

2001

Travel Activities & Motivation Survey: Interest in Agro-Tourism

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Travel Activities & Motivation Survey: TAMS Profile Report Prepared By

- Lang Research Inc. on behalf of
 - Atlantic Tourism Partnership
 - Canadian Tourism Commission
 - Department of Canadian Heritage
 - Greater Toronto Hotel Association
 - Manitoba Ministry of Industry, Trade & Tourism
 - Northern Ontario Heritage Fund
 - Ontario Casino Corporation
 - Ontario Ministry of Agriculture, Food and Rural Affairs
 - Ontario Tourism, Culture & Recreation
 - Ontario Tourism Marketing Partnership
 - Parks Canada
 - Saskatchewan Tourism Authority
 - Tourism B.C.
 - Tourism Toronto
 - Yukon Government Department of Tourism

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Overall, 7.3 % of the travelers have participated in two or more travel activities associated with agro-tourism (i.e., gone to a farmer's fair or market with traveling; visited a pick-your-own farm or participating in a harvest; staying at a working farm or guest ranch). During the past two years, 33 % of travelers have participated in at least one of these three agro-tourism activities while traveling in the last two years. There was no meaningful difference between Canadians and Americans in the likelihood of participation in agro-tourism while traveling.

Female travelers, and especially female Canadian travelers, were slightly more likely to have participated in agro-tourism activities while traveling during the past two years than were males. Participation in agro-tourism also increased as the income of the household increased, but was unrelated to the level of education of the traveler. Overall, Affluent Families and Affluent Mature and Senior Couples represent the prime target markets for agro-tourism.

Those who travel domestically were more likely to participate in agro-tourism while on a trip than those who travel internationally. While the TAMS database is inappropriate to determine what types of trips were taken when the traveler participated in agro-tourism activities, the data suggests that such activities are more likely to be participated in during shorter-haul domestic vacation, than international or longer haul trips.

Those with an interest in agro-tourism were more likely to have sought out vacation experiences that allow exploration and learning. They were also more likely to participate in outdoor activities with a nature theme such as hunting & fishing, canoeing & kayaking and hiking & biking and to have visited zoos, aquariums and planetariums. They were also more likely to have exhibited increased interest in new tourism attractions with a nature theme such as an overnight train ride through natural terrain, a games park or games preserve with wild life viewing areas, wine tours, forestry and mining tours and a world class fishing tournament. Those with a high interest in agro-tourism were also more likely to have sought out French Canadian cultural experiences and opportunities to learn through visits to aboriginal attractions and heritage attractions. Overall, those with an interest in agro-tourism are likely to be responsive to opportunities to learn and explore nature or different cultures.

In both Canada and the United States, travelers who exhibited a high interest in agro-tourism were more likely to have a more favourable impression of Canada and Ontario than those who were not interested in such activities. This suggests that these markets may be more predisposed to consider Canada and Ontario as a travel destination.



An association of Canadian Tourism Ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey (TAMS)*, represents the comprehensive assessment of travel behavior and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. The TAMS database consisted of a telephone survey and a self-completed mail-back survey. The survey was conducted in Canada and the United States between September 27, 1999 to April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. Persons participating in the telephone survey who had traveled in the past two years or expressed interest in travel in the next two years were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

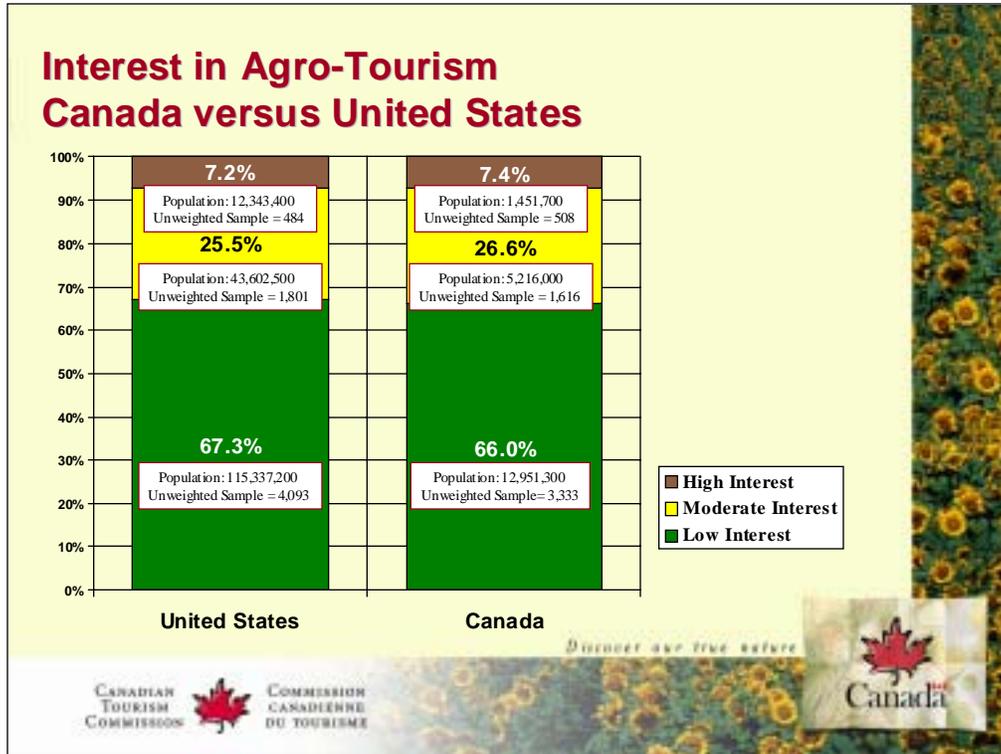
This current study examines interest in agricultural tourism or “agro-tourism” (i.e., visiting a farmers’ fair or market, visiting a pick-your-own farm or participating in a harvest, staying at a working farm or guest ranch) while traveling during the past two years. The database was used to identify sectors of the market that exhibit a moderate interest or high interest in agro-tourism. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations and impressions of Canada and Ontario relative to the interest shown in agro-tourism while traveling. This report also provides an overall market potential to identify those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada’s and Ontario’s agro-tourism activities.



The TAMS Mailback survey contained three items specifically associated with agro-tourism while traveling that were used to construct an overall Agro-Tourism Interest index. These were as follows:

- Whether the respondent had visited a farmers' fair or market while traveling in the past 2 years.
- Whether the respondent had visited a pick-your-own farm or participated in a harvest while traveling in the past 2 years.
- Whether the respondent has stayed at a working farm or guest ranch while traveling in the past 2 years

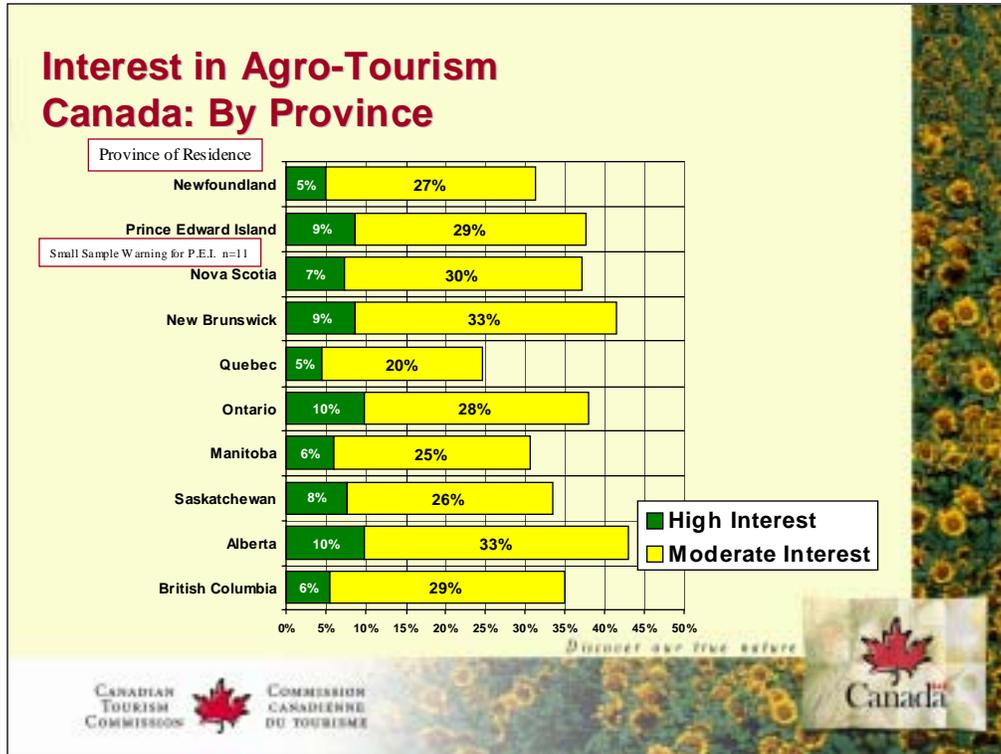
Those who had done none of these activities during the past two years were considered to exhibit a "low interest" in agro-tourism while traveling. Those who had participated in one of the three activities were considered to exhibit a "moderate interest" and those who had participated in two or all three activities were classified as manifesting a "high interest" in agro-tourism.



Based on Participation in Agricultural-Related Activities While Traveling in the Past 2 Years

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

There was no difference in the level of interest exhibited in agro-tourism between Americans and Canadians. Overall, about 7.3 % of the adult travelers exhibit a high interest in agro-tourism travel activities while about 33 % in both countries had participated in at least one of the three agricultural-related activities while on a trip during the past two years.

