At TNS, we know that being successful in today’s dynamic global environment requires more understanding, clearer direction and greater certainty than ever before. While accurate information is the foundation of our business, we focus our expertise, services and resources to give you greater insight into your customers’ behavior and needs.

Our integrated, consultative approach reveals answers beyond the obvious, so you understand what is happening today – and what will happen tomorrow. That is what sets TNS apart.

Thank you for allowing us to explore your business needs. We hope you will continue to trust TNS to provide the insight you need to sharpen your competitive edge.
Introduction

Background

There is some sense that the Windsor-Essex Region has significant unrealized potential as a travel destination both in Canada and in the United States. This view has been expressed at various times by policy-makers, marketing organizations and industry stakeholders in the region. However, before significant new investments in investigating the opportunity are made, and possible courses of action devised, it would be prudent to review existing data pertaining to the region in order to scope the magnitude of potential that exists and to identify, in broad terms, positioning and marketing strategies that are likely to be successful.

To this end the Ontario Ministry of Tourism commissioned TNS Canadian Facts to undertake a review of existing data and to synthesize the results into a single set of implications and recommendations.

Objectives

The essential purpose of this study is to investigate existing data applicable to Windsor-Essex (or the Essex Tourism Region), with a view to developing a roadmap for effectively targeting the destination to potential visitors with motivating messages and packaged product offerings.

In more specific terms, the objectives of this investigation are to:

- Uncover Windsor Essex’s current standing and potential as a tourism destination;
- Define barriers and inducements to choosing Windsor-Essex;
- Determine the messages and expressions of traveler benefits that will resonate most powerfully with the target audience;
- Identify the specific tourism products and experiences that have the most potential to attract desired travellers and are consistent with Windsor’s ability to deliver, either currently or via resource development.
Data Sources And Form of Investigation

In preparing this report the following data sources were explored.

- Travel Activities and Motivations Survey (TAMS) ’06, Canada and US;
- The TAMS Ontario US Return-To-Sample (RTS) Study conducted in the summer of 2007;
- ITS 2001-2005 / CTS 2001-2004 data;
- The recently completed Windsor-Essex Tourism Positioning Study;
- Ontario’s Travel Intentions tracking program;
- The OTMPC Brand and Advertising tracking series.

Patterns within each data set were examined as a means of pursuing specific investigative themes. A technical summary of each of these studies appears in the appendix to this report.

If appropriate, application of multivariate and other analytical techniques were considered as aids to the investigation. However, no new primary survey work was undertaken to support the purposes of this study. It should be noted, therefore, that of the works explored, none is directly focused on the holistic goals of this exploration, and only the Windsor Tourism Positioning Study examines the Windsor region in any detail. As a consequence, there are necessary limitations to the depth of the exploration and the conclusions that can be drawn. There is also an obvious need to rely, to some degree, on indirect associations and inference.
The Current State of Affairs

Statistics on Volume and Trends

Travel from the US

The Windsor-Essex Region has suffered very significant declines in volume (person visits) over the past few years according to the most recent trend data made available by Statistics Canada. The erosion is largely confined to US source markets, and is most dramatic in the context of day trips. Overall, person visits originating in the US declined by 54% between 2001 and 2006, from roughly 7.5 million to just over 3.5 million.

While day trips account for most of this erosion, the overnight component of travel sourced from the US has also shown signs of weakness. Overnight trips made by Americans declined by 24% between 2001 and 2006. Pleasure travel, VFR and the relatively small business stream all posted losses roughly of this magnitude in an overnight context.

It can also be argued that, as far as US travel goes, the overnight segment of Windsor’s tourism sector is underdeveloped, accounting for a decidedly smaller share of total US person visits (11%) than is evident with respect to the neighbouring Southwestern Tourism Region (30%) or the Niagara Region (30%). Greater travel distances explain some of the discrepancy when comparisons are made with Southwestern Ontario, and the broader geographic draw of Niagara undoubtedly favours more overnight stays. However, the point can still be made that Windsor is the more vulnerable region in the sense that it is highly dependent on localized US travellers, the large majority of whom apparently have little inclination to stay for an extended period and may not appreciate the broader tourism offering. Undoubtedly, many see Windsor in a unidimensional way and assign it a very limited tourism role suitable for a short stay or as a stop on the way to another part of Ontario.

Recent trends in US travel volume to Windsor-Essex highlight the degree of vulnerability that exists when assessed in terms of the absolute losses experienced, as well as performance relative to neighbouring regions. The Southwestern Region and Niagara have each posted losses with respect to both same-day and overnight travel from the US, but in both cases the percentage declines pale in comparison with those registered by Windsor-Essex on the same measures.

Clearly then, there is a need to develop a marketing and positioning strategy for the Essex Region that seeks to inform and excite Americans about the broader offering sufficiently to encourage more overnight trips. At the same time, an argument can be made to broaden the region’s US reach to some degree so that it is draws more visitation from beyond the immediate, border area.
Person Visits To The Essex Region From The U.S.

Source: Statistics Canada, International Travel Survey.

Overnight Person Visits To The Essex Region From The U.S. — By Purpose

Source: Statistics Canada, International Travel Survey.
## Change In Essex Travel Volume Relative To Other Ontario Regions
### — From The U.S.

<table>
<thead>
<tr>
<th>Region</th>
<th>From U.S.</th>
<th>Difference In %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2001</td>
<td>2006</td>
</tr>
<tr>
<td>Essex Region:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Person Visits</td>
<td>7,555,028</td>
<td>3,503,399</td>
</tr>
<tr>
<td>Overnight Person Visits</td>
<td>521,137</td>
<td>394,385</td>
</tr>
<tr>
<td>Southwestern Region:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Person Visits</td>
<td>3,169,884</td>
<td>2,189,124</td>
</tr>
<tr>
<td>Overnight Person Visits</td>
<td>805,399</td>
<td>666,065</td>
</tr>
<tr>
<td>Niagara Region:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Person Visits</td>
<td>9,304,452</td>
<td>5,687,570</td>
</tr>
<tr>
<td>Overnight Person Visits</td>
<td>1,843,873</td>
<td>1,678,407</td>
</tr>
</tbody>
</table>

*Source: Statistics Canada, International Travel Survey.*
Travel from Canada

When attention is turned to travel volume sourced in Canada, there is evidence of a relatively mild decline in 2002/2003 with improvement since then. As a consequence, the figures on total person visits drawn from Canada in 2004 (the most recent data made available by Statistics Canada) are roughly in line or slightly better than those posted in 2001. When attention is turned to overnight travel specifically, a similar trend is evident, at least when the volatility of business travel is removed from the equation. However, it is also clear that relatively few Canadians are taking overnight trips to Windsor-Essex purely for pleasure – VFR is far more significant.

In fact, one could argue that the Essex Region is somewhat underdeveloped as a pleasure travel destination in Ontario. Geography has much to do with this, since Windsor-Essex is somewhat farther removed from the hub of population in the GTA and Central Ontario than is Niagara or the Southwestern Region. Still, one could argue that issues of proximity could certainly be overcome in many instances with messages carefully targeted to the travel needs of potential visitors and clearly suggestive of the region’s suitability for an extended stay. The capacity to draw more Canadian volume is clearly tied to perceptions of overnight suitability and the notion that the region has far more to offer than its convenience as a stopover on the way to the US and points south.

Comparative trend information provides some sense of the region’s ‘soft’ position as a travel destination for Canadians. First of all, Windsor currently has far less significance as a recipient of either same-day or overnight Canadian travel when compared with Southwestern Ontario or Niagara. But, perhaps of even greater significance, while these latter two regions have been able to compensate for the loss of overnight American visitors with significant overnight gains in the domestic market, the Essex Region has been unsuccessful in this regard. Moreover, it has also had considerably less success at growing the total number of person visits drawn from Canada (same day or overnight) than the neighbouring Southwestern region.

The above discussion points to the need for a positioning and growth strategy for the domestic market that is not unlike that required in the US. In the case of Canadians, though, the issue of stimulating basic interest in the region takes on greater significance. There is more involved than converting same-day visits to overnight. More domestic travellers need to see Windsor-Essex as an option in the first place, and this will mean attracting more “new” visitors who have had no recent experience with the region and certainly do not see it as even lying within the consideration set for an overnight trip.
Person Visits To The Essex Region From Canada

Person Visits In Millions

Year

2001 2002 2003 2004

1.849 1.637 1.742 1.924

.771 .679 .620 .716

Total

Overnight

Source: Statistics Canada, Domestic Travel Survey.

Overnight Person Visits To The Essex Region From Canada — By Purpose

Person Visits In Thousands

Year

2001 2002 2003 2004

362 358 337 349

201 158 172 182 213

362 158 358 172 337 182 349 213

Pleasure VFR Business

Source: Statistics Canada, Domestic Travel Survey.
### Change In Essex Travel Volume Relative To Other Ontario Regions
— From Canada

<table>
<thead>
<tr>
<th>Region</th>
<th>From Canada</th>
<th>Difference In %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2001</td>
<td>2004</td>
</tr>
<tr>
<td>Essex Region:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Person Visits</td>
<td>1,848,591</td>
<td>1,923,939</td>
</tr>
<tr>
<td>Overnight Person Visits</td>
<td>770,509</td>
<td>716,212</td>
</tr>
<tr>
<td>Southwestern Region:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Person Visits</td>
<td>9,958,715</td>
<td>11,014,000</td>
</tr>
<tr>
<td>Overnight Person Visits</td>
<td>3,261,122</td>
<td>4,031,749</td>
</tr>
<tr>
<td>Niagara Region:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Person Visits</td>
<td>5,384,951</td>
<td>5,554,849</td>
</tr>
<tr>
<td>Overnight Person Visits</td>
<td>1,975,040</td>
<td>2,414,634</td>
</tr>
</tbody>
</table>

Source: Statistics Canada, Domestic Travel Survey
Current Sources of Volume for Overnight Pleasure Travel

The following graphs clearly indicate that, though underdeveloped as sources of overnight visitors, the immediate US border area (Detroit and surrounding areas of Michigan and Ohio) nonetheless represents the most concentrated source of visitors to the region on overnight pleasure trips. Relatively few Americans come from areas of the US beyond these two states.

In the case of Canadian overnight pleasure travellers to the region, the source markets are spread throughout Ontario, but tend to decline in importance (relative to population size) quite dramatically with distance. The Toronto area, for instance, accounts for no more overnight visitors than does Essex and Kent counties in combination, despite that fact that these counties are within an easy day’s drive of any point of interest in the Essex Region and hence should contribute largely in the area of day trips.

With regard to both Canada and the US, existing data seem to indicate that Windsor-Essex currently functions largely as a destination of localized regional interest, with limited capacity to attract overnight travellers from a broader area. The question is, does this situation exist as a function of the Essex Region’s product offering in full knowledge of what that is, or does it stem from limitations in awareness of the offering?

**Overnight Person Visits By Place Of Residence — 2006**
*(US and Other International Visitors only)*

<table>
<thead>
<tr>
<th>Place Of Residence</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michigan</td>
<td>56%</td>
</tr>
<tr>
<td>Ohio</td>
<td>31%</td>
</tr>
<tr>
<td>Illinois</td>
<td>3%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>1%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>0%</td>
</tr>
<tr>
<td>Other USA</td>
<td>5%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>0%</td>
</tr>
<tr>
<td>France</td>
<td>0%</td>
</tr>
<tr>
<td>Other Europe</td>
<td>1%</td>
</tr>
<tr>
<td>All Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

*Source: Statistics Canada, International Travel Survey*
Profile of Overnight Pleasure Travellers To The Essex Region

Americans who have visited the Essex Region for an overnight pleasure trip tend to be older on average, and more affluent than the general US traveller population. There may also be an over-representation of couples with children, although these children are not necessarily present on the trip to Windsor-Essex. The distribution across life stage segments is consistent with this demographic profile to the extent that there appears to be a disproportionately large number of travellers from the Affluent Mature segment among those visiting the Essex Region for an overnight pleasure trip.

The above findings should be interpreted with caution given that some of the demographic details are drawn from a small base of US visitors accumulated across a number of tracking surveys. Nonetheless, the results are consistent with the focus of recent Ontario marketing efforts and strategic targeting in the US.

When turning to overnight pleasure travellers from within Ontario, there are stark differences relative to their US counterparts. Ontario visitors to Windsor exhibit a younger age profile relative to that associated with Americans, are over-represented in the youth segment and under-represented among families and seniors. Incomes are slightly lower than that of the typical Ontario traveller, and decidedly lower than that evident among US visitors to the region.


### Overnight Pleasure Trips By Place Of Residence — 2004

<table>
<thead>
<tr>
<th>Place Of Residence</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michigan</td>
<td>11%</td>
</tr>
<tr>
<td>Ohio</td>
<td>6%</td>
</tr>
<tr>
<td>Toronto Metropolitan Municipality</td>
<td>3%</td>
</tr>
<tr>
<td>Essex County</td>
<td>3%</td>
</tr>
<tr>
<td>Middlesex County</td>
<td>2%</td>
</tr>
<tr>
<td>Waterloo Regional Municipality</td>
<td>1%</td>
</tr>
<tr>
<td>Hamilton-Wentworth Regional Municipality</td>
<td>1%</td>
</tr>
<tr>
<td>Kent County</td>
<td>1%</td>
</tr>
<tr>
<td>York Regional Municipality</td>
<td>1%</td>
</tr>
<tr>
<td>Muskoka District Municipality</td>
<td>1%</td>
</tr>
</tbody>
</table>
These results suggest that Windsor is drawing different types of travellers from its US and domestic source markets. Collectively, they represent an eclectic mix of people with diverse needs and interests, but few individual visitors may be fully utilizing or even aware of the broad offering of tourist attractions within the Windsor-Essex area. There is also some sense that the region is not drawing as effectively as it might from families with ‘tweens’ and teens in Canada (though family groups with young children may be well-represented) and that children of all ages are under-represented among family groups from the US.

