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 bringing 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

**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 2,012,000 Americans in Near & Mid Markets

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?
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

Near / Mid Market Americans Hosted In Ontario
- Once or twice: 42%
- 3 or 4 times: 19%
- 5 or more times: 38%
- Don't know: 0%

Ontarians Hosting
- 53%
- 31%
- 13%
- 2%

Many US Mid/Near market visitors who have visited recently have visited often

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

Hosted Friends Or Relatives From...

- Canada (excluding Ontario): 54%
- USA: 20%
- Overseas: 26%

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>54%</td>
</tr>
<tr>
<td>United States</td>
<td>20%</td>
</tr>
<tr>
<td>UK</td>
<td>7%</td>
</tr>
<tr>
<td>Other Western Europe</td>
<td>5%</td>
</tr>
<tr>
<td>Australia New Zealand/South Pacific</td>
<td>5%</td>
</tr>
<tr>
<td>The Caribbean</td>
<td>2%</td>
</tr>
<tr>
<td>Japan</td>
<td>2%</td>
</tr>
<tr>
<td>Italy</td>
<td>1%</td>
</tr>
<tr>
<td>Eastern Europe (excluding Russia)</td>
<td>1%</td>
</tr>
<tr>
<td>South America</td>
<td>1%</td>
</tr>
<tr>
<td>Other Asia (excluding Russia)</td>
<td>1%</td>
</tr>
<tr>
<td>Some Other Country/Region</td>
<td>1%</td>
</tr>
</tbody>
</table>

Province/Territory:

- Newfoundland and Labrador: 4%
- Nova Scotia: 12%
- New Brunswick: 3%
- Prince Edward Island: 2%
- Quebec: 19%
- Manitoba: 4%
- Saskatchewan: 3%
- Alberta: 26%
- British Columbia: 27%
- Nunavut: 0%
- The Northwest Territories: 0%
- Yukon: 0%

(n=649)

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

<table>
<thead>
<tr>
<th>Country Of Origin</th>
<th>Ontarians In Total From 2006 Census</th>
<th>Ontario Travelers From Feb ‘11 TI Panel</th>
<th>Ontarian Hosting (Past 5 Years) From Feb ‘11 TI Panel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>71%</td>
<td>78%</td>
<td>73%</td>
</tr>
<tr>
<td>Asian / Middle East</td>
<td>12%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Europe</td>
<td>11%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Central / South America</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>US</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Africa</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>*</td>
<td>1%</td>
<td>*</td>
</tr>
</tbody>
</table>

* Less than 0.5%

(n=1,327) (n=649)
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?

Average Number Of Hosted Visits In Past 2 Years
Among those hosting within past 2 years

- Total Ontario hosts: 3.0
- Those who have hosted Canadians (ex. Ontario): 3.4
- Those who have hosted Americans: 2.8
- Those who have hosted overseas visitors: 2.3

(n=525)
# Season When Last Hosted Out-Of-Province Visitors

Among those hosted/hosting within past 5 years

<table>
<thead>
<tr>
<th>Season</th>
<th>Those Hosting Canadian Visitors (A)</th>
<th>Those Hosting American Visitors (B)</th>
<th>Those Hosting Overseas Visitors (C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring (March – May)</td>
<td>19%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Summer (June – August)</td>
<td>52%</td>
<td>69% (A)</td>
<td>58%</td>
</tr>
<tr>
<td>Fall (Sept – Nov)</td>
<td>11%</td>
<td>7%</td>
<td>19%</td>
</tr>
<tr>
<td>Winter (Dec – Feb)</td>
<td>18%</td>
<td>9%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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: 41%
- They had planned to come on their own: 59%
(n=352)

