

# The Great Waterway Travel Intention Study

Final Results Presentation

Prepared for: Region 9 – Regional Tourism Organization



December 2017



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## **Project Overview**

Background

Objectives and Methodology

# Background

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- The Great Waterway is a stunning and diverse tourist destination located in South-Eastern Ontario which hugs the coast of the St. Lawrence River and the Eastern tip of Lake Ontario. The region offers many distinct tourist attractions from golf, wineries, and fine-dining; to outdoor-activities and camping; to heritage and cultural attractions.
- Region 9 Regional Tourism Organization (“RTO 9”), was developed to better communicate the region’s many benefits, and increase overall tourism, and came together between the years of 2009-2010 when the tourism organizations of the region united to form a single, stronger organization, constituted of 8 Destination Marketing Organizations representing many municipalities, towns, cities, villages and townships. These Destination Marketing Organizations include:
  - Cornwall and the Counties
  - Brockville Tourism
  - 1000 Islands Gananoque Chamber of Commerce and TIAP
  - Tourism Kingston and KAP
  - Rideau Heritage Route Tourism Association
  - Land O’Lakes Tourist Association
  - Bay of Quinte Regional Marketing Board
  - Prince Edward County
- RTO9 required the services of a high quality market research firm qualified to carry out a Travel Intention Study.
- On behalf of the RTO9, Forum Research Inc. conducted a high-quality Travel Intention Study among Quebec households to gauge interest in their travel attitudes toward the Great Waterway region located in South Eastern Ontario.

# Objectives and Methodology

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- Both qualitative and quantitative research was conducted in order to learn more about the following,
  - Travel intentions to South Eastern Ontario – The Great Waterway and its 8 destinations;
  - Barriers to travel;
  - Awareness/perception of South Eastern Ontario – The Great Waterway and its 8 destinations;
  - Media habits in relation to travel planning;
  - Travel experiences that are being sought;
  - Length of travel/time of year;
  - Behavior in relation to packaging vs a la carte

# Objectives and Methodology, Cont'd

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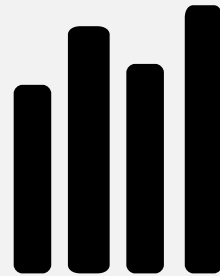
- Two 75-minute French-spoken online focus groups (using webcams) with 12 participants from Montreal and Quebec City were conducted to inform, and help build the telephone survey questionnaire. The following topics were addressed,
  - Various types of activities Quebecers look for in a vacation
  - Motivations and barriers attracting Quebecers to visit Southeastern Ontario
  - Positioning's and angles to promote the region to increase interest and the likelihood to consider visiting.

# Objectives and Methodology, Cont'd

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- Using the findings from the qualitative research, a 20-minute French-language telephone survey was developed. Over 900 surveys were completed with respondents who self-identity as Francophone or Allophone to gain a deep understanding travel attitudes toward the Great Waterway region located in South Eastern Ontario.
  - n=902 surveys were completed in total from the following regions,
    - n=317 Montreal
    - n=231 Quebec City
    - n=189 North Shore of St. Lawrence
    - n=185 South Shore of St. Lawrence





## **Detailed Findings**

### Qualitative Research Results

# Quebecers Sought Various Types of Vacations

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*Time, budget and weather were the three key influencers.*

## TIME

The amount of vacation time available is dictating travel destinations and best times to travel.

- Many were trying to travel a few times a year, with at least a vacation during the summer time, notably:
  - End of school year, the construction vacation (last 2 weeks of July), long weekends (St-Jean, Canada Day, Labour day weekend).

## WEATHER

A long and cold winter or a rainy and cool summer motivates participants to seek a warm destination.

- All-inclusive resorts down South were part of their regular vacation destinations (Florida, Cuba, Republic Dominican, Costa Rica and Mexico were frequently mentioned destinations) - and not only during the winter.

## BUDGET

The amount of money available for vacation often dictated the final destination (as well as the means of transportation).

- Most vacation destinations mentioned were reached by car. They favoured traveling by car to increase their flexibility (ability to visit various sites, go at their own pace, stop often when traveling with young kids), as well as reducing the overall cost.
- In an effort to reduce flight costs, many were driving to a large city center to avoid pricey connecting flights (Montreal, Toronto, Plattsburg, Buffalo, etc. )

# Types of Activities During Vacations

***Depending on the time of year, destinations and vacation types (family, couple, weekends, events, etc.) vary.***

- Casino/gambling
- Going out clubbing/dancing/partying
- Visiting museums/ historical sites
- Great outdoors/ hiking, camping, fishing, trekking, biking, swimming, wildlife watching (whales, birds, etc.)
- Beach vacation, nautical activities, water ways near by
- Rest/relaxing/spa, massage
- Visiting a special exhibit/excursion/activity
- 'Foresta Lumina', concerts, football/hockey game, Marineland, amusement parks, waterslides/waterparks, zoos, festivals, Niagara Falls, climbing mountains
- Meeting new people, living like locals, learning about local culture
- Reconnecting with heritage
- Shopping (clothing, antiques, arts & craft, food/local specialties)
- Cruises

*"It's almost a ritual. I've visited Gaspésie almost every year. We rent a house by the water, deep sea fishing excursion, I've done hand gliding, horse back riding, hiking trails...I enjoy going to the same places years after years and noticing how the landscape is changing over time."* male, Montreal

.....

*"Last summer we went camping at Malbaie, did many hiking trails, visited the local village, did some shopping at little local artisanal boutiques, just looking at handmade soaps, preserves and other treats."* female, Qc City



# Needs Driving Destination Selection

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*Wanting to take advantage of their down time to do things:*

**Need to move:**

- Doing physical activities
- Practicing their favourite sports/activity (biking, swimming, diving, golfing, skiing, hiking, etc.)

**Need to see new/different things:**

- Expanding their personal horizon and knowledge
- Enjoying new scenery, things they haven't seen before

**Need for fun/being entertained:**

- Catching a show, concert or sporting events (football/hockey, etc.)
- Heard about a unique attractions (festival, landmarks, experience)
- Family type activities (water park, amusement parks, zoo, museums)

# Needs Driving Destination Selection

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*Vacation was a way to escape their routine:*

**Need for sunshine, warm weather:**

- Fleeing winter or cool/gray summers

**Need to reconnect:**

- Vacations are a way to reconnect with family members, visiting family and/or friends or their own ancestral regions
- A way to learn/teach new things to their kids
- Romantic getaway (without the kids)
- A special treat/reward or celebrating a special moment (anniversary, graduation, etc.)
- Reconnecting with nature, being in awe of the beauty of one's surroundings

**Need to rest:**

- Beach/all inclusive vacation
- Spa, massage, yoga retreat

# Popular Destinations Mentioned

*Popular destinations regrouped into 3 major types of destinations:*

## Province of Quebec



Provincial parks, Gaspésie, Tadoussac, Malbaie and other small towns.

## Driving Distance (Ontario / East Coast US)



Canada: Ottawa, Toronto, Niagara  
US: Old Orchard Beach, Ogunquit, Cape Cod, Virginia Beach, Adirondack, Manhattan/New Jersey, Boston

## All Inclusive South



Cuba, Dominican Republic, Mexico, Haiti

*Western Canada and international destinations like Europe and South America were mentioned less often and would not compete directly with a trip to Southeastern Ontario.*

# Vacation Planning

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## *Seeking general information about the region first*

- Word of mouth: travel stories and recommendations from family members and colleagues were the most important/frequent triggers to start researching a destination:
- Most were turning to the internet for their research, starting with websites from a specific region (official regional tourist sites). i.e. Voyage Quebec
- At this point they were looking for ideas of activities to see/do; lists of the top things not to miss; any time sensitive events (dates for festivals/attractions); reviews and comments
- Travelers reviews: TripAdvisor and travelers' forums/blogs were consulted to gauge interest levels and avoid tourist traps
- A few were still using published printed guides (Michelin guide, Lonely Planet) for a well planned trip to a specific destination (Europe, large cities), either buying or borrowing books from friends, libraries
- A few mentioned using CAA Quebec to help plan a road trip, as they suggest interesting stops along the way
- TV and magazine ads were also a source of inspiration about 'must see' activities
- Social Media: following travel bloggers on Instagram and/or posts from friends on FB

# Vacation Planning - Resources

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# Vacation Planning – Other Factors

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## *Wanting to travel differently.*

### ***Limited by their finances, they were finding creative ways to get more for less:***

- Many talked about browsing proposed travel packages for inspiration as to which attractions and sites to visit but felt they were getting better value if they bought things separately. “I feel I can get a better deal if I pick and choose my activity and lodging separately than those bundles. I often notice that I can negotiate a better price dealing directly with the guy than the posted price on the web” – male, Montreal
- Lodging in Airbnb, Bed & Breakfast or ‘gîtes’ was a way to get to live like locals, meet people and ultimately save money.

### ***Given the recent political climate in the US and the strong US\$, many said they were avoiding the United States and favoured a Canadian/Quebec destination lately:***

- Security: a few mentioned that they were avoiding certain destinations lately because they didn’t feel secure (Egypt, South America); one respondent also mentioned only relying on sites he considered ‘secured’ before conducting any money transactions. “I don’t want to take any chances with my hard earned money”
- Language: while they were able to speak English and some Spanish, some favoured destination where language was not a barrier (hence why they favoured France, Belgium, Northern African countries).

# Pros and Cons of Packages

*All inclusive and packages were OK for trip down South but most preferred selecting “À la carte”.*

Drivers	Barriers
<ul style="list-style-type: none"><li>• Peace of mind, no worries, everything is handled for you ahead of time</li><li>• You know how much it's going to cost you before leaving, can help with budgeting</li><li>• Safer: can research ahead of time, don't find yourself stranded at the last minute without a place to stay</li><li>• In most case, packages (are supposed) to represent savings</li></ul>	<ul style="list-style-type: none"><li>• Feeling too restricted:</li><li>• already set schedule, don't want to follow a set pace with a group</li><li>• What if the weather isn't cooperating that day – too many possibilities for unexpected restraints and you can't change</li><li>• Prefer choosing based on the spur of the moment ('what I feel like doing that day')</li><li>• Feels like tourist traps</li><li>• May not be the best possible deal</li></ul>

**IMPLICATIONS:** *Participants were using a one week all-inclusive trip to Cuba as their benchmark to establish 'value'; at \$1,000/ person for one week (feeling like you are not restricted on food and alcohol), a 2-3 day excursion to a nearby city can cost just as much.*

# The Great Waterway: “Limited” to “No Awareness”

## *Geographically confusing – unclear designation*

Most thought Southeastern Ontario included Ottawa and went all the way to Niagara Region:

- None have heard the term ‘The Great Waterway’ / ‘La grande voie d’eau’
- Most have visited the Ottawa region (get to see the national capital/museums, Rideau canal) and the GTA including Niagara Falls – Niagara region for the wineries, landmarks, Marineland, Wonderland, etc.
- When told the geographical boundaries of the region, very few were able to visualize, unprompted, what there is to visit

When prompted:

- Most have heard about the 1000 Islands
- Sandbanks Provincial park (unaware that it was part of this region), rang a bell for some
- A few had heard good things about Prince Edward County’s wineries

**NOTE:** Montreal respondents had more awareness/experience as they had travelled through the region more than the Quebec City respondents.



# “Passing by it” – Not a Destination

*The Great Waterway was not perceived as a destination,  
but could be a stop along their way.*

Currently, many have driven along the 401 on their way to Toronto or the Niagara Region and didn't notice anything of interest in that region:

- Very low awareness of any attractions and therefore, it currently doesn't feel like a potential destination.
- The lack of major urban centers was also contributing to their perception that there was not much to do or see.
- Given the close proximity, Montrealers were more open to going for a weekend or a short visit, but Quebec City respondents felt that if they were to drive 4 to 6 hours, they would want to stay longer and therefore, the region would need to offer enough to make it worthwhile.