### Age Profile Of Essex Region Overnight Pleasure Travellers

<table>
<thead>
<tr>
<th>Age:</th>
<th>Percent Of Overnight Essex Pleasure Travellers From…</th>
<th>Difference vs. Total Population</th>
<th>Difference vs. Total Population</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ontario* (% 166)</td>
<td>U.S.** (% 1,058)</td>
<td></td>
</tr>
<tr>
<td>Under 15 Years</td>
<td>18</td>
<td>±0</td>
<td>9</td>
</tr>
<tr>
<td>15 – 24 Years</td>
<td>15</td>
<td>+2</td>
<td>9</td>
</tr>
<tr>
<td>25 – 34 Years</td>
<td>15</td>
<td>+2</td>
<td>9</td>
</tr>
<tr>
<td>35 – 44 Years</td>
<td>17</td>
<td>+1</td>
<td>18</td>
</tr>
<tr>
<td>45 – 54 Years</td>
<td>19</td>
<td>+4</td>
<td>18</td>
</tr>
<tr>
<td>55 – 64 Years</td>
<td>11</td>
<td>±0</td>
<td>19</td>
</tr>
<tr>
<td>65+ Years</td>
<td>5</td>
<td>-9</td>
<td>18</td>
</tr>
</tbody>
</table>

* Source: Statistics Canada, Domestic Travel Survey 2002 – 2004
** Source: Statistics Canada, International Travel Survey 2002 – 2006

### Percent Of Overnight Pleasure Travellers To Windsor From …

<table>
<thead>
<tr>
<th>Household Income:</th>
<th>Percent Of Overnight Pleasure Travellers To Windsor From…</th>
<th>Difference vs. Total Ontario Pleasure Travellers</th>
<th>Difference vs. Total US Near Market Pleasure Travellers</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Near Markets And Ontario Combined (% 104)</td>
<td>% (74)*</td>
<td>%</td>
<td>% (30)**</td>
</tr>
<tr>
<td>Under $80K</td>
<td>70</td>
<td>72</td>
<td>+5</td>
</tr>
<tr>
<td>$80K Or More</td>
<td>30</td>
<td>28</td>
<td>-5</td>
</tr>
</tbody>
</table>

**Caution: Small base.**

### Lifestage Segment:

<table>
<thead>
<tr>
<th>Lifestage Segment:</th>
<th>Percent Of Overnight Pleasure Travellers To Windsor From…</th>
<th>Difference vs. Total Ontario Pleasure Travellers</th>
<th>Difference vs. Total US Near Market Pleasure Travellers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% (166)</td>
<td>%</td>
<td>% (30)**</td>
</tr>
<tr>
<td>Youth</td>
<td>21</td>
<td>25</td>
<td>+10</td>
</tr>
<tr>
<td>Family</td>
<td>28</td>
<td>25</td>
<td>-16</td>
</tr>
<tr>
<td>Affluent/Mature</td>
<td>20</td>
<td>16</td>
<td>+2</td>
</tr>
<tr>
<td>Mainstream Mature &amp; Senior</td>
<td>31</td>
<td>33</td>
<td>+3</td>
</tr>
</tbody>
</table>

**Caution: Very small base.**

Sources of Potential Growth

Windsor-Essex currently attracts a relatively small proportion of those overnight travellers in neighbouring US and domestic regions who express an overt interest in Ontario travel. This interest is demonstrated through past behaviour or, in the US, through derived openness to considering Ontario for overnight pleasure travel. The latter measure (derived openness) is defined by applying the Conversion Model™ to the 2006 Travel Activities and Motivations Survey (TAMS) database. The model has been widely used in a tourism context and its effectiveness as a measure of brand (or destination) affinity and a predictor of future behaviour has been widely verified. More information on the Conversion Model™ appears in the appendix to this report.

It is unreasonable to expect that the Essex Region could be of more than passing interest to all of these potential travellers, but the pool to draw from is quite large relative to current volume and suggests that the possibility certainly exists for the region to generate greater tourism volume from parts of North America that are in reasonably close proximity. However, two conditions must apply, before this can happen.

- The tourism product in the region must be of sufficient diversity and quality to effectively meet a broad set of needs.
- Potential visitors must know that these tourism opportunities exist in the region.

While this report will shed light on the applicability of both conditions in the context of Windsor-Essex, it should be noted that the issue of service capacity is not addressed. It is quite conceivable that, in certain product areas, the tourism infrastructure (transportation, accommodation and facility capacity) may currently be unable to handle large increases in tourism volume.
Growth Opportunity For Windsor – Essex In Neighbouring Markets

<table>
<thead>
<tr>
<th>Michigan, Ohio &amp; Indiana</th>
<th>Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travellers resident in Michigan, Indiana and Ohio who have visited Ontario on overnight pleasure trip in past 2 years</td>
<td>Travellers resident in Michigan, Indiana and Ohio who have not visited Ontario, but open to doing so**</td>
</tr>
<tr>
<td>3,507,000</td>
<td>6,779,000</td>
</tr>
<tr>
<td>87%*</td>
<td>99%*</td>
</tr>
<tr>
<td>To other S. Ontario</td>
<td>To other S. Ontario</td>
</tr>
<tr>
<td>13%*</td>
<td>978,000</td>
</tr>
<tr>
<td>To Essex Region</td>
<td>To Essex Region</td>
</tr>
</tbody>
</table>

* Derived from share of person visits
** Derived from Conversion Model segmentation.

The Region’s Offering

Attractions Currently Offered

The Windsor-Essex area offers a distinctive mix of tourism attractions that are aligned with the region’s southerly location in Canada, unique role in Canadian and North American history, economic significance, natural heritage (Pelee Island, etc.) and its proximity to the US border and large American population centres. The main attractions are categorized and listed below. It is important to document the attraction mix since this will form the basis for positioning and packaging recommendations.

History and Heritage
- Olde Sandwich Towne
- Ford City
- Amherstberg Museums and Galleries
- Canadian Transportation Museum and Historic Village
- Essex County Steam and Gas Museum
- Fort Malden National Historic Site
- Historic Essex Railway Station
- John R. Park Holmestead Conservation Area
- Kingsville Historical Park
- MacKenzie Hall
- Maidstone Bicentennial Museum
- North American Black Historical Museum
- Park House Museum
- Pelee Island Heritage Centre
- Windsor Woodcutting Museum
- Windsor’s Community Museum
- Essex Historical Murals

Tours
- Pelee Island Tours
- Downtown Walking Tours
- Canadian Historical Aircraft Excursions
- African Canadian Heritage Tours and the Underground Railway
- Regional Ghost Tour

Galleries
- Art Gallery of Windsor
- Leamington Arts Centre
- Gibson Galleries (Amherstberg)
- Tsunami Glassworks
- Odette Sculpture Park

Gaming and Nightlife
- Windsor Casino
- Windsor Raceway
- Wide array of bars, nightclubs and live music in Windsor

Gateway
To Detroit and Michigan (Canadians)
To Huron County and Southwestern Ontario
Family
- Canada South Science City
- Colasanti’s Tropical Garden
- XS Family Fun Centre
- Thiessen Apple Orchard
- Silver Tee Miniature Golf and Driving Range

Performing Arts
- Actors Theatre of Windsor
- Chrysler Theatre
- D2 Entertainment
- Down River Playhouse (Amherstberg)
- Korda Artistic Productions
- Migration Hall
- Music Express
- Reisbeck Dinner Theatre Productions
- Theatre Alive
- Theatre Intrigue Society
- Theatre Windsor
- Tropical Polynesian Productions
- University Players
- Windsor Classical Chorus
- Windsor Light Music Theatre
- Windsor Symphony Orchestra

Nature and the Outdoors
- Essex Region Conservation Authority
- Hillman Marsh Conservation Area
- Point Pelee National Park
- Holiday Beach Conservation Area
- Pelee Island
- Bicycle Trail Network

Birding
- Essex County
- Ojibway Park
- Point Pelee
- Kopegaron Woods Bird Sanctuary
- Lake Erie Shoreline (various)
- Lake St. Clair Shoreline (various)
- Pelee Island
- Jack Milner Bird Sanctuary

Gardens
- Dieppe Gardens
- Ambassador and Assumption Park
- Coventry Garden and Peace Fountain
- Canadian Vietnam War Memorial
- Jackson Park
- Essex and Harrow
- Fujisawa Zen Garden
- Kingsville
- Lakeshore
- Lesalle
- Leamington
- Tecumseh

Other
- Extensive Wine Region
- Brewery and Distillery Tours
- Windsor Water World
- Spectator Sports in Detroit and Windsor
- Erie Quest Scuba and Shipwrecks
- Wide Array of Restaurants (including range of ethnic choices)
- Festivals (musical, culinary, nature and holiday)
The above comprises only a partial list, but covers all of the primary attractions and defines the major tourism categories relevant to Windsor-Essex. Most attractions are of regional significance, but a number have potential to attract visitors from a broader geographic area. The latter tend to be concentrated in the areas of nature/outdoors (especially Pelee Island and Point Pelee), birding and certain historical attractions (the Underground Railway and Amherstberg). The Windsor Casino could also potentially draw from a relatively large market area.

Activity Participation in the Essex Region

In the recent past, Ontario and US visitors to the Essex Region for overnight pleasure travel have engaged in an array of activities. The generic activities of shopping and sight seeing top the list, but this is true of virtually all travel destinations. Looking beyond this, it is apparent that the complex of activities involving the Casino, bars and nightclubs and activities associated with the outdoors and sports capture the lion’s share of traveller attention. Some reference is made to nature parks (such as Pelee) and historic sites, but these attractions generally have less prominence in the activity sets of overnight visitors from either the US or Ontario. Even less attention is paid to festivals or fairs in the region, the cultural activities offered, the wine region or the botanical gardens and other horticultural attractions.

Given that some of the less popular attractions and activities are unique to the region and truly differentiating, one could conclude that the breadth of product available in Windsor-Essex is not being optimally leveraged. This takes on even greater significance when it is considered that the very large numbers of same-day visitors from the US are likely even more single-minded in their pursuit of activities in the area (with the Casino and related amenities often representing the primary focus). As a consequence of this narrow focus and limited knowledge base, the encouragement of wider involvement with the area’s attractions and improvement in the ratio of same-day to overnight visits may require a considerable education and image-building effort.
Alignment With Demand

As a first step toward coming to terms with the potential of the region’s offering, it is useful to quantify the extent to which specific components of Windsor’s tourism product have drawing power across potential source markets in North America. It is also of some value to examine this in relation to travellers’ acceptance of Ontario as a possible future destination.

The following table demonstrates that the activities and attractions offered by the Essex Region are collectively capable of stimulating a very large number of overnight visits from among travellers in the surrounding area who are perhaps most likely to consider this region of Ontario. Certainly the demand for these activities and attractions far outstrips the magnitude of current visitor volume to the region. This basically reinforces the notion that growth opportunities do indeed exist, and that the range of product available in Windsor-Essex offers some potential to resonate with a wider audience.
Even when one discounts the region’s amusement parks and beach/sun amenities on the grounds of insufficient drawing power relative to the strong attraction of dominant continental players in these areas (Disney World and the Caribbean/Florida), Windsor-Essex maintains reasonable diversity, magnetism and a degree of distinctiveness sufficient to support growth.

The activities capable of attracting significant volume are diverse and embrace the key pillars of the region’s tourism product. This includes the Casino, particularly among Americans, but of some significance, also includes powerful areas of broader consumer interest in the form of nature parks, historic sites/museums and shopping opportunities. It should be emphasized, as well, that the performing arts and live theatre exhibit surprisingly strong potential in this regard. Winery tours and bird-watching are significant niche opportunities that define some of the Essex Region’s core differentiating strengths and are likely highly motivating to travellers with congruent interests.

