years

Those Hosting Canadians

As host, did you have any expenditures on the visit?

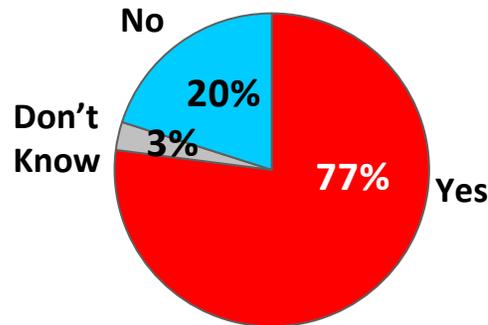


Average amount spent hosting \$397

(n=352)

Those Hosting Americans

As host, did you have any expenditures on the visit?

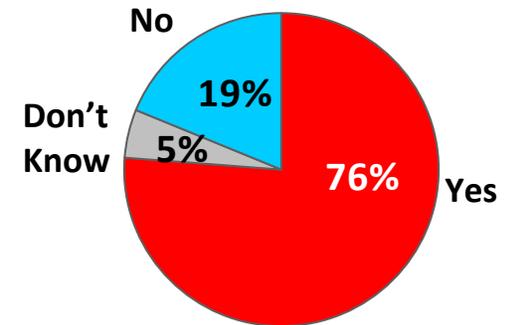


Average amount spent hosting \$425

(n=134)

Those Hosting Overseas Visitors

As host, did you have any expenditures on the visit?



Average amount spent hosting \$505

(n=163)

Note: 'Amount spent hosting' excludes figures over \$2,500 for average calculations.

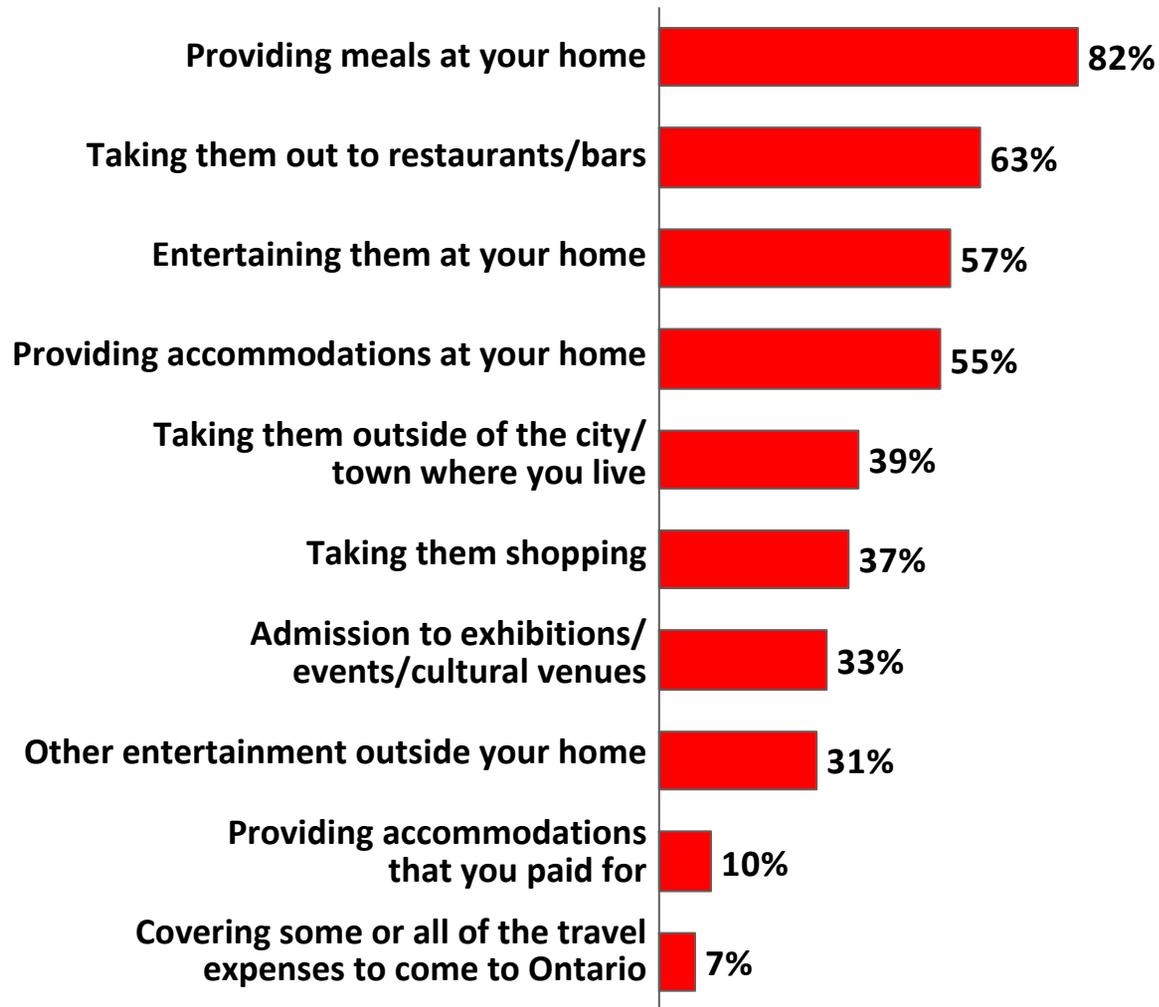
Q22VFR. Did you or your family incur any expenditures related to hosting your friends or relatives?

Q24VFR. Approximately what would you say was the total amount you spent on your friends/relatives while most recently hosting them? If you are unsure, please provide your best estimate. Please enter the amount in Canadian dollars below.

Expenses During Friend/Relative Visit To Ontario

Among hosts incurring expenses on last hosted trip

Total Ontario Hosts Incurring Expenses



Difference From Total Among Those Last Hosting ...		
Canadians	Americans	Overseas Visitors
+1	-1	0
-5	+1	+8
0	+2	-2
0	-8	+5
-10	-7	+22
-4	+3	+4
-8	0	+14
-4	+1	+6
0	-9	+7
-1	-3	+4

Statistically significant difference at 95%.

Q23VFR. What were these expenditures related to? Please select all that apply.