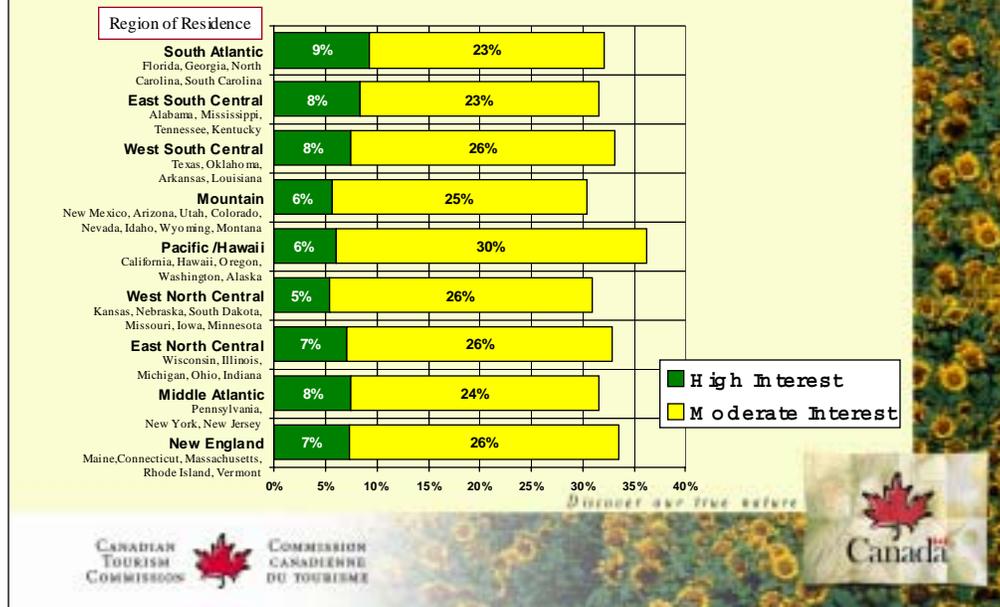


Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

Among Canadians, interest in agro-tourism was highest in Alberta and New Brunswick. There is also above average interest in agro-tourism in P.E.I (based on a very small sample), Nova Scotia and Ontario. Those from Quebec were the least likely to exhibit an interest in agro-tourism.

Interest in Agro-Tourism United States: By Region

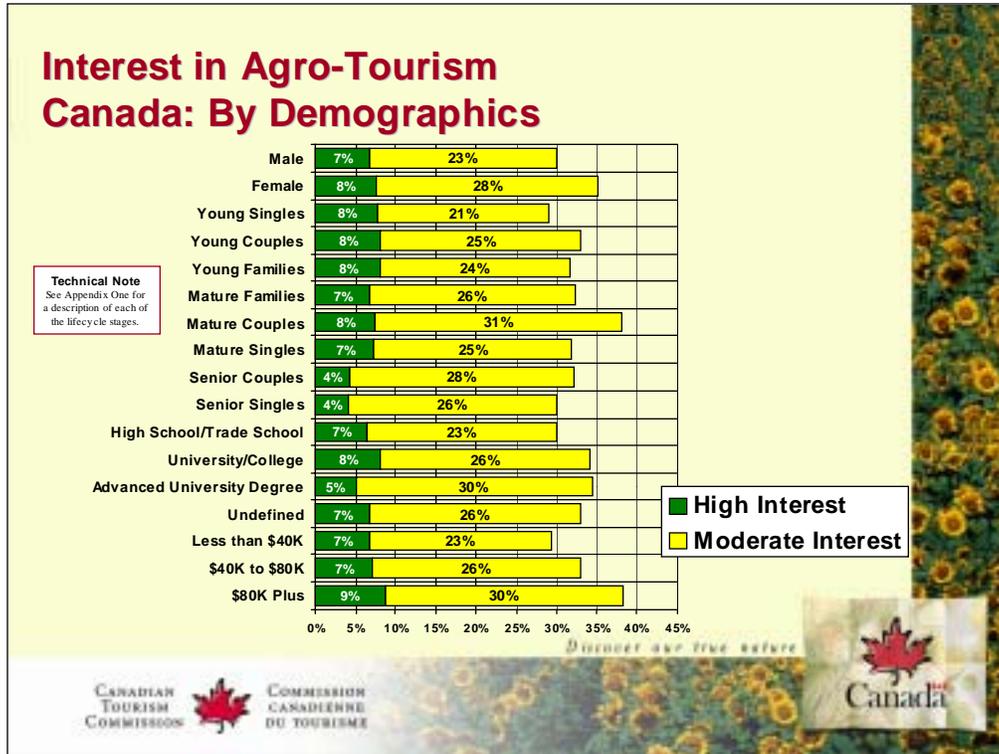


Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

The level of interest manifested in agro-tourism was relatively uniform across the regions of the United States. However, the incidence of participation in at least one agro-tourism activity during the past two years was slightly higher in the Pacific/Hawaii Region than in other regions of the United States.

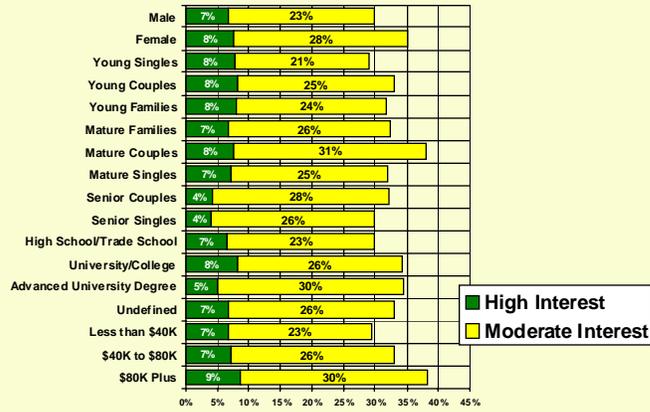
Interest in Agro-Tourism Canada: By Demographics



Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years
Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

In Canada, females were 51 % more likely than males to exhibit a high interest in agro-tourism and 23 % more likely to be moderately interested in such activities. The level of interest on agro-tourism was unrelated to the education level of the respondent, but increased as the household income increased. Overall, the prime markets for agro-tourism are moderate to high income families and mature/senior couples.

Interest in Agro-Tourism United States: By Demographics



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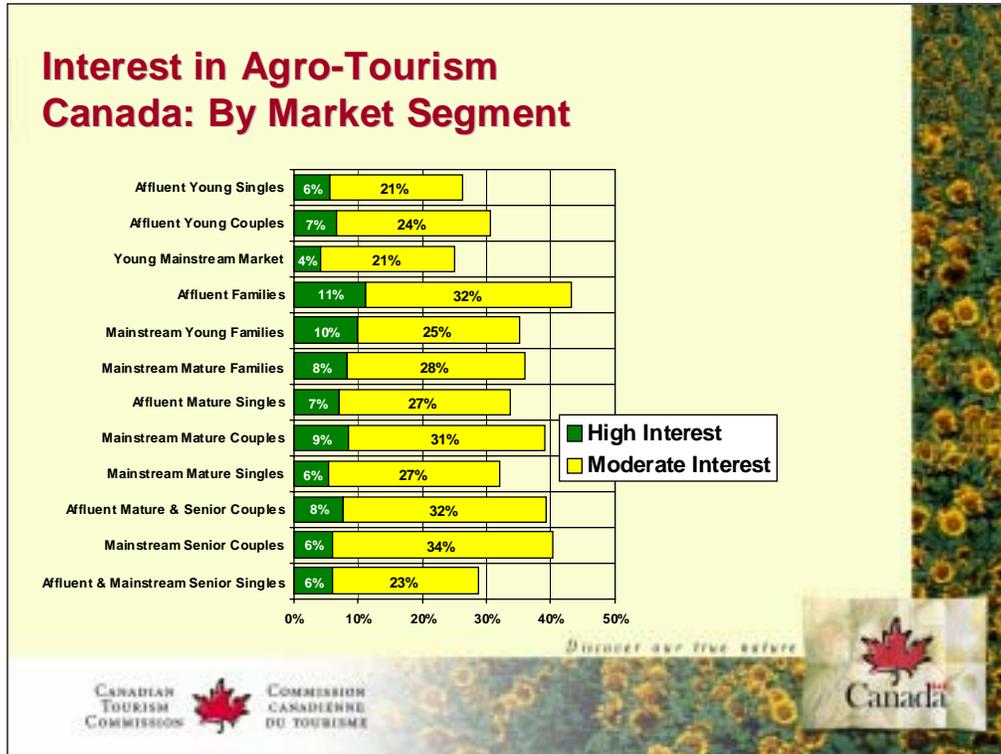
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Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years
Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

There was less variation in the interest in agro-tourism across the various sectors of the market in the United States relative to Canada. However, mature couples were more likely to exhibit an interest in agro-tourism while traveling than other sectors. The level of interest in agro-tourism also increased as the household income increased. Overall, the prime target market for agro-tourism in the United States are moderately to high income mature couples.