While these attractions and tourism activities have drawing power when considered individually, the more significant growth opportunity undoubtedly lies in the effective combination and packaging of various components of the offering in a manner that is meaningful to potential visitors and stimulates heightened interest. Effective packaging in this sense will also encourage wider appreciation of the region and, eventually, broader recognition of Windsor-Essex’s suitability as an overnight pleasure travel destination.
Activities Stimulating Overnight Travel Among Residents Of Key Neighbouring Source Markets

<p>| Projected Number Of Travellers (in '000s) Claiming That Activity Was Main Reason For Taking Any Overnight Trip In The Past 2 Years |
|-------------------------------------------------|-----------------|-----------------|-----------------|
| Residents In Michigan, Ohio &amp; Indiana            | Residents Of Ontario Who Have Taken Overnight Trip Within Ontario In Past 2 Years |
| Have Taken Overnight Trip To Ontario In Past 2 Years | Non-Visitors Open To Visiting Ontario |</p>
<table>
<thead>
<tr>
<th>#</th>
<th>#</th>
<th>#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Claming Any Of The Types Of Activities Available In Essex Region Have Stimulated An Overnight Trip To Any Destination</td>
<td>2,521</td>
<td>602</td>
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<tr>
<td>Specific Activities (Limited To Those Offered In Essex Region):</td>
<td></td>
<td></td>
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<tr>
<td>Theme Parks Net</td>
<td>1,037</td>
<td>220</td>
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<tr>
<td>Amusement Park</td>
<td>860</td>
<td>179</td>
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<tr>
<td>Water Theme Park</td>
<td>236</td>
<td>57</td>
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<tr>
<td>Botanical Gardens</td>
<td>158</td>
<td>30</td>
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<tr>
<td>Musical Attraction</td>
<td>96</td>
<td>23</td>
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<tr>
<td>Science &amp; Technology</td>
<td>81</td>
<td>10</td>
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<tr>
<td>Garden Theme Park</td>
<td>69</td>
<td>15</td>
</tr>
<tr>
<td>Exhibits/Historic Net</td>
<td>895</td>
<td>204</td>
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<tr>
<td>Well Known Historic Sites/Buildings</td>
<td>382</td>
<td>109</td>
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<tr>
<td>Museums</td>
<td>290</td>
<td>67</td>
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<tr>
<td>Lesser Known Historic Sites/Buildings</td>
<td>285</td>
<td>72</td>
</tr>
<tr>
<td>Historical Replicas Of Towns</td>
<td>160</td>
<td>21</td>
</tr>
<tr>
<td>Art Galleries</td>
<td>140</td>
<td>20</td>
</tr>
<tr>
<td>Land Based Outdoor Net</td>
<td>853</td>
<td>213</td>
</tr>
<tr>
<td>Visited Nature Park</td>
<td>577</td>
<td>149</td>
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<tr>
<td>Hiking – Same Day Excursion</td>
<td>196</td>
<td>31</td>
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<tr>
<td>Golfing (Occasional Game)</td>
<td>137</td>
<td>43</td>
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<tr>
<td>Cycling – Same Day Excursion</td>
<td>89</td>
<td>14</td>
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<tr>
<td>Wild Flower/Flora Viewing</td>
<td>98</td>
<td>31</td>
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<tr>
<td>Mini-Golf</td>
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<tr>
<td>Bird Watching</td>
<td>51</td>
<td>13</td>
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<tr>
<td>Casinos</td>
<td>773</td>
<td>102</td>
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<tr>
<td>Water Based Outdoor Net</td>
<td>712</td>
<td>150</td>
</tr>
<tr>
<td>Sunbathing/Beach</td>
<td>580</td>
<td>111</td>
</tr>
<tr>
<td>Motor Boating</td>
<td>146</td>
<td>18</td>
</tr>
<tr>
<td>Sailing</td>
<td>59</td>
<td>11</td>
</tr>
<tr>
<td>Scuba Diving In Lakes &amp; Rivers</td>
<td>26</td>
<td>–</td>
</tr>
<tr>
<td>Parasailing</td>
<td>20</td>
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</tbody>
</table>

(Cont’d)
Activities Stimulating Overnight Travel Among Residents Of Key Neighbouring Source Markets (Cont'd)

<table>
<thead>
<tr>
<th>Projected Number Of Travellers (in '000s) Claiming That Activity Was Main Reason For Taking Any Overnight Trip In The Past 2 Years</th>
<th>Residents Of Michigan, Ohio &amp; Indiana Have Taken Overnight Trip To Ontario In Past 2 Years #</th>
<th>Non-Visitors Open To Visiting Ontario #</th>
<th>Residents Of Ontario Who Have Taken Overnight Trip Within Ontario In Past 2 Years #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific Activities (Limited To Those Offered In Essex Region): (Cont'd)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performing Arts Net</td>
<td>560</td>
<td>113</td>
<td>931</td>
</tr>
<tr>
<td>Live Theatre</td>
<td>331</td>
<td>39</td>
<td>599</td>
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<tr>
<td>Live Theatre With Dinner</td>
<td>178</td>
<td>29</td>
<td>241</td>
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<tr>
<td>Free Outdoor Performances</td>
<td>142</td>
<td>34</td>
<td>216</td>
</tr>
<tr>
<td>Classical Or Symphony Orchestra</td>
<td>85</td>
<td>25</td>
<td>126</td>
</tr>
<tr>
<td>Dance</td>
<td>79</td>
<td>15</td>
<td>132</td>
</tr>
<tr>
<td>Spectator Sports Net</td>
<td>559</td>
<td>97</td>
<td>812</td>
</tr>
<tr>
<td>Professional</td>
<td>397</td>
<td>60</td>
<td>516</td>
</tr>
<tr>
<td>Amateur</td>
<td>219</td>
<td>41</td>
<td>428</td>
</tr>
<tr>
<td>Campground/Camping Net</td>
<td>469</td>
<td>92</td>
<td>938</td>
</tr>
<tr>
<td>Shopping Net</td>
<td>413</td>
<td>95</td>
<td>787</td>
</tr>
<tr>
<td>Festivals &amp; Events Net</td>
<td>326</td>
<td>66</td>
<td>401</td>
</tr>
<tr>
<td>Foods/Drink Festivals</td>
<td>154</td>
<td>29</td>
<td>112</td>
</tr>
<tr>
<td>Music Festivals</td>
<td>148</td>
<td>29</td>
<td>211</td>
</tr>
<tr>
<td>Theatre Festivals</td>
<td>71</td>
<td>18</td>
<td>124</td>
</tr>
<tr>
<td>Dining Net</td>
<td>322</td>
<td>78</td>
<td>476</td>
</tr>
<tr>
<td>Winery Visit &amp; Tasting</td>
<td>212</td>
<td>64</td>
<td>236</td>
</tr>
<tr>
<td>Movies/Cinema</td>
<td>130</td>
<td>21</td>
<td>348</td>
</tr>
<tr>
<td>Local Outdoor Cafes</td>
<td>129</td>
<td>22</td>
<td>164</td>
</tr>
<tr>
<td>Fruit Picking</td>
<td>93</td>
<td>14</td>
<td>185</td>
</tr>
<tr>
<td>Brewery Visit &amp; Tasting</td>
<td>84</td>
<td>27</td>
<td>37</td>
</tr>
<tr>
<td>Photography</td>
<td>82</td>
<td>22</td>
<td>114</td>
</tr>
<tr>
<td>Recreational Dancing</td>
<td>38</td>
<td>7</td>
<td>64</td>
</tr>
<tr>
<td>Hands-On Learning Net</td>
<td>36</td>
<td>21</td>
<td>57</td>
</tr>
</tbody>
</table>

Activity Packaging and Product Development Possibilities

To get some sense of the manner in which elements of the Essex Region's tourism product offering might be developed and packaged in meaningful and compelling ways, a hierarchical clustering routine was applied to the Ontario TAMS RTS database. This entailed examining the interrelationships among all of the approximately 200 travel activities for which participation rates were collected. This analysis is of particular interest because it focused only on activities undertaken in Ontario during the last visit. Therefore, it is a visit-specific analysis that determines the manner in which specific activities are combined on a single overnight trip to Ontario. Because the RTS survey was confined to the US, the analysis is directly applicable only to the American source markets. However, because the more general travel activity sets of Americans and Canadians are broadly similar, the results of this analysis are likely germane to the Canadian market as well.

The following dendogram (split across three pages) portrays the manner in which various activities are linked together within individual trips. For the most part, the linkages are expressions of natural associations of interest and make intuitive sense. They also reveal some activity clusters that are of particular relevance to Windsor-Essex and should be subject to further exploration and assessment as possible packaging and product development opportunities that are consistent with behavioural realities. There is, for instance, a cluster of activities around casinos and gaming that includes live theatre, live performances, winery tours, antiques, high-end dining and shopping. Packages developed along these lines would potentially present opportunities for utilizing the Windsor Casino more effectively as an anchor for an expanded Windsor-Essex experience capable of supporting overnight stays.

Similarly, there exists an interesting interaction between the historical/cultural cluster of activities and nature parks, floral viewing and other botanical interests. As another possible packaging opportunity, one might also turn to interests in viewing zoological life and an attraction to exhibitions, carnivals, fairs and food/drink festivals.

While these clusters may not currently be suitable for development of formal packages in all instances, they do provide, at a minimum, some insight into effective means of juxtaposing product messages in communication pieces and other marketing materials. They also provide insight with respect to the possible courses of future product development.
Note on reading the Dendogram

The following dendogram should be read from left to right. Activities that are connected to each other closer to the left-hand side of the chart are behaviourally aligned insofar as they are often undertaken by the same individual on a single trip. Connections further to the right link activities and activity groups that are more remotely aligned and tend to occur less commonly on the same trip. The result is a set of nested activity clusters. For instance, visiting a planetarium, a science theme park, an amusement park, a water theme park, a wax museum and playing mini-golf represent a cluster of aligned activities that often occur on the same trip. Within that, visiting both an amusement and water theme park defines a sub-cluster of activities that are very closely tied to each other.

The same logic applies to the relationships between larger groups or clusters. The cluster of activities composing the grouping running from planetariums to mini-golf is, for instance, more closely tied to the clusters “free performance in park/recreational dancing” and “viewing marine life/golf” than to “ice skating/children’s museums”.
Dendogram of Activity Participation On Overnight Trips To Ontario Among US Visitors

Fishing
Motor boating
Lakeside resort
Hiking
Sunbathing
Swimming in lakes
Kayaking or canoeing
Remote outpost
Remote lodge
Wild lodge by car
Rock climbing
Motor home or RV
Public campground
Private campground

Planetarium
Science theme park
Amusement park
Water theme park
Wax museums
Mini-golf

Free perform in park
Ethnic festivals
Music festivals
Food processing plants
Musical attractions
Recreational dancing

Viewing marine life
Viewing land animals/birds
Aquariums
Zoos
Firework displays
Garden theme park
Farmers markets/fairs
Food/drink festivals
Carnivals
Exhibitions or fairs
Golf - occasional game
Dendogram of Activity Participation On Overnight Trips To Ontario Among US Visitors (Cont’d)

- In-line/roller blading
- Health/wellness spa
- Bowling
- Paintball
- Board games
- Rec cycling
- Stayed at health spa
- Country inn or resort
- Same day horse riding
- Farm operations
- Farm or guest ranch
- Football
- Country concerts
- Fruit picking
- ATV - same day
- Dining at a farm
- Baseball or softball
- Entertainment farms
- Cooking courses
- Breweries

Profiling and Sizing the Activity Clusters

The activity clusters can be sized and profiled to assist the Essex Region with assessing the magnitude of opportunity that exists and means of reaching those travellers exhibiting the desired activity characteristics. There are a number of clusters that are relevant to the region. Some of the key ones and the percentage of Ontario visitors they involve (cluster size) are outlined below.

<table>
<thead>
<tr>
<th>Activity Clusters</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Casinos Plus”</td>
<td>48%</td>
</tr>
<tr>
<td>“Nature Gardens”</td>
<td>20%</td>
</tr>
<tr>
<td>“Museums”</td>
<td>16%</td>
</tr>
<tr>
<td>“Animals and Fairs”</td>
<td>11%</td>
</tr>
<tr>
<td>“Amusement/ Themes Parks”</td>
<td>3%</td>
</tr>
<tr>
<td>“Farms/Rural”</td>
<td>3%</td>
</tr>
<tr>
<td>“Music/Festivals”</td>
<td>2%</td>
</tr>
</tbody>
</table>

Combine into a single cluster “Nature & Museums” 32%

Detailed profiles for the four largest clusters in the above chart are given on the following pages. The intent, here, is to provide some initial insight with respect to targeting possibilities, realizing, of course, that more extensive probing of these clusters would be required if they were to be incorporated into product development initiatives, marketing plans or media buys.

When reviewing these profiles, it should be kept in mind that some of the characteristics uncovered represent the profile of US visitors to Ontario generally and are not necessarily particular to the specific cluster in question. Perhaps the most important example of this can be found in the age profile. Virtually all activity clusters are under-developed in the most youthful adult age cohorts, suggesting that the province, in general, has had less success at attracting youthful American adults than older age groups. Nonetheless, underdevelopment among youth is still a valid cluster characteristic when one considers the actual activity behaviour of Americans who have visited the province during the past three years.
“Casino Plus” Activity Cluster

Defining Travel Activities:
International high-end dining, other high-end dining, dining-local recipes, shopping-books/music, shopping-clothing/shoes, local arts and crafts, local outdoor cafes, gourmet food stores, antiques, casinos, wineries, live theatre, movies/cinema, live theatre with dinner.

Size:
48% of US travellers to Ontario

Distinguishing Profile Characteristics:
More frequent overnight pleasure travellers:

71% 3+ trips in past 12 months
(vs. 51% among all other travellers)

30% 6+ trips in past 12 months
(vs. 18% among all other travellers)

Somewhat over-represented in larger nearby cities:
Detroit, Chicago, Cleveland, Buffalo

Media Habits:
Somewhat elevated weekend and community newspaper readership.

More inclined to read the newspaper travel section at least occasionally (77% vs. 68%).

Elevated magazine readership (entertainment 43%, news magazines 35%, general interest 31%, home and garden 30%, food & cooking 28%, health & fitness 26%, travel 25%, business & finance 24%).

Somewhat wider range of TV and radio genre watched/listened (TV: movies 74%, dramas 64%, news/current affairs 63%; Radio: oldies 51%, news/talk radio 45%).
“Nature & Gardens” Activity Cluster

Defining Travel Activities:

Nature parks, well-known natural “wonders”, botanical gardens, flora viewing, photography and garden centres.

Size:

20% of US travellers to Ontario

Distinguishing Profile Characteristics:

Age: Under-representation of youth 18-29 years (10%)
   Over-representation of adults 30-49 years (41%)

Travel: Travel more frequently on overnight pleasure trips than is the norm (73% 3+ trips per year vs. 53% for others)

Place of Residence: Over-representation in distant locals, such as Florida and Dallas, but also in much nearer urban markets (Chicago, Minneapolis, Cleveland)

Media Habits:

Tend to read a wider array of newspaper types.