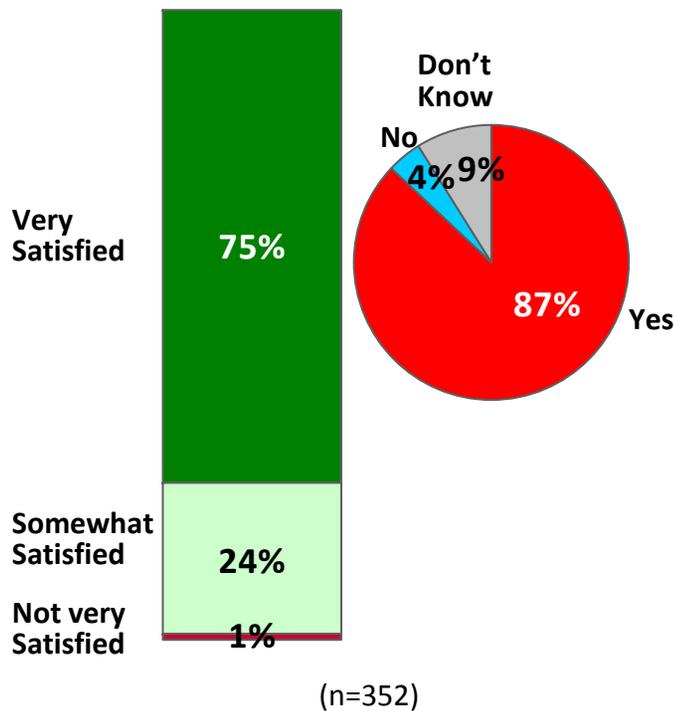
Overall Satisfaction Of Friends/Relatives With Last Hosted Trip

Among those hosting in past 5 years

Those Hosting Canadians

Degree of visitor satisfaction with Ontario Trip

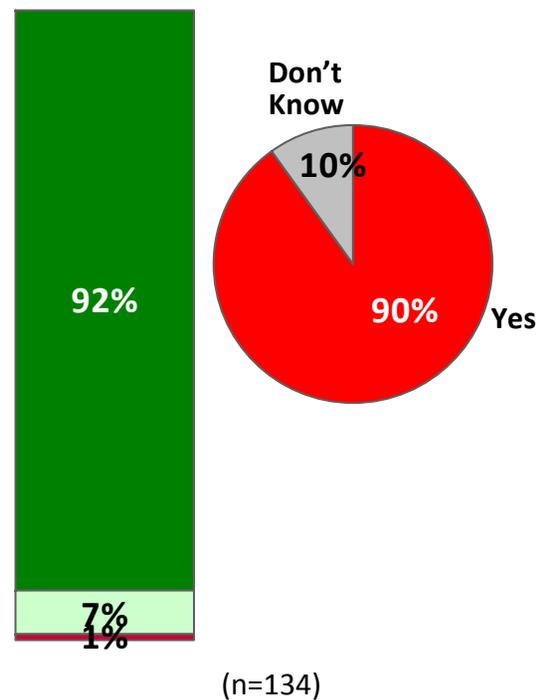
Their expressed interest in returning to Ontario



Those Hosting Americans

Degree of visitor satisfaction with Ontario Trip

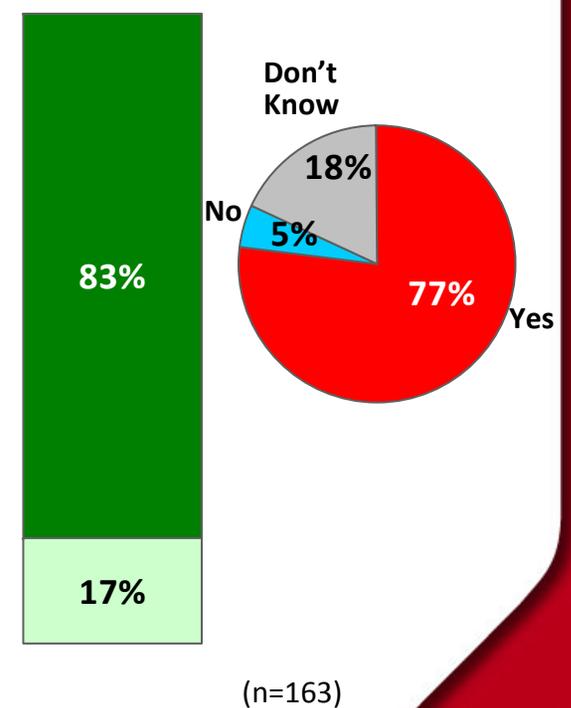
Their expressed interest in returning to Ontario