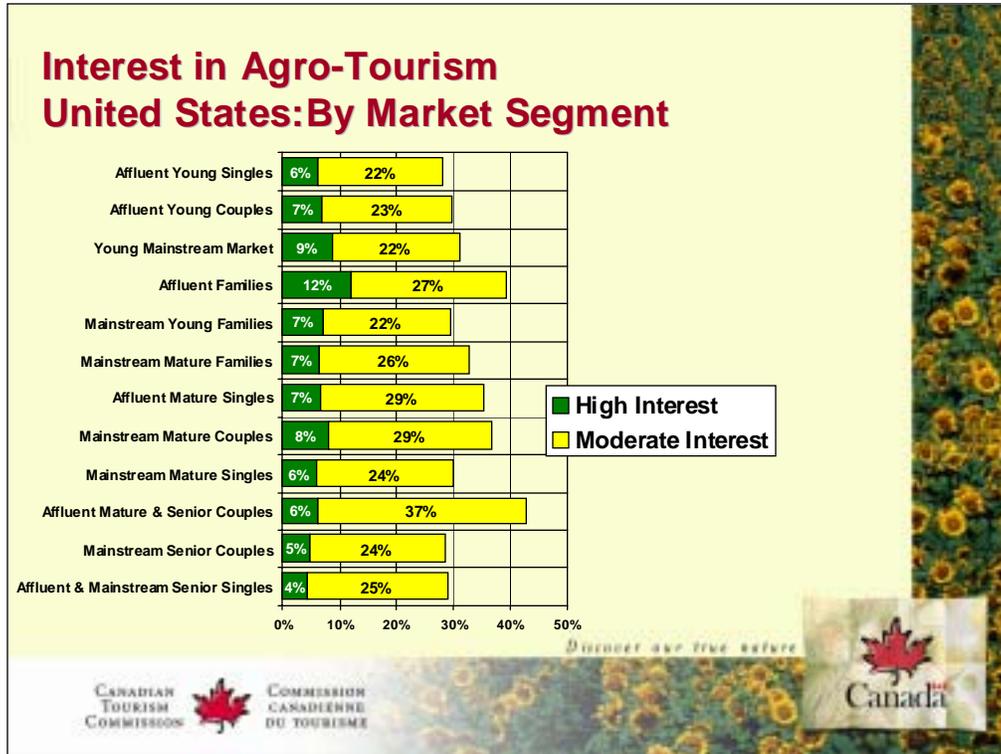
Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

In terms of the market segments (see technical notes) in Canada, interest in agro-tourism was highest among Affluent Families. Mainstream Mature Couples and Affluent Mature and Senior Couples also exhibited an above average participation rate in agro-tourism while traveling during the past two years. These are the prime markets for such tourism activities.

Technical Note

The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.



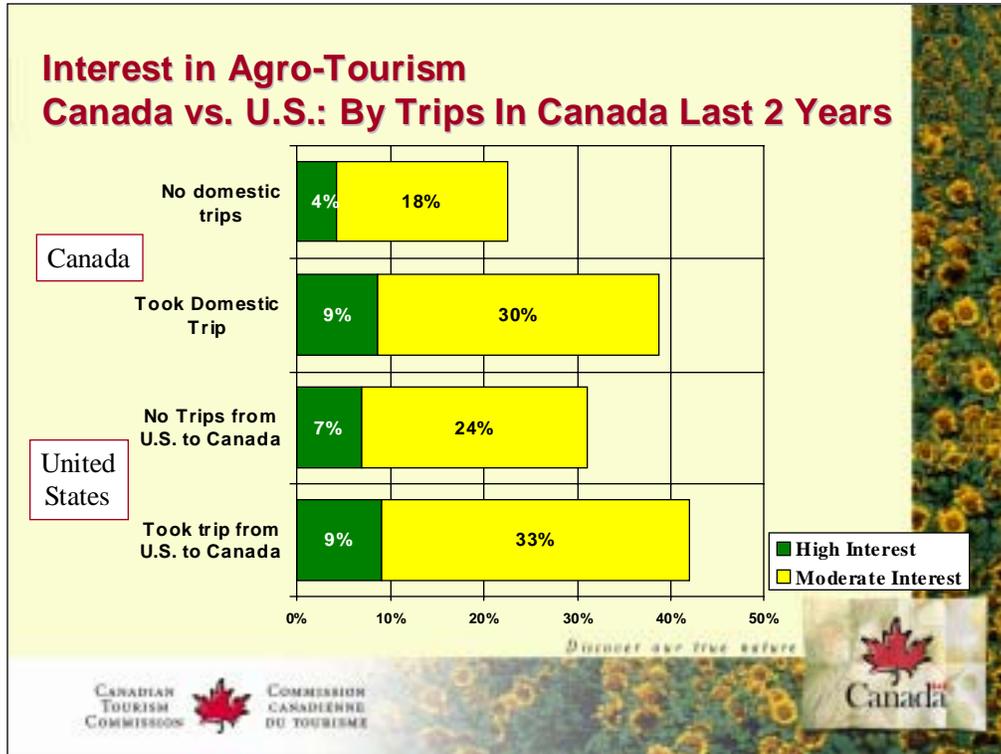
Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years

Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

A similar pattern was observed in the United States with the Affluent Families and Affluent Mature and Senior Couples most likely to have participated in agro-tourism activities while traveling in the past two years. Mainstream Couples and Affluent Singles also exhibited an above average interest in such activities in the U.S. market. These represent the prime target markets for agro-tourism.

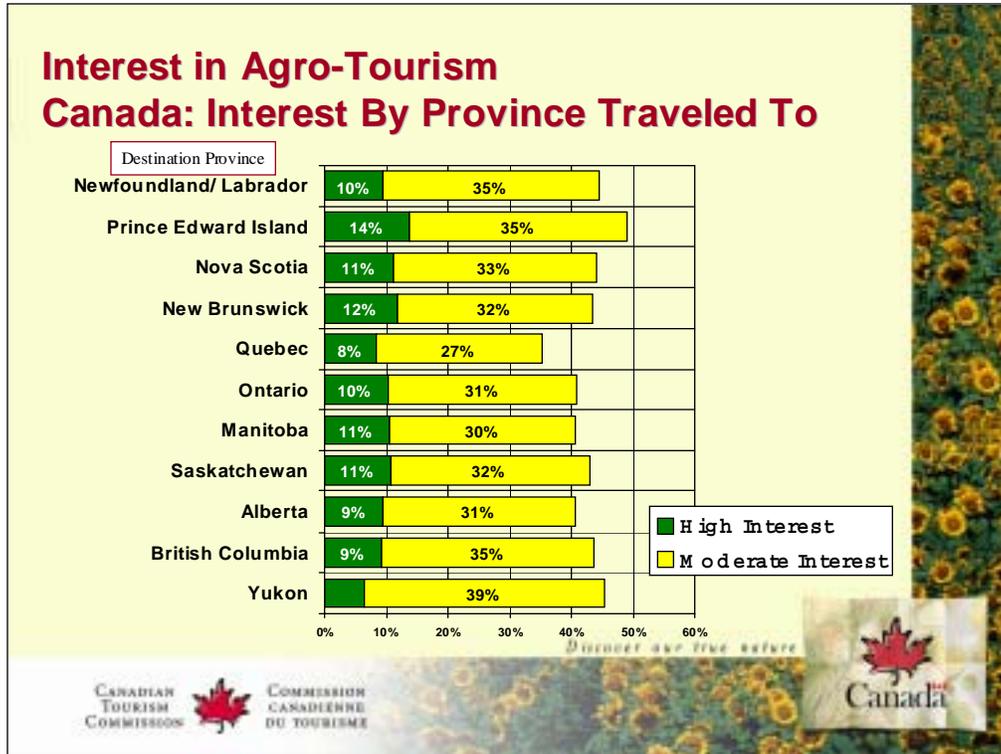
Technical Note

The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.



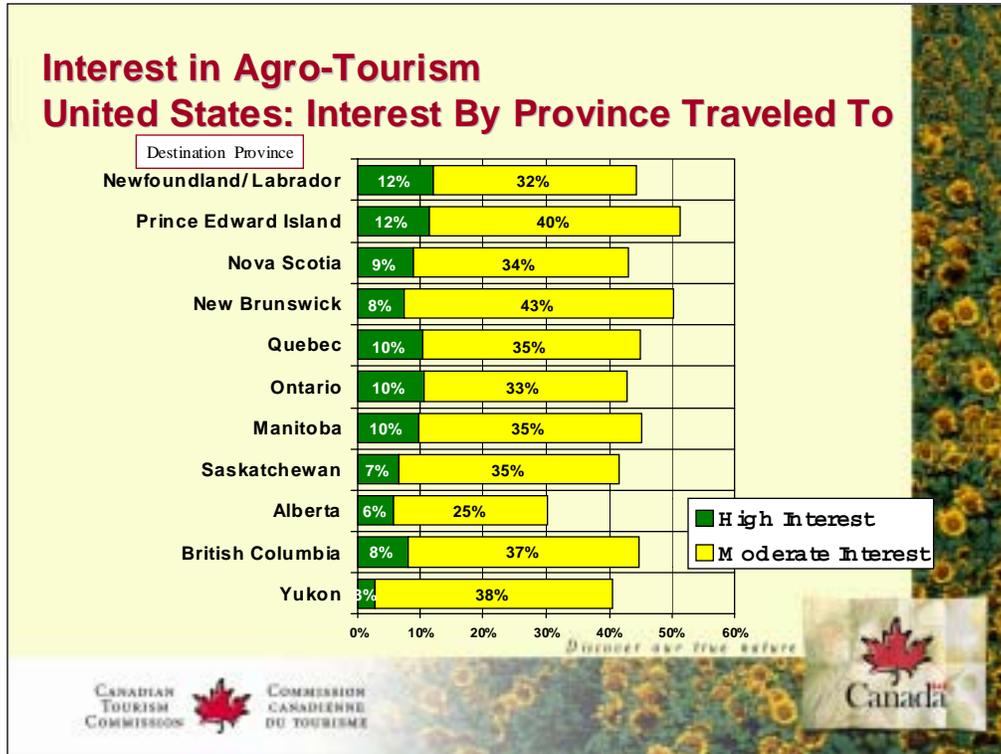
Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years
Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

In Canada, those who traveled domestically were only 107 % more likely to have participated in two or more agro-tourism activities and 72 % more likely to have participated in at least one activity of this nature. Thus Canadian domestic travelers were much more likely to exhibit an interest in such activities than those who have not traveled domestically during the past two years. Travelers to Canada from the United States were only 35.4 % more likely to have participated in at least one agro-tourism activity while traveling than those who did not take a trip to Canada. This indicates that agro-tourism vacation activities are more likely to be undertaken as part of a domestic vacation rather than as part of a vacation to another country.



