

SOUTH EASTERN ONTARIO

CONSUMER INSIGHTS SURVEY

Wave 1 Summer 2018

Final Report

October 1, 2018

For more information please contact:

Erica D'souza, Tourism Strategist
ericaf@twenty31.org
+1 647 889 4763

Oliver Martin, Partner
oliverm@twenty31.org
+1 416 721 3544

Twenty31 Consulting Inc.
Tourism.Defined.
www.Twenty31.org

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Note: Figures in this report are percentages unless indicated. All figures in charts and tables might not add to 100 due to rounding and weighting or multiple response categories.

October 1, 2018

Introduction

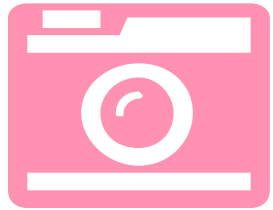
To better understand the traveller journey for visitors to the South Eastern Ontario region we conducted a pilot Consumer Insights Survey using consumer databases.

We conducted a pilot Consumer Insights Survey to develop a better understanding of potential and existing South Eastern Ontario visitors. The survey uncovered important insights about how people discover the region and access information about what it has to offer, the process they go through when planning and booking a trip through to the experience they have when in the region.

This survey was a primary market research initiative identified in the RTO9 Multi-Year Data and Research Plan ("Plan"), which was launched in April 2018. The Plan was designed to address the unmet research needs of destinations and tourism operators in the region, with a key focus on improving the timeliness and reliability of data. This year's survey is the pilot for six planned waves over the next two years.

We are proud to be moving further along the path to becoming the hub for gathering data and research in the region and realizing our vision as the leading strategic tourism partner for our destinations.

South Eastern Ontario Traveller Profile



Leisure
travellers

89%

2

More than half
(67%) of all
trips were 2
nights or less

Interested in culture and
heritage, food and drink and
passive outdoor activities



94%

More likely to
be short-haul
travellers
arriving by car



Fully
independent
travel style



Appreciate the beauty and
attractiveness of the region

89% Couples

\$450

Almost three quarters (74%)
of travellers spend less than
\$450 per trip



Most likely to
visit on Friday,
Saturday or
Sunday. The
peak is
Saturday at
64%.

Summary and Growth Insights

The number one need identified by travellers is more and enhanced online resources to help with inspiration/planning and booking.

The survey revealed that familiarity and interest in South Eastern Ontario is high, however when it comes to being inspired, planning and booking a trip the resources travellers typically use are limited, which has impacted the likelihood of travellers visiting the region.

When travellers do visit they are very satisfied and likely to become loyal repeat visitors. Travellers cited the beauty of the destination, being close to home, fun and excitement as reasons for enjoying their trip and/or wanting to return.

RTO9's priority areas of culture and heritage, food and drink and outdoor adventure prove to align with the activities undertaken by travellers when in the region.

Taking these factors into consideration, the opportunity for South Eastern Ontario and its destinations lies in increased awareness of the many places to explore, through enhanced and more comprehensive inspiration/planning resources and booking options.

Summary and Growth Insights, continued

The areas for growth and improvement require strong partnerships and collaboration to ensure an integrated approach.

Issue	Solution
Inspiration/Pre-planning	Comprehensive websites with accommodation options and events, interactive maps, travel apps, itineraries, social media marketing with the use of quality pictures of the destinations' offerings, increase residents awareness of offerings/activities for VFR market
Booking	Destinations, hotels and operators need to increase online booking options and presence on Expedia, TripAdvisor etc.
Length of stay	To extend length of stay, develop more packages and itineraries to help guide visitors through the region and thereby increase their awareness of places to explore and activities
Affordability	Budget conscious travellers may be enticed to stay overnight in South Eastern Ontario rather than a more expensive destination such as Ottawa or Toronto. Promotions and discounts may provide further incentive to book an overnight stay

METHODOLOGY

Overview

The Consumer Insights Survey was deployed in summer 2018 by RTO9 and destinations in the region.



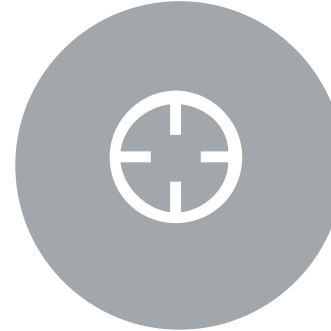
METHOD

- Online
- 11 Minute Questionnaire
- Fieldwork from June 25 – August 10, 2018



SAMPLE SIZE

- 2,461 total respondents
- South Eastern Ontario (2,185), Kingston 1,000 Islands (159), Bay of Quinte (62), 1000 Islands Brockville (42) and Land O Lakes (13)



TARGET

- Overnight Pleasure Travellers, who: took an overnight trip in the last two years to South Eastern Ontario or plan to take an overnight pleasure trip in the next two years



COMMUNICATION

- Consumer databases of RTO9 and five Destination Marketing Organizations (DMOs), social media and Tourism Talk were used to reach the target group

Questionnaires

With the collaboration of our destinations we were able to reach our target group more effectively.

- Separate questionnaires were developed for the South Eastern Ontario region and eight destinations:
 - Bay of Quinte
 - Prince Edward County
 - Land O'Lakes (Lennox & Addington, Frontenac)
 - Rideau Heritage Route
 - Kingston 1000 Islands
 - 1000 Islands Gananoque
 - 1000 Islands Brockville
 - Cornwall and The Counties

Questionnaires, cont'd

A battery of standard questions was developed to permit comparison and tracking where possible.

- The questionnaires contained two series of questions:
 - 1) Destination specific, to measure awareness and propensity to travel; and
 - 2) Standard questions, to permit comparison and tracking. These questions helped us to learn more about the following:
 - Reasons for visiting
 - Activities participated in
 - Media habits
 - Booking methods
 - Length and time of travel
 - Spending and perceptions of value
 - Travel mode to destination
 - Accommodation choice
 - Overall trip satisfaction
 - Leisure travel interests
- Questions 10 and 27 were eliminated from the final report as the analysis did not reveal useful data. It is common that some questions 'don't work' for myriad reasons. The key is to eliminate or modify them for future waves.

Sample Size

The vast majority of responses came from the South Eastern Ontario questionnaire.

- RTO9 and 75% of the destinations participated by deploying the questionnaires. There were 2,461 total respondents (n=2,461).
- The following number of responses came from the destinations:
 - South Eastern Ontario n=2,185
 - Kingston 1,000 Islands n=159
 - Bay of Quinte n=62
 - 1000 Islands Brockville n=42
 - Land O'Lakes n=13
- Three of the eight destinations did not deploy a questionnaire. 1000 Islands Gananoque deployed the South Eastern Ontario questionnaire to their own consumer database.

Communication

Through a concerted effort, the survey was emailed to the target group and promoted on social media channels.

- Consumer databases were utilized, which in total was 60,560 contacts.

Destination Name	Number of Database Contacts	Response Rate
Bay of Quinte	1,500	4.1%
Prince Edward County	1,400	-
Land O'Lakes (Lennox & Addington, Frontenac)	3,700	0.4%
Rideau Heritage Route	Unknown	-
Kingston 1000 Islands	4,660	3.4%
1000 Islands Gananoque	18,000	-
1000 Islands Brockville	1,300	3.2%
Cornwall and The Counties	Unknown	-
South Eastern Ontario	30,000	7.3%

- Twitter, Facebook, Newsletters and e-blasts were also used to encourage responses.

Lessons Learned

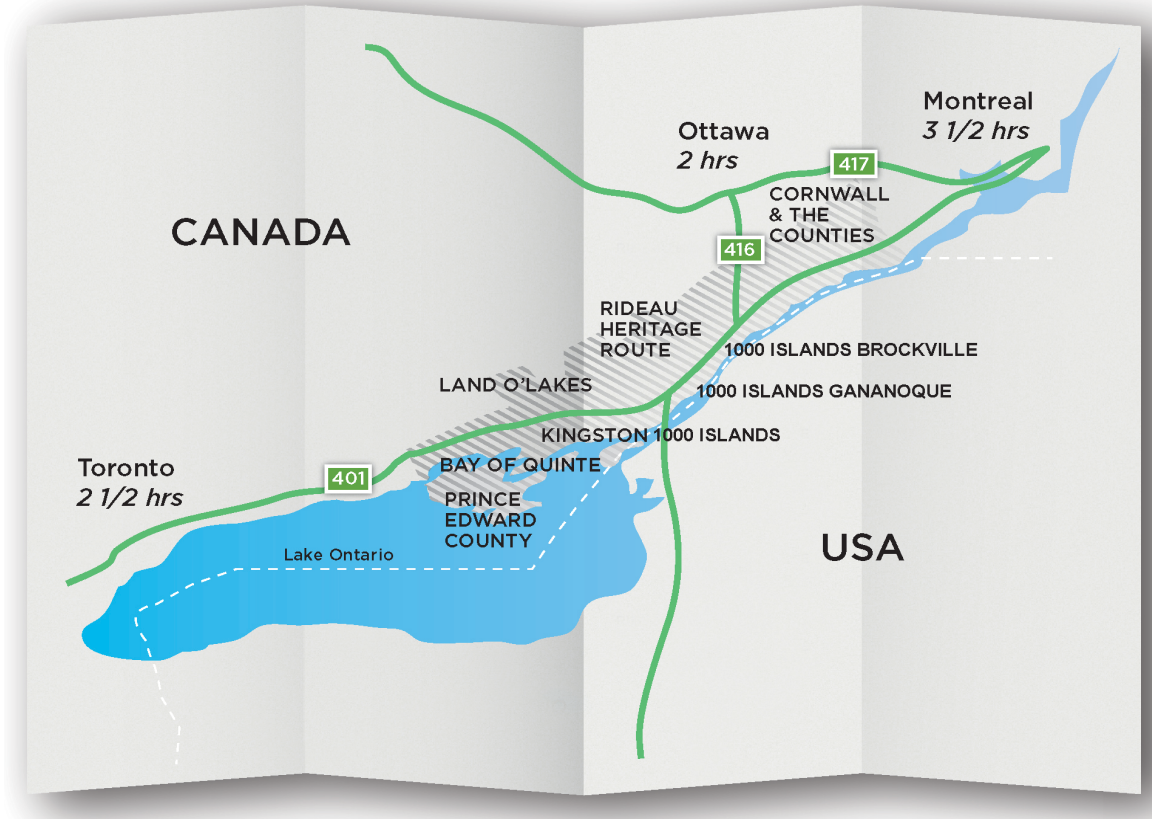
There were three key lessons learned during the pilot, in addition to others that will be taken into consideration during the next wave.