Those Hosting Overseas

Degree of visitor satisfaction with Ontario Trip

Their expressed interest in returning to Ontario



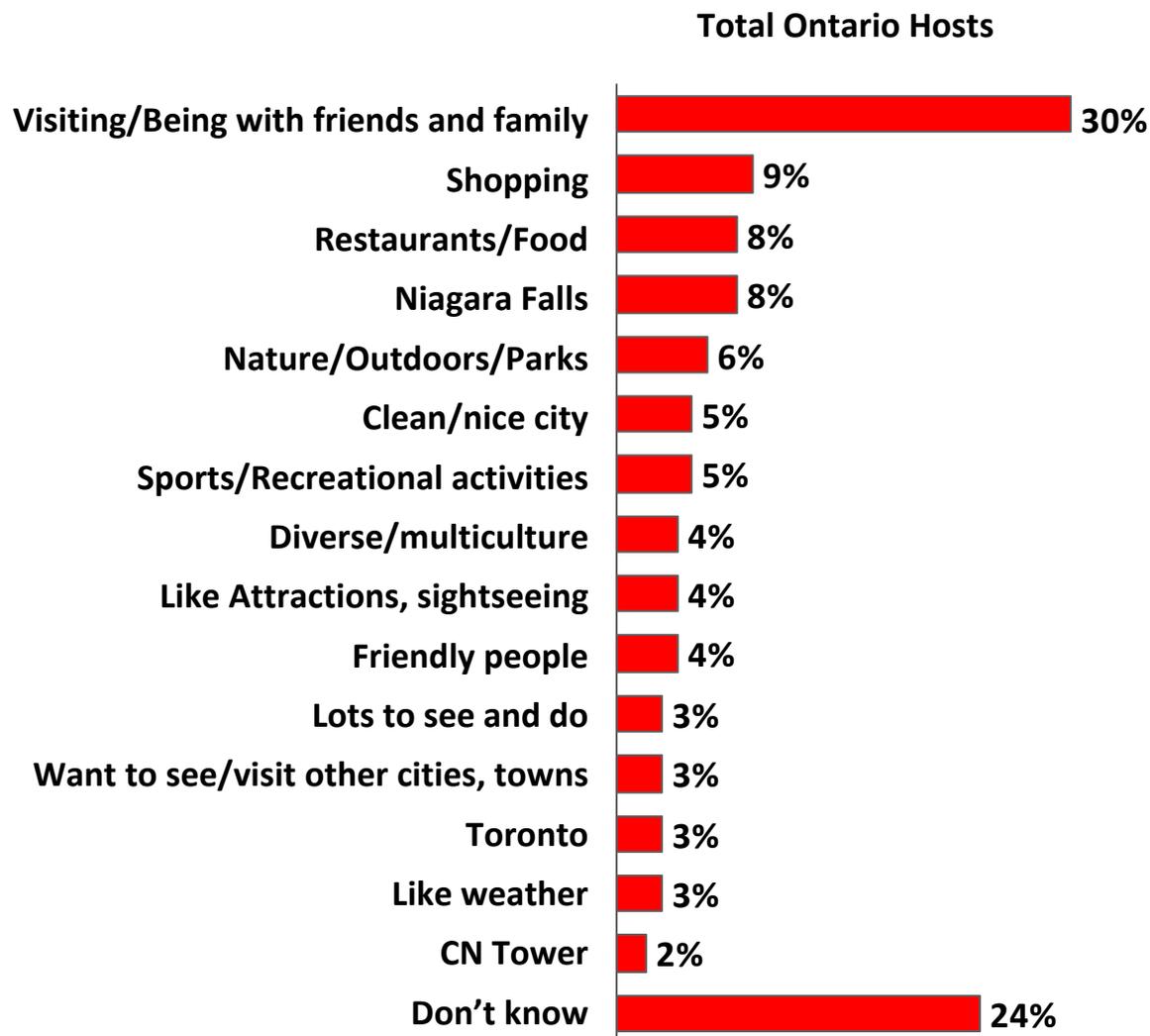
Q25VFR. Overall, how satisfied would you say your friends or relatives were with their trip to Ontario? Please select one answer only.

Q28VFR. Did your friends or relatives express an interest in visiting Ontario again in the future?



Volunteered 'Likes' Of Last Ontario Visit Expressed By Visitors

Among those hosting in past 5 years



Difference From Total Among Those Last Hosting ...		
Canadians	Americans	Overseas Visitors
+1	+4	-4
-1	+2	0
-1	+4	0
-4	+1	+6
-3	+6	+3
+1	-2	-1
-3	+1	+5
0	+4	-3
0	-3	+1
-1	+2	-1
+1	-3	-2
0	-1	+2
-1	0	+3
-2	-1	+3
-1	-1	+4
+2	-3	0

■ Statistically significant difference at 95%.
 Q26VRF. What specific aspects of their trip to Ontario did they particularly like?





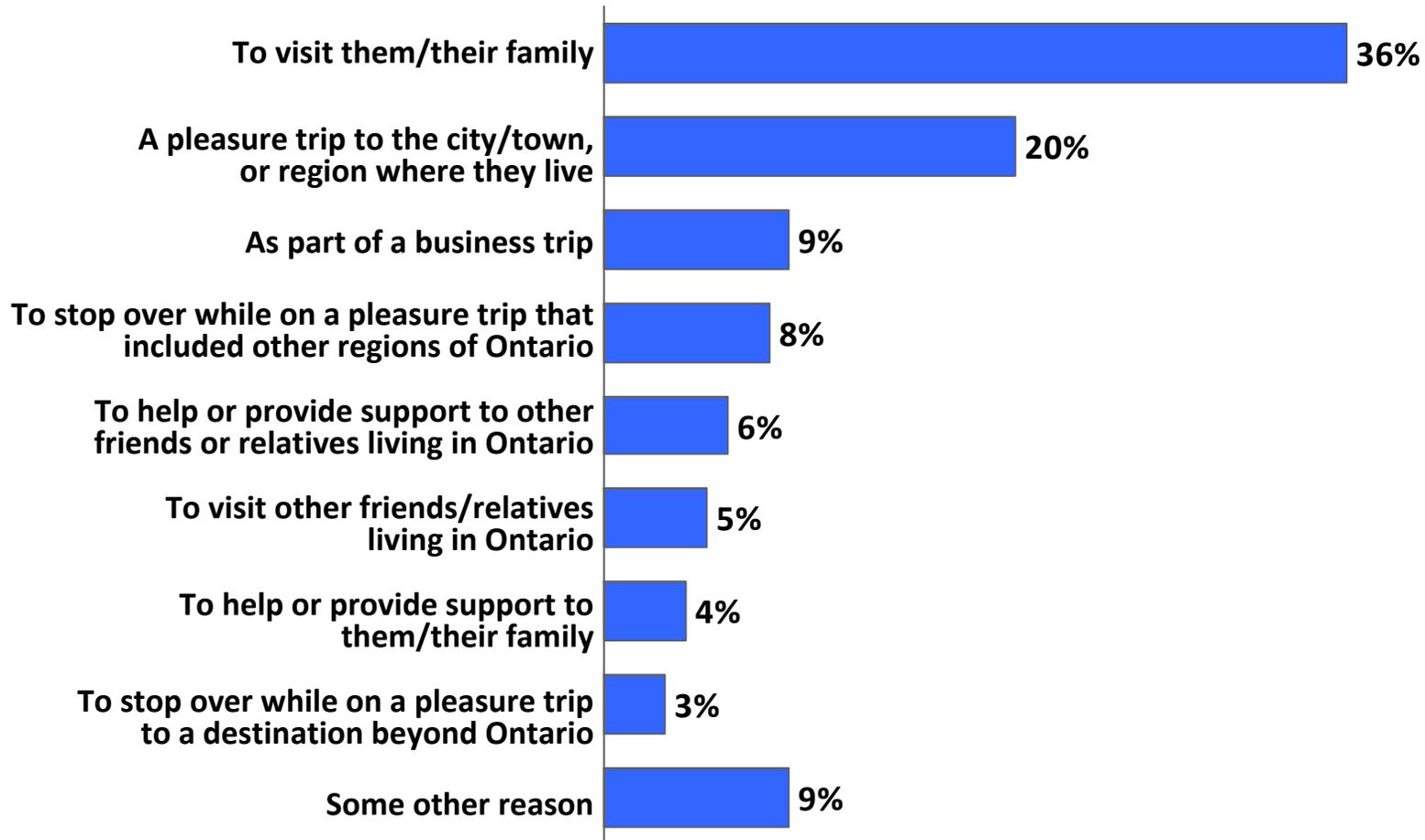
The Experience Of Mid / Near Market Americans Hosted In Ontario