**Those Hosting Americans**
- Came because of my invitation: 42%
- They had planned to come on their own: 58%
(n=134)

**Those Hosting Overseas Visitors**
- Came because of my invitation: 46%
- They had planned to come on their own: 54%
(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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Total Ontario Hosts</th>
<th>Difference From Total Among Those Last Hosting</th>
</tr>
</thead>
<tbody>
<tr>
<td>To visit you/your family</td>
<td>59%</td>
<td>Canadians: +1</td>
</tr>
<tr>
<td>To visit other friends/relatives living in Ontario</td>
<td>17%</td>
<td>Americans: -5</td>
</tr>
<tr>
<td>A pleasure trip to the city/town, or region where you live</td>
<td>9%</td>
<td>Overseas Visitors: 0</td>
</tr>
<tr>
<td>To stop over while on a pleasure trip that included other regions of Ontario</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>As part of a business trip</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>To stop over while on a pleasure trip to a destination beyond Ontario</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>To help or provide support to you/your family</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>To help or provide support to other friends or relatives living in Ontario</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Some other reason</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

(n=649)

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

<table>
<thead>
<tr>
<th>Those Hosting....</th>
<th>Number Of Nights Stayed</th>
<th>Total Nights In Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In My City/Town</td>
<td>Elsewhere In Ontario</td>
</tr>
<tr>
<td>Canadians (n=345)</td>
<td>7.7</td>
<td>1.3</td>
</tr>
<tr>
<td>Americans (n=132)</td>
<td>6.0</td>
<td>1.7</td>
</tr>
<tr>
<td>Overseas Visitors (n=162)</td>
<td>11.6</td>
<td>4.9</td>
</tr>
</tbody>
</table>

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

### Percent Stating Visitor Stayed At Least One Night In Hosts Home

<table>
<thead>
<tr>
<th>Those Hosting....</th>
<th>Percent Stating Visitor Stayed At Least One Night In Hosts Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canadians (n=345)</td>
<td>6.1 nights 79%</td>
</tr>
<tr>
<td>Americans (n=132)</td>
<td>6.1 nights 86%</td>
</tr>
<tr>
<td>Overseas Visitors (n=162)</td>
<td>11.0 nights 93%</td>
</tr>
</tbody>
</table>

### Percent Stating Visitor Stayed At Least One Night In Paid Accommodation In Ontario

<table>
<thead>
<tr>
<th>Those Hosting....</th>
<th>Percent Stating Visitor Stayed At Least One Night In Paid Accommodation In Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canadians (n=345)</td>
<td>3.2 nights 32%</td>
</tr>
<tr>
<td>Americans (n=132)</td>
<td>3.8 nights 45%</td>
</tr>
<tr>
<td>Overseas Visitors (n=162)</td>
<td>5.9 nights 40%</td>
</tr>
</tbody>
</table>

- Statistically significant difference from other two grouping 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:
  - Great influence: 51%
  - Slight influence: 22%
  - No influence at all: 24%
  - Don't know/remember: 4%

- My influence on specific activities chosen:
  - Some of each: 7%
  - I recommended: 24%
  - I took lead & always participated: 35%
  - They decided on their own: 34%

<table>
<thead>
<tr>
<th>Influence of opportunity to stay in my home on decision to visit</th>
<th>My influence on specific activities chosen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great influence</td>
<td>Some of each: 7% I recommended: 24%</td>
</tr>
<tr>
<td>Slight influence</td>
<td>I took lead &amp; always participated: 35%</td>
</tr>
<tr>
<td>No influence at all</td>
<td>They decided on their own: 34%</td>
</tr>
<tr>
<td>Don't know/remember</td>
<td></td>
</tr>
</tbody>
</table>

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

Those Hosting Americans

- Influence of opportunity to stay in my home on decision to visit:
  - Great influence: 65%
  - Slight influence: 33%
  - No influence at all: 15%
  - Don't know/remember: 2%

- My influence on specific activities chosen:
  - Some of each: 5%
  - I recommended: 21%
  - I took lead & always participated: 41%
  - They decided on their own: 33%

<table>
<thead>
<tr>
<th>Influence of opportunity to stay in my home on decision to visit</th>
<th>My influence on specific activities chosen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great influence</td>
<td>Some of each: 5% I recommended: 21%</td>
</tr>
<tr>
<td>Slight influence</td>
<td>I took lead &amp; always participated: 41%</td>
</tr>
<tr>
<td>No influence at all</td>
<td>They decided on their own: 33%</td>
</tr>
<tr>
<td>Don't know/remember</td>
<td></td>
</tr>
</tbody>
</table>

(Q17VFR. Did they ever participate in activities without you?)