1. A consumer survey can provide insightful destination specific research not currently available elsewhere.
 - *Issue:* Only four of the eight destinations and the RTO participated in the survey.
 - *Solution:* Improve understanding of the value and benefits of participating in this research initiative, for DMOs/DMPs and their valued tourism operators.
2. The success of a consumer database survey involving multiple destinations relies heavily on the coordination of all participants.
 - *Issue:* The planned survey deployment date was June 25th, however only Kingston's survey was deployed on that date. The rest of the participating destinations deployed throughout the month of July. The South Eastern Ontario survey deployed on July 19th due to being developed after the destinations' questionnaires.
 - *Solution:* Ensure all destinations are engaged and aware of the timelines prior to deployment.
3. Databases need to be up to date with new consumers added regularly.
 - *Issue:* Some destinations have relatively small consumer databases.
 - *Solution:* Anticipating that consumer databases will be used for research initiatives, all destinations should ensure they have a viable database management strategy to accurately keep track of consumers.

RESULTS

Where is South Eastern Ontario?

To provide a reference point, a regional map was included for respondents to identify destinations relative to other well-known cities in Ontario.

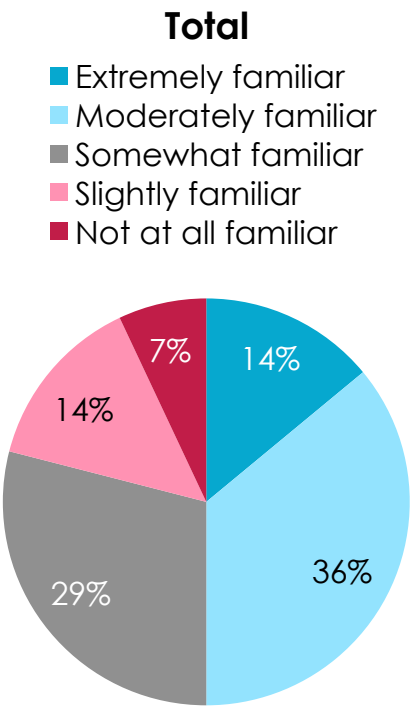


- South Eastern Ontario includes the region east of the Bay of Quinte to the Ontario/Quebec border as shown on this map.

Familiarity with the destination

Respondents have strong familiarity with South Eastern Ontario as a tourism destination.

Q1: How familiar are you with South Eastern Ontario region as a tourism destination? n=2461



	Bay Of Quinte (n=62)	1000 Islands Brockville (n=42)	Kingston 1000 Islands (n=159)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=2185)
Extremely familiar	34%	22%	24%	8%	13%
Moderately familiar	39%	38%	42%	62%	36%
Somewhat familiar	18%	26%	22%	30%	29%
Slightly Familiar	8%	12%	7%	---	15%
Not at all Familiar	1%	2%	5%	---	7%

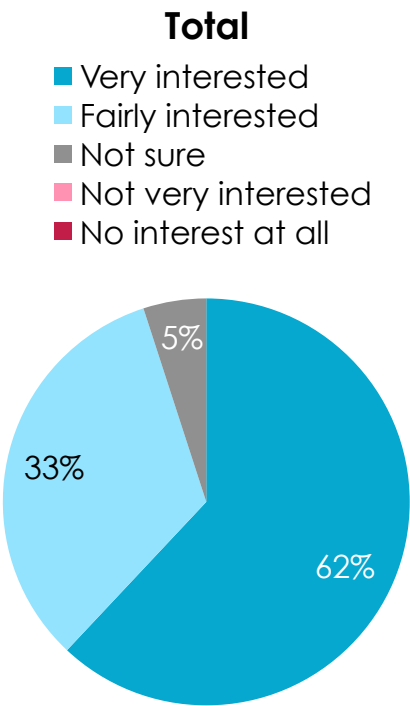
INSIGHT

Familiarity can be an awareness or set of perceptions about a destination. Most respondents are familiar with South Eastern Ontario; 65% expressed moderate/some familiarity and 13% were extremely familiar.

Interest in travel to the region

Respondents express a strong interest in travelling to South Eastern Ontario.

Q2: How interested are you in travelling to South Eastern Ontario for a leisure trip? n=2461



	Bay Of Quinte (n=62)	1000 Islands Brockville (n=42)	Kingston 1000 Islands (n=159)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=2185)
Very interested	68%	74%	70%	62%	61%
Fairly interested	26%	24%	25%	31%	33%
Not sure	6%	---	4%	7%	6%
Not very interested	---	2%	1%	---	---
No interest at all	---	---	---	---	---

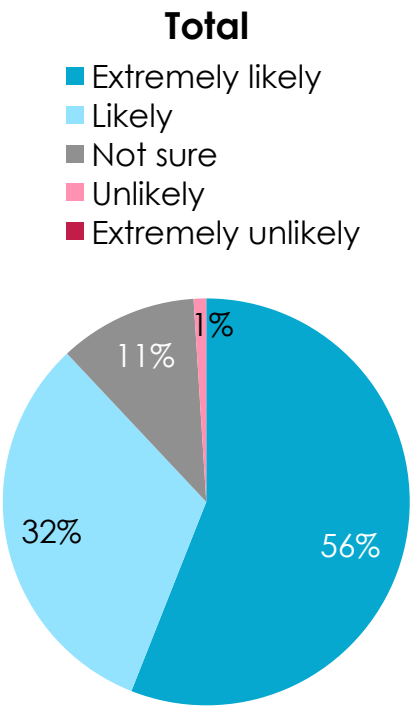
INSIGHT

An overwhelming 95% of respondents are very or fairly interested in travelling to South Eastern Ontario.

Likelihood of travel to the region

Likelihood of travel to South Eastern Ontario drops only slightly against expressed interest.

Q3: What is the likelihood that you will travel to South Eastern Ontario for leisure purposes in the next two (2) years? n=2461



	Bay Of Quinte (n=62)	1000 Islands Brockville (n=42)	Kingston 1000 Islands (n=159)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=2185)
Extremely likely	84%	76%	63%	54%	54%
Likely	11%	21%	26%	46%	33%
Not sure	5%	2%	9%	---	12%
Unlikely	---	---	2%	---	1%
Extremely unlikely	---	---	1%	---	---