Most Recent Trip

Primary Reasons For Visit To Ontario

Among those hosted within past 2 years

Mid / Near Market Americans



(n=109)

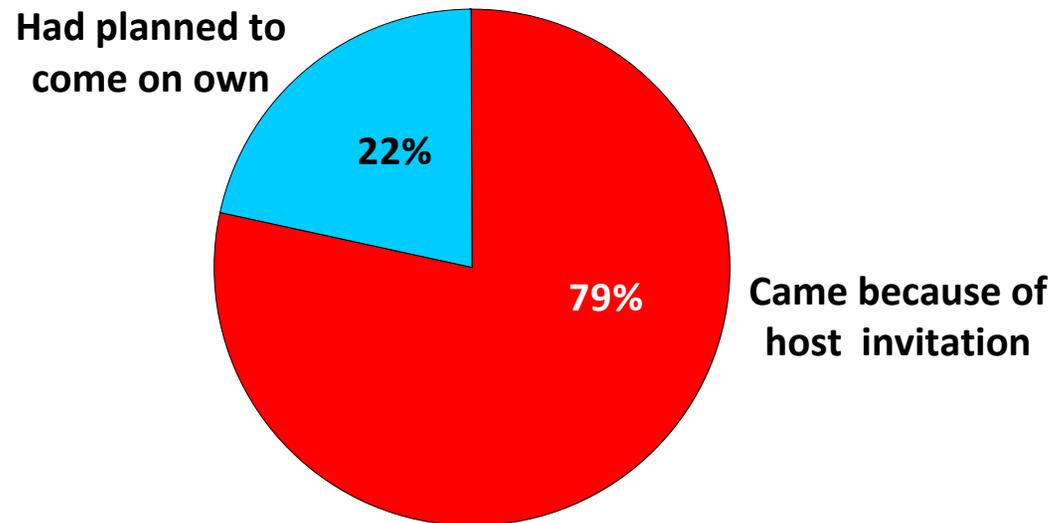
Q7VFR. What was the primary reason for your visit to their city/town?



Who Initiated Visit?

Among those hosted within past 2 years

Mid / Near Market Americans



(n=109)

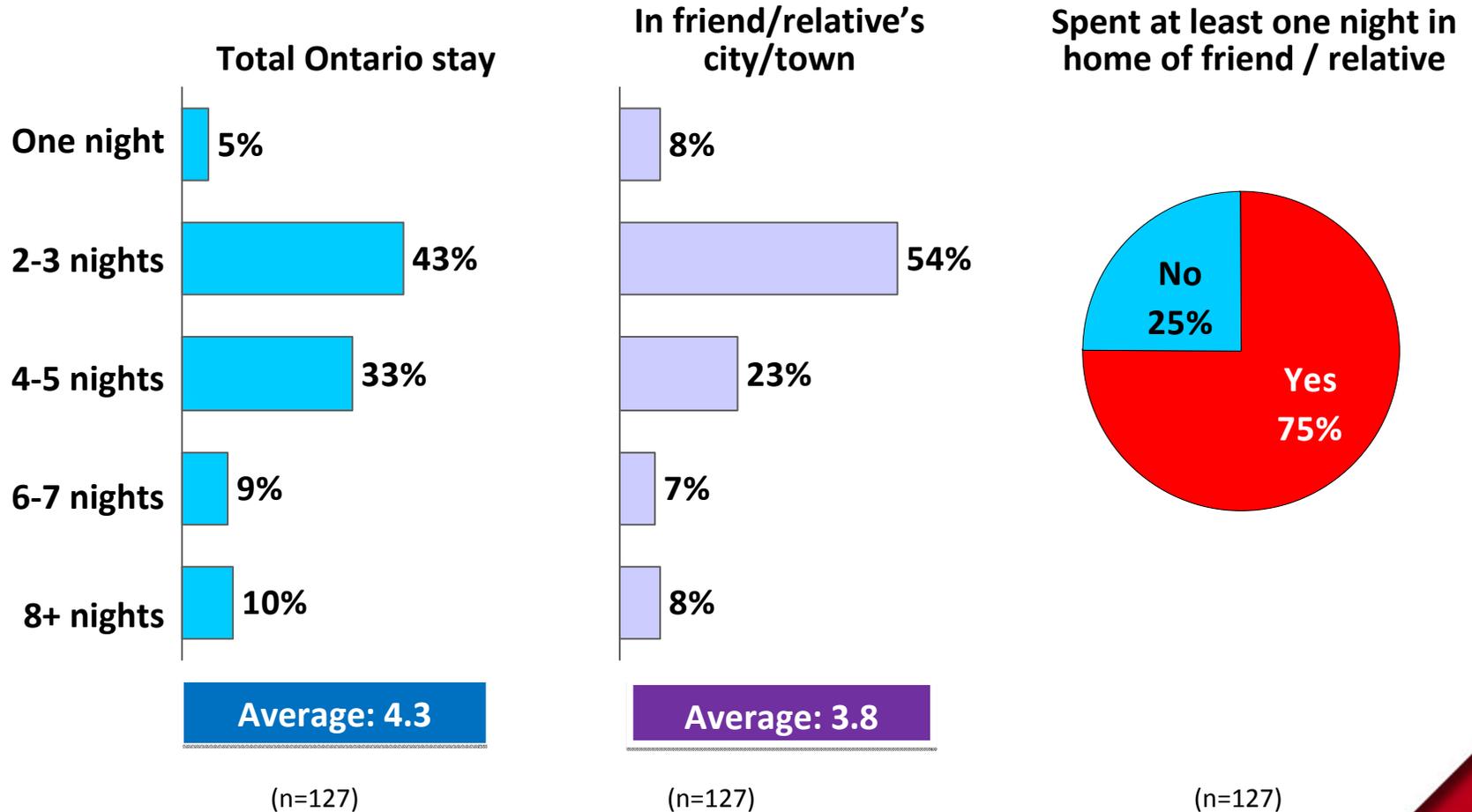
Q8VFR. Did you come to their city/town because your friends/relatives invited you, or were you planning to come on your own?