Those Hosting Overseas

- Influence of opportunity to stay in my home on decision to visit:
  - Great influence: 50%
  - Slight influence: 17%
  - No influence at all: 33%
  - Don't know/remember: 10%

- My influence on specific activities chosen:
  - Some of each: 10%
  - I recommended: 30%
  - I took lead & always participated: 43%
  - They decided on their own: 33%

<table>
<thead>
<tr>
<th>Influence of opportunity to stay in my home on decision to visit</th>
<th>My influence on specific activities chosen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great influence</td>
<td>Some of each: 10% I recommended: 30%</td>
</tr>
<tr>
<td>Slight influence</td>
<td>I took lead &amp; always participated: 43%</td>
</tr>
<tr>
<td>No influence at all</td>
<td>They decided on their own: 33%</td>
</tr>
<tr>
<td>Don't know/remember</td>
<td></td>
</tr>
</tbody>
</table>

(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?)

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

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

(n=107) (n=134) (n=152) (n=163)
Activities During Last Friend/Relative Visit
Among those hosting in past 5 years

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total Ontario Hosts</th>
<th>Difference From Total Among Those Last Hosting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provided meals at my home</td>
<td>84%</td>
<td>Canadians -3, Americans +6, Overseas Visitors +3</td>
</tr>
<tr>
<td>Entertained them at my home</td>
<td>76%</td>
<td>Canadians -6, Americans +16, Overseas Visitors +1</td>
</tr>
<tr>
<td>Took them out to restaurants/bars</td>
<td>66%</td>
<td>Canadians -5, Americans -2, Overseas Visitors +11</td>
</tr>
<tr>
<td>Took them sightseeing</td>
<td>63%</td>
<td>Canadians -6, Americans +1, Overseas Visitors +13</td>
</tr>
<tr>
<td>Took them shopping</td>
<td>62%</td>
<td>Canadians -3, Americans -2, Overseas Visitors +7</td>
</tr>
<tr>
<td>Took them to family entertainment venues (e.g. amusement parks, zoos)</td>
<td>29%</td>
<td>Canadians -2, Americans -12, Overseas Visitors +15</td>
</tr>
<tr>
<td>Took them to cultural venues (e.g. museums, galleries, theatre)</td>
<td>29%</td>
<td>Canadians -7, Americans +6, Overseas Visitors +8</td>
</tr>
<tr>
<td>Took them to major events (e.g. sports, exhibitions, festivals)</td>
<td>20%</td>
<td>Canadians -4, Americans +1, Overseas Visitors +8</td>
</tr>
<tr>
<td>Took them on day/overnight trips outside of my city/town to other areas in Ontario</td>
<td>19%</td>
<td>Canadians -6, Americans -2, Overseas Visitors +12</td>
</tr>
<tr>
<td>Took them to adult entertainment venues (e.g. nightclubs, casinos, shows)</td>
<td>16%</td>
<td>Canadians -3, Americans -4, Overseas Visitors +10</td>
</tr>
<tr>
<td>Took them on organized tours</td>
<td>8%</td>
<td>Canadians +3, Americans -7, Overseas Visitors +1</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
<td>Canadians +1, Americans -1, Overseas Visitors -3</td>
</tr>
</tbody>
</table>

* 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

<table>
<thead>
<tr>
<th>Total Ontario Hosts</th>
<th>How these other places/activities were chosen:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Based on their experience from previous visits to Ontario</td>
</tr>
<tr>
<td></td>
<td>They followed my/my family's recommendations</td>
</tr>
<tr>
<td></td>
<td>They followed recommendations of their friends/colleagues/other people they know</td>
</tr>
<tr>
<td></td>
<td>They had researched various trip options prior to taking their trip to Ontario</td>
</tr>
<tr>
<td></td>
<td>They researched various trip options upon their arrival in Ontario</td>
</tr>
</tbody>
</table>