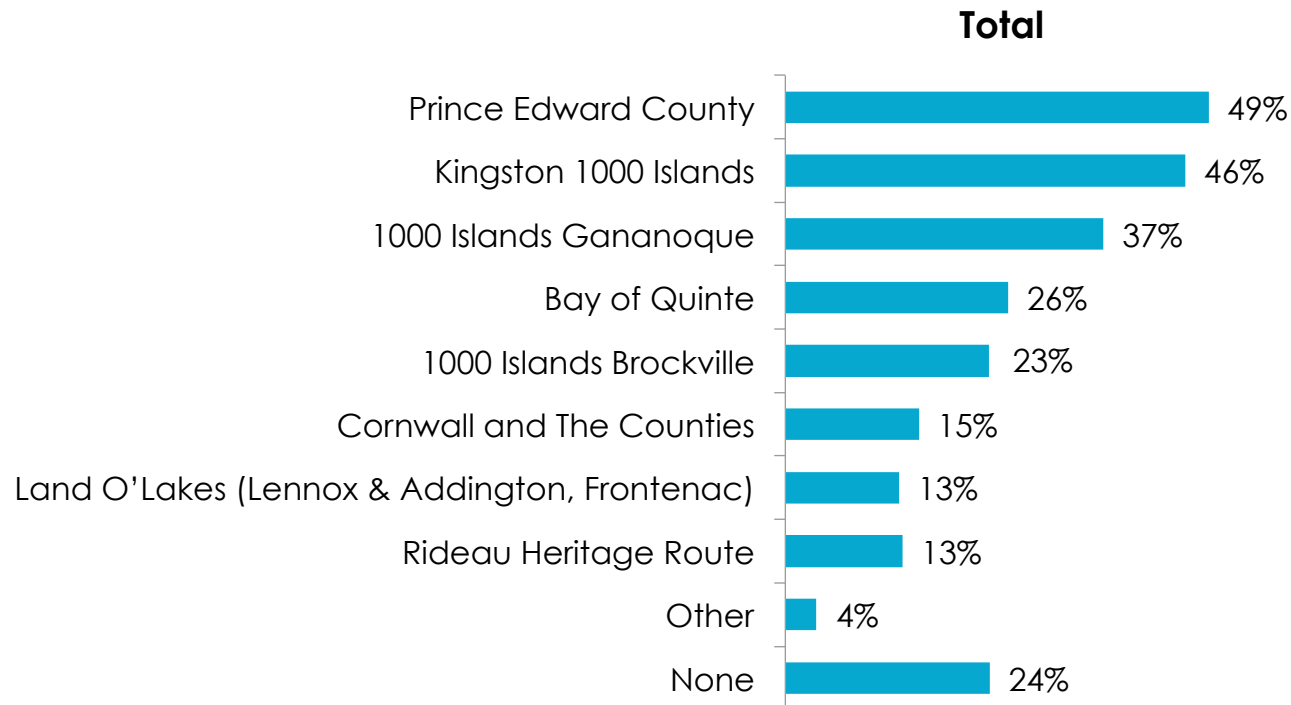
INSIGHT

The likelihood of travelling to South Eastern Ontario for leisure purposes in the next two years is high at 88%.

Most recent leisure trip to South Eastern Ontario

Almost half of all travellers have visited Prince Edward County. A quarter of leisure travellers didn't visit South Eastern Ontario at all.

Q4: Have you travelled for leisure purposes to any of the cities/regions in South Eastern Ontario listed below in the last two (2) years? n=2461



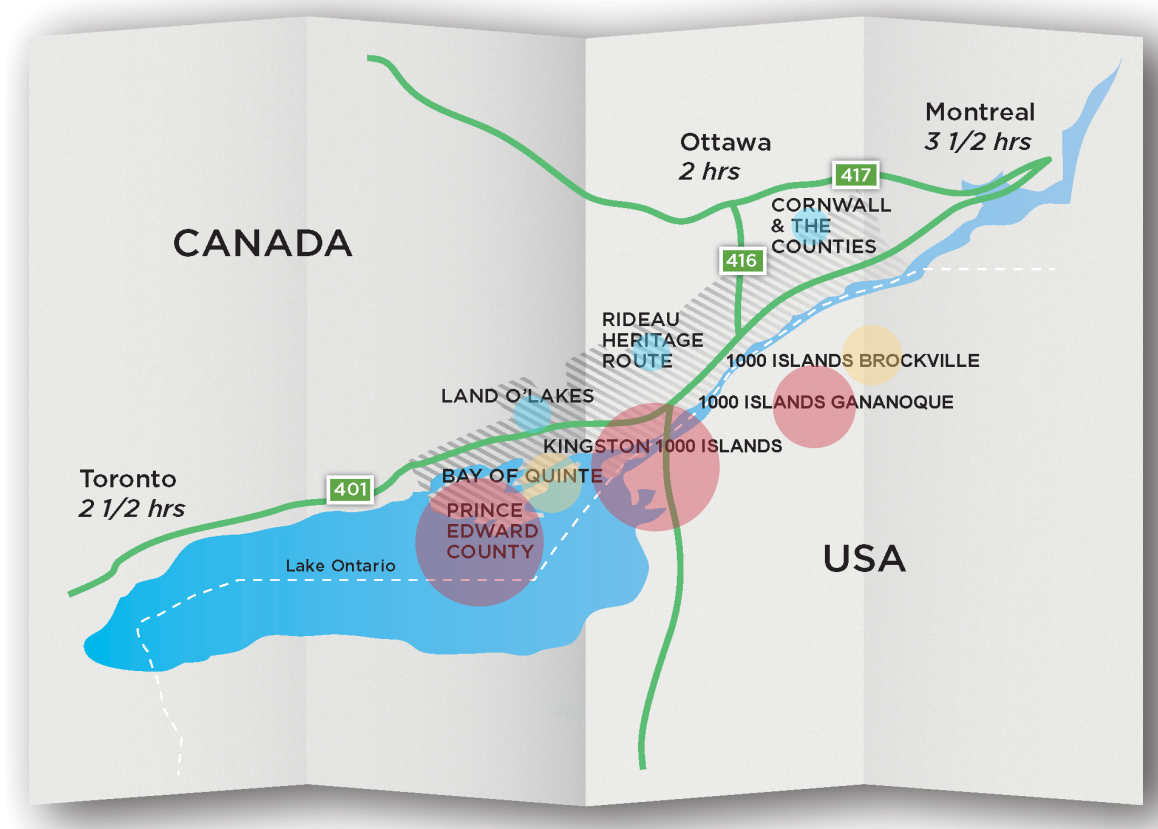
INSIGHT

Almost half of all leisure travellers visited Prince Edward County (49%) and Kingston 1000 Islands (46%), over a third (37%) visited 1000 Islands Gananoque.

Almost a quarter of leisure travellers did not travel to any cities in South Eastern Ontario.

Most recent leisure trip to South Eastern Ontario

Heat map by destination



Main reason to visit

Leisure is the main reason for visiting South Eastern Ontario.

Q5: What was your main reason to visit? n=1882

	Total	Bay Of Quinte (n=631)	Cornwall and The Counties (n=378)	1000 Islands Brockville (n=577)	1000 Islands Gananoque (n=901)	Kingston 1000 Islands (n=1132)	Land O'Lakes (n=322)	Prince Edward County (n=1198)	Rideau Heritage Route (n=332)
Leisure	89%	92%	89%	93%	94%	93%	93%	93%	94%
Visiting friends and/	32%	39%	35%	33%	30%	34%	42%	34%	38%
Sporting event/ tournament	6%	10%	11%	8%	8%	7%	11%	6%	8%
Business trip	4%	7%	7%	6%	5%	5%	8%	5%	6%
Conference/ convention	3%	3%	4%	4%	3%	3%	3%	3%	4%

INSIGHT

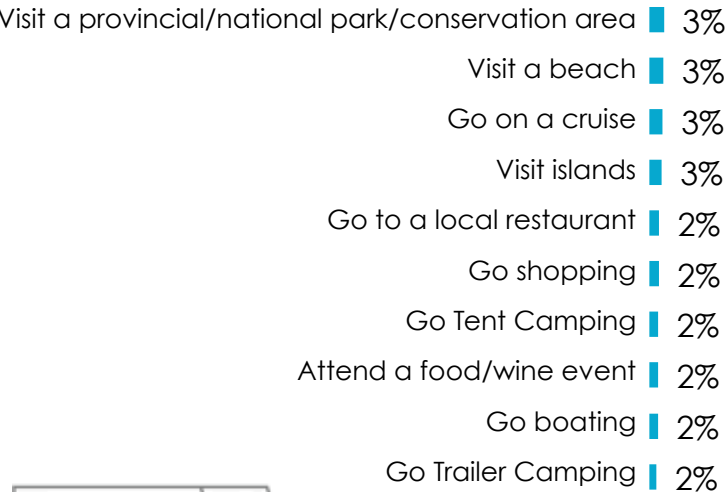
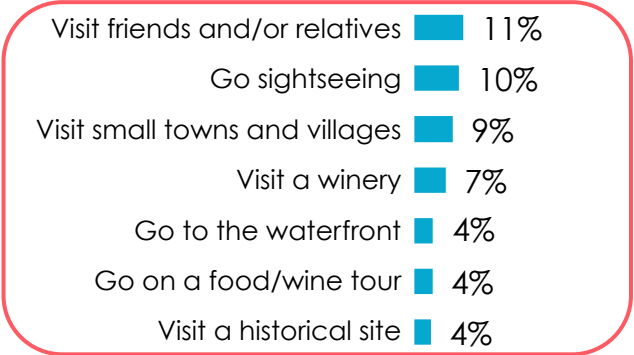
Across all destinations, leisure was the main reason for travel cited by 89% of respondents. For 32% of all respondents, visiting friends and/or relatives (VFR) was the main reason for travel, signifying that travellers combine leisure and VFR when visiting the region.

Primary reason for travel, activities

The primary reason for travel is VFR, however, travellers are interested in sightseeing, culture and heritage, food and drink and the waterfront.

Q6: What was your primary reason for travel to South Eastern Ontario?
n=1822

Total



INSIGHT

Aside from spending time with friends and/or relatives, South Eastern Ontario travellers came to the region for sightseeing, culture and heritage (small towns and villages, historical site visits), food and drink (winery visits, food/wine tours) and to enjoy the waterfront.

Seasonality by month

Summer is the peak season for travel to South Eastern Ontario.