Overnight Trip Length

Among those hosted within past 5 years staying overnight in Ontario

Mid / Near Market Americans



Q9VFR. How long did you stay in Ontario?

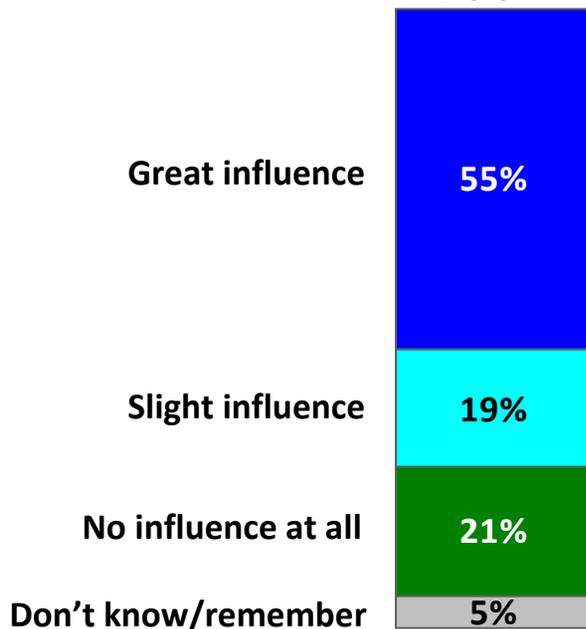
Q10VFR. You mentioned that you stayed in Ontario for <X> nights. For how many of these nights did you stay in the city/town where your friends/relatives live specifically?

Q11VFR. Did you stay at the home of a friend or relative for at least one night?

Influence Of Friend/Relative On Trip Destination & Activities

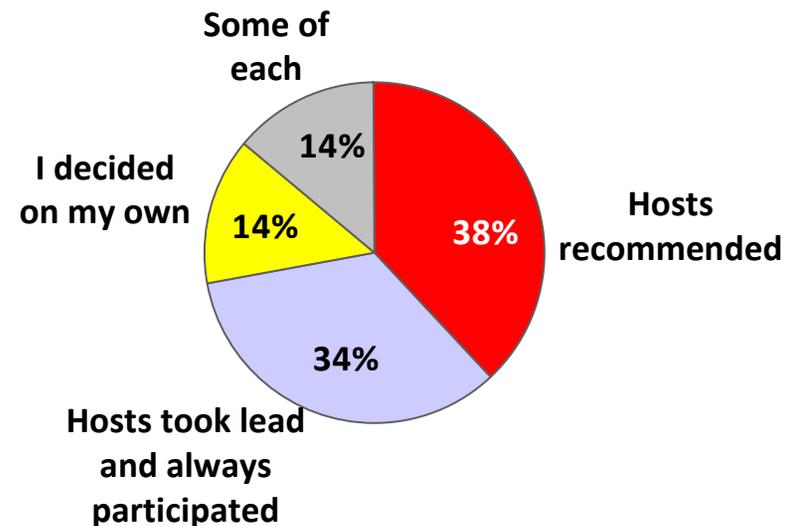
Mid / Near Market Americans

Influence of opportunity to stay in home of friend or relative on decision to visit



(Among those who stayed one night with friends or relative: n=83)*

Influence of hosts on specific activities



(Among those who visited Ontario friends or relatives in past 5 years: n=146)

* Based under 100, interpret with caution.

Q15VFR. To what extent did the opportunity to stay with your friends and relatives influence your decision to visit the city/town where they live?

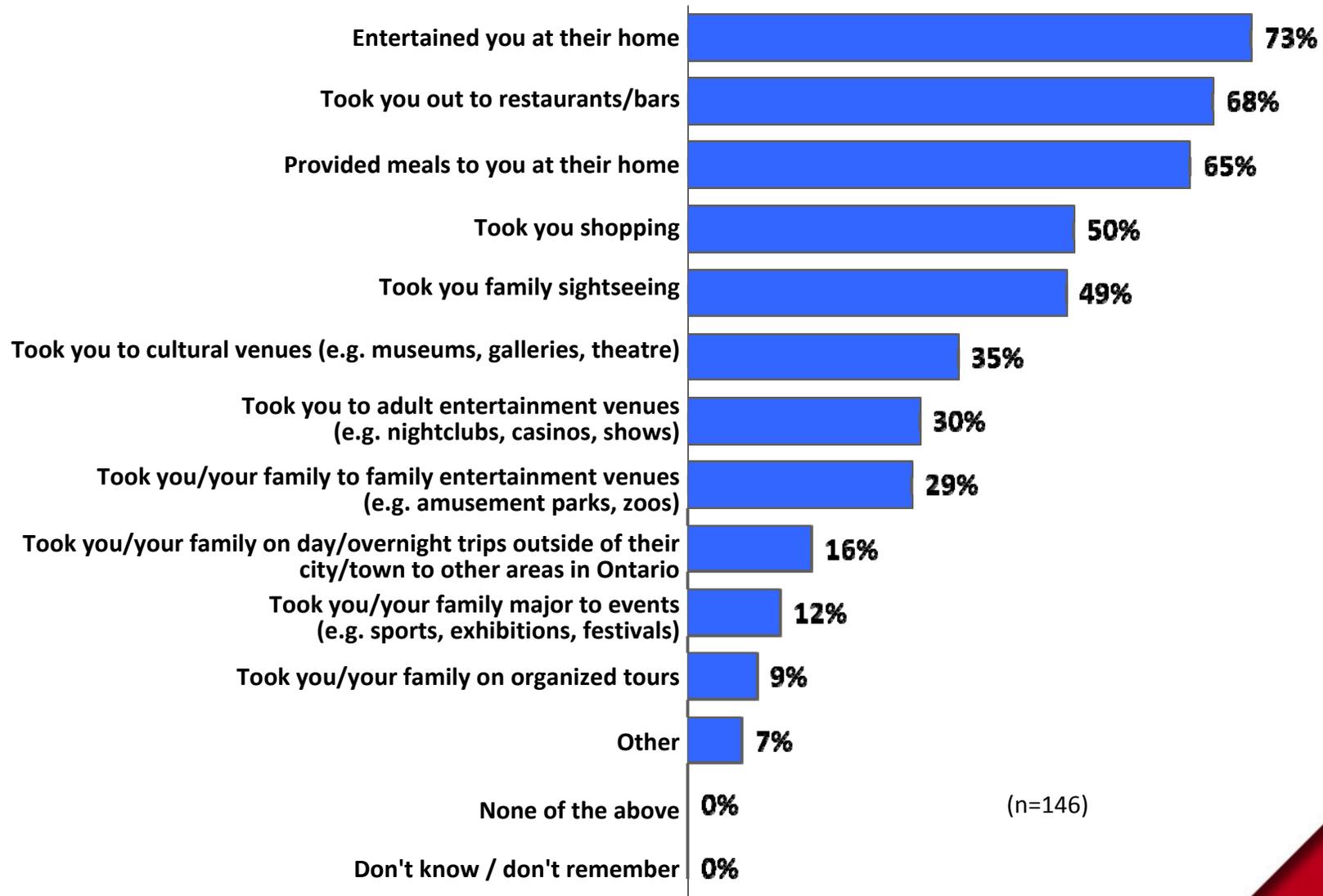
Q17VFR. Did you ever participate in activities without your host?