Magazine readership above norm for titles that are consistent with their travel interests (nature, outdoor, health/fitness, home and garden, crafts, photography, travel) but also in areas, such as technology, entertainment and family/parenting (Most popular: entertainment 36%, general interest 33%, home and garden 31%).

Television viewership exhibits a skew toward biography, history and drama, but is also overdeveloped in nature, home and garden and travel (Most popular: movies 75%, dramas 68%, news/current affairs 63%).

Radio listening skewed toward oldies and talk radio (62% and 45%).
“Museums” Activity Cluster

Defining Travel Activities:
Science museums, military/war museums, historical sites (both well-known and other), strolling through cities, history museums, arts galleries, historical replicas of towns.

Size:
16% of US travellers to Ontario

Distinguishing Profile Characteristics:
Strongly skewed to 30-44 year age group (38% vs. 18% among other travellers)

More frequent overnight pleasure travellers on average (37% 6+ times per year)

Place of residence is dispersed with negative correlation to distance from border (as with all segments), but over-representation of Florida and Chicago residents is similar to that evident in the case of the nature & garden segment

Media Habits:
Readership of newspapers of all forms is well above the norm as is readership of the travel section.

Magazine interests are wide-ranging with overdeveloped readership in business and news magazines, crafts & antiques, family/parenting, general interest, home & garden, photography & video, science, geography and travel (Most popular: general interest 42%, news magazines 39%, entertainment 39%).

Wider variety of television and radio programming choices relative to other travellers (TV: movies 69%, news 68%, dramas 62%; Radio: oldies 54%, news/talk 46%).
“Animals & Fairs” Activity Cluster

Defining Travel Activities:

Viewing marine life, viewing land animals and bird watching, visiting aquariums, visiting zoos, attending fireworks displays, garden theme parks, farmers markets & fairs, food & drink festivals, carnivals and exhibitions/fairs.

Size:

11% of US travellers to Ontario

Distinguishing Profile Characteristics:

Age: Heavily skewed 30 to 49 years (46%)

Heavier travellers in general (as with the other groups described) and interest in returning to Ontario is above the norm.

Significant over-representation from Detroit (14%), also Florida and, to a small degree, Philadelphia

Media Habits:

Newspaper readership is frequent and well developed.

Magazine readership is above average for virtually all categories (Most popular: home and garden 42%, general interest 42%, news magazines 41%).

TV viewership is wide-ranging, but there is a tendency to avoid reality shows and soap operas (Most popular: news and current affairs 71%, dramas 70%, movies 69%, history 62%).

Oldies and news are top picks among radio programs (58% and 41%) but soft music is also somewhat over-developed relative to total travellers.
Clustering General Travel Activities

Using the detailed information on wider travel activities available in the main TAMS ’06 US database (activities on any overnight trips taken in the past two years), it is possible to derive more general travel activity clusters. These are groupings of activities that tend to be present together within the travel activity set of the specific individual.

It is important to note that these activities do not necessarily take place on a single trip, nor do they necessarily occur together at a single destination. Indeed, we can neither confirm nor deny, with the data at hand, that there is even a desire on the part of the traveller to engage in all activities in the set on any given trip. For these reasons, this analysis must be considered highly exploratory, though still capable of yielding useful insights. The purpose, here, is to identify packaging opportunities that may address unmet needs – clusters of activities that are not currently sought in Ontario or Windsor, but could be promoted together as a means of catering to the wider travel interests of potential visitors.

Given the mandate of the analysis reported herein, this assessment of wider travel interests will focus only on those clusters that are congruent with the Windsor-Essex Region’s tourism offering. Recent Ontario visitors and non-visitors who are open to experiencing travel in Ontario have been analyzed separately in anticipation that the general needs-states of the two groups are likely to differ.

Recent Ontario Visitors

When the general travel interests of recent visitors to Ontario are compared with the activities that they undertook on their last visit to the province, it becomes apparent that there may exist opportunities to reconfigure activity patterns in a manner that better meets primary interests. In the case of Windsor-Essex, this has a number of implications.

1. The Windsor Casino could potentially be aligned with enjoyment of the local urban experience (outdoor cafes, local restaurants/cuisine, strolling through the city, enjoyment of local movie theatres and local shopping), and to both historic sites in the immediate area and natural attractions of some significance such as Pelee Island.

   The challenge, here, may be to upgrade the urban experience in the immediate vicinity of the Casino so that it meets expectations. Local business improvement and intensification may be in order. By contrast, coordinated tours of Pelee Island and local historic sites should be relatively easy to arrange.

2. The wine region may have greater motivational power if linked to a wider cultural experience, including nightlife, high-end dining, galleries, exhibitions and museums. High-end cinema experiences or festivals would also fall into this cluster of activities.
This activity set contrasts with the previous one in that it defines a superior, premium experience rather than an authentic local one. Here too, some degree of upgrading and intensification may be required, although there may not be as strong a need for holistic improvement of an entire neighbourhood or neighbourhoods.

3. Experiencing flora, fauna and attendant photography opportunities possibly represent a single cluster of interests that essentially stand on their own. It may be possible, then, to target these activities quite intensely to a relatively narrow consumer niche without the need to establish linkages to wider historic or cultural experiences to the extent that recent travel activity patterns within Ontario itself might suggest.

4. Focused overtures to specific target groups may also be a useful strategy to adopt with respect to each of golf, adventure travel and recreational camping. It is assumed in all of these cases that the quality and quantity of the local product can adequately meet visitor expectations. If there is some uncertainty about this, it is recommended that these activities be packaged within broader complementary activity sets rather than run the risk of having them stand on their own and fail to impress.

Collectively, the activity clusters discussed above account for a large proportion of the Ontario visitor population from the US. By extension, then, there may be significant potential for the Essex Region to generate increased travel volume from this population by marketing itself effectively in these activity spaces, and by intensifying product development around its existing core of attractions in each case.

**Open Non-Visitors**

Among open non-visitors in the US, there appears to exist a large and extensive cluster of activities that essentially define the ‘Florida experience’. Neither Windsor-Essex nor Ontario as a whole are capable of fully competing in this space – a reality that likely goes some way toward explaining the persistence of unrealized potential within this traveller group. These travellers have a large body of interests that naturally inhibit Ontario’s ability to emerge as the preferred choice and its capacity to command a significant share of travel expenditures. The province may stimulate positive intentions, but have some difficulty competing with alternatives that are particularly well placed to take the lion’s share of ‘main annual pleasure trip’ volume, particularly in the family sector.

Still, there is evidence of a large cluster of interrelated interests that provide space for Windsor-Essex to establish motivational power. These cover a very broad gamut of travel experiences including historic sites, museums, cultural activities, casinos, wineries, experiencing nature, viewing flora and fauna, urban entertainment, festivals and outdoor events/performances.
If one believes that there may be an interest in accessing this breadth of experience on a single trip, the challenge for the Region is to promote and provide access to as many of these activities as possible within a broad holistic offering. The key, here, is to underscore diversity of experience, and to highlight as many of Windsor-Essex’s core strengths when doing so. This is admittedly a difficult challenge. Enthusiasm in the notion of diversity must be fostered without diluting the message by focusing too little attention on too many options. Also, as with recent Ontario visitors, there would be a need to ensure that the product offering is capable of delivering to expected standards. In fact, the need to do so is likely more critical among open non-visitors, given that weakness on any link in the diverse experience chain has the capacity to undermine overall satisfaction with the visit.

Beyond this, there are smaller activity clusters that may offer secondary potential for Windsor-Essex among open non-visitors resident in the US:

- Replication of the typical Ontario summer cottage experience and the casual recreation activities that go with it;
- A strong offering for golfers.

The key activity clusters discussed above are sized in the table below. The detailed dendograms follow.

<table>
<thead>
<tr>
<th>Activity Clusters – Ontario Visitors</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainstream</td>
<td>25%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>22%</td>
</tr>
<tr>
<td>Animals, Fun and Beach</td>
<td>19%</td>
</tr>
<tr>
<td>Active Outdoors</td>
<td>14%</td>
</tr>
<tr>
<td>Themed Events</td>
<td>11%</td>
</tr>
<tr>
<td>Wildlife</td>
<td>7%</td>
</tr>
<tr>
<td>Golfing</td>
<td>4%</td>
</tr>
<tr>
<td>Camping</td>
<td>4%</td>
</tr>
<tr>
<td>Extreme Sport</td>
<td>2%</td>
</tr>
<tr>
<td>Team Sport</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity Clusters – Open Non-Visitors</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive Integrated Travel Activity Sets</td>
<td>43%</td>
</tr>
<tr>
<td>The ‘Florida’ Experience</td>
<td>22%</td>
</tr>
<tr>
<td>Active Outdoors</td>
<td>8%</td>
</tr>
<tr>
<td>Camping</td>
<td>3%</td>
</tr>
<tr>
<td>Golfing</td>
<td>2%</td>
</tr>
</tbody>
</table>
Dendogram of Activity Participation On Overnight Trips
Among US Visitors

Mainstream
Well known historic sites
Other historical sites
Nature park - visited
Well known natural “wonders”
Dining - local recipes
Shop/browse - Clothing/shoes
Strolling around a city
Shop/browse - Arts & crafts studios
Shop/browse - Book/music stores
Went to local outdoor cafes
Casino(s)
Movies/cinema

Wildlife
Wildlife viewing - Bird watching
Wildlife viewing - Land animals
Wildlife viewing - Whale watching
Wildflowers/flora viewing
Botanical gardens
Hiking - Same day excursion
Photography

Entertainment
Live theatre
Live theatre with dinner
Rock & roll / popular concert
Stand-up comedy clubs
Food/drink festivals
Ethnic festivals
Free outdoor performances
Farmers’ markets
Exhibitions or fairs
Firework displays
Dining - Int’l high-end restaurants
Dining - Other high-end restaurants
Lakeside/riverside resort
Seaside resort
Art galleries
Museum - General history
Museum - Science or tech
Museum - Military/war
Shop/browse - Antiques
Shop/browse - Gourmet foods
Shop/browse - Greenhouse
Wineries for day visits and tasting
Breweries for day visits and tasting
Historical replicas of cities
IMAX movie theatres
Animals, Fun & Beach
- Aquariums
- Zoos
- Amusement park
- Water theme park
- Sunbathing or sitting on a beach
- Swimming in oceans
- Motor boating
- Swimming in lakes

Camping
- Public campground in park
- Private campground
- Motor home or RV while traveling

Golfing
- Golfing - Occasional game
- Golfing - Played while at resort
- Golfing - Package golf tour
- Pro golf tournaments

Classical/symphony concert
- Opera
- Ballet/dance
- Jazz concert

Scuba diving in lakes/river
- Snorkeling in lakes or rivers

Ice hockey
- Pro ice hockey games

Kite surfing
- Bungee jumping
- Dog sledding
- Wilderness skills courses
- Hot air balloon festivals
- Hot air ballooning
- Remote or fly-in wilderness lodge
- On a houseboat
- Archaeological digs
- Historical re-enactments
- Hang gliding
- Remote or fly-in wilderness outpost
- Camp site in wilderness setting
Dendrogram of Activity Participation On Overnight Trips Among US Visitors (Cont’d)

- International film festivals
- Literary festivals or events
- Gay Pride parades
- Cooking school
- Wine tasting school
- International sporting events
- Farm or guest ranch
- Harvesting / other farm operations
- Pro figure skating

- Beach volleyball
- Volleyball
- Badminton
- Tennis
- Football
- Comedy festivals
- Basketball
- Pro basketball games
- Baseball or softball

**Active Outdoors**
- Climbing - Rock climbing
- Climbing - Mountain climbing
- Kayaking or canoeing - freshwater
- Hiking/Backpacking in wilderness
- Cycling - Mountain biking
- Cycling - Overnight trip
- Skiing - Cross country
- Snowshoeing
- Kayaking or canoeing - ocean
- White water rafting
- Fishing - trophy fishing
- Fishing - ice fishing
- Fishing - fresh water
- Fishing - salt water
- Viewing northern lights
- Wilderness lodge drivable by car
- Scuba diving in sea/ocean
- Snorkeling in sea/ocean
- Parasailing
- Sailing
- ATV - Same day excursion
- ATV - Overnight touring trip
- Ice-skating
- Snowmobiling - Day use
- Water skiing
- In-line/roller blading
- Snowboarding
Dendogram of Activity Participation On Overnight Trips Among US Visitors (Cont'd)

Day visit to health spa
Health spa

Fitness - Fitness centre
Fitness - Jogging outdoors
Mini-golf
Board games
Cycling - Recreational, same day
Horseback riding - same day excursion

Festivals & Themed Events
Pro baseball games
Pro football games
Amateur sports competitions
Horse races
Auto races
Amateur competition (not sports)
Country/western concerts
Western theme events
Religious festivals
Dining at a farm
Paleontological/archaeological sites
Interpretive program
Theatre festivals
Curatorial tours
Music festivals
Musical attractions
Circus
Carnivals
Cooking/wine tasting courses
Resort with gourmet restaurant
Bowling
Recreational dancing
Planetarium
Science & technology theme park
Movie theme park
Wax museums
Garden theme park
Food processing plants
Entertainment farms
Fruit picking at farms or open fields
Museum - Children's
Soccer
Pro soccer games
Dendogram of Activity Participation On Overnight Trips
Among US Visitors (Cont’d)

Horseback riding - Overnight stop
Equine (horse) competitions
Skateboarding
Paintball