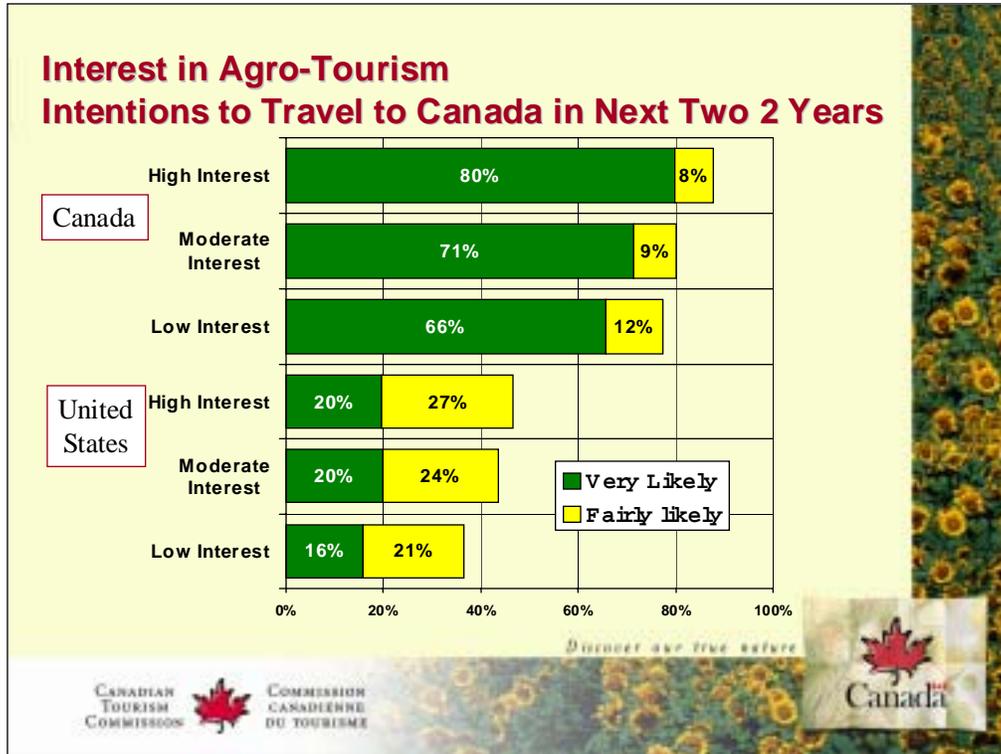
Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years
Base: Percent of Population (18 Plus) Who Took At Trip to Each Province During the Last 2 Years

In Canada, there was a weak association between interest in agro-tourism and the provinces visited during the past two years. However, those who exhibited an interest in agro-tourism were somewhat less likely to have visited Quebec than other provinces and slightly more likely to have visited Prince Edward Island. The decrease in travel to Quebec reflects the fact that those from Quebec exhibited less interest in agro-tourism and were also more likely to have taken a trip within the province of Quebec.



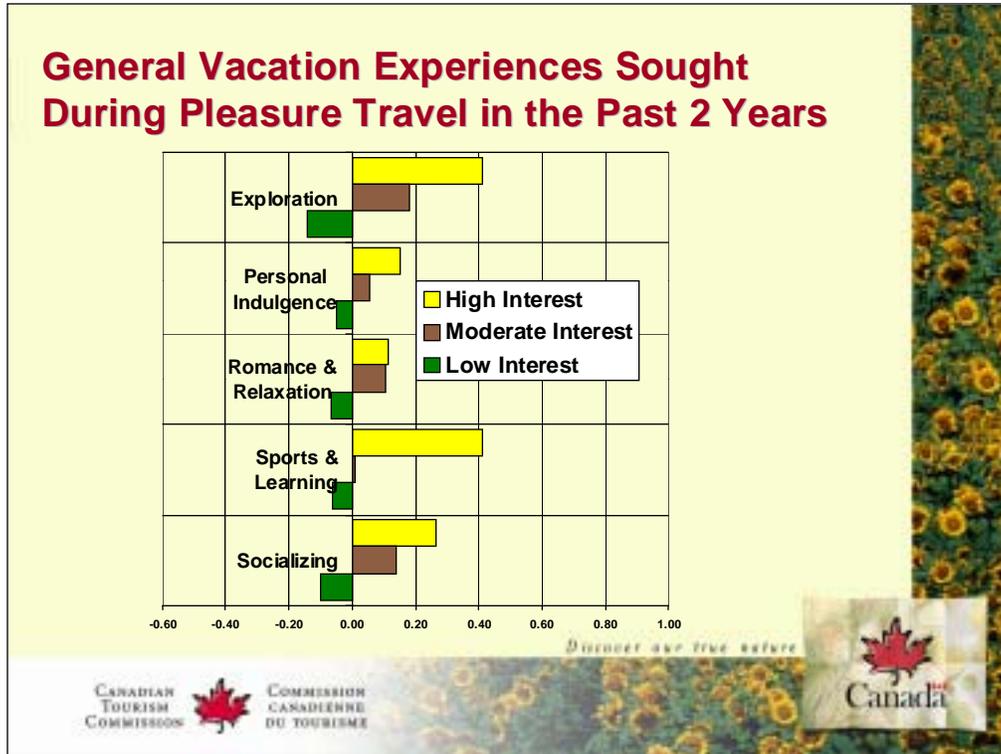
Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years
Base: Percent of Population (18 Plus) Who Took At Trip to Each Province During the Last 2 Years

There was only a weak association between the level of interest exhibited in agro-tourism by Americans and the province visited during the past two years. However, those with an interest in agro-tourism were more likely to have visited P.E.I. and Nova Scotia than other provinces and less likely to have taken a trip to Alberta.



Based on Participation in Agricultural Related Activities While Traveling in the Past 2 Years
Base: Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

The likelihood of taking a trip within or to Canada during the next two years increased slightly as the level of interest in agro-tourism increases. This association was stronger in Canada than in the United States. This result reflects the fact that Canadians who travel domestically are more likely to be interested in agro-tourism activities.



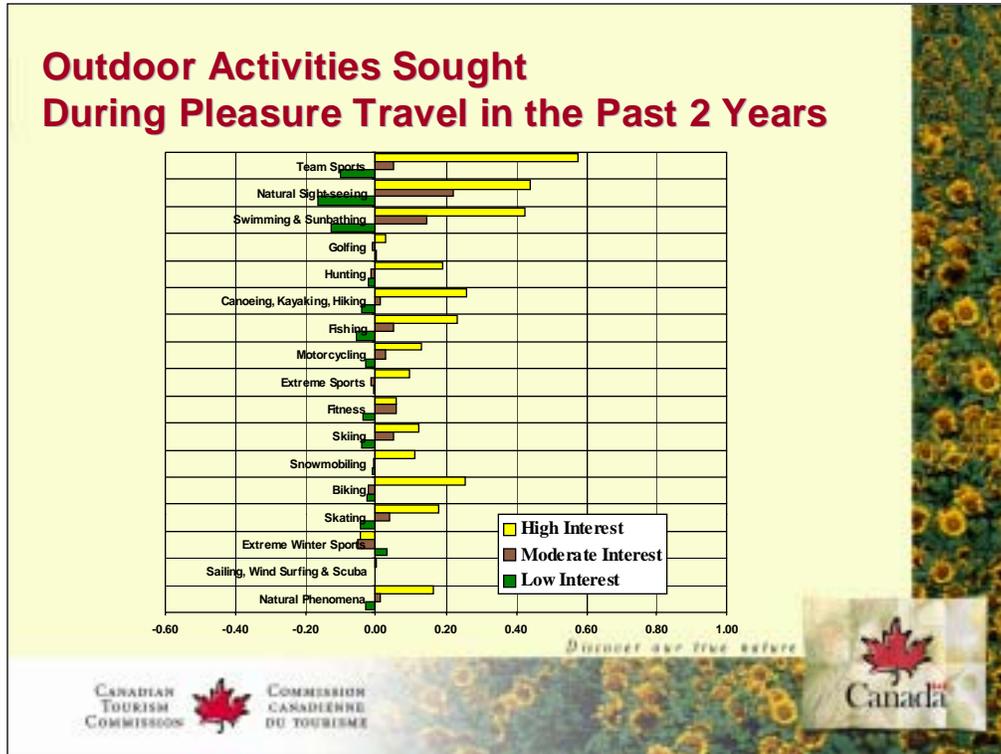
By Interest in Agro-Tourism Based on Participation While Traveling in Past 2 Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Those with a high interest in agro-tourism were more likely to have sought out vacation experiences associated with exploration, sports and learning vacation (e.g., to participate in a hobby or sport) and socializing with family and friends. Advertising and promotional materials designed to promote agro-tourism should emphasize the opportunities for learning and the ability to spend quality time with one’s spouse/partner or children.

Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of “0” and a standard deviation of “1”. A value of “0” means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.