Q18VFR. Did your friends or relatives recommend specific activities to do or places to go, or did you decide on your own what to do/where to go?

Activities During Visit With Friend/Relative

Among those hosted in Ontario during past 5 years

Mid / Near Market Americans

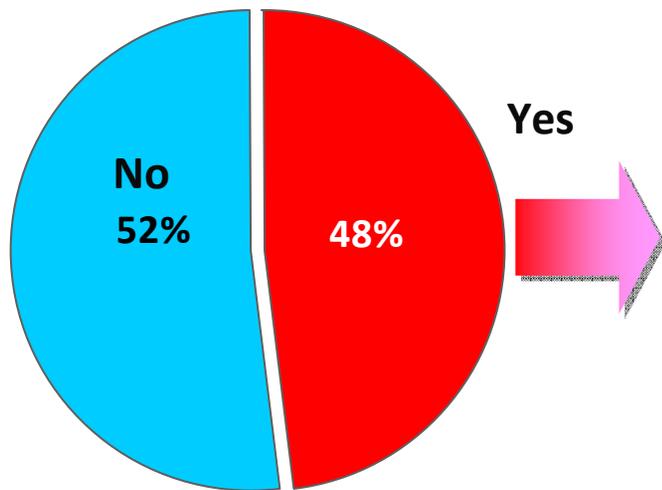


Q16VFR. What did your friends/ relatives do for you/your family while they were hosting you? Please select all answers that apply.

Planning Of Activities In Ontario Beyond Host Town On Last Trip

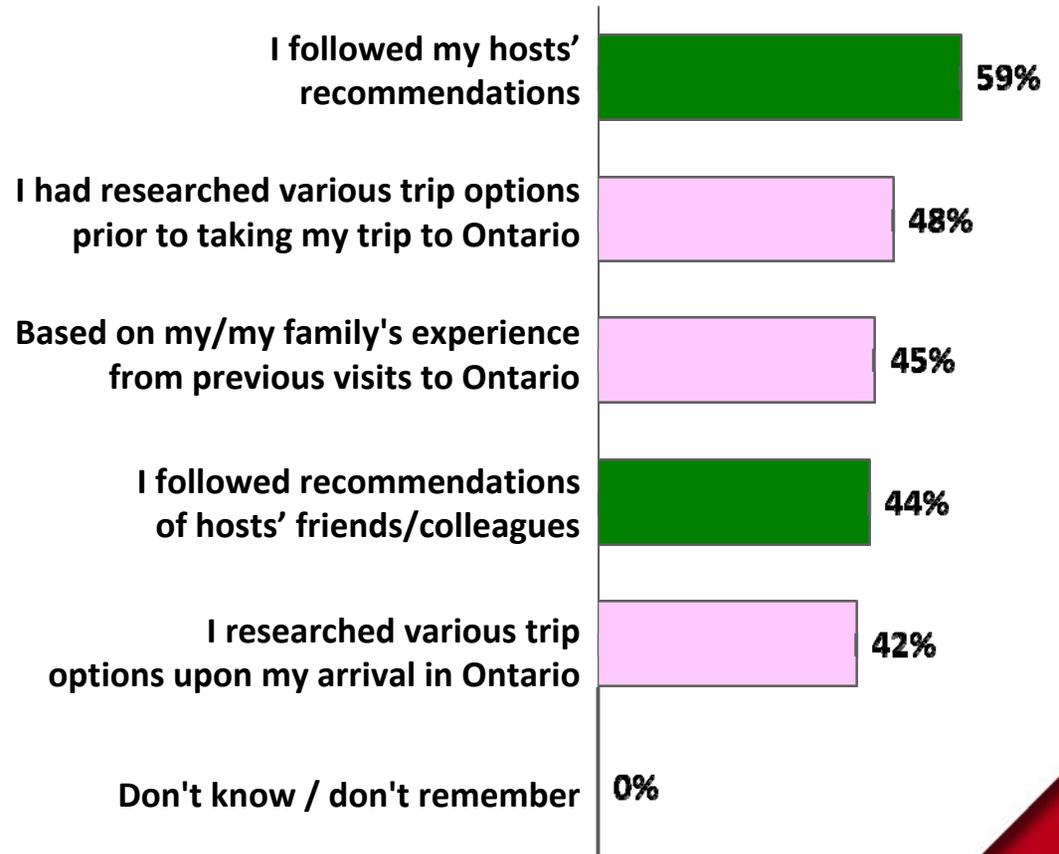
Among those hosted in Ontario during past 5 years

Whether visited other places in Ontario for activities without hosts



(n=146)

How these other places / activities chosen



Q19VFR. Did you visit other places in Ontario for activities without your host?