Q7: When did you visit? If your trip occurred over multiple months please indicate when you started your trip n=1882

	Total	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
January	1%	2%	3%	6%	---	1%
February	1%	3%	---	2%	---	1%
March	2%	3%	---	2%	---	2%
April	4%	7%	3%	4%	---	4%
May	13%	8%	11%	15%	8%	13%
June	22%	35%	32%	23%	15%	21%
July	30%	21%	32%	24%	46%	29%
August	15%	13%	16%	12%	23%	15%
September	8%	8%	---	6%	8%	9%
October	2%	---	---	3%	---	3%
November	1%	---	---	2%	---	1%
December	1%	---	3%	1%	---	1%








INSIGHT

Travellers visited the region primarily during the months of May to August. April (4%) and September (8%) emerged as secondary travel months. March and October received a similar amount of visitors (2%).

Peak days

Travellers are most likely to visit for a weekend getaway. Saturday is the most popular day for visiting.

Q8: What day(s) of the week was your visit? n=1882

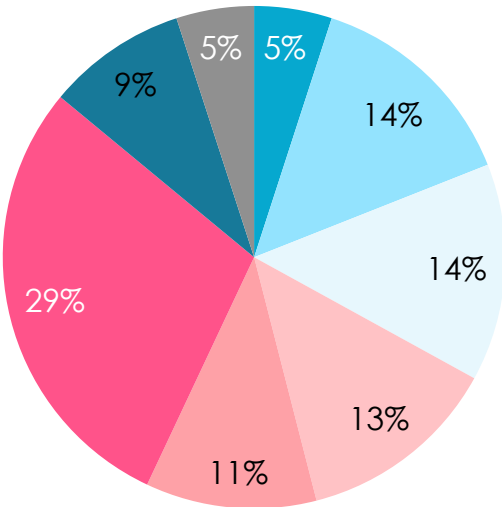
	Total	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
Monday	 22%	26%	27%	18%	46%	22%
Tuesday	 25%	20%	32%	22%	23%	25%
Wednesday	 28%	28%	32%	25%	23%	28%
Thursday	 33%	43%	35%	29%	31%	33%
Friday	 48%	62%	41%	43%	38%	48%
Saturday	 64%	69%	73%	59%	77%	64%
Sunday	 47%	52%	54%	42%	77%	47%

INSIGHT

South Eastern Ontario travellers most often visit on the weekend. Saturday was the peak day (64%), while Friday (48%) and Sunday (47%) received an almost equal percentage of visits.

Pre-planning timeframe

South Eastern Ontario travellers begin planning their trips within two months of departure; however, the majority plan within just three weeks of the visit.



Q9: When did you start planning your trip? n=1882

	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=1632)
While you were here	13%	5%	9%	0%	4%
The week of the visit	20%	16%	14%	31%	14%
1 week before the visit	20%	14%	13%	23%	14%
2 weeks before the visit	7%	14%	14%	15%	14%
3 weeks before the visit	13%	8%	10%	15%	11%
1-2 months before the visit	18%	24%	30%	8%	28%
3-5 months before the visit	7%	8%	7%	0%	9%
More than 6 months before the visit	2%	11%	3%	8%	6%

INSIGHT








Most commonly, South Eastern Ontario travellers begin planning their trip within 2 months of departure (86%). More than half planned their trip within 3 weeks of visiting, and one third (33%) planned the same week of travel or when in the destination.

Only a small amount (14%) said they planned their trip +3 months ahead.

First time or repeat visit

The vast majority of travellers are repeat visitors.

Q11: Was this your first visit to the region? n=1882

	Total	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
RETURNING TRIP	 72%	84%	76%	83%	92%	71%
I visited less than a year ago	 45%	74%	54%	63%	69%	43%
I visited 2 years ago	 13%	3%	5%	12%	15%	13%
I visited 3-5 years ago	 8%	3%	3%	4%	0%	9%
I visited between 5-10	 4%	2%	8%	2%	8%	4%
I visited 10+ years ago	 2%	2%	5%	2%	0%	2%
This was my first visit	 28%	16%	24%	17%	8%	29%

INSIGHT

Repeat visitation is high (72%), the majority of travellers visited less than a year ago.

Over a quarter (28%) are first time visitors – including 43% of travellers aged 25 – 39.

Travel companions

South Eastern Ontario travellers are most likely to visit as a couple.

Q12: Who were you primarily travelling with? n=1882

Total		Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
With spouse/partner	<div><div></div></div> 53%	61%	56%	50%	31%	53%
With family, no kids	<div><div></div></div> 6%	3%	5%	5%	---	6%
With family, kids	<div><div></div></div> 19%	18%	14%	18%	46%	19%
Myself	<div><div></div></div> 6%	5%	8%	11%	---	6%
With friends	<div><div></div></div> 14%	11%	11%	14%	23%	14%
With my business colleagues/team	<div><div></div></div> 1%	---	3%	2%	---	1%
Other	<div><div></div></div> 1%	2%	3%	---	---	1%

INSIGHT

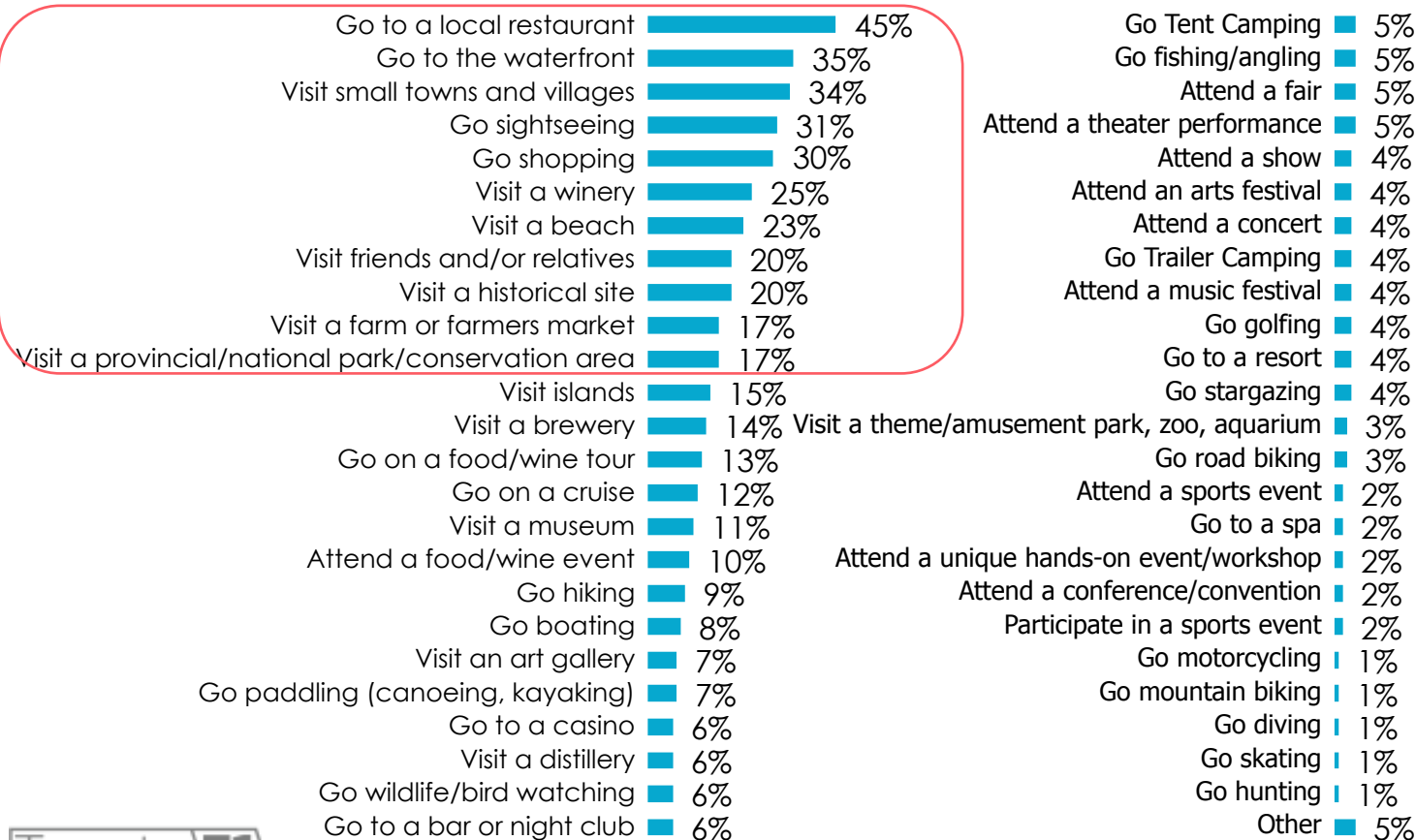
South Eastern Ontario travellers are more likely to have travelled with a spouse/partner (53%) or family with kids (19%). Travelling with friends was the third most common way to travel. Relatively few – just 12% - travelled with family (no kids) or alone.

Types of activities

Going to a local restaurant, visiting the waterfront and small towns and villages were the most common activities undertaken.