Skiing - Downhill
Ski resort or mountain resort

Aboriginal festivals & events
Aboriginal outdoor adventure/sports
Aboriginal cuisine
Aboriginal arts and crafts shows
Aboriginal cultural experiences
Aboriginal heritage attractions

Hunting
Hunting - Small game
Hunting - Birds
Hunting - Big game

Motorcycling - Day excursion
Motorcycling - Overnight trip
Dendogram of Activity Participation On Overnight Trips
Among US Non-Visitors “Open” To Ontario

The “Florida” Experience
Sunbathing or sitting on a beach
Swimming in oceans
Seaside resort
Snorkeling in sea/ocean
Amusement park
Mini-golf
Dining - Int’l high-end restaurants
Dining - Other high-end restaurants
Shop/browse - Gourmet foods
Golfing - Occasional game
Fishing - salt water
Museum - Children’s
Fitness - Fitness centre
Fitness - Jogging outdoors
Pro baseball games
Horse races

Extensive Interrelated Activity Set
Snowmobiling - Day use
Viewing northern lights
Free outdoor performances
Firework displays
Stand-up comedy clubs
Rock & roll / popular concert
Wildflowers/flora viewing
Wildlife viewing - Land animals
Wildlife viewing - Whale watching
Wildlife viewing - Bird watching
Exhibitions or fairs
Aquariums
Live theatre with dinner
Amateur sports competitions
Aboriginal festivals & events
Museum - Science or tech
IMAX movie theatres
Well known historic sites
Other historical sites
Strolling around a city
Museum - General history
Well known natural “wonders”
Art galleries
Wineries for day visits and tasting
Casino(s)
Photography
Dendogram of Activity Participation On Overnight Trips Among US Non-Visitors “Open” To Ontario (Cont’d)

Extensive Interrelated Activity Set (cont’d)

- Botanical gardens
- Shop/browse - Greenhouse
- Dining - local recipes
- Shop/browse - Clothing/shoes
- Shop/browse - Arts & crafts studios
- Shop/browse - Book/music stores
- Went to local outdoor cafes
- Shop/browse - Antiques
- Farmers’ markets
- Movies/cinema
- Nature park – visited
- Hiking - Same day excursion
- Historical replicas of cities
- Museum - Military/war
- Live theatre
- Zoos
- Lakeside/riverside resort
- Ethnic festivals
- Food/drink festivals
- Breweries for day visits and tasting
- Dining at a farm
- Motor boating
- Country/western concerts
- Interpretive program
- Science & technology theme park
- Fruit picking at farms or open fields
- Circus
- Planetarium
- Bowling
- Religious festivals
- Farm or guest ranch
- Parasailing
- Snowboarding
- Baseball or softball

Spas, Discovery, Food and Wine

- Day visit to health spa
- Health spas
- Aboriginal heritage attractions
- Paleontological/archaeological sites
- Aboriginal cuisine
- Salsa/dance
- Food processing plants
- Cooking/wine tasting courses
Dendogram of Activity Participation On Overnight Trips
Among US Non-Visitors “Open” To Ontario (Cont’d)

Jazz concert
Resort with gourmet restaurant
Movie theme park
Water theme park
Garden theme park
Musical attractions

Camping
Kayaking or canoeing - freshwater
Horseback riding - same day excursion
Public campground in park
Private campground
Swimming in lakes
Fishing - fresh water
Cycling - Recreational, same day
Motor home or RV while traveling
Cycling - Overnight trip

Kayaking or canoeing - ocean
Cycling - Mountain biking
Board games
Classical/symphony concert
Opera
Music festivals
Hot air balloon festivals

Golfing
Golfing - Played while at resort
Golfing - Package golf tour
Pro golf tournaments
Ice-skating

Hunting/ Macho Outdoors
Hunting - Big game
Hunting - Small game
Hunting - Birds
Scuba diving in sea/ocean
Wilderness lodge drivable by car
ATV - Same day excursion
Fishing - ice fishing
Auto races
Football
Water skiing

Tennis
Remote or fly-in wilderness lodge
Volleyball
International sporting events
Dendogram of Activity Participation On Overnight Trips
Among US Non-Visitors “Open” To Ontario (Cont’d)

Active Outdoors
Carnivals
Entertainment farms
Aboriginal cultural experiences
Aboriginal arts and crafts shows
Western theme events
Recreational dancing
Museums
Hiking/Backpacking in wilderness
Camp site in wilderness setting
White water rafting
Skiing - Cross country
Skiing - Downhill
Ski resort or mountain resort
Sailing

Motorcycling - Day excursion
Motorcycling - Overnight trip
Amateur competition (not sports)
Beach volleyball
Pro football games

Pro basketball games
Pro soccer games
In-line/roller blading
Courses to learn another language
Reconciling the Ontario-Specific and General Activity Clusters

In assessing the marketing significance of the two clustering schemes, it is important to see them as being complementary to each other. The activity sets based on trip-specific travel to Ontario represent the core. The general activity sets provide us with potential means of interlinking the core clusters or perhaps separating out specific interest groups that could be leveraged as niche opportunities.

A comparison of the two sets of results suggests an opportunity to loosely link the activity clusters to create a broader net of activities or experiences. Traveller interests are very diverse, even more so when we take the influences of entire travel parties into account. The pattern of general activity clustering attests to this diversity of interest and also suggests that repeated interaction with a destination constitutes a journey from initial exploration through to customization of experience with an emphasis on key focal points for enjoyment. It is the latter that feeds repeat visitation over a long time frame.

This underscores a need to impress with diversity of experience from the very first visit. Visitors need to be exposed to sufficient diversity to allow them to uncover reasons for returning and to take the experiential journey that starts with exploration and leads to knowledge, comfort and finally the isolation of focal points for personal enjoyment and repeat visitation. This is particularly true in the context of source markets that are relatively close-by – markets that have particular importance with respect to driving volume to Windsor-Essex and Southwestern Ontario generally.

From a practical standpoint, this means that it would be worthwhile to use the trip-specific clusters as focal points for communications, packaging and product development, but to also establish connections between clusters in a manner that is congruent with the nature and juxtaposition of activities in the region. For example, museums and history could be developed as a unified package of exploratory activities, but could be complemented by references to opportunities for nightlife. This would provide momentum for visitors to move beyond the initial discovery stages of destination involvement.

Beyond this, there are a number of single activities that can be pulled out of existing clusters and promoted to niche markets as sole focal points for a trip. Those that have particular relevance for Windsor-Essex are golf and wildlife viewing. Needless to say, the expectations of those with intense interest in such activities are exceptionally high. It is, therefore, critical to ensure that the region is capable of delivering to these high standards before initiating niche-marketing approaches of this kind.
Satisfaction Among Recent Visitors

The question as to whether the Essex Region offers sufficient product quality to meet the needs of overnight visitors can be addressed through an examination of satisfaction levels. Virtually all overnight visitors express satisfaction with their trip to Windsor-Essex and tend to do so in strongly positive terms rather than in a qualified fashion. This suggests that the existing product offering does not exhibit major deficiencies and, in some cases, has the capacity to impress.

Having said this, however, it is worth comparing the degree of satisfaction generated by the Essex Region with that achieved by Southwestern Ontario, overall. Data captured among US visitors indicate that, based on recent experience, Windsor-Essex tends to stimulate less enthusiasm than do other areas of Ontario’s Southwest. This implies that travellers to the Essex Region are not routinely exposed to the more impressive and differentiating elements of the product offering. There may also be issues with the product itself or supporting amenities in some instances – not enough to evoke outright dissatisfaction, but sufficient to dissuade an expression of enthusiasm. The recent positioning study conducted on behalf of Windsor-Essex provides evidence that visitors to the region from either Ontario or the US tend to focus criticism on the quantity (though not necessarily the quality) of attractions and events, and to a lesser degree on the availability of well priced, good quality accommodation.

When US overnight visitors to Southwestern Ontario (including the Essex Region) are asked to articulate what they particularly like about the area from a tourism perspective, emotive responses are prominent (friendly, enjoyable and relaxing). There is also an expectation of diversity of experience and a fair amount of focus on the quality of accommodation and food choices. When it comes to specific product elements, scenery/nature and cultural experiences (theatre, history and art) tend to carry somewhat greater weight than do casinos, shopping and nightlife. Here too, evidence suggest that a rebalancing or broadening of the Essex Region’s offering may be in order, at least in terms of the way in which it is communicated to potential visitors. It is also quite evident that some emphasis must be attached to the quality of supportive services, and that all must be integrated with a strong emotive message that underscores diverse opportunities for relaxation, excitement and enjoyment.
Satisfaction With Last Trip To South Western Ontario (Including Essex Region)

Among U.S. Pleasure Travellers

- Very Satisfied: 89%
- Somewhat Satisfied: 9%
- Not Very Satisfied: 1%
- Not At All Satisfied: 1%

Specific ‘Likes’:

<table>
<thead>
<tr>
<th>Place</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friendly People</td>
<td>23%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>22%</td>
</tr>
<tr>
<td>Enjoyable</td>
<td>18%</td>
</tr>
<tr>
<td>Visiting Family/Friends</td>
<td>17%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>16%</td>
</tr>
<tr>
<td>Scenery</td>
<td>11%</td>
</tr>
<tr>
<td>Good Restaurants</td>
<td>11%</td>
</tr>
<tr>
<td>Plenty To See/Do</td>
<td>10%</td>
</tr>
<tr>
<td>Affordable</td>
<td>10%</td>
</tr>
<tr>
<td>Live Theatre/Performances</td>
<td>9%</td>
</tr>
<tr>
<td>Great Weather</td>
<td>8%</td>
</tr>
<tr>
<td>Clean</td>
<td>7%</td>
</tr>
<tr>
<td>Nature</td>
<td>7%</td>
</tr>
<tr>
<td>History/Culture/Art</td>
<td>5%</td>
</tr>
<tr>
<td>Casino/Gambling</td>
<td>4%</td>
</tr>
<tr>
<td>Shopping</td>
<td>4%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>2%</td>
</tr>
</tbody>
</table>


Satisfaction With Windsor As A Travel Destination

Percent of travellers who visited Windsor on last overnight trip to Ontario

<table>
<thead>
<tr>
<th>Place Of Residence</th>
<th>Ontario (74)*</th>
<th>U.S. (30)**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>72%</td>
<td>68%</td>
</tr>
<tr>
<td>Somewhat Satisfied</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*(n=104)


*Caution: Small base.
The Perceptual Backdrop and Future Opportunity

Results of the Tourism Positioning Study

Brand Image

The Tourism Positioning Study was conducted on behalf of the Windsor, Essex County and Pelee Island Convention and Visitor Bureau during the spring of 2007. Both qualitative and quantitative phases were involved, with interviewing conducted in Southern Ontario and that portion of the US within a five-hour drive of Windsor (basically, the North-Central US). The intent of the study was to uncover traveller knowledge and perceptions of Windsor as well as obtain reaction to a number of preliminary positioning concepts. These data would be used to develop a positioning strategy for the region capable of optimizing tourism growth potential.

Results of both the qualitative and quantitative components of the study confirm that appreciation of the Windsor region is weak, and knowledge of its full tourism offering is significantly under-developed. Among travellers resident in Southern Ontario, there is certainly awareness of the city itself and some of the key attractions in the area (Pelee Island and the Windsor Casino), but knowledge often doesn’t extend much beyond this, even among those who have been in (or through) the city recently. As one might expect, the region’s image profile is quite soft, particularly on some of the stronger motivational drivers that are essentially emotive in nature (fun, value, diversity of experience and opportunities for either relaxation or excitement). Signs of weakness are also evident with respect to some of the hygienic, cost-of-entry factors related to assurances of safety and security while visiting. Undoubtedly, perceived safety issues are a function of both Windsor’s reputation as an industrial city and its proximity to the Detroit metropolitan area.

From a perceptual perspective, Windsor is more strongly associated with gaming (the Casino) than with any other imagery dimension or amenity. And, even here, the association is not particularly strong. This simply demonstrates the degree to which knowledge is lacking. In the end, the typical Southern Ontario pleasure traveller has insufficient information to consider the Windsor region as offering enough diversity of experience or potential for excitement, wonder and enjoyment to justify an extended trip, and certainly not one that is likely to be suitable for family vacationing including children or teens. This being said, there are rudimentary expectations that Windsor should offer access to at least some of the individual amenities that are normally associated with larger urban centres, particularly given its proximity to Detroit and the existence of a large casino. This includes, in a generic sense at least, nightlife, dining and certain urban cultural and entertainment attractions.

Among Americans, the situation is, if anything, more extreme. In general, Americans living in the immediate area (the North-Central region) have very limited awareness of what Windsor has to offer and their impressions of the city and surrounding area are therefore quite tentative. They have no real assurance of what Windsor is capable of offering in terms of fundamental end
benefits or underlying emotive drivers. Appreciation of the specific amenities available is also quite limited, resulting in a rather ill defined image.