*“The bus on the way to Toronto stops in Kingston. It looked boring, like there was nothing to do there. It's not motivating to visit...it seemed deserted.”*

*female, Montreal*



# Key Barriers to The Great Waterway

*Nothing feels unique or offers something which can't be seen closer to home.*

At first glance, pictures were not showing anything they haven't seen elsewhere before.

- Certain sense of nationalistic pride, many respondents preferred visiting Quebec regions before traveling further to visit what seemed similar to what they can see in Quebec.
- While fine dining and wineries were interesting activities they normally seek, they were doubting that there is a 'region specific' culinary style (as they have a preconceived notion that food is normally superior in Quebec compared to Ontario).
- One barrier to the Great Waterway was the fact that it didn't include a large urban center. The few who visited Kingston (passed by) felt it had nothing to do (unaware of events, museum, Fort Henry).
- Out of the images shown, nothing seemed to target families with young children and therefore, it felt as though this region was not for everyone.

*"(I've seen) nothing unique here. We have wonderful bike paths in Quebec, golf courses, wineries, tons of lakes and islands, camping sites and beaches, we have old forts with historical re-enactments too ...I won't drive 6 hours to go fish when I can do the same right here."*

*- male, Montreal*

*"I would rather start by visiting my own province before I go discover elsewhere. There are tons of beautiful regions to discover in Quebec. I would rather encourage the local economy. That's a lot of driving to see something similar to what I can find closer" - male, Quebec City*



# Key Drivers for The Great Waterway

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***Not too far yet you feel as though you are in completely different scenery.***

Especially relevant to Montrealers, the region seemed easily accessible and would make it a perfect weekend excursion (48hrs)

- Different heritage and history; visiting Fort Henry to learn more about the types of battles there (compared to Quebec historical battles between French and British), including the Upper Canada Village (which was unknown).
- Thousand Islands cruises and particularly the Boldt Castle (unknown and interesting attraction)
- Rideau Canal Locks; watching boats go by and/or sailing along the canal
- Culinary tours and the wine routes in Prince Edward County
- New scenery to discover while cycling on 'secure/designated' bike paths, maybe stopping at wineries along the way
- Camping, and Sandbanks beaches – experiencing the white sand and turquoise water (which should be warmer than the St. Lawrence river in Quebec).
- Summer and Fall were the two most probable and appealing times of year for this type of destination (outdoors, sightseeing, sceneries, water sports)

# Leverage Key Attractions That Feel Unique

***Boldt Castle, Sandbanks and the Thousands Islands were the most intriguing attractions.***

Once they learned more about the regions and various attractions, they felt they could probably make the Great Waterway an interesting destination, but they needed a specific ‘hook’ to get them to start considering the region

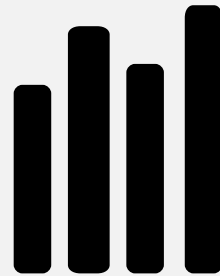
- A unique and specific destination/attraction such as the Boldt Castle or Sandbanks beaches.
- For many respondents, a stop along the way on the 401, or a weekend getaway was a great way for them to get a taste of the region
- That said, a time sensitive occasion/event would help to increase the urgency to enquire/learn more.



*“I was told not to miss the foliage in the fall at the 1000 Islands, it’s apparently gorgeous.” - female, Montreal*

*“Sandbanks is part of our short term list of places to visit. We’re hoping soon. Apparently the beaches are extraordinary, white sand beaches. It looks like down South. You forget that you’re still in Canada” - female, Quebec City*