By Interest in Agro-Tourism Based on Participation While Traveling in Past 2 Years

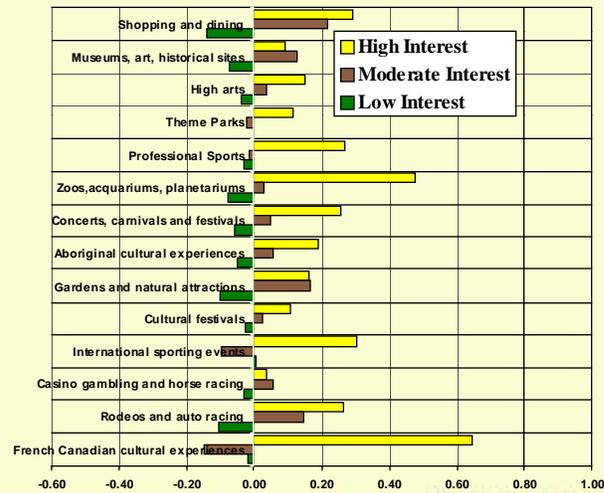
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Those with a high interest in agro-tourism tended to be more active in most outdoor activities than those who were not interested. This was especially apparent for team sports, natural site seeing and swimming & sunbathing. They were also more likely to have participated in nature-orientated outdoor activities such as hunting & fishing, canoeing & kayaking and hiking & biking. Clearly there is a nature-theme in those activities pursued by persons who have participated in agro-tourism activities. This suggest that the promotion of agro-tourism should stress the opportunities to experience nature.

Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years



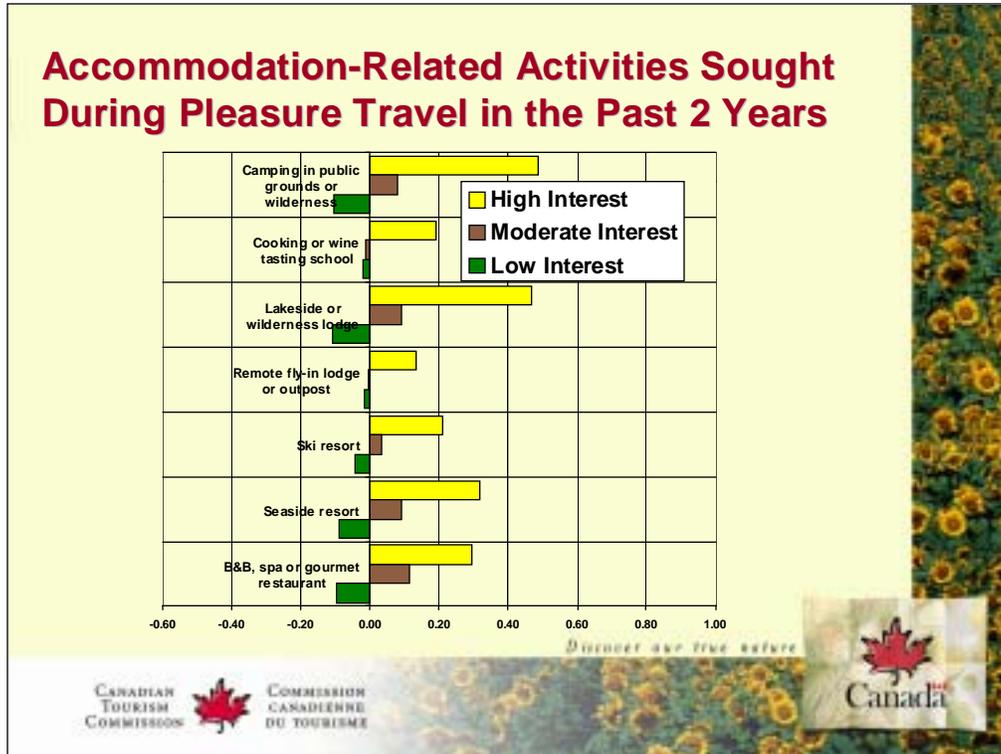
By Interest in Agro-Tourism Based on Participation While Traveling in Past 2 Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Those with a high interest in agro-tourism while traveling were also more likely to have participated in French Canadian cultural experiences and to have visited zoos, aquariums and planetariums. This reflects the fact that persons with an interest in agro-tourism are also interested in other learning experiences and especially those with a nature or cultural theme.

Technical Note

•This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of “0” and a standard deviation of “1”. A value of “0” means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.



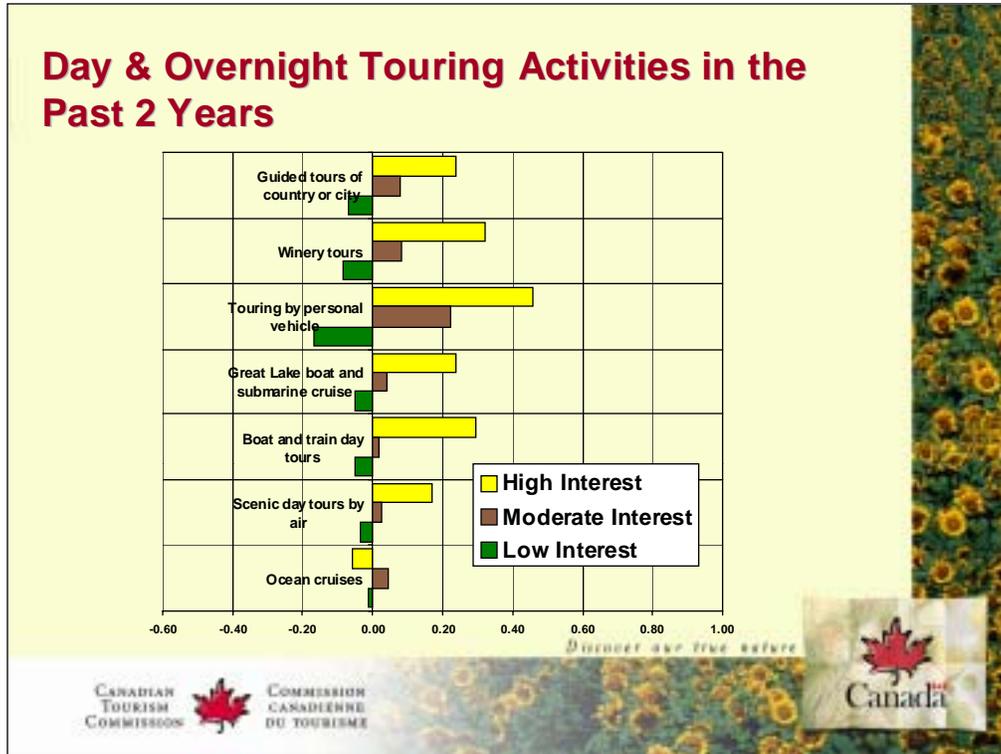
By Interest in Agro-Tourism Based on Participation While Traveling in Past 2 Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Those with a high interest in agro-tourism were also more likely to have camped in public camp grounds or the wilderness or stayed at lakeside or wilderness resorts. This again reflects the love of nature exhibited by such travelers in their vacation pursuits.

Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.



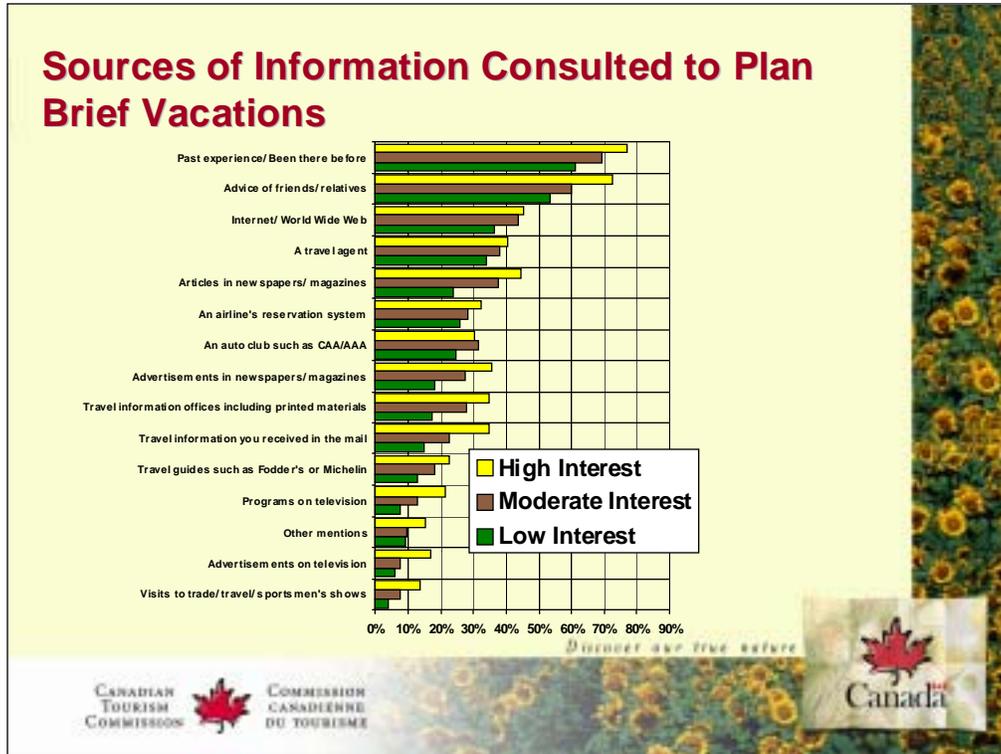
By Interest in Agro-Tourism Based on Participation While Traveling in Past 2 Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Those with a high interest in agro-tourism, as well as those with a moderate interest, were more likely to have taken tours of small towns and rural areas by personal vehicle during the past two years reflecting their interest in exploratory vacation experiences with a rural theme. Those with a high interest were also more likely have taken guided tours of the country or city, wine tours as well as other types of tours. Clearly exploration is an important dimension to the vacation activities of these travelers.