It is important to note, however, that Americans who have actually visited Windsor tend to be far more complimentary, suggesting that the city and neighbouring region does quite well in terms of satisfying expectations and needs. Although the scores achieved are not overwhelmingly positive, they are still reasonably strong with respect to basic benefits such as safety, enjoyment, fun, friendliness and the quality of food and drink. For US visitors, Windsor also tends to be considered a destination that offers an opportunity to get a break from one’s day-to-day routine. The waterfront attracts some notice, but for the most part, these positive perceptions stem from experience with the Casino and related dining and entertainment venues. Indeed, the Windsor Casino tends to dominate the impressions of recent American visitors. Their experience with other elements of the regional offering seems to be quite closely circumscribed.
Comparison Between Importance And Performance Of The Windsor Area
For Various BENEFITS — Among US Residents

Average rating score on 10-point scale among total North/Central US residents

Comparison Between Importance And Performance Of The Windsor Area
For Various BENEFITS — Among US Visitors

Average rating score on 10-point scale among residents of the North/Central US who have ever visited Windsor

- Great place to watch live sporting events: Importance 3.8, Delivery 4.2
- Place that offers solitude and isolation: Importance 5.5, Delivery 5.0
- Romantic place to visit: Importance 5.4, Delivery 5.1
- Place that provides insight into other cultures: Importance 5.1, Delivery 5.7
- Place that pampers me: Importance 4.9, Delivery 5.0
- Great place to participate in sports: Importance 4.6, Delivery 4.8
- Experience a different physical environment: Importance 5.4, Delivery 6.4
- Place that offers great food and drink: Importance 7.0, Delivery 6.7
- Place that offers value for money: Importance 6.9, Delivery 7.4
- Sense that you are welcome: Importance 6.7, Delivery 7.9
- Feeling of independence: Importance 6.7, Delivery 7.4
- Peaceful & relaxing place to visit: Importance 6.1, Delivery 7.7
- Destination that offers value for money: Importance 6.3, Delivery 7.4
- To get a break from day-to-day: Importance 8.3, Delivery 6.9

Comparison Between Importance And Performance Of The Windsor Area For Various BENEFITS — Among Ontario Residents

Average rating score on 10-point scale among total Southern Ontario residents

- To get a break from day-to-day: Importance 8.3, Delivery 6.5
- Sense that you are welcome: Importance 8.3, Delivery 6.5
- Feeling of safety: Importance 8.2, Delivery 6.4
- Feeling of independence: Importance 8.0, Delivery 6.6
- Destination that offers value for money: Importance 8.0, Delivery 6.3
- Peaceful & relaxing place to visit: Importance 7.9, Delivery 6.2
- A fun place: Importance 7.4, Delivery 5.8
- Place that offers great food and drink: Importance 7.2, Delivery 6.1
- Place that has a unique sense of place: Importance 6.6, Delivery 5.7
- Experience a different physical environment: Importance 6.6, Delivery 5.7
- Place that provides an authentic experience: Importance 6.5, Delivery 5.7
- Feeling of exploration: Importance 6.5, Delivery 5.7
- Place that offers solitude and isolation: Importance 5.9, Delivery 5.4
- Romantic place to visit: Importance 5.9, Delivery 4.7
- Place to gain knowledge of history, geography: Importance 5.7, Delivery 5.7
- Place that pampers me: Importance 5.6, Delivery 5.0
- Place that provides insight into other cultures: Importance 5.4, Delivery 4.7
- Great place to participate in sports: Importance 4.9, Delivery 4.5
- Great place to watch live sporting events: Importance 4.4, Delivery 3.6

Comparison Between Importance And Performance Of The Windsor Area For Various BENEFITS— Among Ontario Visitors

Average rating score on 10-point scale among residents of the Southern Ontario who have ever visited Windsor

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Importance</th>
<th>Delivery</th>
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<tbody>
<tr>
<td>To get a break from day-to-day</td>
<td>6.7</td>
<td>8.2</td>
</tr>
<tr>
<td>Sense that you are welcome</td>
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<td>8.3</td>
</tr>
<tr>
<td>Feeling of safety</td>
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<td>8.1</td>
</tr>
<tr>
<td>Feeling of independence</td>
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<td>7.9</td>
</tr>
<tr>
<td>Destination that offers value for money</td>
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<td>7.9</td>
</tr>
<tr>
<td>Peaceful &amp; relaxing place to visit</td>
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<td>7.8</td>
</tr>
<tr>
<td>A fun place</td>
<td>6.3</td>
<td>7.3</td>
</tr>
<tr>
<td>Place that offers great food and drink</td>
<td>6.6</td>
<td>7.4</td>
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<tr>
<td>Place that has a unique sense of place</td>
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<tr>
<td>Experience a different physical environment</td>
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<tr>
<td>Place that provides an authentic experience</td>
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<tr>
<td>Feeling of exploration</td>
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<td>6.4</td>
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<tr>
<td>Place that offers solitude and isolation</td>
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<tr>
<td>Romantic place to visit</td>
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<tr>
<td>Place to gain knowledge of history, geography</td>
<td>5.8</td>
<td>5.8</td>
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<td>Place that pampers me</td>
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<tr>
<td>Place that provides insight into other cultures</td>
<td>4.9</td>
<td>5.5</td>
</tr>
<tr>
<td>Great place to participate in sports</td>
<td>4.7</td>
<td>5.2</td>
</tr>
<tr>
<td>Great place to watch live sporting events</td>
<td>3.7</td>
<td>4.9</td>
</tr>
</tbody>
</table>

(n=187)

Comparison Between Importance And Performance Of The Windsor Area For Various AMENITIES — Among US Residents

Average rating score on 10-point scale among total North/Central US residents

<table>
<thead>
<tr>
<th>Amenities</th>
<th>Importance</th>
<th>Delivery</th>
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<tbody>
<tr>
<td>Accommodations are reasonably-priced</td>
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<tr>
<td>Overall destination quality</td>
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<tr>
<td>Ease of getting from place to place</td>
<td>7.5</td>
<td>5.0</td>
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<tr>
<td>Great food and drink</td>
<td>7.1</td>
<td>5.3</td>
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<tr>
<td>Variety of restaurant experiences</td>
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<td>5.3</td>
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<tr>
<td>Beach/lake/river/waterfront</td>
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<td>5.3</td>
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<tr>
<td>Opportunities for outdoor/nature experiences</td>
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<td>4.8</td>
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<tr>
<td>Attractions for the entire family</td>
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<td>4.8</td>
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<tr>
<td>Historical sites</td>
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<tr>
<td>Museums/art exhibits/art galleries</td>
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<tr>
<td>Quality of shopping</td>
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<tr>
<td>Live theatre/performing arts/concerts</td>
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<td>Nightlife (entertainment)</td>
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<td>Availability of unique/luxury accommodations</td>
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<tr>
<td>Upscale atmosphere</td>
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<tr>
<td>Availability of gourmet dining</td>
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<tr>
<td>Gaming/Casino</td>
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<td>4.2</td>
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<tr>
<td>Pro sports games</td>
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<td>3.5</td>
</tr>
<tr>
<td>Golf facilities</td>
<td>3.9</td>
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</tbody>
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Comparison Between Importance And Performance Of The Windsor Area
For Various AMENITIES — Among US Visitors

Average rating score on 10-point scale among residents of the North/Central US who have ever visited Windsor

<table>
<thead>
<tr>
<th>Amenities</th>
<th>Importance</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations are reasonably-priced</td>
<td>7.9</td>
<td>6.3</td>
</tr>
<tr>
<td>Overall destination quality</td>
<td>7.6</td>
<td>6.6</td>
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<tr>
<td>Ease of getting from place to place</td>
<td>7.3</td>
<td>6.4</td>
</tr>
<tr>
<td>Great food and drink</td>
<td>6.9</td>
<td>6.7</td>
</tr>
<tr>
<td>Variety of restaurant experiences</td>
<td>6.4</td>
<td>6.4</td>
</tr>
<tr>
<td>Beach/lake/river/waterfront</td>
<td>6.7</td>
<td>6.5</td>
</tr>
<tr>
<td>Opportunities for outdoor/nature experiences</td>
<td>5.9</td>
<td>6.1</td>
</tr>
<tr>
<td>Attractions for the entire family</td>
<td>5.9</td>
<td>5.5</td>
</tr>
<tr>
<td>Historical sites</td>
<td>6.0</td>
<td>5.8</td>
</tr>
<tr>
<td>Festivals &amp; events</td>
<td>5.7</td>
<td>5.9</td>
</tr>
<tr>
<td>Museums/art exhibits/art galleries</td>
<td>5.5</td>
<td>5.9</td>
</tr>
<tr>
<td>Quality of shopping</td>
<td>5.2</td>
<td>6.1</td>
</tr>
<tr>
<td>Live theatre/performing arts/concerts</td>
<td>5.0</td>
<td>5.8</td>
</tr>
<tr>
<td>Nightlife (entertainment)</td>
<td>5.0</td>
<td>6.1</td>
</tr>
<tr>
<td>Availability of unique/luxury accommodations</td>
<td>4.6</td>
<td>6.8</td>
</tr>
<tr>
<td>Upscale atmosphere</td>
<td>4.5</td>
<td>6.1</td>
</tr>
<tr>
<td>Availability of gourmet dining</td>
<td>4.5</td>
<td>5.8</td>
</tr>
<tr>
<td>Gaming/Casino</td>
<td>4.3</td>
<td>6.1</td>
</tr>
<tr>
<td>Pro sports games</td>
<td>3.2</td>
<td>4.4</td>
</tr>
<tr>
<td>Golf facilities</td>
<td>3.1</td>
<td>4.7</td>
</tr>
</tbody>
</table>

(n=355)

Comparison Between Importance And Performance Of The Windsor Area
For Various AMENITIES — Among Ontario Residents

Average rating score on 10-point scale among total Southern Ontario residents

- Accommodations are reasonably-priced: Importance 8.3, Delivery 6.3
- Overall destination quality: Importance 7.8, Delivery 6.1
- Ease of getting from place to place: Importance 7.6, Delivery 6.2
- Great food and drink: Importance 7.3, Delivery 6.3
- Beach/lake/river/waterfront: Importance 6.8, Delivery 6.4
- Variety of restaurant experiences: Importance 6.7, Delivery 6.3
- Opportunities for outdoor/nature experiences: Importance 6.5, Delivery 6.3
- Attractions for the entire family: Importance 6.1, Delivery 6.1
- Quality of shopping: Importance 6.0, Delivery 5.9
- Festivals & events: Importance 6.0, Delivery 5.9
- Historical sites: Importance 5.7, Delivery 5.7
- Museums/art exhibits/art galleries: Importance 5.5, Delivery 5.6
- Availability of gourmet dining: Importance 5.0, Delivery 5.4
- Nightlife (entertainment): Importance 5.9, Delivery 5.2
- Live theatre/performing arts/concerts: Importance 5.4, Delivery 5.1
- Upscale atmosphere: Importance 5.3, Delivery 5.0
- Availability of unique/luxury accommodations: Importance 4.9, Delivery 5.7
- Gaming/casino: Importance 3.7, Delivery 6.8
- Pro sports games: Importance 3.1, Delivery 4.6
- Golf facilities: Importance 3.1, Delivery 5.3

(n=316)

Comparison Between Importance And Performance Of The Windsor Area For Various AMENITIES — Among Ontario Visitors

Average rating score on 10-point scale among residents of the Southern Ontario who have ever visited Windsor

- Accommodations are reasonably-priced: 6.6 (Importance), 6.6 (Delivery)
- Overall destination quality: 7.6 (Importance), 6.6 (Delivery)
- Ease of getting from place to place: 7.5 (Importance), 6.6 (Delivery)
- Great food and drink: 7.4 (Importance), 6.7 (Delivery)
- Beach/lake/river/waterfront: 6.9 (Importance), 6.7 (Delivery)
- Variety of restaurant experiences: 6.7 (Importance), 6.7 (Delivery)
- Opportunities for outdoor/nature experiences: 6.6 (Importance), 6.6 (Delivery)
- Attractions for the entire family: 6.3 (Importance), 6.3 (Delivery)
- Quality of shopping: 6.4 (Importance), 5.9 (Delivery)
- Festivals & events: 6.3 (Importance), 6.1 (Delivery)
- Historical sites: 6.0 (Importance), 6.0 (Delivery)
- Museums/art exhibits/art galleries: 5.9 (Importance), 5.9 (Delivery)
- Availability of gourmet dining: 6.3 (Importance), 6.3 (Delivery)
- Nightlife (entertainment): 6.3 (Importance), 6.3 (Delivery)
- Live theatre/performing arts/concerts: 5.7 (Importance), 5.7 (Delivery)
- Upscale atmosphere: 5.7 (Importance), 5.0 (Delivery)
- Availability of unique/luxury accommodations: 6.1 (Importance), 4.9 (Delivery)
- Gaming/casino: 7.3 (Importance), 3.9 (Delivery)
- Pro sports games: 4.9 (Importance), 3.3 (Delivery)
- Golf facilities: 5.7 (Importance), 3.2 (Delivery)

(n=188)

Reaction To Travel Concepts

When presented with preliminary Windsor travel concepts, there is evidence that Southern Ontarians are more likely to be drawn to a package that focuses on outdoor/nature experiences or culture, heritage and festivals than one oriented to gaming and the urban experience. While the latter cluster of activities may provide important support for visiting the region, it does not necessarily define what is fundamentally unique and different about the Windsor area, particularly when comparisons are made with the many large urban centres that are nearby. From this perspective, heritage and, in particular, the unique landscape elements and natural environment may be somewhat more compelling and capable of stimulating enthusiasm to visit.

Americans in the immediate region do not seem to have a strong collective preference for one concept over the others. In fact, the three perform quite similarly and generally have less motivational power than is evident among residents of Ontario. In keeping with the greater interest in gaming among Americans generally, the gaming/nightlife concept has a slight advantage with respect to stimulating a positive reaction, but it may also be somewhat polarizing to the extent that, on the other side of the spectrum, a larger number of travellers find it the least appealing of the options assessed.