Q13: What did you do while you were here? n=1882

Total



INSIGHT

The 10 most popular activities undertaken reflect food and drink (local restaurants, winery visits, farm/farmer's markets visits), outdoor activities (going to the waterfront, beach visit and provincial/national park/conservation areas) and culture and heritage (small towns and villages, historical sights and shopping), in addition to sightseeing and VFR.

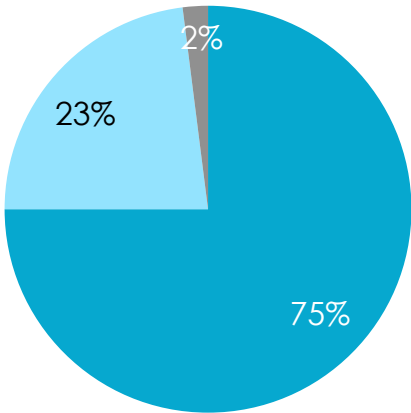
Trip enjoyment

South Eastern Ontario travellers are highly satisfied with their trips.

Q14: Did you enjoy your trip? n=1882

Total

- Really enjoyed the trip
- Enjoyed the trip
- The trip was OK
- Did not enjoy the trip



	Bay Of Quinte (n=631)	Cornwall and The Counties (n=378)	1000 Islands Brockville (n=577)	1000 Islands Gananoque (n=901)	Kingston 1000 Islands (n=1132)	Land O'Lakes (n=322)	Prince Edward County (n=1198)	Rideau Heritage Route (n=332)
Really enjoyed the trip	80%	78%	78%	76%	78%	79%	78%	78%
Enjoyed the trip	19%	20%	20%	22%	20%	20%	21%	20%
The trip was OK	1%	2%	2%	2%	2%	1%	1%	2%
Did not enjoy the trip	---	---	---	---	---	---	---	---

INSIGHT

Across all destinations, trip satisfaction is 98% or higher. Travellers to the Bay of Quinte, Land O'Lakes and Prince Edward County expressed the highest satisfaction levels.

Reasons for enjoying or not enjoying trip to South Eastern Ontario

The vast majority of travellers enjoyed their trip for the beauty and attractiveness of the destination.

Q15: Please explain why you enjoyed or did not enjoy your trip. n=1882



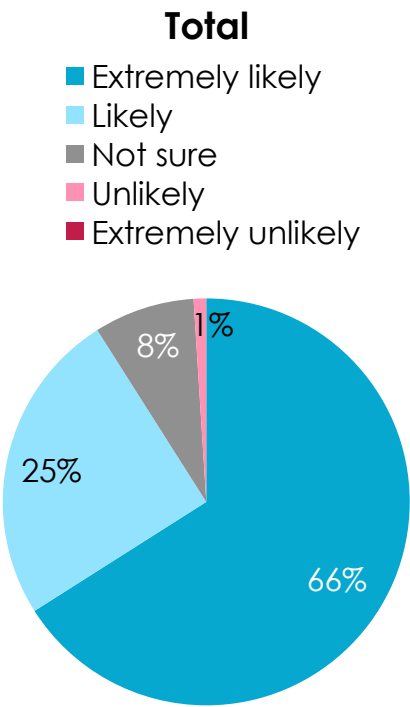
	Total
LIKE	93%
Beautiful place to visit again (Scenery)	43%
Friendly people	11%
Had a good experience / Fun time	11%
Delicious food	10%
Explore many other places / Many destinations to visit	9%
Beautiful beaches / Waterfront / Lakes	8%
Relaxing trip	7%
Great weather	6%
Many options for wineries / breweries	6%
Good restaurants	5%
Amazing driving / Cycling / biking / hiking experience	5%
Met family / friends	5%
Trip with family / friends	5%
Activities / Games	4%
Good quality wines	3%
Many options for markets / shopping malls	3%
Visit historic places	3%
Many exiting fun activities to indulge	3%

	Total
Amazing cruise trip	2%
Boating / Sailing	2%
Good shopping experience	2%
Good accommodation facility	2%
Shows / Concerts / Events	2%
Enjoyable (Unspecified)	2%
Easy accessible day trip / Close proximity	2%
Amazing / Good trip	2%
Camping	1%
Beautiful islands	1%
Different culture	1%
Beautiful parks	1%
Affordable pricing	1%
Fishing experience	1%
DISLIKE	3%
Lack of time	1%
Bad weather	1%
Others	3%
None	2%

Likelihood of returning to South Eastern Ontario for a leisure trip

When travellers do visit they are very satisfied and likely to become loyal repeat visitors.

Q16: How likely are you to return to South Eastern Ontario for an overnight leisure trip within the next two (2) years? n=1882



	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=1632)
Extremely likely	80%	75%	74%	61%	66%
Likely	18%	19%	19%	31%	25%
Not sure	---	3%	6%	8%	8%
Unlikely	2%	3%	1%	---	1%
Extremely unlikely	---	---	---	---	---

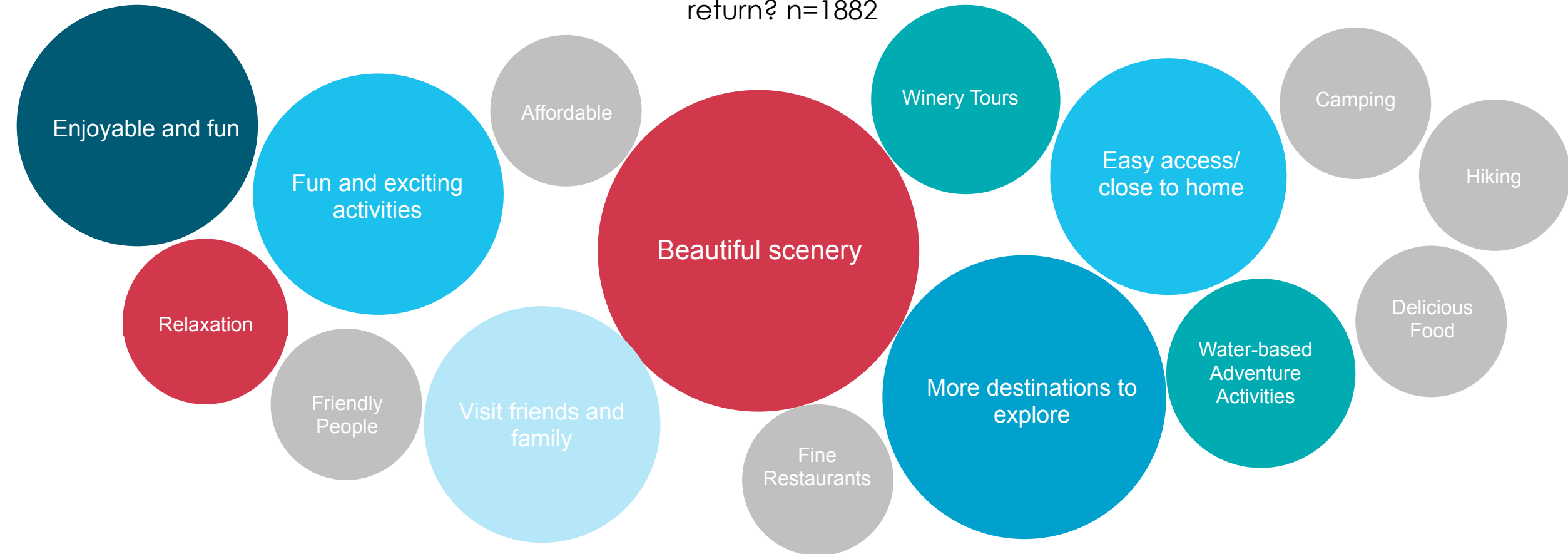
INSIGHT

Travellers likelihood of returning to South Eastern Ontario (91%) decreased against trip satisfaction. Bay of Quinte captured the highest number of visitors expressing a likelihood to return.

Reasons for returning or not returning

The beauty and attractiveness of the region is the key motivator for wanting to return. Limited time, money and competing destinations were reasons for not returning.

Q17: Please explain why you want to return or why do you not want to return? n=1882



Pre-planning sources

Word of mouth and direct engagement with a hotel/accommodation were the two most popular sources for trip planning.

Q18: What sources of information did you use to plan your trip? n=1882

Total		Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
Spoke to a friend and/or relative	37%	39%	30%	41%	54%	36%
Direct with hotel/accommodation	36%	28%	35%	37%	31%	36%
Destination marketing website	29%	49%	30%	26%	38%	29%
A brochure/travel guide	20%	31%	27%	16%	23%	19%
Visitor Information Centre	16%	20%	38%	14%	15%	16%
The Great Waterway website	13%	10%	16%	7%	8%	13%
Social Media	4%	3%	5%	6%	8%	4%
Online Booking Site	2%	3%	5%	3%	---	2%
Tour Operator	2%	2%	5%	1%	---	2%
Travel Agent	1%	---	---	2%	---	1%

INSIGHT

For planning and inspiration, South Eastern Ontario travellers most commonly spoke to a friend and/or relative, engaged directly with a hotel/accommodation and researched online using a destination marketing website.

Pre-planning sources, online

Online booking sites are one of the least popular ways travellers planned their trips to the region.