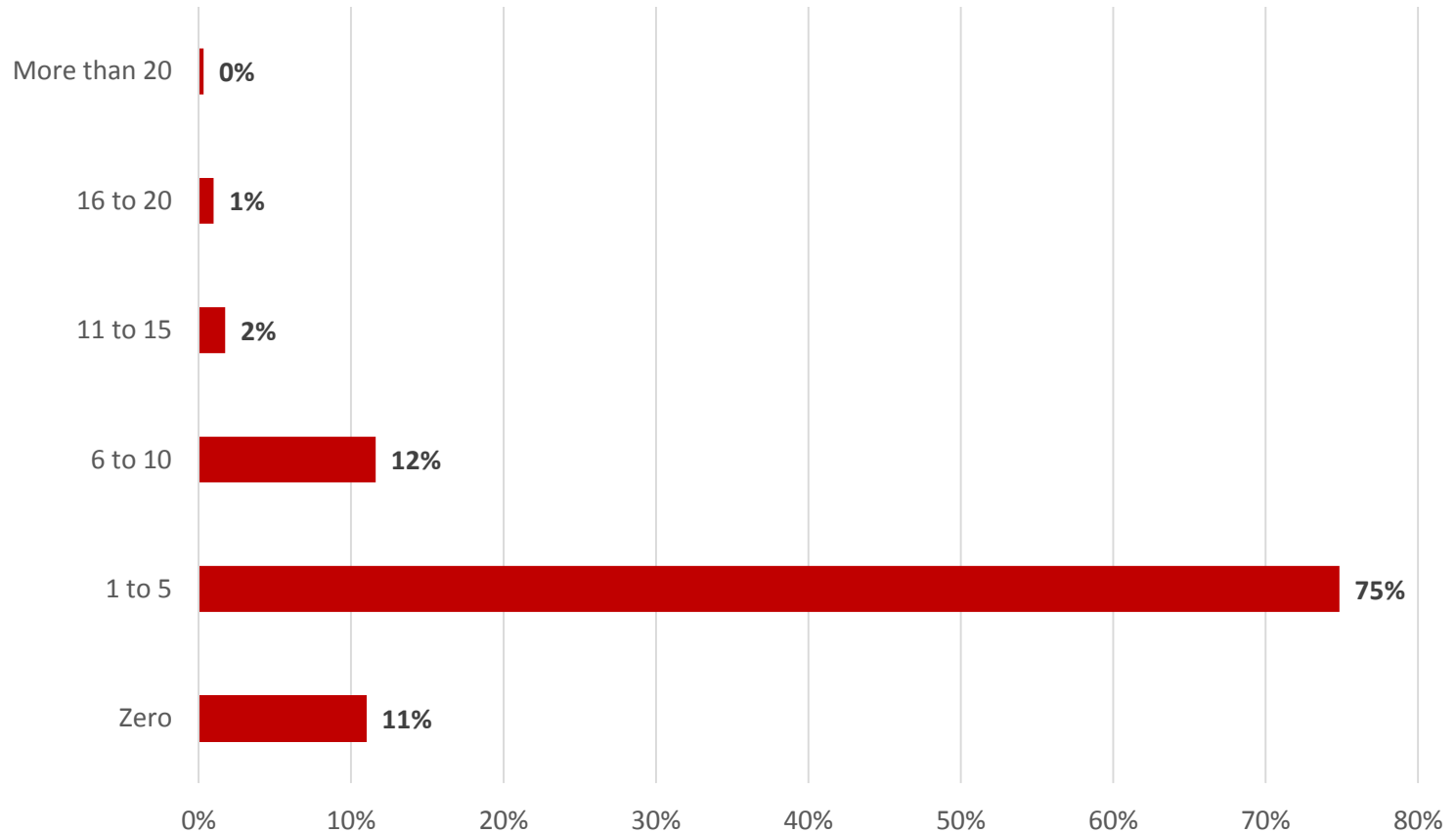


## **Detailed Findings**

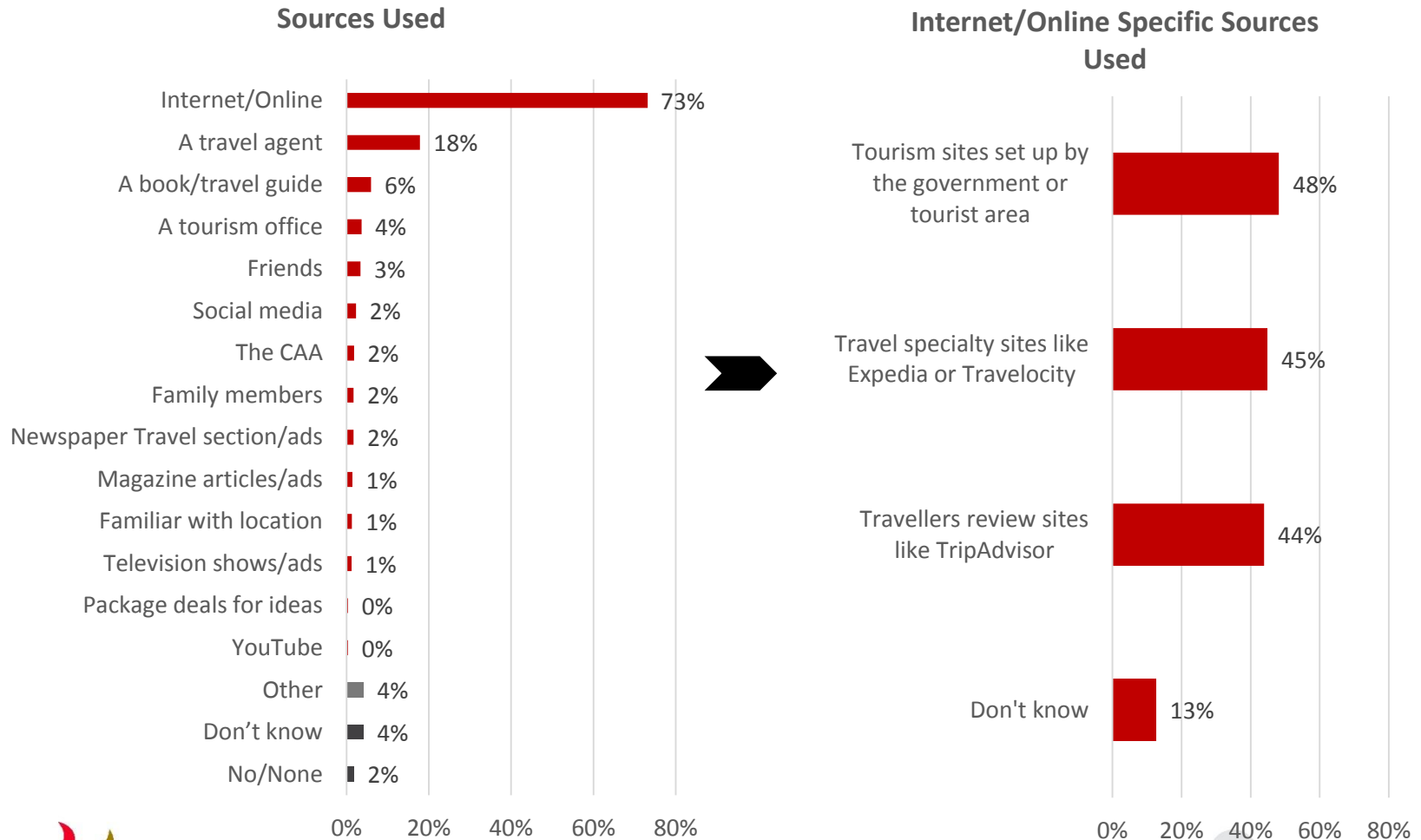
### Quantitative Research Results



# Pleasure Trips Taken in Past 2 Years



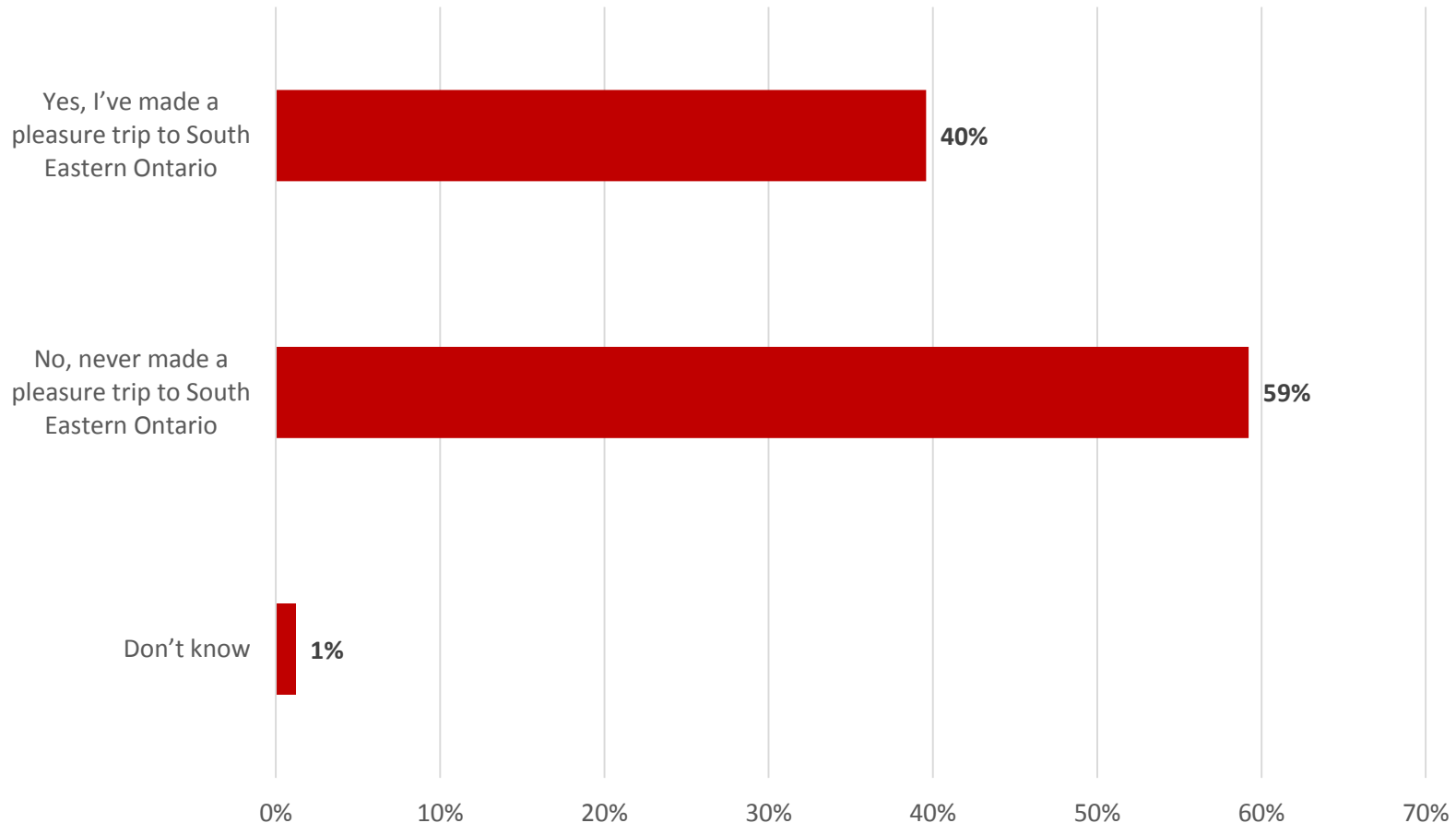
# Learning About Attractions – Sources Used



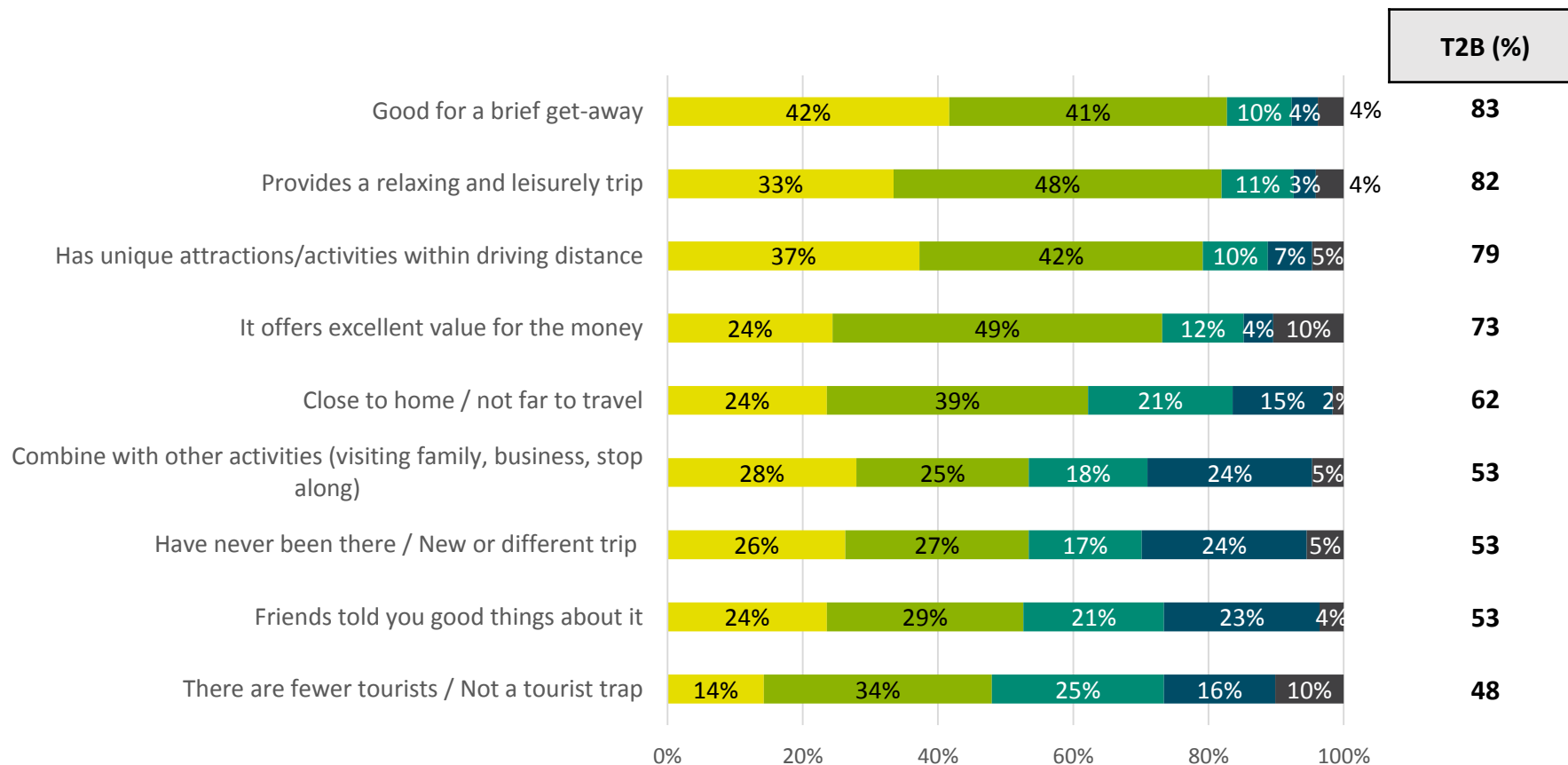
2A. In planning your last trip, what sources did you use to learn about the attractions that were available? BASE: All except NONE at Q1 (n=825)

2B. Since you mentioned the internet/online, was that..? (n=604)