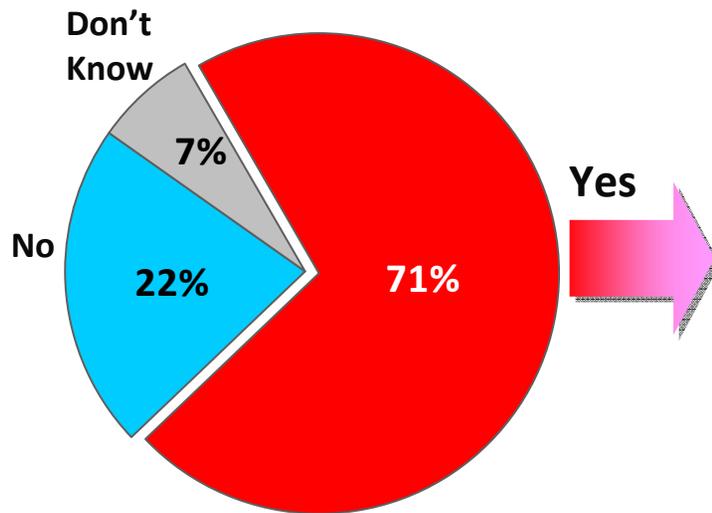
Q20VFR. How did you plan these trips to other parts of Ontario outside the city/town/ where your friends/relatives live?

Expenditure By Host On My Visit

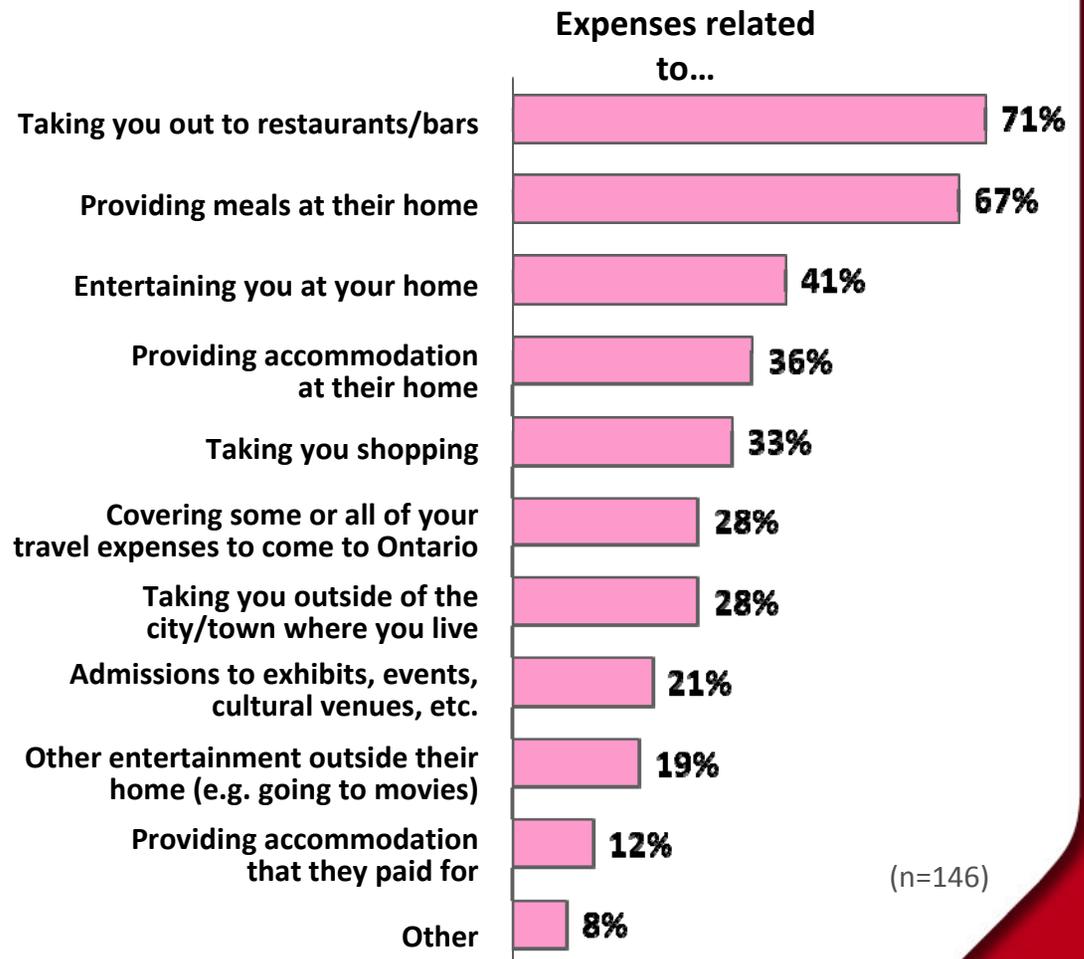
Among those hosted in Ontario during past 5 years

Mid / Near Market Americans

Did host have any expenditures from your visit?



Average amount spent hosting \$423



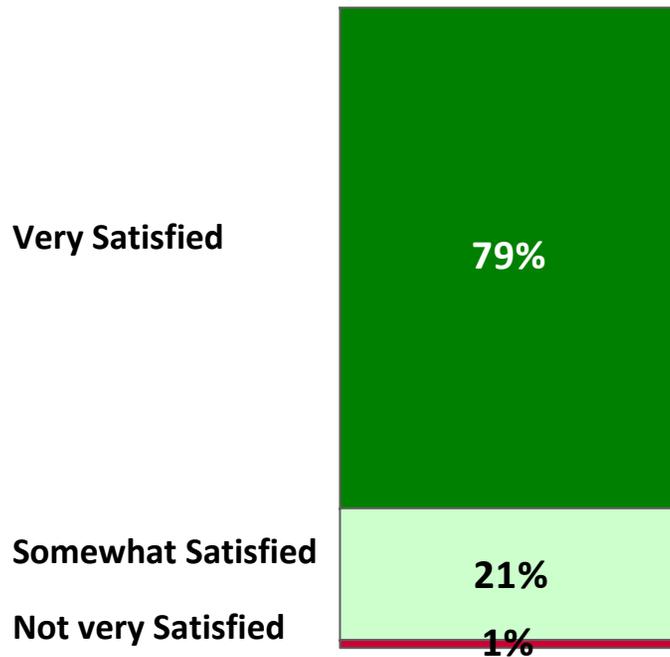
Q22VFR. To the best of your knowledge, did your friends or relatives incur any expenditures related to hosting you/your family?
 Q23VFR. What were these expenditures related to?
 Q24VFR. Approximately what would you say was the total amount they spent on you/your family members while you were most recently hosing them? If you are unsure, please provide your best estimate. Please enter the amount in US dollars below.