Q18, i. Online Booking Site: What sources of information did you use to plan your trip? n=1882

Total		Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
Online Booking Site	2%	3%	5%	3%	---	2%
Expedia	1%	2%	3%	---	---	1%
TripAdvisor	1%	---	3%	1%	---	1%
Booking.com	1%	3%	5%	1%	---	1%
Travelocity		---	3%	1%	---	---
Kayak		---	3%	---	---	---

INSIGHT

The use of online booking sites for trip planning is less common for travel to South Eastern Ontario across all destinations. However, this may be due to limited offerings and presence on each respective website.

Pre-planning sources, social media

Social media is not a key trip planning resource for South Eastern Ontario travellers.

Q18, vi. Social Media: What sources of information did you use to plan your trip? n=1882

Total		Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
Social Media	4%	3%	5%	6%	8%	4%
Facebook	3%	3%	5%	3%	8%	3%
Instagram	1%	3%	3%	3%	---	1%
Trip Advisor	1%	2%	3%	1%	---	1%
Twitter		---	---	1%	---	---
YouTube		---	---	1%	---	---
Pinterest		---	---	---	---	---







INSIGHT

Social media is used less frequently for South Eastern Ontario travellers trip planning, perhaps reflecting limited presence and engagement on these sites by destinations and tourism operators/accommodations.

Length of stay

A two night trip is the most common length of stay.

Q19: How long did you stay for? n=1882

	Total	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
Less than 1 night	 18%	13%	38%	19%	22%	18%
1 night	 17%	13%	38%	21%	19%	17%
2 nights	 32%	29%	---	33%	30%	31%
3 nights	 17%	16%	8%	16%	16%	18%
4-7 nights	 11%	11%	16%	4%	8%	12%
More than 1 week	 5%	18%	---	7%	5%	4%

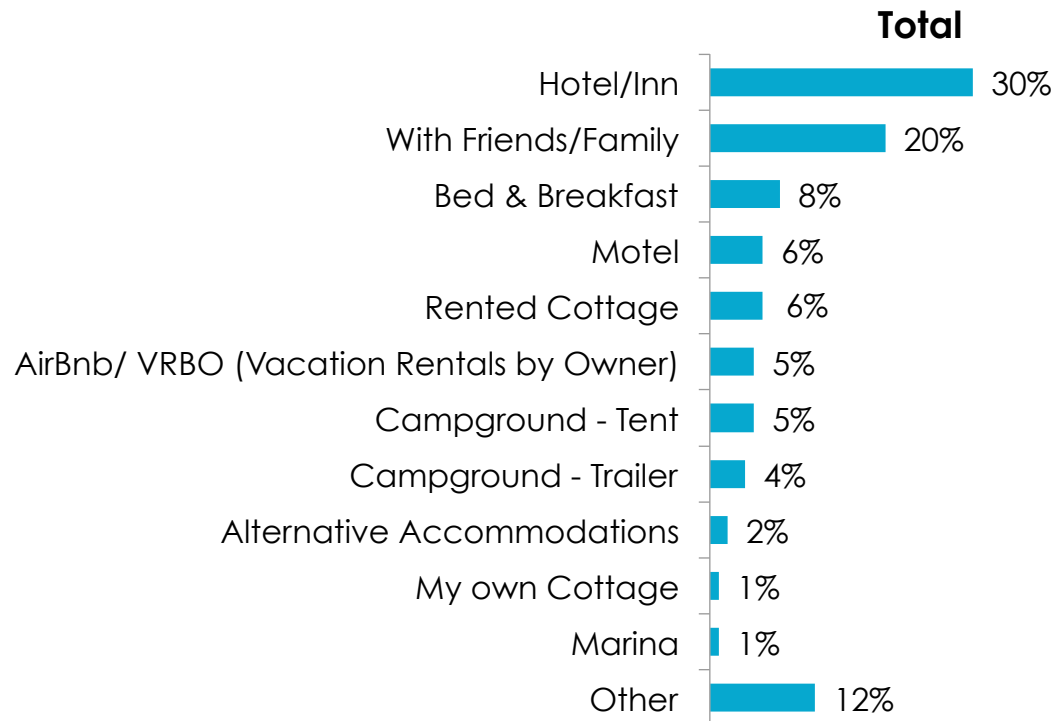
INSIGHT

More than half (67%) of all trips were 2 nights or less. The most common length of stay is a two night trip. Based on age, travellers +70 stayed the longest – 40% stayed three nights or more.

Accommodations

Hotel is the preferred accommodation choice for travellers.

Q20: Where did you stay while on your trip? n=1882



INSIGHT

50% of travellers stayed in a hotel/inn or with friends/family. When looking at variability by age, 36% of travellers aged 18-24 stayed with friends/family.

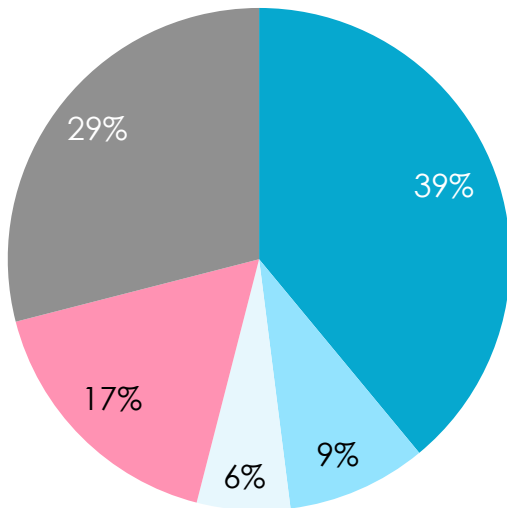
The majority of travellers that responded 'Other' visited only for the day and not overnight.

Actual booking

Online and directly with the accommodation is the preferred method for booking overnight stays.

Total

- Online - directly with property
- Through travel booking website
- AirBnb/VRBO
- I called the property
- Other



Q21: How did you book your overnight stay? n=1882

	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=1632)
Online - directly with property (e.g., hotel website)	37%	37%	36%	31%	39%
Through travel booking website (e.g., Expedia, TripAdvisor)	5%	11%	7%	8%	9%
AirBnb/VRBO (Vacation Rentals by Owner)	10%	8%	5%	---	6%
I called the property	20%	22%	17%	15%	17%
Other	28%	22%	35%	46%	29%

INSIGHT

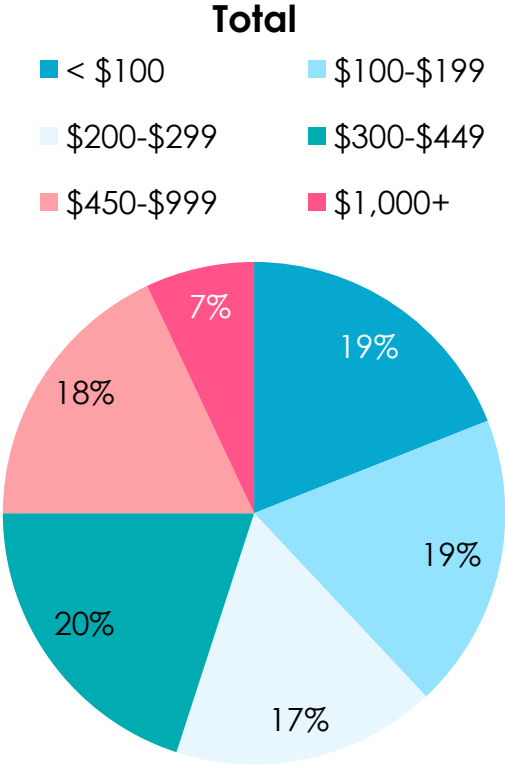
When it comes to booking an overnight stay, travellers mostly booked online directly with their chosen accommodation property – this was especially true for those aged 18-24 (54%). Only 11% of travellers aged 24-35 called the property.

In some cases 'Other' reflected travellers that didn't stay overnight.

Estimated trip spending

Travellers are likely to spend less than \$450 during their trip.

Q22: How much did you spend on your trip including accommodations?
n=1882



	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=1632)
< \$100	21%	32%	25%	38%	18%
\$100-\$199	18%	19%	19%	23%	19%
\$200-\$299	16%	11%	17%	8%	17%
\$300-\$449	26%	11%	16%	23%	20%
\$450-\$999	11%	22%	15%	---	19%
\$1,000+	8%	5%	8%	8%	7%

INSIGHT

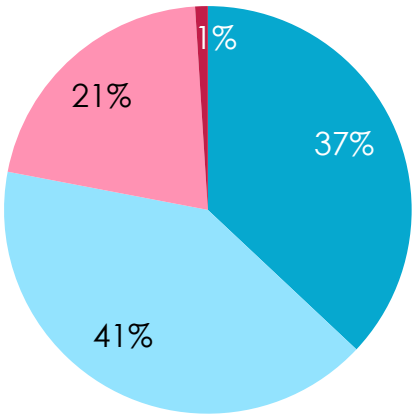
The pattern of spend is varied, however almost three quarters (74%) of travellers spend less than \$450 per trip. This is likely due to few high-end hotel options, short trip lengths and the fact that some travellers stay with friends and/or family (20%) during their visit.