# Pleasure Trips to South Eastern Ontario



# Reasons for Interest in Traveling to South Eastern Ontario



Strongly Agree

Somewhat Agree

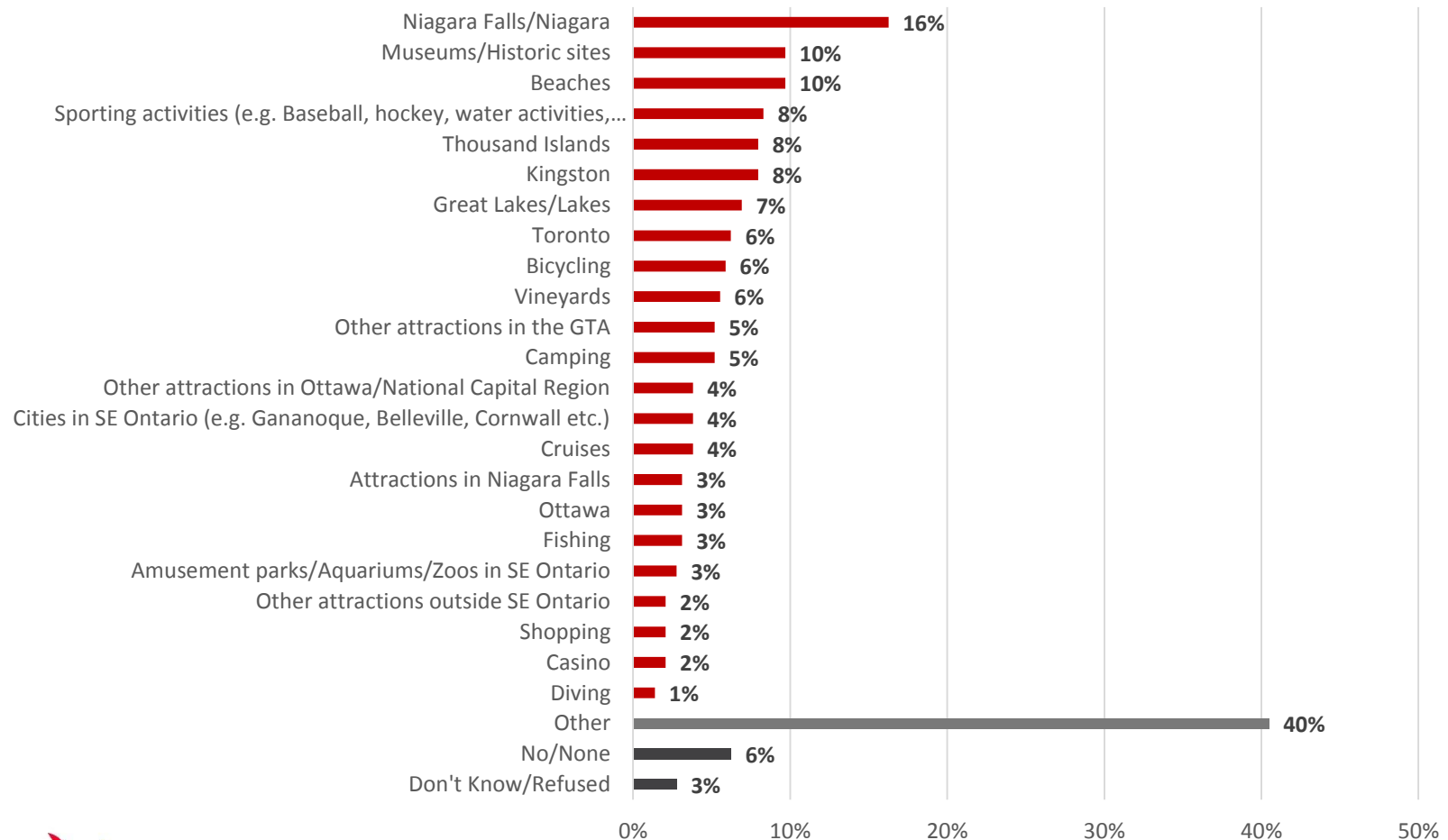
Somewhat Disagree

Strongly Disagree

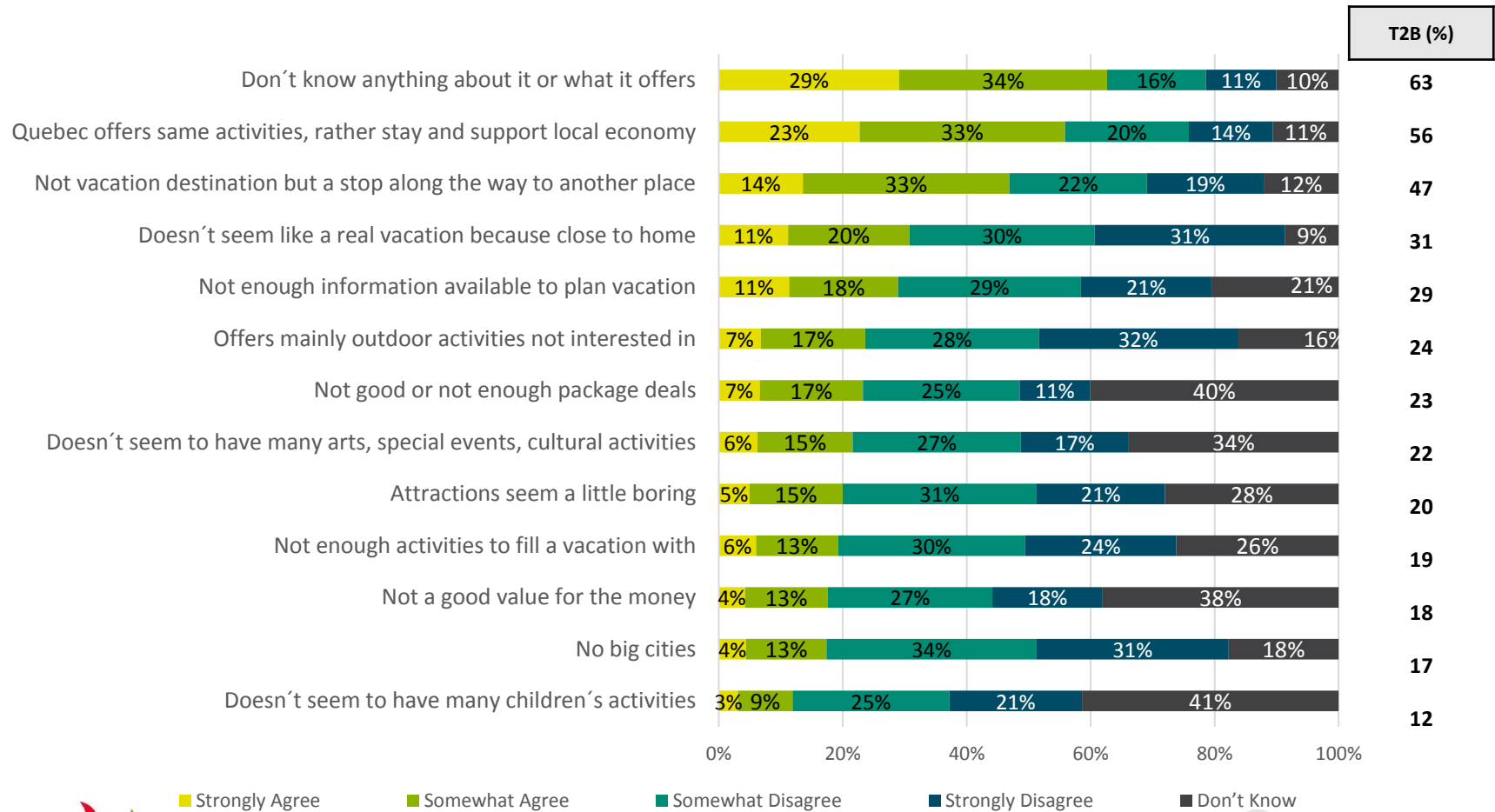
Don't Know



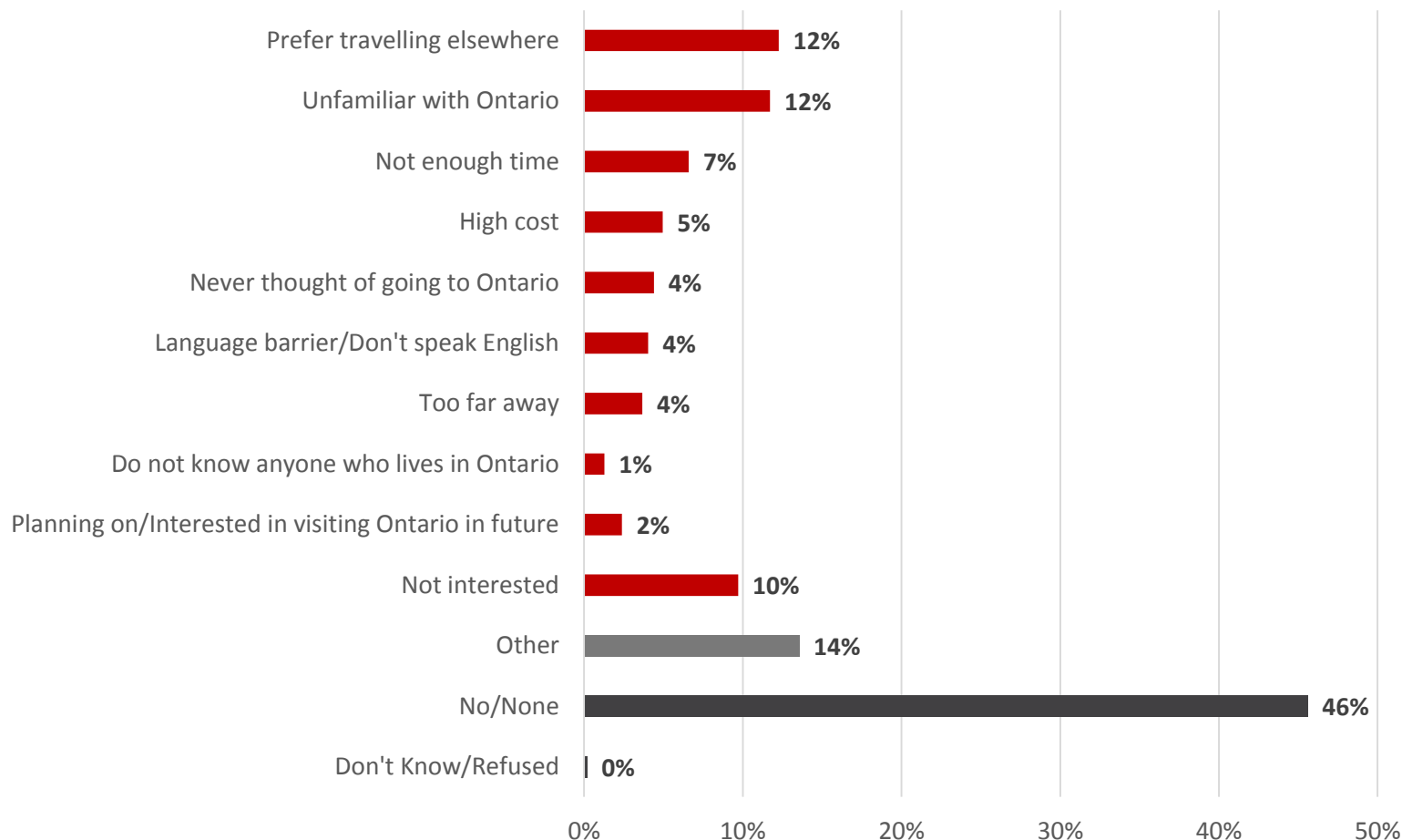
# Unique Attractions/Activities Within Driving Distance of South Eastern Ontario



# Reasons for Not Traveling to South Eastern Ontario



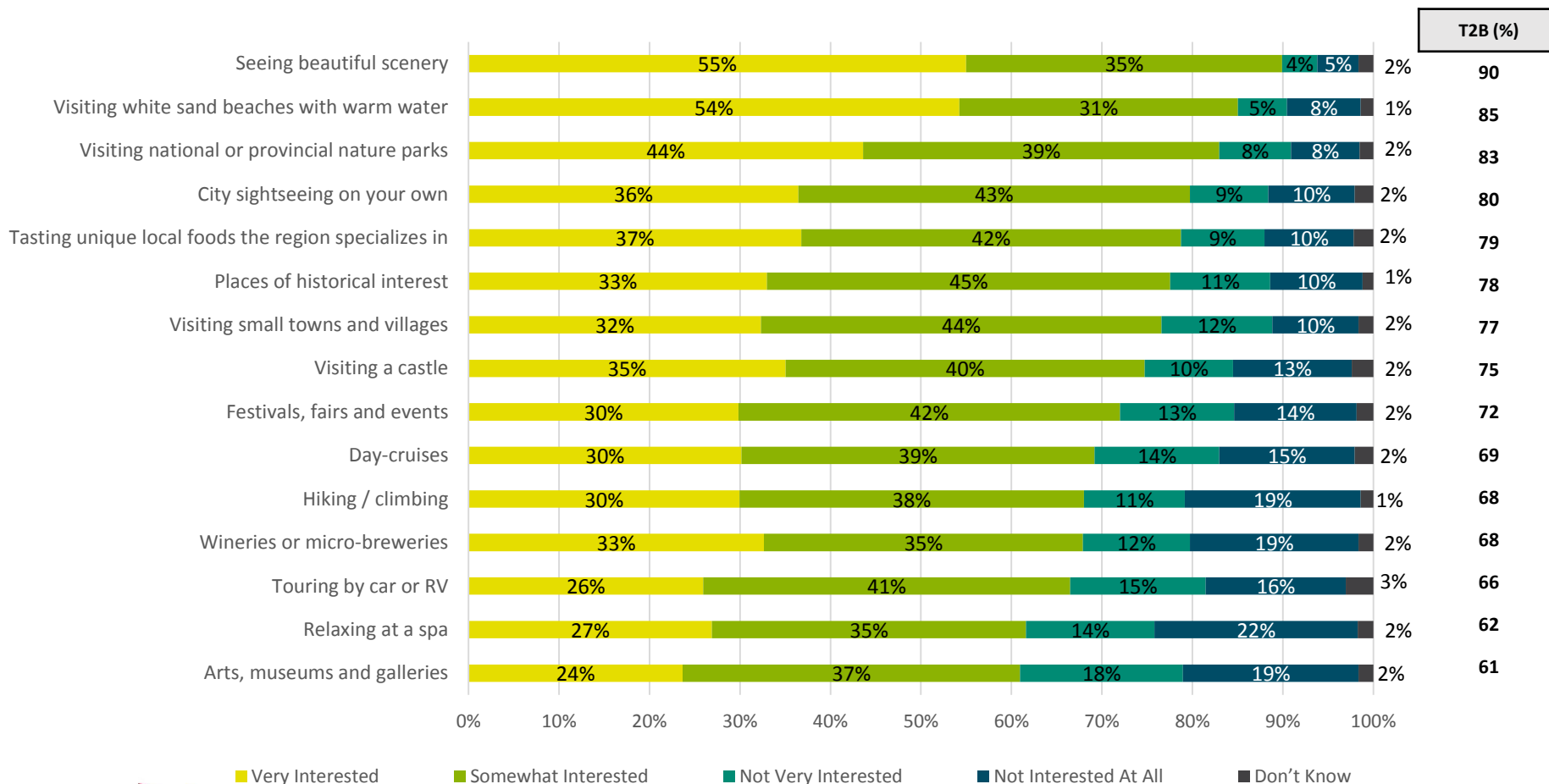
# Other Reasons for Not Traveling to South Eastern Ontario