### Difference From Total Among Those Last Hosting...

<table>
<thead>
<tr>
<th></th>
<th>Canadians</th>
<th>Americans</th>
<th>Overseas Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canadians</td>
<td>+8</td>
<td>+2</td>
<td>-19</td>
</tr>
<tr>
<td>Americans</td>
<td>-8</td>
<td>+1</td>
<td>+13</td>
</tr>
<tr>
<td>Overseas Visitors</td>
<td>+3</td>
<td>-1</td>
<td>-6</td>
</tr>
<tr>
<td></td>
<td>-2</td>
<td>-8</td>
<td>+13</td>
</tr>
<tr>
<td></td>
<td>-5</td>
<td>-5</td>
<td>+15</td>
</tr>
</tbody>
</table>

Whether visited other places in Ontario for activities without hosts:

- **Yes**: 45%
- **No**: 38%
- **Don't Know**: 18%

(n=649)

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

Total Ontario Hosts Who Recommended

- I was familiar with / I had visited these places/done these activities before: 84%
- I did some research on the Internet: 29%
- I had heard about these places/activities from other people: 26%
- I did some research in newspapers, magazines, travel books, etc: 19%
- I asked advice from people outside of my family: 10%
- From travel advertising I saw while I knew my friends/relatives were coming: 8%

(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?
  - No: 28%
  - Don’t Know: 10%
  - Yes: 77%

**Average amount spent hosting $397**
(n=352)

**Those Hosting Americans**

- As host, did you have any expenditures on the visit?
  - No: 20%
  - Don’t Know: 3%
  - Yes: 77%

**Average amount spent hosting $425**
(n=134)

**Those Hosting Overseas Visitors**

- As host, did you have any expenditures on the visit?
  - No: 19%
  - Don’t Know: 5%
  - Yes: 76%

**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**

- Providing meals at your home: 82%
- Taking them out to restaurants/bars: 63%
- Entertaining them at your home: 57%
- Providing accommodations at your home: 55%
- Taking them outside of the city/town where you live: 39%
- Taking them shopping: 37%
- Admission to exhibitions/events/cultural venues: 33%
- Other entertainment outside your home: 31%
- Providing accommodations that you paid for: 10%
- Covering some or all of the travel expenses to come to Ontario: 7%

**Difference From Total Among Those Last Hosting ...**

<table>
<thead>
<tr>
<th></th>
<th>Canadians</th>
<th>Americans</th>
<th>Overseas Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing meals at your home</td>
<td>+1</td>
<td>-1</td>
<td>0</td>
</tr>
<tr>
<td>Taking them out to restaurants/bars</td>
<td>-5</td>
<td>+1</td>
<td>+8</td>
</tr>
<tr>
<td>Entertaining them at your home</td>
<td>0</td>
<td>+2</td>
<td>-2</td>
</tr>
<tr>
<td>Providing accommodations at your home</td>
<td>0</td>
<td>-8</td>
<td>+5</td>
</tr>
<tr>
<td>Taking them outside of the city/town where you live</td>
<td>-10</td>
<td>-7</td>
<td>+22</td>
</tr>
<tr>
<td>Taking them shopping</td>
<td>-4</td>
<td>+3</td>
<td>+4</td>
</tr>
<tr>
<td>Admission to exhibitions/events/cultural venues</td>
<td>-8</td>
<td>0</td>
<td>+14</td>
</tr>
<tr>
<td>Other entertainment outside your home</td>
<td>-4</td>
<td>+1</td>
<td>+6</td>
</tr>
<tr>
<td>Providing accommodations that you paid for</td>
<td>0</td>
<td>-9</td>
<td>+7</td>
</tr>
<tr>
<td>Covering some or all of the travel expenses to come to Ontario</td>
<td>-1</td>
<td>-3</td>
<td>+4</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Degree of visitor satisfaction with Ontario Trip</th>
<th>Their expressed interest in returning to Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>75%</td>
</tr>
<tr>
<td>Somewhat Satisfied</td>
<td>24%</td>
</tr>
<tr>
<td>Not very Satisfied</td>
<td>1%</td>
</tr>
</tbody>
</table>

(n=352)

Those Hosting Americans

<table>
<thead>
<tr>
<th>Degree of visitor satisfaction with Ontario Trip</th>
<th>Their expressed interest in returning to Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>92%</td>
</tr>
<tr>
<td>Somewhat Satisfied</td>
<td>7%</td>
</tr>
<tr>
<td>Not very Satisfied</td>
<td>1%</td>
</tr>
</tbody>
</table>