Technical Note

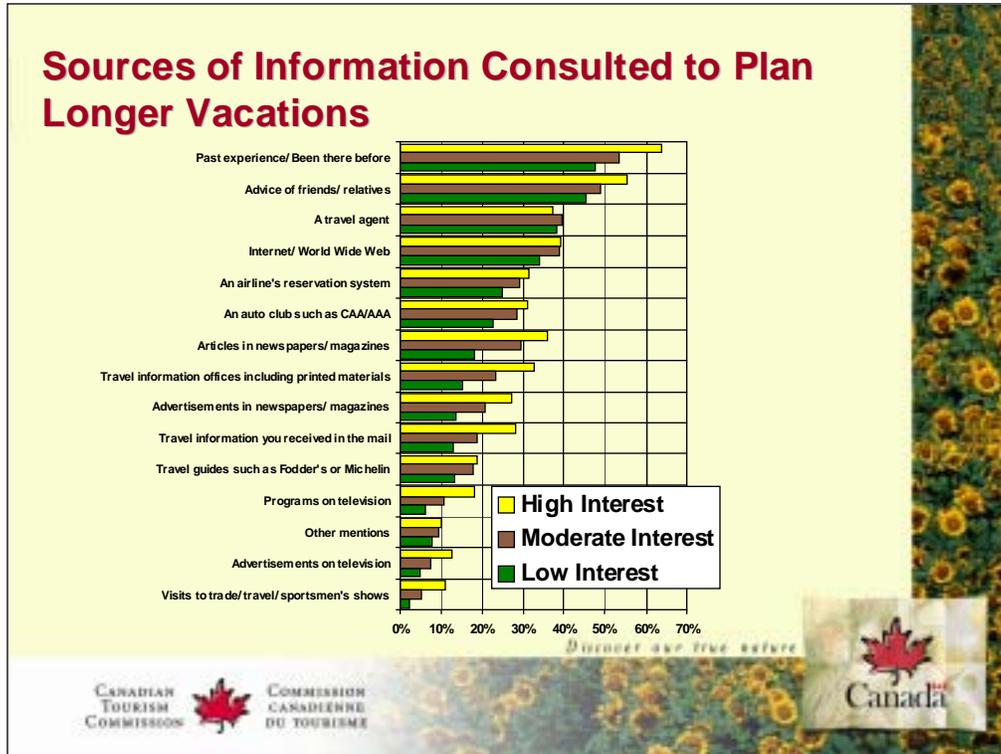
This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of “0” and a standard deviation of “1”. A value of “0” means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.



By Interest in Agro-Tourism Based on Participation While Traveling in Past 2 Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Those with a high interest in agro-tourism were more likely to rely on the advice of family and friends than others when planning brief vacations. They also consult a larger variety of information sources when planning their brief vacations and especially newspaper and magazine articles/advertising, travel information obtained from travel bureaus, travel information received in the mail and travel guides. Those with a moderate interest in agro-tourism also consult a larger array of information sources when planning brief vacations than those with low interest, but fewer information sources than those with a high interest. The reliance on print materials when planning vacations suggests that agro-tourism is best promoted through the print media, travel guides and direct mail campaigns.



By Interest in Agro-Tourism Based on Participation While Traveling in Past 2 Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Those with a high interest in agro-tourism were more likely to rely on the advice of family and friends when planning longer vacations as well. They were also more likely to consult newspaper and magazine articles and advertising, travel information obtained from travel bureaus, travel information received in the mail, travel guides, trade shows and television programs. Those with a moderate interest in agro-tourism also consult a larger array of information sources when planning longer vacations than those with low interest, but fewer information sources than those with a high interest. As with brief vacations, the heavy use of newspaper and print materials when planning vacations suggests that agro-tourism is best promoted through the print media, travel guides and direct mail campaigns.

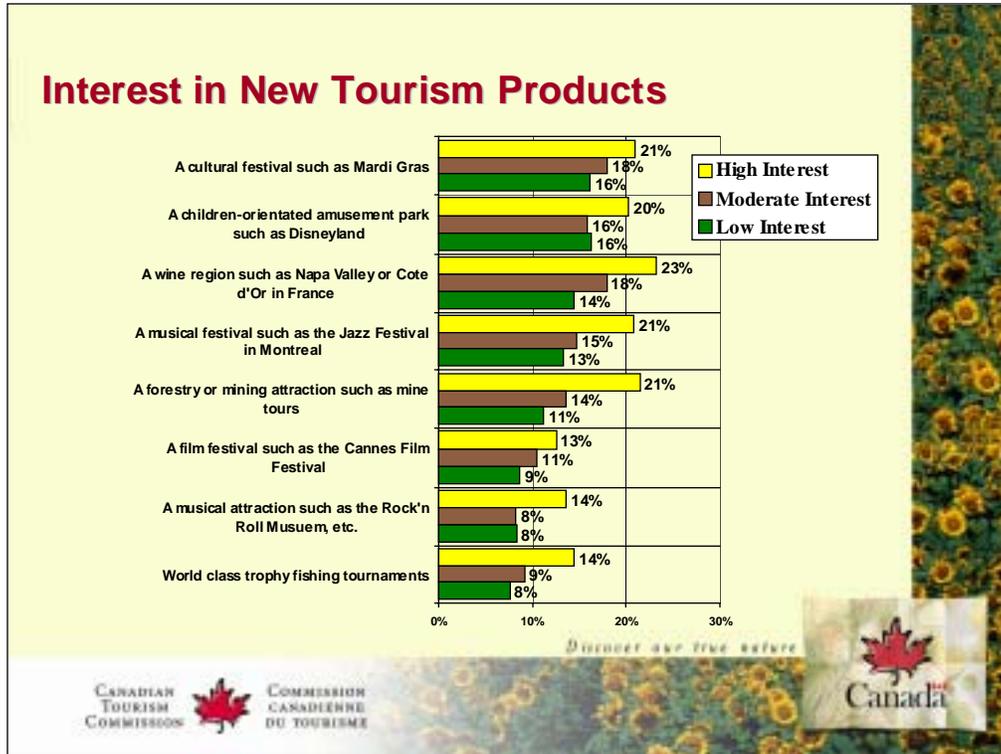


By Interest in Agro-Tourism Based on Travel Activities (Part One of Two)

Percent Stating Attraction Would Make Them “A Lot More Interested” in Taking a Trip to Ontario

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Respondents were asked whether each of sixteen new tourism attractions would make them “a lot more interested” in taking a trip to Ontario. Among the more popular tourism attractions, those with a high interest in agro-tourism exhibited interest in activities with a nature theme such as an overnight train ride through natural terrain, a games park or games preserve with wild life viewing areas and garden attractions. High interest agro-tourism travelers were also more interested in exploratory attractions such as an aboriginal museum and heritage attractions with historical reconstructions.

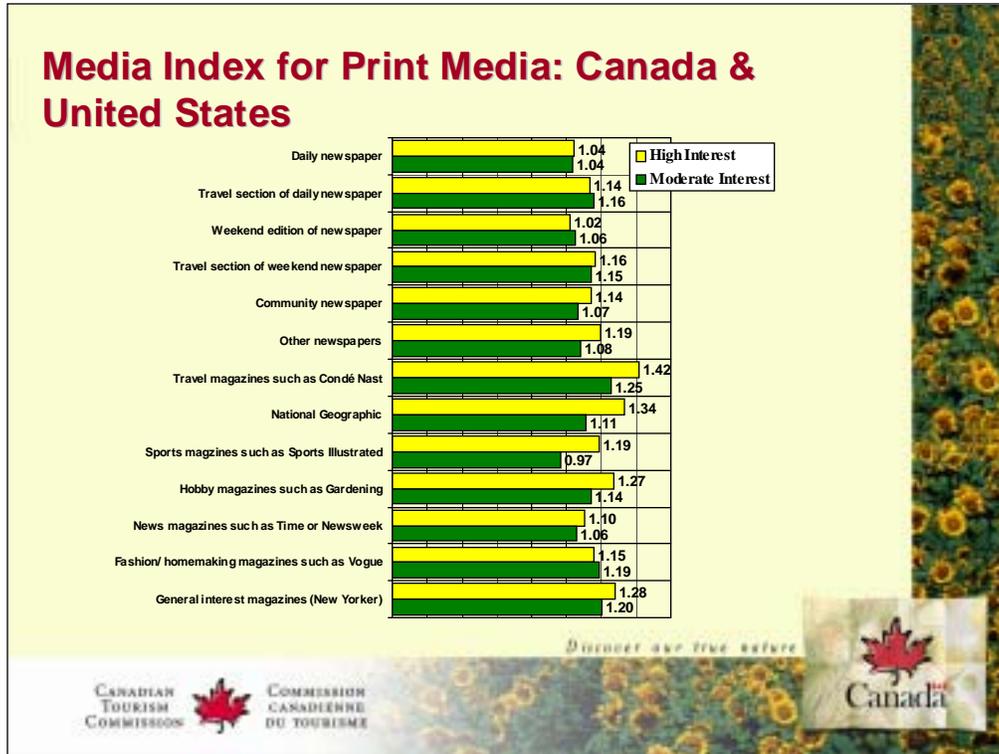


By Interest in Agro-Tourism Based on Travel Activities (Part Two of Two)

Percent Stating Attraction Would Make Them “A Lot More Interested” in Taking a Trip to Ontario

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Among the tourism attractions which were somewhat less popular overall, those with a high interest in agro-tourism were also more likely to be interested in wine tours, musical festivals, forestry and mining tours and world class fishing tournaments. Clearly these types of travelers are attracted to events and attractions that will give them interesting and unusual vacation experiences.