5B. Are there any other reasons why you have never considered making a pleasure trip to South Eastern Ontario? BASE: No, never made a pleasure trip to South Eastern Ontario (n=546)

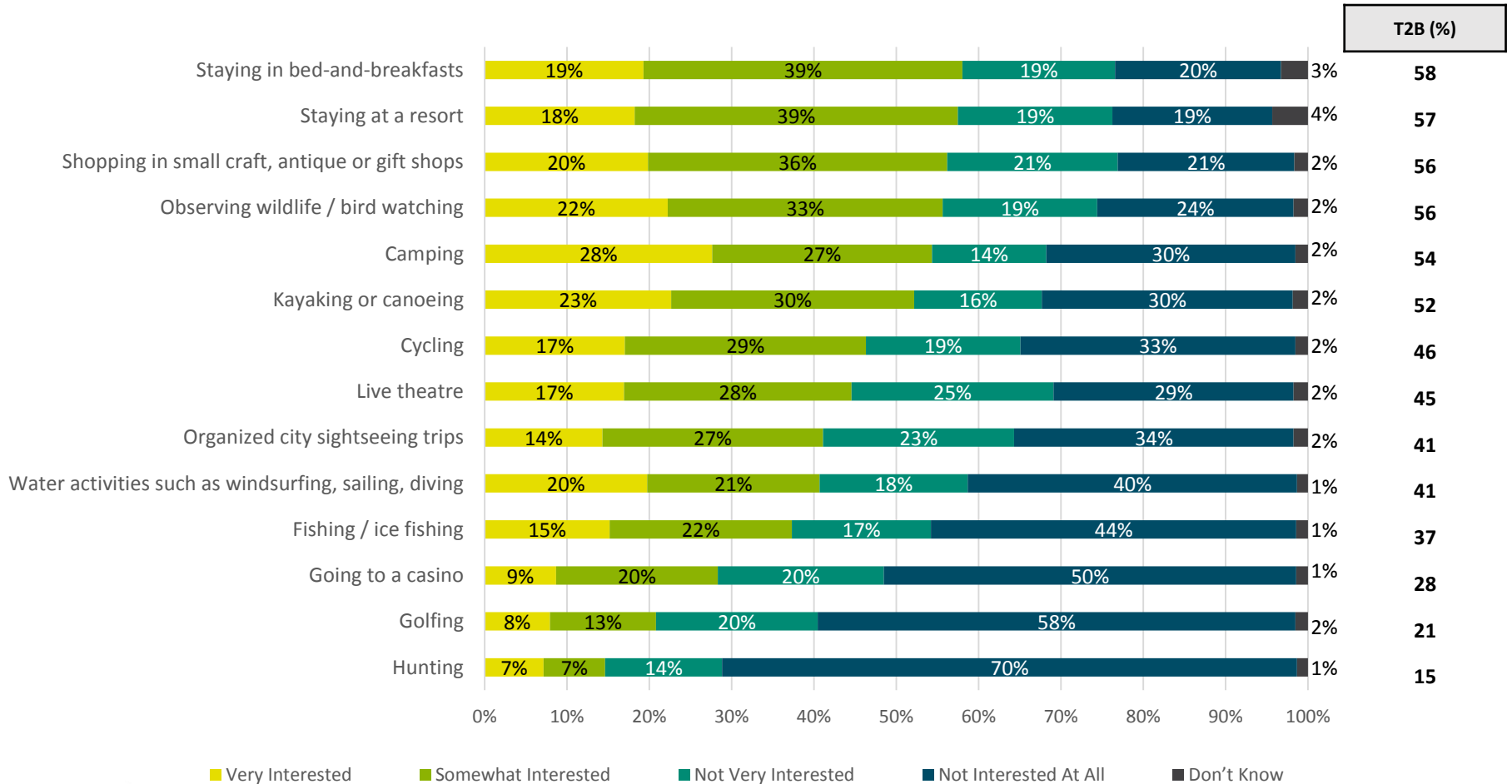


# Interest in Attractions/Activities Offered in South Eastern Ontario

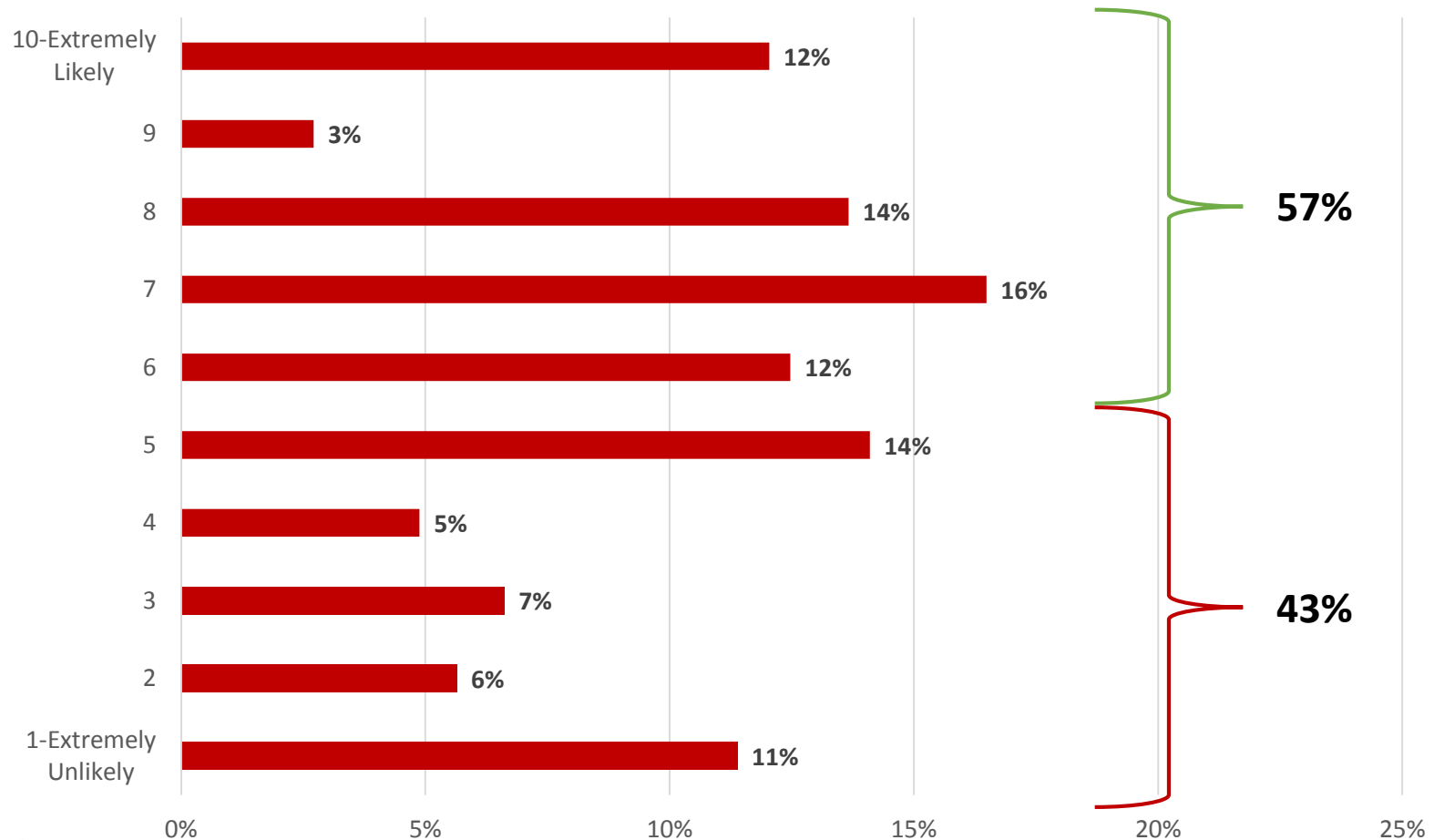




# Interest in Attractions/Activities Offered in South Eastern