(n=134)

Those Hosting Overseas

<table>
<thead>
<tr>
<th>Degree of visitor satisfaction with Ontario Trip</th>
<th>Their expressed interest in returning to Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>83%</td>
</tr>
<tr>
<td>Somewhat Satisfied</td>
<td>17%</td>
</tr>
</tbody>
</table>

(n=163)

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total Ontario Hosts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting/Being with friends and family</td>
<td>30%</td>
</tr>
<tr>
<td>Shopping</td>
<td>9%</td>
</tr>
<tr>
<td>Restaurants/Food</td>
<td>8%</td>
</tr>
<tr>
<td>Niagara Falls</td>
<td>8%</td>
</tr>
<tr>
<td>Nature/Outdoors/Parks</td>
<td>6%</td>
</tr>
<tr>
<td>Clean/nice city</td>
<td>5%</td>
</tr>
<tr>
<td>Sports/Recreational activities</td>
<td>5%</td>
</tr>
<tr>
<td>Diverse/multiculture</td>
<td>4%</td>
</tr>
<tr>
<td>Like Attractions, sightseeing</td>
<td>4%</td>
</tr>
<tr>
<td>Friendly people</td>
<td>4%</td>
</tr>
<tr>
<td>Lots to see and do</td>
<td>3%</td>
</tr>
<tr>
<td>Want to see/visit other cities, towns</td>
<td>3%</td>
</tr>
<tr>
<td>Toronto</td>
<td>3%</td>
</tr>
<tr>
<td>Like weather</td>
<td>3%</td>
</tr>
<tr>
<td>CN Tower</td>
<td>2%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>24%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Difference From Total Among Those Last Hosting ...</th>
<th>Canadians</th>
<th>Americans</th>
<th>Overseas Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canadians</td>
<td>+1</td>
<td>+4</td>
<td>-4</td>
</tr>
<tr>
<td>Americans</td>
<td>-1</td>
<td>+2</td>
<td>0</td>
</tr>
<tr>
<td>Overseas Visitors</td>
<td>-1</td>
<td>+4</td>
<td>0</td>
</tr>
<tr>
<td>Difference From Total Among Those Last Hosting ...</td>
<td>-4</td>
<td>+1</td>
<td>+6</td>
</tr>
<tr>
<td>Canadians</td>
<td>-3</td>
<td>+6</td>
<td>+3</td>
</tr>
<tr>
<td>Americans</td>
<td>+1</td>
<td>-2</td>
<td>-1</td>
</tr>
<tr>
<td>Overseas Visitors</td>
<td>+1</td>
<td>-2</td>
<td>-1</td>
</tr>
<tr>
<td>Difference From Total Among Those Last Hosting ...</td>
<td>-3</td>
<td>+1</td>
<td>+5</td>
</tr>
<tr>
<td>Canadians</td>
<td>0</td>
<td>+4</td>
<td>-3</td>
</tr>
<tr>
<td>Americans</td>
<td>0</td>
<td>-3</td>
<td>+1</td>
</tr>
<tr>
<td>Overseas Visitors</td>
<td>-1</td>
<td>+2</td>
<td>-1</td>
</tr>
<tr>
<td>Difference From Total Among Those Last Hosting ...</td>
<td>+1</td>
<td>-3</td>
<td>-2</td>
</tr>
<tr>
<td>Canadians</td>
<td>0</td>
<td>-1</td>
<td>+2</td>
</tr>
<tr>
<td>Americans</td>
<td>0</td>
<td>-1</td>
<td>+2</td>
</tr>
<tr>
<td>Overseas Visitors</td>
<td>-1</td>
<td>0</td>
<td>+3</td>
</tr>
<tr>
<td>Difference From Total Among Those Last Hosting ...</td>
<td>-2</td>
<td>-1</td>
<td>+3</td>
</tr>
<tr>
<td>Canadians</td>
<td>0</td>
<td>-1</td>
<td>+2</td>
</tr>
<tr>
<td>Americans</td>
<td>-1</td>
<td>0</td>
<td>+3</td>
</tr>
<tr>
<td>Overseas Visitors</td>
<td>-1</td>
<td>-1</td>
<td>+4</td>
</tr>
<tr>
<td>Difference From Total Among Those Last Hosting ...</td>
<td>+2</td>
<td>-3</td>
<td>0</td>
</tr>
</tbody>
</table>