These findings suggest that, on balance, it would make sense for Windsor to focus more attention on what is unique about the area in the realm of nature and/or heritage. This would balance the existing (and potentially) polarizing power of the Casino and position the diversity of the entire region more effectively as a means of drawing a wider spectrum of travellers from both Canada and the US. This is not to say, however, that the Casino and urban nightlife should be ignored. To the contrary, they have considerable significance as supports to a broad travel offering stimulating the fundamental emotive drivers of diversity, excitement, fun and enjoyment for a wide audience.
Interest In Windsor Tourism Concepts

Percent of North/Central US and Southern Ontario residents

<table>
<thead>
<tr>
<th>Gaming/Entertainment/Dining</th>
<th>USA</th>
<th>Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will Definitely Visit</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Will Probably Visit</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Neutral</td>
<td>42%</td>
<td>39%</td>
</tr>
<tr>
<td>Will Probably Not Visit</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>Will Definitely Not Visit</td>
<td>8%</td>
<td>13%</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Outdoor Experiences</th>
<th>USA</th>
<th>Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will Definitely Visit</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Will Probably Visit</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Neutral</td>
<td>47%</td>
<td>37%</td>
</tr>
<tr>
<td>Will Probably Not Visit</td>
<td>19%</td>
<td>30%</td>
</tr>
<tr>
<td>Will Definitely Not Visit</td>
<td>9%</td>
<td>14%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Culture/Heritage/Festivals</th>
<th>USA</th>
<th>Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will Definitely Visit</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Will Probably Visit</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Neutral</td>
<td>49%</td>
<td>37%</td>
</tr>
<tr>
<td>Will Probably Not Visit</td>
<td>21%</td>
<td>29%</td>
</tr>
<tr>
<td>Will Definitely Not Visit</td>
<td>6%</td>
<td>14%</td>
</tr>
</tbody>
</table>

(USA: n=1,308); (Ontario: n=462)


Ranking of Windsor Travel Concepts

Percent of North/Central US and Southern Ontario travellers

| Outdoor Experiences | 26% First | 21% Second | 23% Third |
| Culture / Heritage / Festival | 21% First | 28% Second | 19% Third |
| Gaming / Entertainment / Dining | 29% First | 14% Second | 30% Third |

External Sources of Resistance

The most recent wave of Ad and Brand tracking conducted in September of 2007 identified a number of impediments to choosing Ontario as a destination among travellers in Detroit and Cleveland - US urban source markets of particular significance to the Windsor region. Almost one-third of travellers in these cities pointed to the existence of significant barriers to the selection of Ontario. Persistent misperceptions concerning passport requirements were prominent among the issues identified, likely aligned with long-standing concerns about border crossing difficulties, generally. Also prominent among the factors mentioned were cost concerns undoubtedly related to gasoline prices, US economic fortunes and the strong Canadian dollar. When linked to vagueness about Windsor’s tourism offering, these cost issues undoubtedly bring value-for-the-money into question.

These pressures are not directly related to the tourism product or supportive marketing programs, but could significantly constrain the industry’s growth potential nonetheless. The existence of these impeding external forces must, therefore, be taken into account when assessing the effectiveness of communications and tourism marketing programs. The same is true within Ontario itself, where the strong Canadian dollar is likely making it increasingly difficult for domestic travellers to resist tourism opportunities in the US.

Existence Of Specific Issues/Concerns Related to Ontario Travel

Percent of pleasure travellers in US Near Markets

<table>
<thead>
<tr>
<th>Issue</th>
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<tr>
<td>Passport/ID required</td>
<td>60%</td>
</tr>
<tr>
<td>Net Price</td>
<td>26%</td>
</tr>
<tr>
<td>Safety/security/crime</td>
<td>7%</td>
</tr>
</tbody>
</table>

Recommendations

Nature of the Problem

The Essex Region’s current position in the marketplace can be described as one of vulnerability. The region is dependent on a fairly localized market and a stream of same-day visitors from the US. It does not maintain a strong image as a destination warranting an overnight stay and, perhaps, tends to be seen more as an area of purely local recreational interest, or as a gateway elsewhere, rather than a legitimate destination for an extended stay.

As a consequence of this soft position, Windsor-Essex has been hit quite hard by the recent downturn in US tourism traffic. Moreover, it has not only experienced more significant losses than neighbouring or analogous regions, but has also had considerably less success than those regions at replacing lost US volume from domestic sources. In fact, among Canadians, one could argue that Windsor-Essex remains underdeveloped as a tourism region and has difficulty reaching out to the large population agglomeration in the central part of the province.

At the same time, there is compelling evidence that the region offers significant growth opportunity. Windsor-Essex’s tourism offering is, in reality, quite diverse and in many respects uniquely differentiated by climate, geography, history and heritage. Findings suggest that many elements of the offering could conceivably resonate quite strongly with large segments of the available travel market in the nearby regions of the US and within Ontario itself. The question is, how can this pool of latent interest be tapped, and how can the barriers to realizing this potential be removed or reduced?

Before embarking on this discussion, it should be pointed out that external impediments exist that can be ameliorated only through large-scale efforts that go well beyond anything particular to Windsor-Essex. For instance, while Americans continue to travel in large numbers, their affinity for Ontario (and Canada) is not strong and apparently easily affected by issues such as border crossing concerns and gasoline prices. They are bypassing Ontario more often in favour of familiar domestic destinations on the one hand and iconic or exotic foreign destinations on the other. The reasons for this aren’t specific to Windsor-Essex, but because of the region’s particularly soft position in the marketplace, may be more significantly affected than other Ontario destinations. It is this disadvantage that the region must overcome, and one can point to a number of inhibiting deficiencies that could be responsive to destination-specific marketing solutions.

At heart, Windsor-Essex’s unique issues stem from limited knowledge of the region in either Ontario or the US and, beyond a few high-profile attractions, little appreciation of the depth and diversity of the tourism offering. It is very likely that few potential visitors see Windsor-Essex as an integrated travel region at all, but tend to focus on individual activities or attractions rather than the “basket” of experiences available to them. This leaves the region vulnerable to
competitive destinations, and open to being pigeonholed by narrowness of perspective and stereotypical negative associations stemming from its industrial heritage.

This has implications not only with respect to drawing overnight traffic but also in terms of the profile of visitors the Essex Region is able to attract. At the present time, there is a lack of perceived all-family suitability and possible weaknesses among youth in the US and both the senior and more affluent segments of the Canadian traveller population.

Possible Solutions

It is beyond the scope of this particular project to put forward definitive solutions to the challenges faced by the Essex Region’s tourism industry. However, a number of conjectural recommendations can be presented for possible consideration and further exploration.

The Essex Region needs to position itself as a single holistic tourism area capable of delivering a range of unique travel experiences. It is the synergy and interconnectedness of this diversity of experience that offers the potential to lift the region to a new plane and more fully realize its potential. To some extent, this means achieving better balance by placing some emphasis on attractions and activities in the areas of nature, historical/cultural experiences and the performing arts. It is also important to demonstrate what makes Windsor-Essex unique in terms of geography and heritage. The consumer should be encouraged to see Windsor as an anchor point for a wide-ranging experience capable of fulfilling expectations of fun, excitement and relaxation, rather than primarily a gateway to other locales.

In this vein, efforts should be made to integrate the Casino more effectively into the fabric of Windsor-Essex by presenting and packaging it with complementary amenities and attractions not only within Windsor itself, but also throughout the region. In this way, the power of the Casino would be enhanced and felt more widely across the region’s tourism industry. At the same time, this approach would also provide opportunities to differentiate Windsor’s casino experience from casino and gaming offerings available elsewhere, including those developed in Michigan, thereby insulating Windsor to some degree and providing a foundation for growth in this sector. Possibilities to more effectively target an upscale traveller might be enhanced as well.

A discussion of packaging can not be separated from targeting considerations, but for practical reasons product packaging possibilities must be considered first. This means assessing the inventory of product in the Essex Region, determining where quality gaps exist and where upgrades are possible. It also involves coming to terms with servicing capacity. Once this is accomplished, consideration can be given to developing effective packages that are aligned with traveller desires and behaviour and establishing the consumer psychographic/lifestage targets that are congruent with the offer in each case. It is also at this stage that pricing strategies and desired value impressions can be brought into play, for it is quite clear that
pricing, affordability and value must be managed with some dexterity in the context of consumer targeting for Windsor-Essex to achieve optimal lift.

With regard to specific packaging and product integration opportunities, preliminary efforts taken in this direction by the Windsor-Essex-Pelee CVB seem to be sound and consistent with traveller needs. Further exploration of possible linkages are required to determine the degree of synergy inherent in, for instance, integration of the Casino with the wine region and the performing arts, or linking nature and botanical attractions to history and heritage. One might also consider the possibility of leveraging some of Detroit’s urban and sports attractions as a means of drawing more domestic travellers to Windsor-Essex, assuming that the Canadian side of the border is carefully positioned as the anchor point for a wider tourism experience. As has been demonstrated, there are some specific audience profiling characteristics that might be useful in helping target these activity interest clusters through media.

It is important, as well, to come to terms with possibilities that may be hidden by a preoccupation with traveller behaviour. Taking a purely consumer-centric view, it is necessary to understand where pleasure traveller interests lie, unencumbered by the restrictions of geography or inventory at specific destinations. This could lead to the discovery of new possibilities for meeting traveller need and new ways of linking and packaging tourism offerings, as well as the establishment of new priorities for product development. Consideration might be given to aligning the Windsor Casino, festivals or the Essex wine region to attractions or events that are somewhat different than those suggested by retrospective observation of behaviour. This, in turn, could result in the fashioning of new product configurations and concepts that optimize competitive advantage.

Pursuing this train of thought, there is evidence to suggest that, while existing activity clusters might constitute logical focal points for packaging and product development directed to a broad audience, they should not be developed and marketed in complete isolation. Certain elements from one package could be alluded to in others and provide impetus for return and repeated visitation. For instance, a trip that primarily involves an initial exploration of the region’s museums, historic sites and landscape (gardens), could be complemented with elements of nightlife or fine dining – the latter might not only satisfy a desire for diversity within the travel party but provide strong motivation for further exploration of the area and the isolation of focal points for personal enjoyment on subsequent trips.

At the same time, the possibility exists to treat certain types of activities as sole focal points for travel to the region targeted to specific interest groups of enthusiasts. Assuming that product can be assembled that meets the exacting standards of such enthusiasts – golf and wildlife viewing (especially bird watching) represent possible niche opportunities of this type for Windsor-Essex. In such cases, geographic targeting is less important than promotion in vertical media (magazines geared to specific interest groups, etc.) and, possibly, online social media.

Apart from what this research has uncovered, there may also exist certain activity possibilities that are unique to the region, but remain unknown and largely undeveloped. One example could be the extensive salt mining operation in the region, particularly when linked to the
distinctive geological characteristics upon which it is founded and this industry’s long history in
the area. Results from TAMS 2000 suggest that these forms of industrial/economic tourism
activities are likely to stimulate greater interest in visiting Ontario among approximately 10% of
American and Canadian pleasure travellers.

Although packaging and effective positioning of the region’s unique strengths are certainly
central to a growth strategy, sight should not be lost of the need to reinforce a positive sense of
place in a more pedestrian, experiential sense as well. Visitors must feel good about simply
being at the destination and experiencing the local ambiance, sights and opportunities to mix
with the resident population. While shopping and sightseeing may not be key drivers of
destination choice, they are virtually universal tourism activities and play a large part in defining
the experience and establish interest in returning. It is, therefore, of some relevance to identify
potential deficiencies in both the urban and rural spaces that Essex County and Windsor, in
particular, make available to visitors. Significant gaps may require substantial resources for
infrastructure improvement, or at least prompt a realization that their continued existence will
place limits on tourism growth potential.

Finally it should be reiterated that the Essex Region’s positioning must be proclaimed with a
louder voice in order to reach the target audience in either Canada or the US. The region
currently suffers from a lack of profile. To overcome this problem two conditions must be
satisfied – a clear positioning platform and brand strategy must be developed and adhered to
long-term, and investment must be made in both the product (so that experience matches the
promise) and in marketing/communications (so that the intended audience is made aware).
This will inevitably require a budget of some size, and commitment to a long-term strategy.
APPENDIX

Descriptions of the Studies Involved in the Analysis

Travel Concepts Tested in the Windsor-Essex Positioning Study

Detailed Description of the Conversion Model™
The Studies Involved in the Analysis

Travel Intentions Study

The Ontario Ministry of Tourism and recreation initiated an ongoing quantitative tracking study designed to measure US and Canadian travel intentions to destinations in Ontario. TNS Canadian Facts was commissioned to conduct the research via our central location telephone facilities located across Canada. Findings from the research are disseminated to key agencies and stakeholders throughout the province.

In order to meet the research objectives, 5,782 computer assisted telephone (CATI) interviews are targeted among US (3,882 completions) and Canadian (1,900 completions) households each quarter. In 2006, the study was converted to one wave per year, conducted in February.

In June 2005 TNS conducted a parallel online study to identify sources of variance between Online and Telephone methodologies in tourism research. The insights attained through this pioneering study have since been invaluable in informing the design of tourism studies combining internet and telephone methodologies, particularly in developing sample frame and weighting schemata.

Ontario Tourism Ad and Brand Tracking

The Ontario Tourism Marketing Partnership Corporation (OTMPC) manages a tracking program to measure the impact of its advertising efforts domestically and in the US. The research is intended to provide consumer intelligence and feedback to assist with both directing the marketing/advertising program and measuring its effectiveness.