Ontario (cont'd)

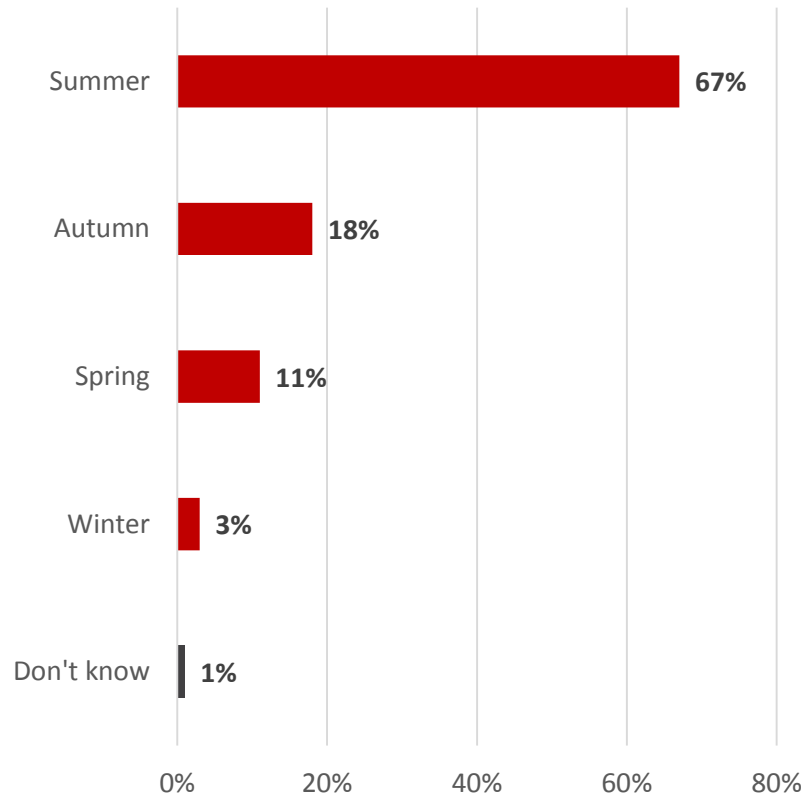


# Interest in Traveling to South Eastern Ontario After Information Provided

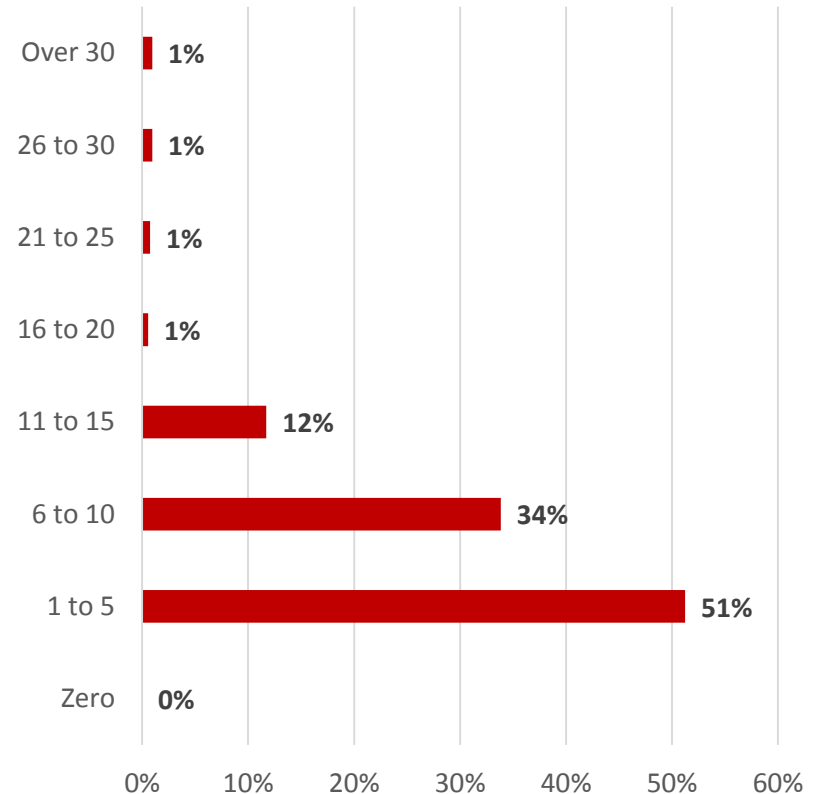


# Time of Year and Duration Travel Preference

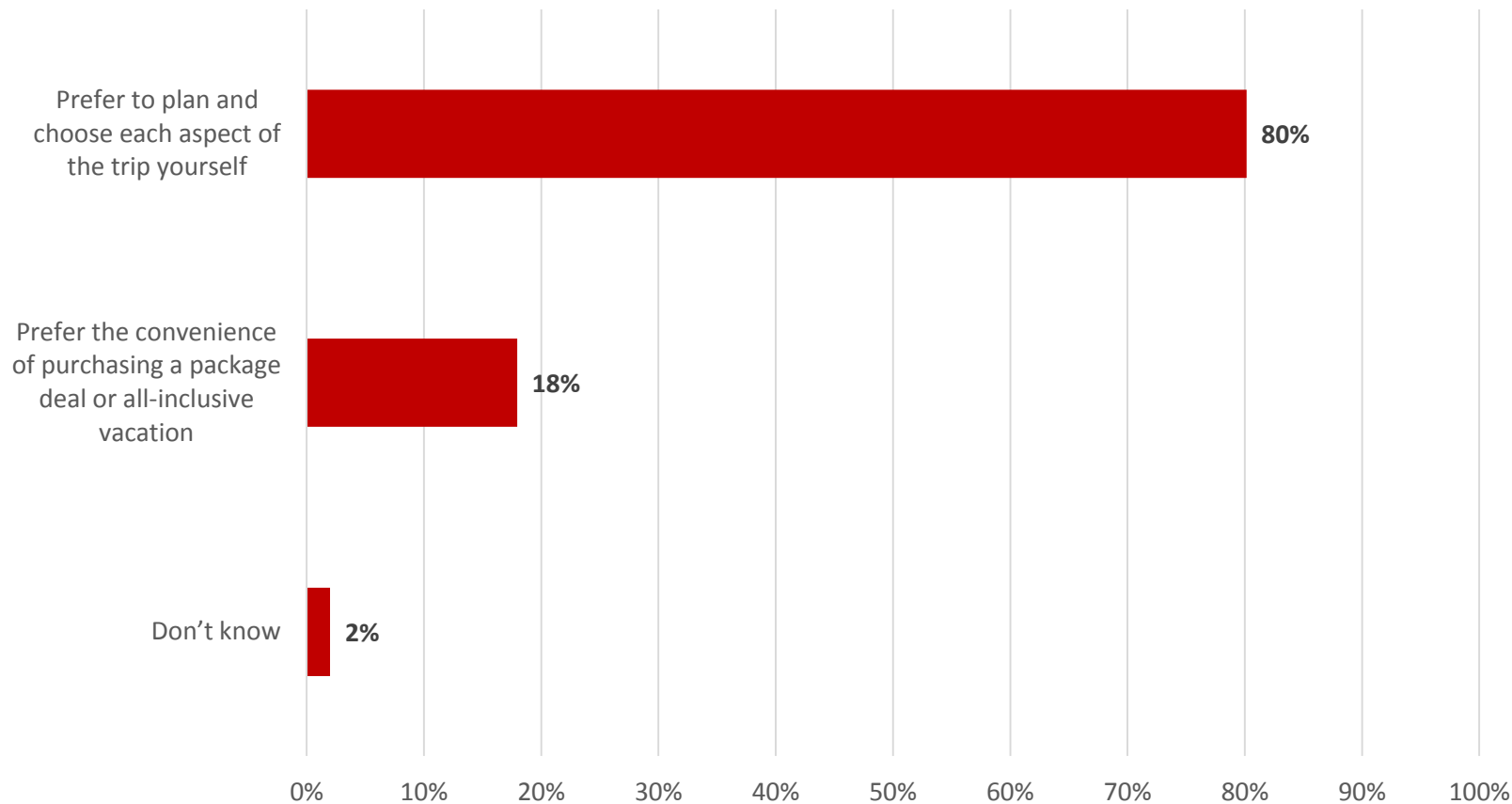
Preferred Vacation Season for SE Ontario



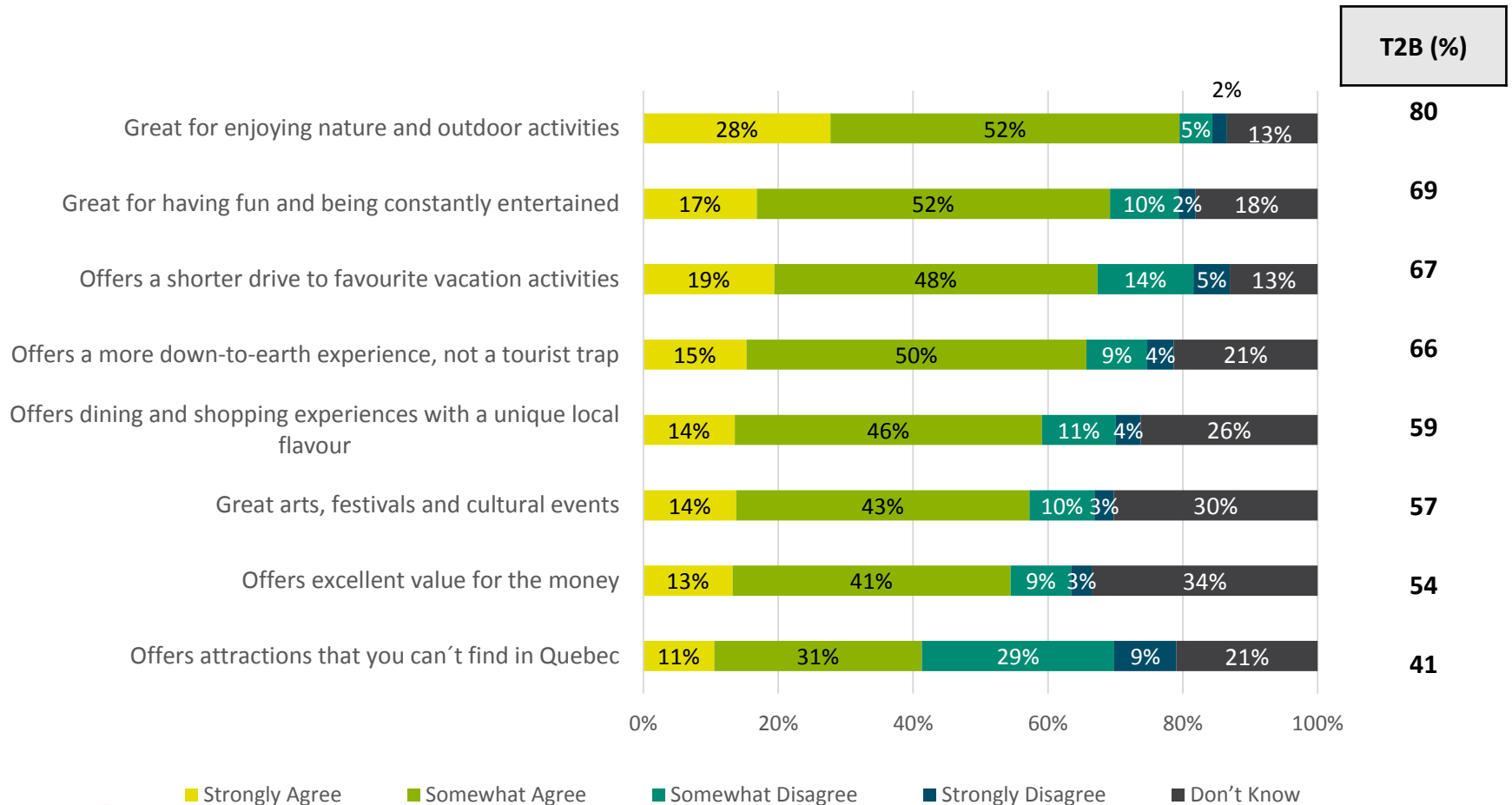
Preferred Vacation Duration for SE Ontario