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

- To visit them/their family: 36%
- A pleasure trip to the city/town, or region where they live: 20%
- As part of a business trip: 9%
- To stop over while on a pleasure trip that included other regions of Ontario: 8%
- To help or provide support to other friends or relatives living in Ontario: 6%
- To visit other friends/relatives living in Ontario: 5%
- To help or provide support to them/their family: 4%
- To stop over while on a pleasure trip to a destination beyond Ontario: 3%
- Some other reason: 9%

(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

- Came because of host invitation: 79%
- Had planned to come on own: 22%

(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

<table>
<thead>
<tr>
<th></th>
<th>Total Ontario stay</th>
<th>In friend/relative’s city/town</th>
<th>Spent at least one night in home of friend / relative</th>
</tr>
</thead>
<tbody>
<tr>
<td>One night</td>
<td>5%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>2-3 nights</td>
<td>43%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>4-5 nights</td>
<td>33%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>6-7 nights</td>
<td>9%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>8+ nights</td>
<td>10%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Average: 4.3</td>
<td>Average: 3.8</td>
<td></td>
</tr>
</tbody>
</table>

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

- Great influence: 55%
- Slight influence: 19%
- No influence at all: 21%
- Don’t know/remember: 5%

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

Influence of hosts on specific activities

- Hosts recommended: 38%
- Hosts took lead and always participated: 34%
- I decided on my own: 14%
- Some of each: 14%

(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

- Entertained you at their home: 73%
- Took you out to restaurants/bars: 68%
- Provided meals to you at their home: 65%
- Took you shopping: 50%
- Took you family sightseeing: 49%
- Took you to cultural venues (e.g. museums, galleries, theatre): 35%
- Took you to adult entertainment venues (e.g. nightclubs, casinos, shows): 30%
- Took you/your family to family entertainment venues (e.g. amusement parks, zoos): 29%
- Took you/your family on day/overnight trips outside of their city/town to other areas in Ontario: 16%
- Took you/your family major to events (e.g. sports, exhibitions, festivals): 12%
- Took you/your family on organized tours: 9%
- Other: 7%
- None of the above: 0%
- Don’t know / don’t remember: 0%

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

- Yes: 48%
- No: 52%

(n=146)

How these other places / activities chosen

- I followed my hosts’ recommendations: 59%
- I had researched various trip options prior to taking my trip to Ontario: 48%
- Based on my/my family's experience from previous visits to Ontario: 45%
- I followed recommendations of hosts’ friends/colleagues: 44%
- I researched various trip options upon my arrival in Ontario: 42%
- Don't know / don't remember: 0%

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?
- Yes 71%
- No 22%
- Don’t Know 7%

Expenses related to...
- Taking you out to restaurants/bars 71%
- Providing meals at their home 67%
- Entertaining you at your home 41%
- Providing accommodation at their home 36%
- Taking you shopping 33%
- Covering some or all of your travel expenses to come to Ontario 28%
- Taking you outside of the city/town where you live 28%
- Admissions to exhibits, events, cultural venues, etc. 21%
- Other entertainment outside their home (e.g. going to movies) 19%
- Providing accommodation that they paid for 12%
- Other 8%

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 hosting 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

- Very Satisfied: 79%
- Somewhat Satisfied: 21%
- Not very Satisfied: 1%

Expressed interest in returning to Ontario

- Yes: 98%
- No: 2%

(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

- Visiting/Being with friends and family: 20%
- Restaurants/Food: 13%
- Friendly people: 11%
- Nature/Outdoors/Parks: 9%
- Sports/Recreational activities: 9%
- Shopping: 7%
- Want to see/visit other specified: 4%
- Like Attractions, sightseeing: 4%
- Clean/nice city: 3%
- Toronto: 1%
- Niagara Falls: 1%
- Easy to access/Convenient: 1%
- Museums: 1%
- Don’t know: 22%

(n=146)

Q26VFR. What specific aspects of this your trip to Ontario did you particularly like?
Impact Of VFR
Visiting Friends And Relatives