By Interest in Agro-Tourism Based on Travel Activities in Past 2 Years

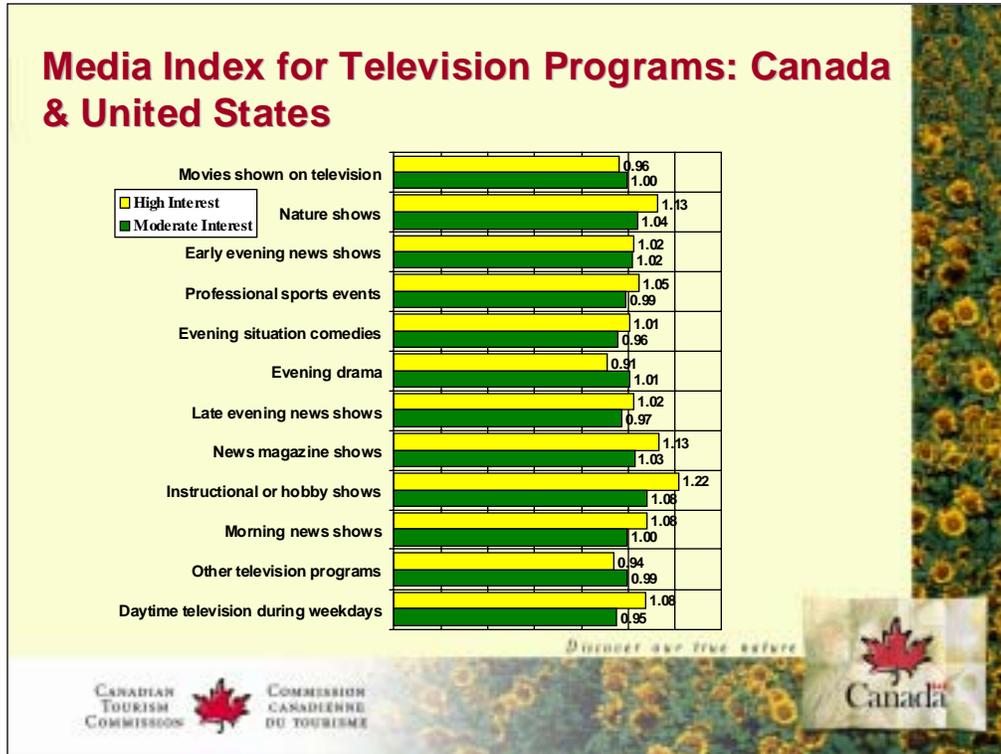
Percent Reading Each Publication Type Among Those With An Interest in Agro-Tourism By Percent Reading Each Type of Publication in General Market

**Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S.
(Mailback Survey)**

Media indexing for various types of print media (see Technical Note below) suggests that travel magazines, the travel section of the newspaper, National Geographic, hobby magazines and general interest magazines are the most efficient channels by which to reach those with a high interest in agro-tourism. These same print media sources are generally efficient methods by which to promote agro-tourism to those with a moderate interest in such activities.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in professional sports were 20 % more likely to read a particular publication than the general adult population.



By Interest in Agro-Tourism Based on Travel Activities in Past Two Years

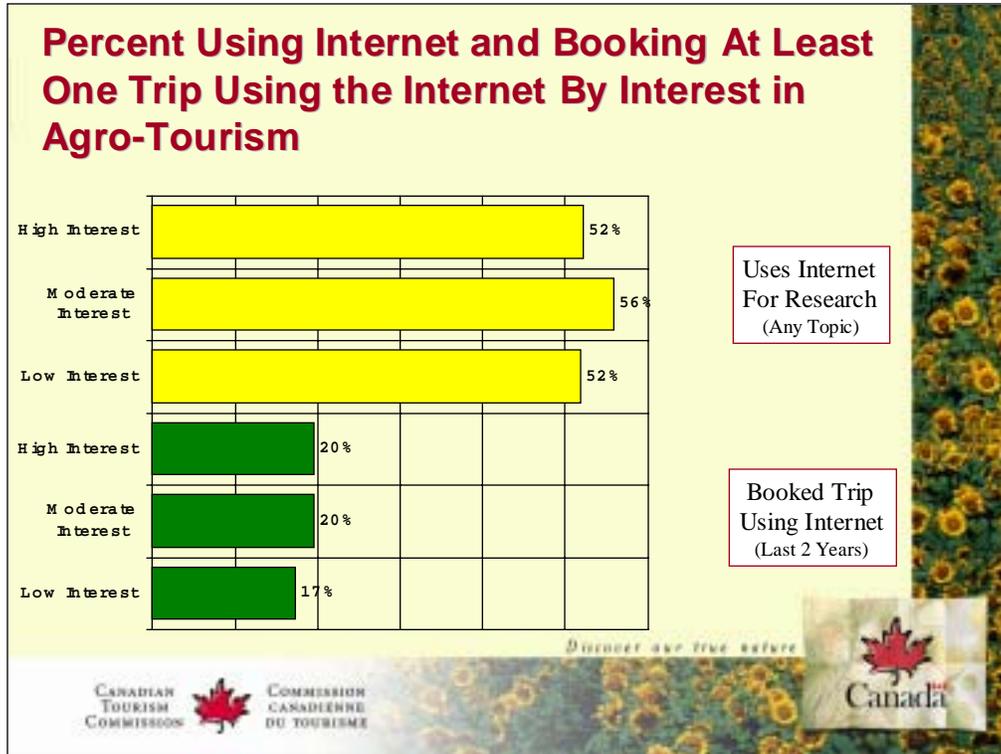
Percent Watching Each Type of Television Program Among Those With An Interest in Agro-Tourism By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Those with a high interest in agro-tourism are more likely to watch instructional and hobby shows as well as nature shows, outcomes consistent with their interest in learning and nature.

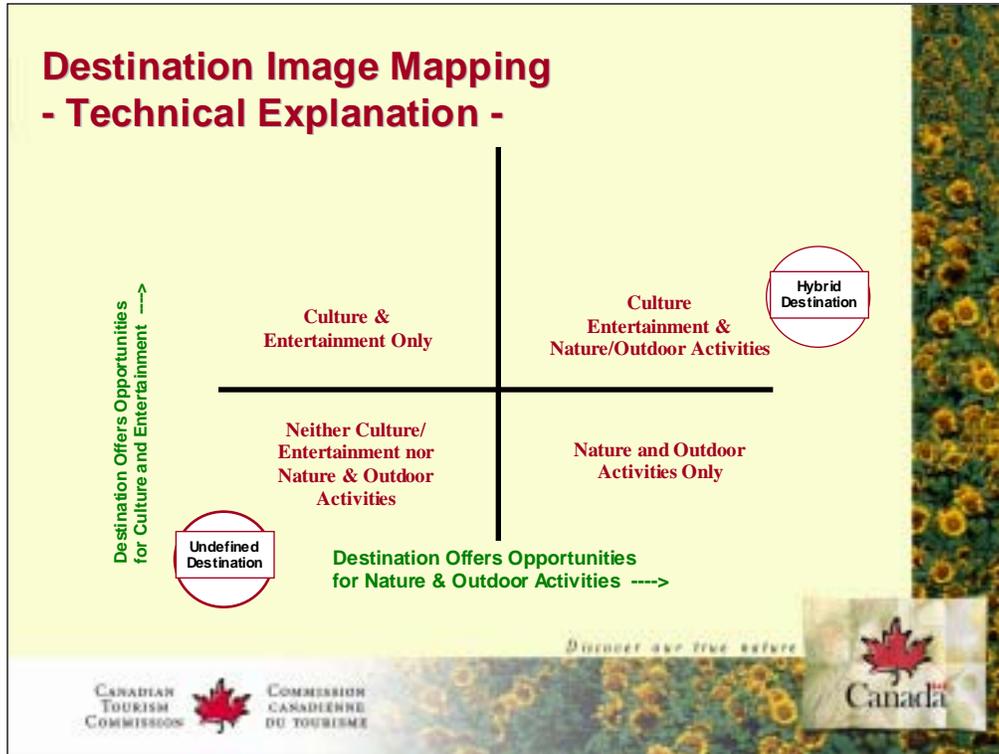
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in professional sports were 20 % more likely to read a particular publication than the general adult population.

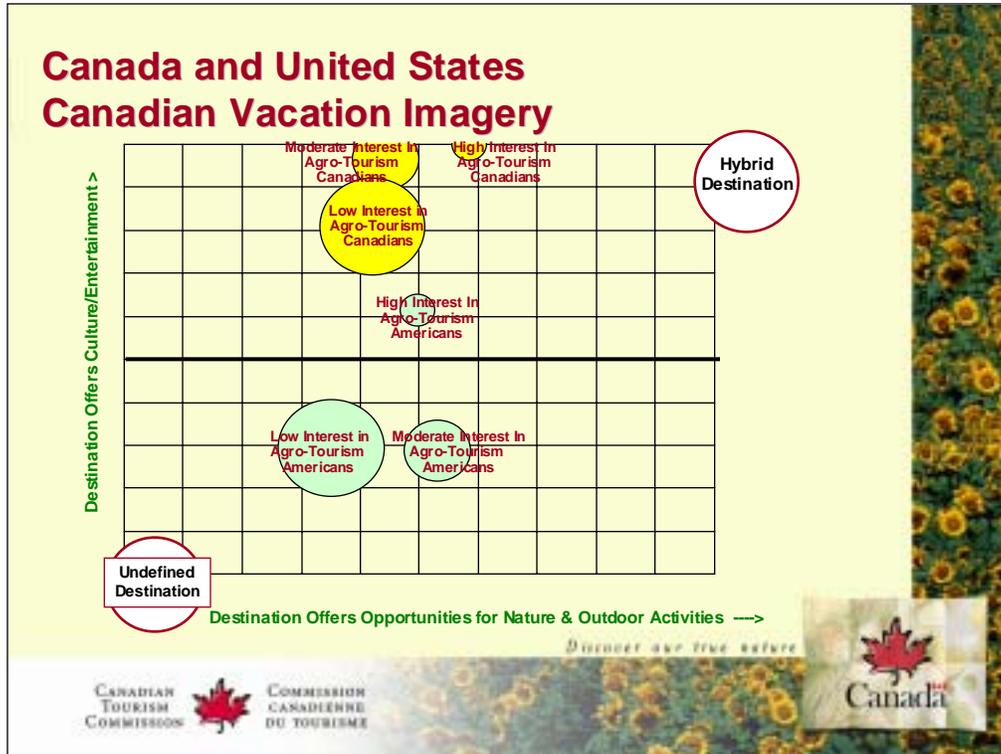


Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Use of the Internet as a source of information and a media channel by which to book a trip was unrelated to the level of interest manifested in agro-tourism while traveling.