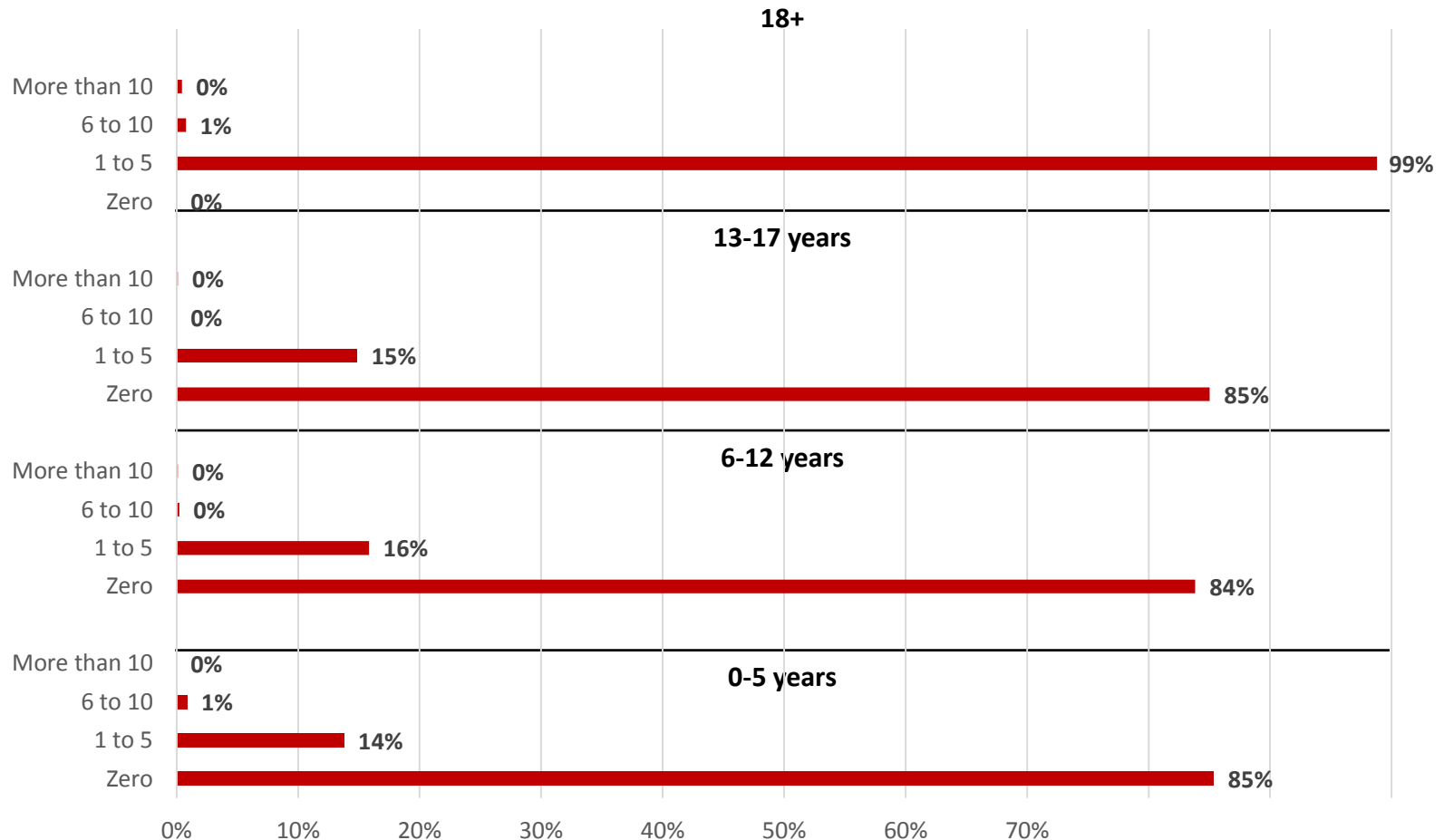
# Planning Preference



# South Eastern Ontario as a Pleasure Trip Destination

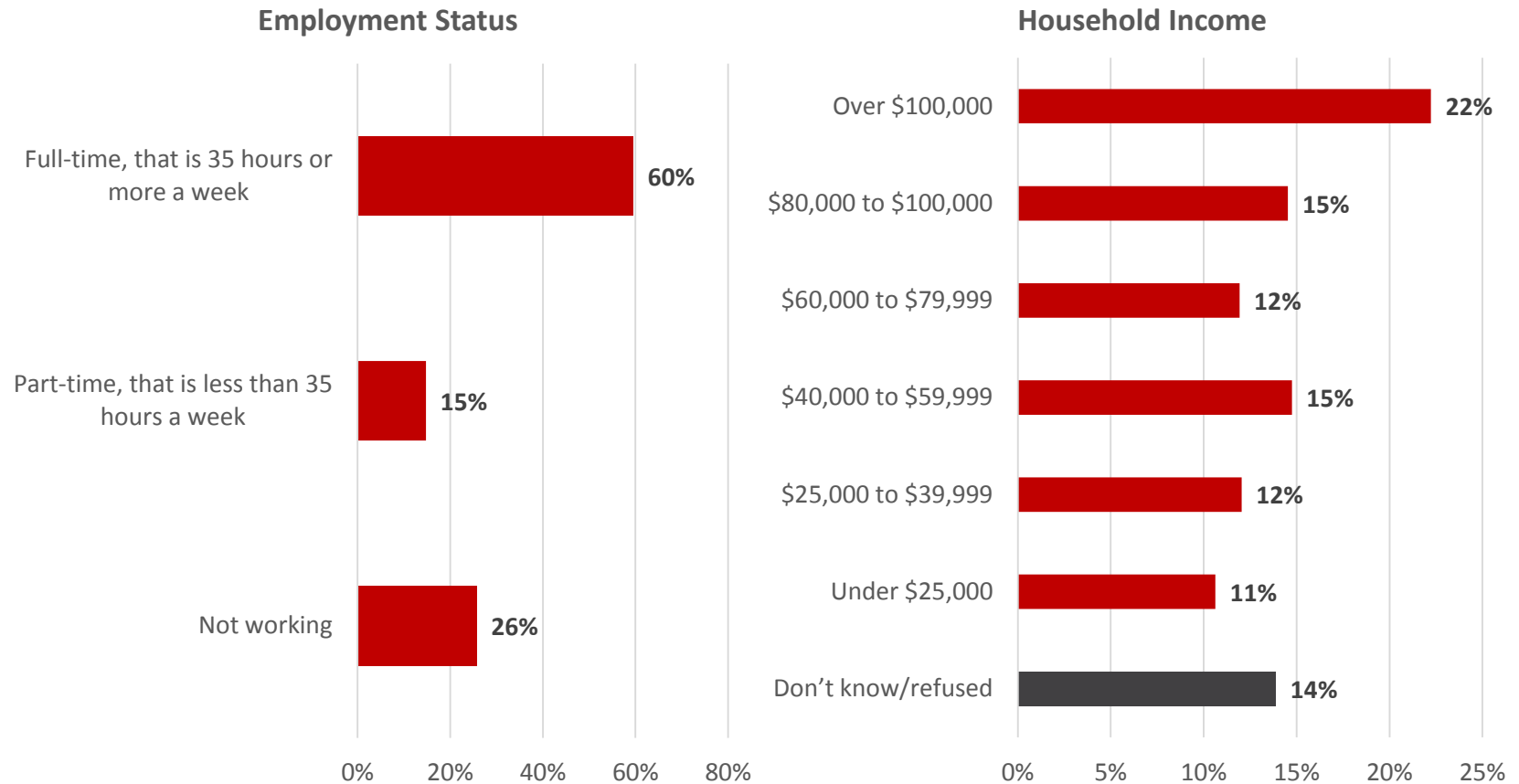


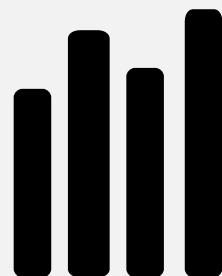
# Household Overview



D1. Including yourself, how many people are there in your household in each of the following age groups? (n=922)

# Employment Status and Household Income





# Ontario's Tourism Industry Overview



# Ontario's Tourism Industry

## Current Performance Indicators

- International Border Crossings

	Jun 2017	% change*	Jan-Jun 2017	% change*
<b>Total Inbound</b>	<b>1,888,440</b>	<b>5.9%</b>	<b>6,823,178</b>	<b>3.9%</b>
From the U.S.	1,541,570	4.6%	5,603,423	1.4%
Same-day	644,927	0.2%	2,784,826	-1.5%
Overnight	896,643	8.0%	2,818,597	4.5%
From overseas	346,870	11.9%	1,219,755	17.2%
U.K.	42,846	-6.2%	152,840	4.6%
China	29,022	4.1%	106,658	8.0%
Germany	16,652	6.6%	65,814	8.8%
South Korea	19,010	35.1%	67,573	38.9%
Japan	11,740	-4.1%	54,827	18.3%
India	27,623	47.7%	78,463	40.1%
France	8,427	2.5%	40,147	21.6%
Brazil	11,709	21.5%	45,738	22.6%
Mexico	17,674	114.0%	64,370	89.8%
<b>Total Outbound</b>	<b>1,987,455</b>	<b>3.4%</b>	<b>13,124,157</b>	<b>3.9%</b>
To the U.S.	1,537,521	-0.2%	9,601,137	2.9%
Same-day	897,346	-4.8%	5,179,958	0.1%
Overnight	640,175	7.1%	4,421,179	6.3%
To overseas	449,934	17.5%	3,523,020	6.8%

# Ontario's Tourism Industry

## Current Performance Indicators

- Ontario Hotel Statistics

	Jun 2017	% change*	Jan-Jun 2017	% change*
Hotel Occupancy	79.3%	-1.8†	67.0%	1.2†
Hotel Average Daily Rate	\$164.24	3.1%	\$151.26	6.2%
<b>Exchange Rates (3)</b>				
USD	\$1.27	-2.8%	\$1.32	-0.2%
EUR	\$1.46	1.4%	\$1.45	-2.2%
GBP	\$1.65	-3.8%	\$1.68	-10.9%
<b>Employment in Tourism-Related Industries (4)</b>	1,900,500	6.0%	1,768,300	1.0%
<b>Travel Price Index (4)</b>	124.4	3.0%	120.7	2.4%
<b>Gas Prices (cents/litre) (5)</b>	108.7	6.4%	109.5	11.5%

\* Percentage change over same period of previous year

† Change in percentage points



## **Executive Summary**

Key Findings, Conclusions, and Recommendations

# Quantitative Survey Summary

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The following points summarize key insights gathered from telephone travel intention survey results,

- 89% of respondents took at least 1 pleasure trip in the past 2 years. 75% respondents stated they took 1-5 pleasure trips.
- 73% indicated they used the Internet and online resources to learn about attractions that were available to visit.
- 48% used government-run sites or sites set up focusing on tourism specific to that area. 45% used general travel sites such as Expedia or Travelocity while 44% used review sites such as TripAdvisor.
- 40% indicated they had made a pleasure trip to South Eastern Ontario.
- 83% agreed South Eastern Ontario was a good brief getaway spot, 82% agreed the location provided a relaxing and leisurely trip, and 79% agreed the location provided unique attractions/activities within driving distance.

# Quantitative Survey Summary Cont'd

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- Niagara Falls/the Niagara region (16%), museums/historic sites (10%), and beaches (10%) were provided as examples of unique attractions and activities within driving distance.
- 63% indicated they didn't know anything about South Eastern Ontario or what it offers.
- 56% indicated they would rather stay and support their local community. Quebec offers the same activities closer to home.
- 24% would prefer to travel somewhere else and/or are unfamiliar with Ontario.
- 90% were interested in seeing beautiful scenery, 85% wanted white sand beaches with warm water, 83% wanted to visit national/provincial nature parks, and 80% wanted self-guided sightseeing in South Eastern Ontario region.

# Quantitative Survey Summary Cont'd

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- 57% indicated they were likely to plan a pleasure trip to South Eastern Ontario within the next 2 years based on everything they heard about the region.
- 67% would prefer to visit the region during the Summer, followed by 18% preferring to visit in the Fall. Furthermore, 51% would consider spending 1-5 days visiting the region, followed by 34% spending 6-10 days.
- 80% would prefer to plan a trip on their own and choose each aspect of the visit on their own.
- 80% were most likely to agree the region is great for enjoying nature and outdoor activities, followed by 69% agreeing the area is great for having fun / being constantly entertained, and 67% agreeing the region offers favourite vacation activities only a short drive away.

# Qualitative Conclusions and Recommendations

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## **Tease interest by positioning the region as an interesting and worthwhile destination.**

While its proximity made the region a great potential destination, their lack of awareness of what the region has to offer was the biggest barrier.

- False preconceived assumptions that there is nothing unique or interesting to do along the 401 will need to be addressed and refuted:
  - Events, festivals and specific examples of cultural activities (such as 'Art Trails') is needed to add to the interest of visiting a region for its scenery; once there, they want to know what they can see and visit.
- Using thematic packages (i.e. family oriented activities, water ways/cruises, cultural events, active sportsman, history buff, epicurean) and promoting key activities for each, would help to illustrate and inform as to the type of things to do and see. Videos may be helpful.
  - While they prefer creating their own 'circuits', packages would help them determine what they should see/visit.
- Promote unique local food specialties and continue to promote the quality of the local wines (perhaps using Quebec celebrity chefs), to promote the culinary tours.

# Qualitative Conclusions and Recommendations

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## **Once they have a taste, give them reasons to extend their stay and explore more**

Packages should focus on offering affordable lodging with specific activities that could easily be combined for an effortless weekend trip.

- Including Airbnb, Bed & Breakfast and the opportunity to stay with locals, or highlight the various camp grounds (RV, tents) so they can choose various price points /lodging styles depending on their needs
  - Many voiced a preference for lodging elsewhere than hotels so as to live a more immersive experience
- Reminding them how easily they can access the region (driving hours from Montreal/Quebec City) yet, how different the experience would be. Different and unique food, scenery and wild life.
  - Sandbanks has the potential to offer the feeling that one has travelled a long way to get to these landscapes (typically associated with southern destinations), yet it's closer than they think.



# Quantitative Conclusions and Recommendations

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Actionable efforts can be made by the RTO9 to drive interest in South Eastern Ontario as a tourism destination. These efforts will not only increase awareness and interest but may also result in increased tourism.

- Roughly half of the respondent's who used online resources, used government-run websites for the travel needs. There is an inherent value in government-provided information. RTO9 has the platform as a division of the Ontario government to provide travel information about South Eastern Ontario. Efforts should be put into creating educational information regarding the Great Waterway as a tourist attraction in South Eastern Ontario.
- Over half of all respondents did not know about the region and the attractions/tourism it offers. There is an opportunity to create promotional material so that awareness about the region increases and information about the region is readily available to those who are interested.