Perception of value

Trips to South Eastern Ontario are seen as offering good/excellent value for money.

Q23: Compared to other trips and destinations, do you feel that your trip offered value for money?
n=1882

- Total**
- The trip offered excellent value
 - The trip offered very good value
 - The trip offered good value
 - The trip offered poor value



	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=1632)
The trip offered excellent value	51%	43%	46%	15%	37%
The trip offered very good value	39%	30%	41%	54%	41%
The trip offered good value	10%	24%	13%	31%	21%
The trip offered poor value	---	3%	---	---	1%

INSIGHT

When comparing other trips and destinations, travellers viewed South Eastern Ontario positively when thinking about value for money.

Influencers

Currently, travellers most commonly hear about the region from friends and/or relatives.

Q24: How did you hear about this region? n=1882

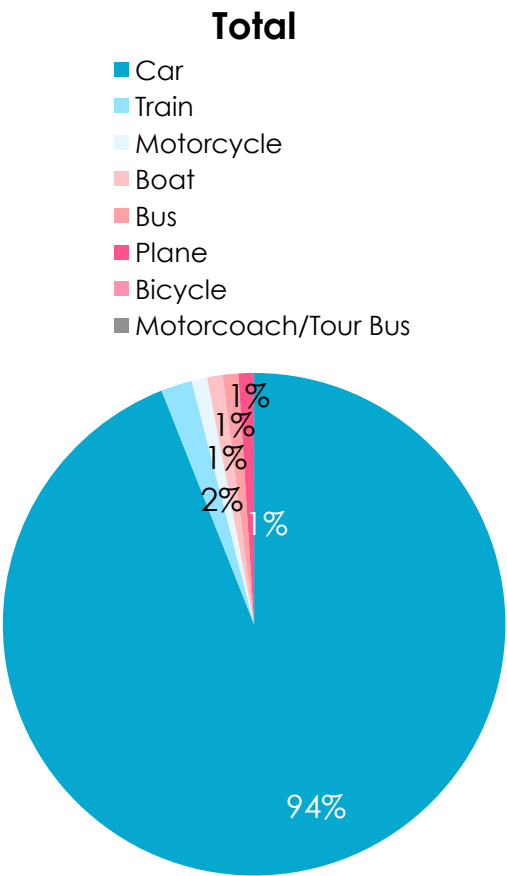
Total		Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (n=13)	South Eastern Ontario (n=1632)
Friends and/or relatives	68%	77%	68%	73%	85%	68%
Travel Guides/Maps	21%	16%	16%	18%	15%	21%
Online Advertising	18%	25%	16%	17%	15%	18%
Publications/News Outlets/Article	12%	11%	24%	12%	15%	12%
Travel Information Centre (e.g., OnRoute)	9%	8%	14%	11%	---	9%
An Event	6%	5%	16%	4%	---	6%
Bloggers	3%	7%	---	4%	---	3%
TV/Radio Ads	3%	3%	14%	3%	8%	3%
Social Media	2%	2%	---	3%	15%	2%

INSIGHT

Friends and/or relatives remains the most popular way to hear about the region. Other important sources are Travel Guides/Maps and Online Ads. Currently, social media is used least.

How they got here

For 94% of travellers car was the means of transport to reach the destination, reflecting the high number of short-haul travellers.



Q25: How did you travel to the region? n=1882

	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=1632)
Car	95%	86%	91%	100%	94%
Train	2%	5%	2%	---	1%
Motorcycle	2%	---	---	---	2%
Boat	2%	3%	3%	---	1%
Bus	---	5%	1%	---	1%
Plane	---	---	1%	---	1%
Bicycle	---	---	1%	---	---
Motorcoach/Tour Bus	---	---	1%	---	---

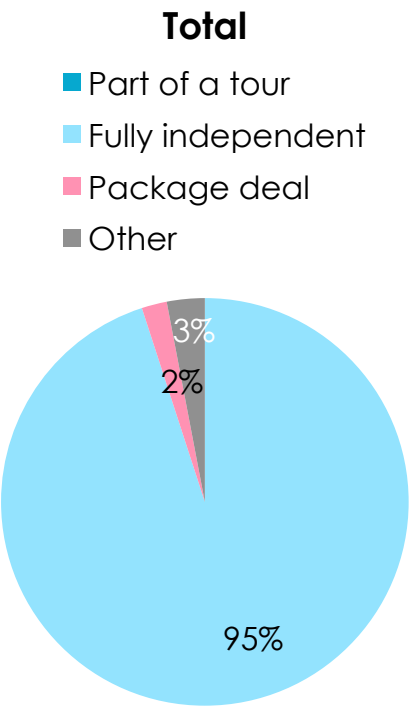
INSIGHT

Travel by car was the main means of transport to reach the destination.

Package vs. FIT

Travellers prefer fully independent travel over tours or package deals.

Q26: Was you trip to South Eastern Ontario: i) Part of a tour ii) Fully Independent iii) Package deal
n=1882



	Bay Of Quinte (n=61)	1000 Islands Brockville (n=37)	Kingston 1000 Islands (n=139)	Land O'Lakes (Lennox & Addington, Frontenac) (n=13)	South Eastern Ontario (n=1632)
Part of a tour	2%	---	---	---	---
Fully independent	96%	92%	95%	100%	95%
Package deal	2%	5%	2%	---	2%
Other	---	3%	3%	---	3%

INSIGHT

The preferred travel style for 95% of travellers to the region is fully independent.

Most recent leisure trip outside of South Eastern Ontario, last two years

The top three Ontario destinations visited outside of South Eastern Ontario are Toronto, Niagara Falls and Ottawa.

Q28: What other Ontario locations outside of South Eastern Ontario have you travelled to in the last two (2) years for leisure? n=2461



INSIGHT

Respondents also visited a variety of destinations across Ontario.

Most recent leisure trip outside of Ontario (last two years)

Travellers mostly stayed within the Americas for their most recent leisure trips outside Ontario.

Q29: Which other locations outside of Ontario have you traveled to for a leisure trip in the last two (2) years? n=2461



INSIGHT

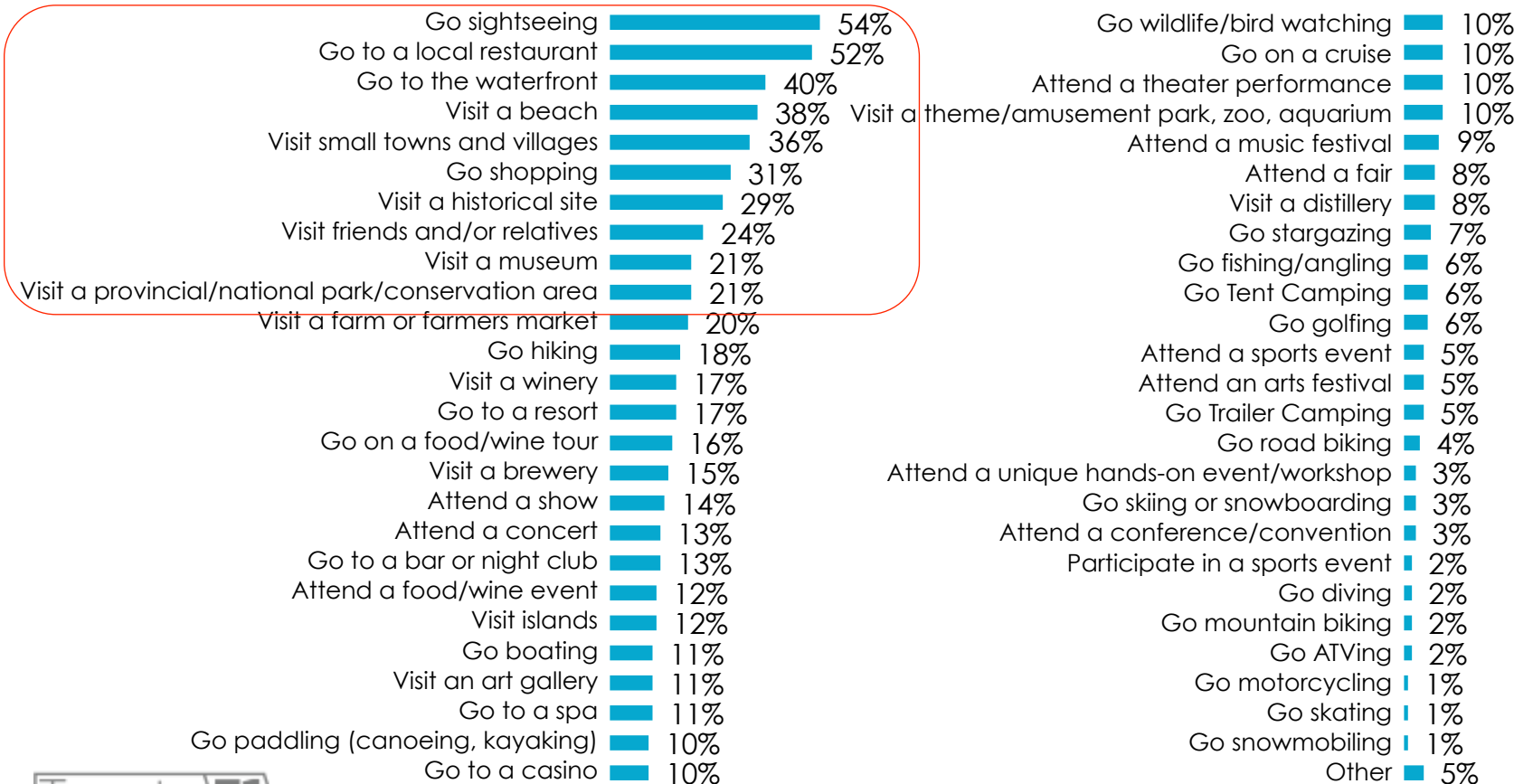
The destinations mentioned were primarily within Canada, United States, Mexico and the Caribbean. A smaller number of travellers cited travelling to Europe.