Overall Satisfaction With Hosted Visit To Ontario

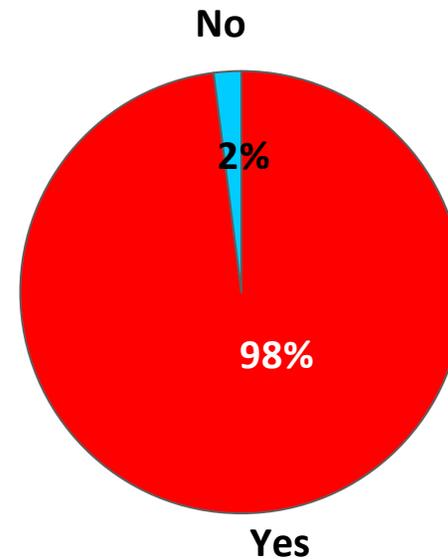
Among those hosted in Ontario during past 5 years

Mid / Near Market Americans

Degree of satisfaction with visit



Expressed interest in returning to Ontario



(n=146)

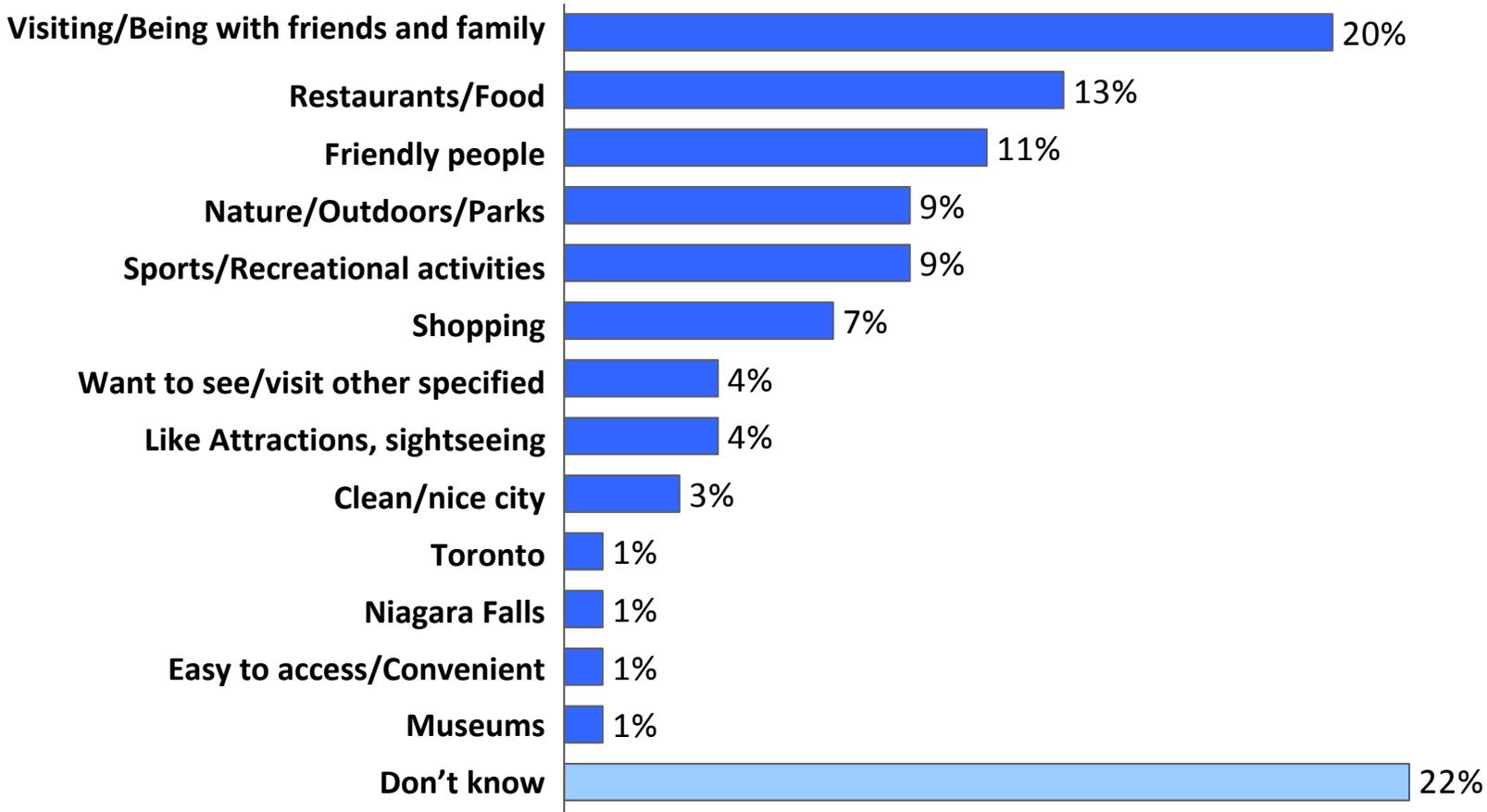
Q25VFR. Overall, how satisfied were you with this your trip to Ontario? Please select one answer only.

Q28VFR. Are you interested in visiting Ontario again in the future?

Volunteered 'Likes' Of Ontario Expressed By Visitors

Among those hosted in Ontario during past 5 years

Mid / Near Market Americans



(n=146)

Q26VFR. What specific aspects of this your trip to Ontario did you particularly like?





Impact Of VFR

Visiting Friends And Relatives