TNS Canadian Facts has been commissioned to conduct this research program since 2004. Since that time, ten waves of tracking have been commissioned to measure the impact of advertising campaigns. Each wave of research is implemented in two phases as outlined below:

- Phase I is conducted immediately after the close of the campaign and comprises the initial ad assessment, as well as a brand assessment of Ontario as travel destination; and,

- Phase II of the assessment consists of returning to the sample immediately after the close of the travel season to determine the behavioural outcomes of campaign awareness and appreciation. ROI and conversion estimates are the primary outputs from this phase.

The research for each phase is conducted online using the TNS panels in Canada and the US. The study targets 2,220 completions among travellers (past two years or next 12 months) for each wave of tracking. Research is confined to Ontario, Montreal and US Tier 1 Near Markets.
Windsor-Essex Positioning and Destination Development Study

TNS Canadian Facts was commissioned by the Windsor, Essex County and Pelee Island Convention and Visitors Bureau to develop a destination development plan for the Region.

Following a review of historic data, a two-phased research plan was implemented.

The first phase, consisted of a series of focus groups conducted in selected Canadian and U.S. cities. The focus groups explored both short get-aways (1-3 nights) and longer trips (4+ nights away from home), awareness and perceptions of the City of Windsor and its environs, and assessed a series of possible tourism concepts. Building on the findings of the qualitative research, the second phase involved quantitative research among TNS online panel members living within southwestern Ontario and specific U.S. markets within a 5-hour drive of Windsor.

462 online interviews were conducted in southwestern Ontario, including 158 in the GTA. An additional 131 interviews were conducted among recent immigrants in the GTA. In the U.S., 1,308 interviews were conducted across 10 DMAs, including Chicago, Indianapolis, Pittsburgh, Cleveland, Toledo, Buffalo, Detroit, Flint, Grand Rapids and Lansing. All respondents were household travel decision-makers.

The online research quantified travel behaviour (both short get-aways and longer trips) assessed the awareness and perceptions of Windsor and environs and evaluated three possible tourism concepts. The research provided an overall assessment of the strengths and weaknesses of the region’s tourism image and existing infrastructure and provided direction for future repositioning work.

The Travel Activities And Motivations Survey (TAMS)

Tourism is one of Canada's major industries, with both Canadian and US residents representing the greatest source of tourism revenue. In order to develop marketing strategies and travel products to attract visitors to Canadian destinations, a large-scale travel survey, known as the Travel Activities and Motivations Study (TAMS), was conducted in Canada and the US approximately four years ago. Since that time, TAMS has proven to be of considerable value in that it provides a comprehensive assessment of travel behaviour and motivators of the target Canadian and US markets.

To offer continuity with and simultaneously build upon TAMS, an association of government ministries, organizations and tourism/hospitality groups across Canada (the Partnership) have collaborated in order to conduct a second wave of TAMS research (TAMS ‘06). As such, TNS Canadian Facts was commissioned to conduct the travel survey in the US and Statistics Canada carried out the work in Canada.

All fieldwork was conducted in the first six months of 2006. In total, of 60,649 fully completed questionnaires were achieved in the US using a self-completion mail back approach with the
TNS US household panel serving as the sample source. In Canada a mixed telephone/mail back follow-up approach was adopted, with approximately 54,000 completions achieved on the short initial telephone questionnaire, and 24,000 on the detailed mail back follow-up.

**Ontario TAMS Return-To-Sample Study**

In order to supplement the TAMS US database for Ontario, TNS Canadian Facts was commissioned by the OTMPC to conduct a follow-up survey of TAMS ’06 American participants. A mail self-completion methodology was adopted and the sample disproportionately assigned to Ontario visitors and non-visitors, with the objective of getting a similar number of completions across the two groups. In addition, the non-visitor sample was matched to the geographic profile of visitors. Approximately 3,800 completed questionnaires were ultimately accepted into the final database – approximately 1,600 among visitors and 2,200 among non-visitors to the province.

The questionnaire provided extensive detail on Ontario travel behaviour, perceptions of the province relative to its competitors and activities engaged in while traveling in the province. The original TAMS ’06 database was appended to each record, providing a very rich analytical data source.

The Return-To-Sample Survey was conducted in the summer of 2007.

**International Travel Survey (ITS)**

The survey is currently administered as part of the International Travel Survey Program (ITS). The ITS has been conducted by Statistics Canada since the 1920s to meet the requirements of the Canadian System of National Accounts (Balance of Payments (BOP)). Through the years, the need for detailed characteristics of travellers for market research and industry planning was gradually incorporated in the survey. Today, the ITS provides a full range of statistics on the volume of international travellers and detailed characteristics of their trips such as expenditures, activities, places visited and length of stay.

The targeted population for the Frontier Counts survey is all international travellers entering Canada either by air, sea or land. The travellers are distributed into categories of flows which are, Canadian residents returning to Canada from the United States, Canadian residents returning to Canada from countries other than the U.S., United States residents entering Canada, Residents of countries other than U.S. entering Canada and finally "Other" travellers which consist of foreign and resident crew members, diplomats, military personnel, immigrants and former residents.
Depending on the mode of entry into Canada, the frontier counts correspond either to a complete census or is done on a sample basis (selection of Customs Declaration cards for the air travellers).

The frontier count is done using the information collected about the entrants into Canada recorded on forms by CBSA officials. Each port of entry sends in its administrative data according to an understanding signed by Statistics Canada and CBSA.

At all ports of entry across Canada, a count is done to determine the number of travellers by selected categories, by type of transportation, as well as the number of vehicles (cars, trucks, motorcycles, snowmobiles and bicycles) in the case of highway and ferry points.

The information collected in the 18 largest international airports is recorded on Custom Declaration cards (E-311). The information about the number of travellers, country of residence and the type of entry is used to estimate the frontier counts by type of travellers and airport. The data capture is done on a sample basis or on a census basis, depending on the travellers' type and the size of the airport. For the other airports, administrative data recorded on E-63 forms, which correspond to a census, are obtained to produce estimates. The E-63 forms collect information on the number of passengers and crewmembers of commercial and private crafts entering Canada.

CANPASS, a telephone reporting system, registers the number of travellers entering Canada by private plane or boat. The system also allows in certain ports of entry, the counts of pre-authorized travellers entering by cars that own a special permit without having to interact with a CBSA agent. Estimates are produced to determine the number of travellers for each car registered with CANPASS.

For the other land ports of entry, the information is collected on a census basis. The counts are recorded in different ways, either on E-62 Entry Tallies, E-62B for bus, E-62T for trucks or by the Primary Automated Lookout System (PALS). The number of travellers, country of residence, transportation mode and length of stay are obtained from these forms and are used for the estimation of frontier counts.
The Canadian (Domestic) Travel Survey (CTS)

The Canadian Travel Survey (CTS) is conducted by Statistics Canada on behalf of the Canadian Tourism Commission and the ten provincial governments. The CTS, is conducted as a supplement to Statistics Canada's monthly Labour Force Survey. Information is collected on the following topics.

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<th>Traveller Profiles</th>
<th>Information About Trips</th>
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<td>marital status;</td>
<td>origin;</td>
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<tr>
<td></td>
<td>activities;</td>
</tr>
<tr>
<td></td>
<td>travel expenditures</td>
</tr>
</tbody>
</table>
OUTDOOR EXPERIENCES

- Parks and gardens, including 5 km of parkland along Windsor’s spectacular waterfront
- Odette Sculpture Park – a delightful collection of sculpture from world-renowned artists on display along the waterfront walkways.
- A lush Carolinian forest oasis at the southern tip of Canada, Point Pelee National Park is considered one of the world’s birding “hot-spots” with nature trails and a magnificent boardwalk.
- Pelee Island, accessible by ferry – sandy beaches, a magnificent winery, excellent fishing and accommodations.
- Kayaking and canoeing
- Hiking and cycling, including the 50 km (30 mile) Chrysler Canada Greenway nature trail
- Boating and Fishing
- Miles of sunny public beaches
- Nineteen conservation areas with rare Carolinian forests
- Golf – Many public course, offering a full range of services, from challenging championship courses to executive courses.
GAMING/ENTERTAINMENT/DINING

- Tax-free winnings in Canada
- Vegas-style gaming, open 7 days a week, 24 hours a day
- 100,000 sq. ft of gaming – including more than 3,000 slot machines, poker, craps, roulette
- Luxury accommodations at Casino Windsor's Four-diamond hotel (AAA 4-diamond award)
- Sports enthusiast can now bet on four different sports games in Legends Sports Bar
- The region's only smoke-free casino
- Gaming also at Windsor Raceway, harness racing and casino slots.
- Windsor Symphony, live theatre, active club scene and nightlife, Jazz, blues clubs
- More than 400 restaurants, sample authentic cuisine from virtually anywhere in the world.
- Southwestern Ontario's wine route, with more than a dozen wineries, award-winning wines, vineyard tours and tastings
- All venues are smoke free
- Via Italia Windsor's Little Italy - 16+ family-owned restaurants in 1 mile, authentic Italian cuisine, intimate cafés, gelato shops (gelateria), boutique shops
- Canadian Club Brand Center – tours, tastings from the home of Canadian whiskey
CULTURE/HERITAGE/FESTIVALS

- Fort Malden, step back in time to the War of 1812 with guided tours of the fort, barracks and interpretative centre.
- Art Gallery of Windsor - The Gallery's collection is made up of over 3,000 works of art
- African-Canadian Heritage Tour: Between 1840 and 1860 more than 30,000 American slaves came secretly to Canada and freedom. Follow this memorable heritage tour that takes you along the "Underground Railroad" to re-live the plight of those who sought freedom under the North Star.
- Art in the Park - Ontario's largest outdoor summer art and craft show and sale with over 300 exhibitors
- Carousel of the Nations - For more than 30 years we've hosted the biggest international party of the year, celebrating the rich cultural experiences of the world in food, music, costume and dance.
- Target Fireworks Display - First held in 1959, today, the Target Fireworks is the centerpiece of the mutual celebration of Canada Day and Independence Day. More than one million spectators line both sides of the Detroit River. Three barges are loaded with more than 10,000 fireworks shells for this celebration of international friendship, and one of the biggest fireworks displays in North America.
- Festival Epicure - 22 top restaurants and food specialties, wine, beer and spirits and non-stop music
- Windsor Bluesfest International; Windsor International Busker Festival; Leamington Tomato Festival; Tecumseh Corn Festival; Harrow Fair; Shores of Erie International Wine Festival – everything from country fairs to music festivals.
Conversion Model™

Conversion Model™ segmentation is a powerful tool within the context of tourism consumer research. This model adds value to the data analysis by providing meaningful consumer segments based on their psychological attachment to Canada and competing destinations for vacations, and their openness to visiting Canada and competing destinations.

Exclusive to TNS Canadian Facts, Conversion Model™ is the leading model for understanding customer commitment and customer acquisition. Used by 80% of the top brands in the world for developing market share acquisition and customer-based protection strategies, over 6,000 Conversion Model™ studies have been conducted since it was first developed. Within the Canadian tourism sector, Conversion Model™ has been used by a number of clients, including the CTC. It was also used in the 2006 Travel Activities and Motivation Survey (TAMS2).

Its principal merits lie in the ability of the model to obtain measures of attachment and openness to Canada as a destination for vacations through subtle questioning of future intent, rather than directly. By contrast, although widely used, “intender” questioning typically produces overstatement, which, if not validated in market, can distort market growth expectations.

Conversion Model™ questions and analysis can be used as a primary method of identifying and describing segments of the market, which are open to taking extended vacations within Canada or competing destinations.

We need to understand which long-haul travellers are truly open to Canada and which ones are not, and what drives commitment to Canada and competing destinations. How many travellers are available and open to the idea of a vacation to Canadian destinations? Conversion Model™ will effectively quantify these issues for each group leading to an accurate portrayal of the size of committed and uncommitted market segments. This will allow planning to take place using reasonable estimates of market potential, and with key drivers of commitment defined and means of attracting potential visitors identified.
The segments tell us how people feel about vacation destinations.

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entrenched Visitors</strong></td>
<td>Strongly committed to taking vacations in Canada and unlikely to reduce their interest in favour of other destinations in the long term.</td>
</tr>
<tr>
<td><strong>Average Visitors</strong></td>
<td>Committed to return visitation to Canada, but not immovable. Fairly committed at the moment and provide positive word-of-mouth, but could abandon Canada in favour of the competition long term.</td>
</tr>
<tr>
<td><strong>Shallow Visitors</strong></td>
<td>Uncommitted to taking vacations in Canada and could switch their allegiances. Some are already considering other destinations quite seriously rather than the idea of returning to any destinations within Canada during the foreseeable future.</td>
</tr>
<tr>
<td><strong>Convertible Visitors</strong></td>
<td>Uncommitted to taking vacations in Canada and are most likely to defect to other destinations rather than return.</td>
</tr>
<tr>
<td><strong>Available Non-Visitors</strong></td>
<td>Not taking vacations in Canada but are the most likely to do so in the short term. Have very real interest in Canada on a fundamental psychological level.</td>
</tr>
<tr>
<td><strong>Ambivalent Non-Visitors</strong></td>
<td>Not taking vacations in Canada but are as attracted as much to Canada as to competing destinations.</td>
</tr>
<tr>
<td><strong>Weakly unavailable Non-Visitors</strong></td>
<td>Not taking vacations in Canada, but may be available at some point, though not in the near future.</td>
</tr>
<tr>
<td><strong>Strongly unavailable Non-Visitors</strong></td>
<td>Not vacationing in Canada and, are not available; they strongly prefer other destinations for their vacations.</td>
</tr>
</tbody>
</table>