Types of activities sought during leisure trips

Sightseeing and going to a local restaurant were the most common activities travellers participated in on their most recent leisure trip.

Q30: What activities did you do while on your last leisure trip? n=2461

Total



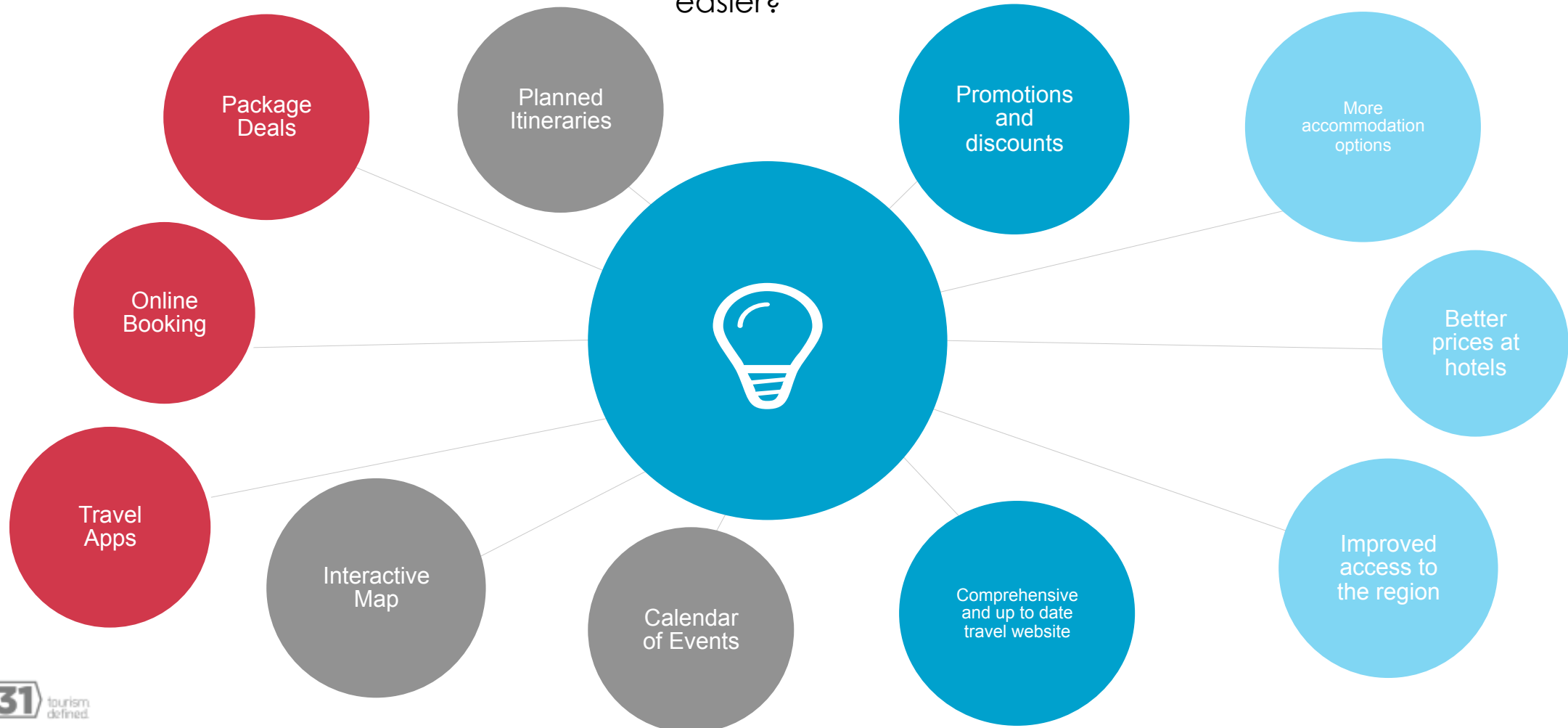
INSIGHT

Activities undertaken by respondents during their last leisure trip reflects many of the same activities travellers did during trips to South Eastern Ontario. This signifies an opportunity to increase traveller's awareness about South Eastern Ontario's offerings in these areas across all destinations.

Ways to improve trip planning

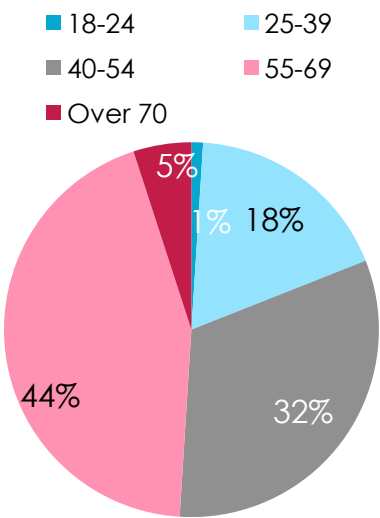
The majority of improvements noted by respondents are related to improved online resources that would assist with both inspiration/planning and booking.

Q36: What would make your trip planning to South Eastern Ontario easier?

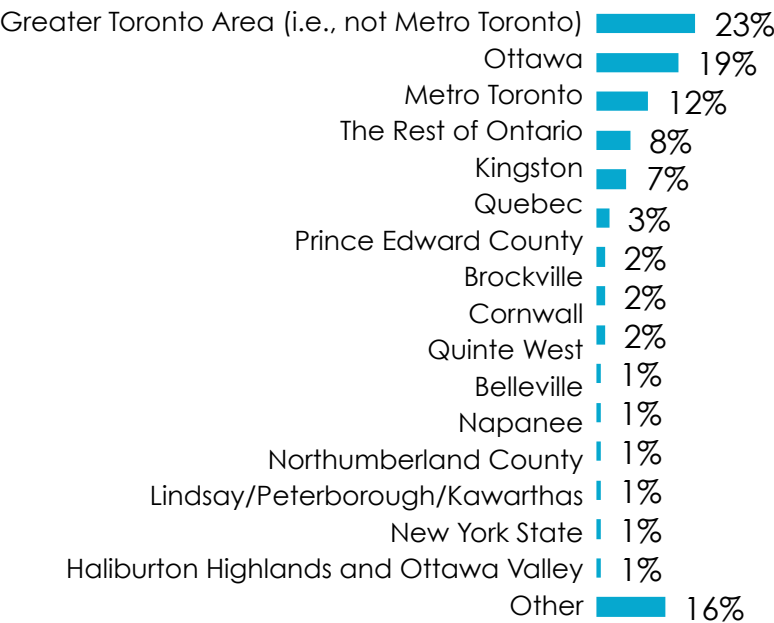


Respondent Profile (n=2461)

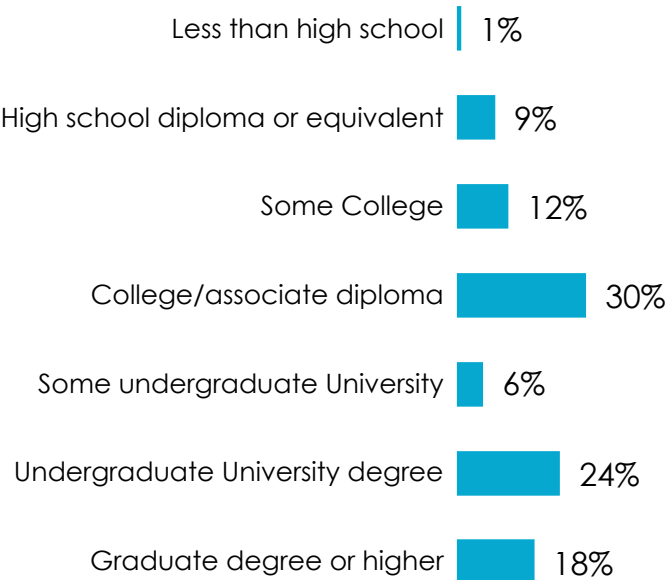
Q31: What is your age?



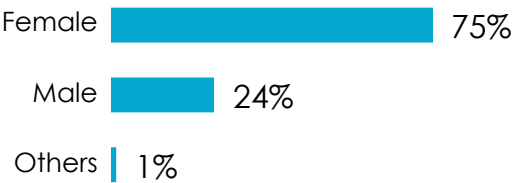
Q32: Where do you currently live?



Q34: What is your highest level of education?



Q33: Identify my gender as



Q35: What is your approximate annual household income?