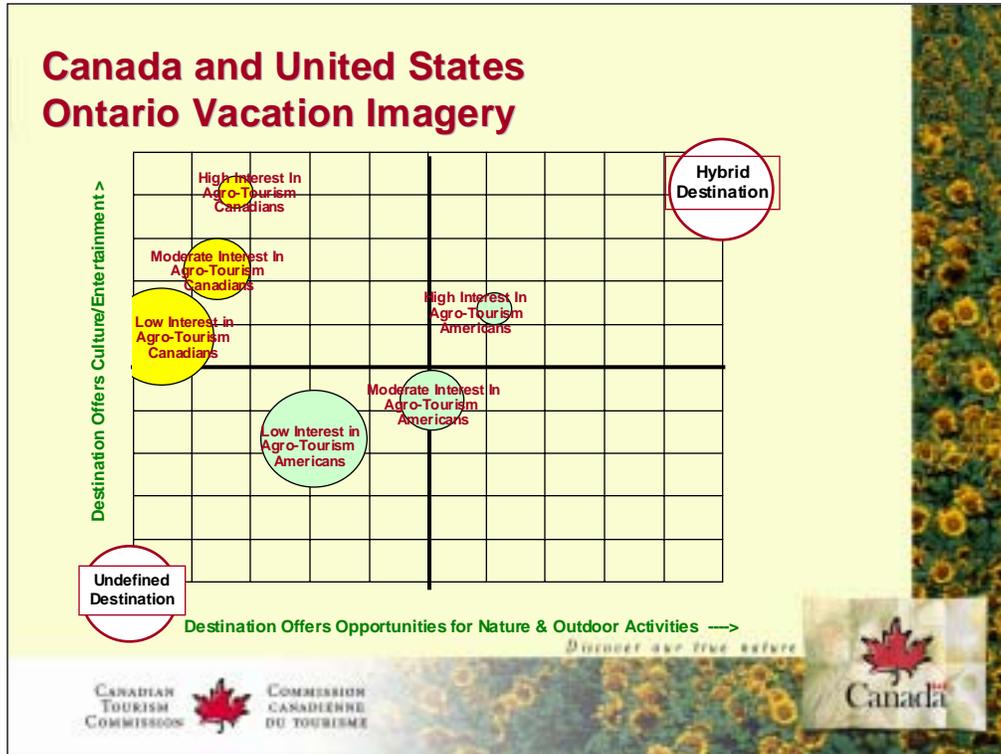
Respondents were asked to assess the image of Canada and Ontario on a ten point rating scale for 25 image attributes. These ratings were factor analyzed to identify to general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellence opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.



By Interest in Agro-Tourism Based on Travel Activities in Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market

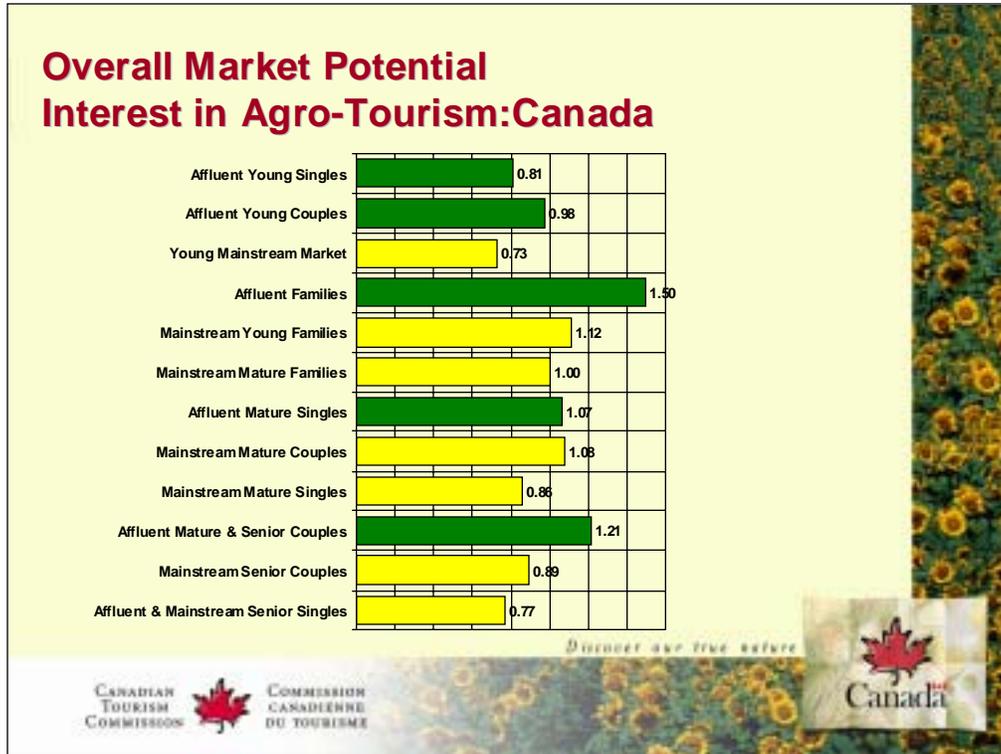
Those with a high interest in agro-tourism while traveling generally had a more positive impression of Canada than those with a moderate or low interest. This was especially apparent among Americans where those with a high interest in agro-tourism were much more likely to view Canada as having much to offer in the way of culture and entertainment than other Americans. Among Canadians, those with a high interest in agro-tourism were more likely to view Canada as having more to offer in in the way of nature and outdoor activities than those with a moderate or low interest in agro-tourism.



By Interest in Agro-Tourism Based on Travel Activities in Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market

The impression held of Ontario tended to improve as the level of interest in agro-tourism increased. Thus, in both Canada and the United States, those with a high interest in agro-tourism perceived Ontario as a place with more to offer in terms of both culture & entertainment as well as nature & outdoor activities. This may partially reflect the fact that those who have participated in such activities were more sophisticated and knowledgeable travelers and more likely to be familiar with Ontario's natural and cultural riches.



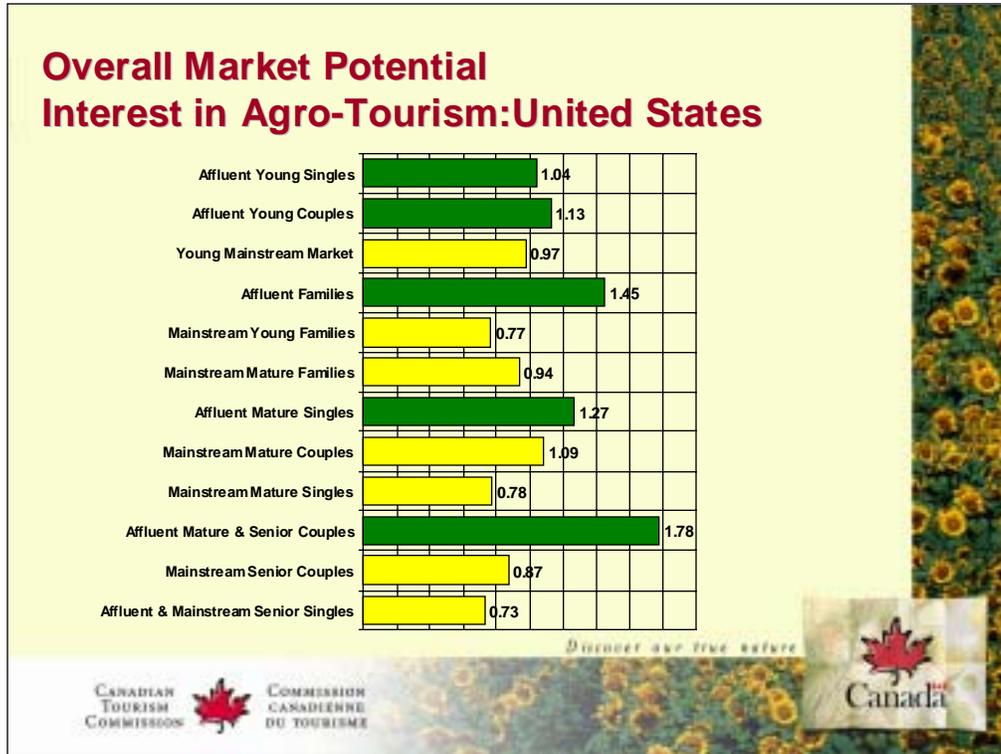
Interest in Agro-Tourism By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote agro-tourism. This Index indicates that in Canada, Affluent Families represent the prime target market for such initiatives. Other segments with above average interest in agro-tourism include Mainstream Young Families and Affluent Mature and Senior Couples. These segments represent the prime target groups for such promotional activities.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an Interest in agro-tourism related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.



Interest in Agro-Tourism By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

The Overall Market Potential Index for the United States shows a similar pattern as that observed for Canada. However, in the United States, the Affluent Mature and Senior Couples and Affluent Families are more likely to be responsive to such initiatives. Affluent Mature Singles, who often seek out novel vacation experiences, represent a secondary target market for the promotion of agro-tourism to the U.S.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an Interest in agro-tourism related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.