# Quantitative Conclusions and Recommendations

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- A challenge RTO9 may face when working to increase both awareness of, and tourism in South Eastern Ontario, is the resistant to travel to Ontario from Quebecers who self-identify as a Francophone or Allophone. Over half of those who responded to the survey prefer to support Quebec and its local tourism. Initiatives to entice Quebecers to come to Ontario and show the value Ontario is a unique challenge. Portraying South Eastern Ontario as a tourist destination that is both exotic and unique to Quebec may entice this group to consider the region.
- Overall, there is interest in traveling to South Eastern Ontario based on the results of this survey research. Educational and promotional material should be developed about this area. The Quebec community appears to be uniformed at this current time and when they are informed, interest in the South Eastern Ontario results.



## Appendices

# 1.1 – Qualitative Research Discussion Outline



## TRAVEL INTENTION STUDY Discussion Outline (Online FGs)

### I. Introduction to Discussion (5 minutes)

1. Hello everyone, my name is Pascal. I'll be the moderator of today's discussion. Before we start, I would like to thank you for agreeing to participate in this online video focus group.
2. Today we are hear to discussion your thoughts about travel.
3. Before we jump into the discussion, I've got a few guidelines for our discussion that I need to go through real quick, and then we'll get into it.
4. Please be honest in your responses – there are no right or wrong answers. I don't expect that all of you will have had the exact same experiences, or that you will always agree or disagree with each other. All I ask is that you are honest and respectful of each other.
  - Please keep in mind that if I ask you about your personal experiences/likes/dislikes, you can share as little or as much as you feel comfortable.
  - You should know that I do not work for the sponsor of this research, I work for an independent market research company called Forum Research
5. Have Fun! And feel free to engage with each other throughout the discussion.
6. Whenever working online, there is the possibility of technology issues. If you run into any issues **please call XXXXXXXX**. I'll give you a minute to write that down.

### II. Personal Introductions (5 minutes)

1. Let's start with personal Introductions. I would like to get to know each of you a little bit better.
  - What keeps you busy during the day
  - Household competition



III. Deep Dive Last Vacation (10 minutes)

1. Tell me about your last vacation
  - Where did you go
  - What time of year was it
  - How long was the vacation
2. What types of activities did you look for when planning a vacation
3. What was the highlight of that vacation
4. What other locations were considered
  - Why were they eventually eliminated (not chosen)

IV. Deep Dive Second Last Vacation (10 minutes)

1. I've now heard about your last vacation. Tell me about the vacation prior to that
  - Where did you go
  - What time of year was it
  - How long was the vacation
2. What types of activities did you look for when planning a vacation
3. What was the highlight of that vacation
4. What other locations were considered
  - Why were they eventually eliminated (not chosen)

V. Vacation Planning (15 minutes)

1. Walk me through the ~~the~~ key decision factors you considered when deciding where to vacation
2. Tell me about what information sources you use to help you make decisions about where to vacation
  - Probe: media habits regarding travel planning
  - What type of information is most helpful
    - *Listen for: pictures, reviews, videos, advice from friends/family, etc.*
3. How important is it, if at all, to book vacations as a package (vs. a la carte), explain
  - How often if at all, have you booked a package
  - What are the benefits of booking a package
  - What are the drawbacks of booking a package
  - What types of activities/experiences/attractions are most appealing



- Probe: examples
- Are there any types of activities that you avoid or find unappealing

VI. Perceptions of Southeastern Ontario - unaided (5 minutes)

1. When I mention Southeastern Ontario, what comes to mind, if anything
2. [Show of Hands] Have they ever visited Southeastern Ontario
  - If yes: Where in Southeastern Ontario
  - What was the motivation for the trip
  - What attracted you to that area

VII. More Information on the Great Waterway (20 minutes)

1. Have you heard of The Great Waterway

*"The Great Waterway is located in South-Eastern Ontario. It is made up of 8 areas including: Prince Edward County, Bay of Quinte, Land O'Lakes, Kingston, Gananoque, Brockville, The 1,000 Islands, the Rideau Heritage Route, and Cornwall."*

  - If yes: how did you hear about it
  - If yes: what do you know about it
  - Has anyone visited it
    - If Yes: Tell me about the trip
      - Where specifically did you go
      - What was the motivation for the trip **\*\*IMPORTANT – GET LIST\*\***
      - What time of year did you visit
      - How long was the trip
      - What attracted you to that area **\*\*IMPORTANT – GET LIST\*\***
      - How did you learn about the area
      - What did you like most about your visit **\*\*IMPORTANT – GET LIST\*\***
2. For those who have never visited Southeastern Ontario, why have you not vacationed or visited there? Why hasn't the area caught your interest as a vacation destination?
  - [ASK FOR LIST OF BARRIERS] **\*\*IMPORTANT\*\***

Before we continue our discussion, I want to tell you about the Great Waterway:

*The Great Waterway is a stunning and diverse tourist destination located in South-Eastern Ontario. It hugs the coast of the St. Lawrence River and the Eastern tip of Lake Ontario. The area has many majestic waterways such as: bays, lakes and rivers. It is made up of 8 Destinations including: Prince Edward County, Bay of Quinte, Land O'Lakes, Kingston 1000 Islands, Ganarogue 1000 Islands, Brockville 1000 islands, Rideau Heritage Route, and Cornwall and the Counties. The region offers many distinct tourist attractions including: boat cruises, camping, hiking and cycling trails, golf, wineries, and fine-dining. It also has many heritage and cultural attractions.*

**[SHOW STIMULI]**

3. I'm curious, when I read you this description, what stood out, if anything
4. How appealing does the Great Waterway sound, as a destination
5. What are the key appeals of the region
6. As a reminder, the types of attractions offered in the area include: boat cruises, camping, hiking and cycling trails, golf, wineries, heritage and cultural attractions, and fine-dining. How appealing are these types of attractions when you are considering vacation destinations
  - Probe: which are most appealing, why
  - Probe: which are least appealing, why
  - If they are appealing: explore what has been the barrier to visiting
    - Anything beyond awareness that is a barrier

**VIII. MARKETING (5 minutes)**

1. Based on what you now know of the Great Waterway, if you were in charge of marketing it to residents of Montreal/Quebec City, what would you highlight about it
  - What key words would you use
  - Which activities/attractions would you highlight

*You have been a wonderful group! Thank you for all the thoughtful and insightful feedback. That concludes our discussion.*



## 1.2 – Qualitative Research Stimuli

COMTÉ PRINCE EDWARD

VINICULTURE

ROUTE DES ARTS DU COMTÉ PRINCE EDWARD





## 1.3 – Quantitative Research Survey

Forum Research  
September 22, 2017

### Great Waterway Travel Questionnaire Screener (To be Finalized)

Hello, I'm \_\_\_\_\_ from Forum Research, a Canadian market research company, and we're conducting a survey about travel. I just have a few questions before we start. [INSERT STANDARD INTRODUCTION]

#### RESPONDENT RESIDENCE (FROM SAMPLE LIST)

##### SC1

Montreal (n=317)

Quebec City (n=231)

The north shore of the St. Lawrence (n=189)

The south shore of the St. Lawrence (n=185)

##### SC2

About how many pleasure trips of one night or more have you made in the past 5 years? [DO NOT READ]

- None ..... 1 [TERMINATE & RECORD]  
1 to 3 ..... 2  
4 to 5 ..... 3  
6 to 10 ..... 4  
More than 10 ..... 5  
Don't know ..... 6

[ASK: Have you made any pleasure trips in the past 5 years?]

- Yes ..... 7 [CONTINUE]  
No ..... X [TERMINATE & RECORD]

##### SC3

Have you lived in your current location for...[READ]

- Less than 2 years ..... 1 [TERMINATE AND RECORD]  
3 to 5 years ..... 2  
Over 5 years ..... 3

##### SC3

Which age group can I place you in? [READ]

- Under 18 years ..... X [TERMINATE & RECORD]  
18-24 ..... 1  
25-34 ..... 2  
35-44 ..... 3 [WATCH QUOTAS]  
45-54 ..... 4  
55-64 ..... 5  
65-75 ..... 6  
Over 75 years of age ..... X [TERMINATE & RECORD]

##### SC4

Are you a Francophone, Anglophone, Allophone or other?

- Francophone ..... 1



Allophone .....	2	
Anglophone.....	X	[TERMINATE & RECORD]
Other .....	X	[TERMINATE & RECORD]
Refused.....	X	[TERMINATE & RECORD]

**SC4**

Do you have any children under the age of 18 currently living at home or are you an adult-only household?

Adult only household .....	1	[WATCH QUOTAS]
Have children .....	2	
Refused.....	X	[TERMINATE & RECORD]

**SC5 ENTER:**

Male .....	1	[WATCH QUOTAS]
Female .....	2	

## Main Questionnaire

1. For this survey, we want to focus on pleasure trips that you have taken in the past two years, by yourself or with your family or friends. By pleasure trips, we mean out-of-town trips lasting one or more nights, for vacation or brief get-away purposes. We are not asking about business trips, visits to friends or relatives, or visits to your cottage.

In the past 2 years, how many pleasure trips have you taken?

ENTER NUMBER OF TRIPS: \_\_\_\_\_

2. In planning your last trip, what sources did you use to learn about the attractions that were available?  
[DO NOT READ LIST EXCEPT WHERE INDICATED. ENTER ALL THAT APPLY]

### The Internet/online sources

[IF INTERNET/ONLINE, ASK: Was that...]

- Tourism sites set up by  
the government or tourist area ..... 1
- Travel specialty sites like Expedia  
or Travelocity ..... 2
- Travellers review sites like TripAdvisor ..... 3
- [DO NOT READ] Don't know the source..... 4
- YouTube..... 5
- Social media..... 6
- A tourism office..... 7
- A travel agent ..... 8
- A newspaper Travel section/ads ..... 9
- Magazine articles/ads ..... 10
- Television shows/ads' ..... 11
- A book/travel guide ..... 12
- The CAA..... 13
- Looked at package deals for ideas ..... 14
- Another source of information (Specify)  
\_\_\_\_\_

Don't know/can't remember ..... X

3. Have you ever made a pleasure trip to South Eastern Ontario? This would include the area stretching along the St. Lawrence River from the Quebec border to Kingston, and would include the areas around: Cornwall, Brockville, Gananoque [PRONOUNCED: GANNON-OCK-KWAY], Kingston, the Thousand Islands, Prince Edward County, Bay of Quinte [PRONOUNCED: BAY OF KINTAY], Land O'Lakes, and the Rideau Heritage Route.

- Yes, I've made a pleasure to South Eastern Ontario ..... 1
- No, never made a pleasure trip to South Eastern Ontario ..... 2 [SKIP TO Q5a]
- Don't know ..... X [SKIP TO Q6]



**[IF YES (CODE 1) IN Q3, ASK Q4]**

4. I'm going to read some reasons that may or may not explain what first drew you to South Eastern Ontario instead of other destinations that offer similar types of attractions and activities. Please tell me whether you STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE OR STRONGLY DISAGREE that you decided to visit South Eastern Ontario instead of another destination because...

ROTATE	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree	Don't Know
1. It's close to home / not far to travel	1	2	3	4	X
2. It's good for a brief get-away	1	2	3	4	X
3. It offers excellent value for the money	1	2	3	4	X
4. It does have unique attractions and activities that are within driving distance	1	2	3	4	X
<b>[ASK] Which ones?</b>					
5. It provides a relaxing and leisurely trip	1	2	3	4	X
6. You've never been there and it was a new or different trip for you	1	2	3	4	X
7. There are fewer tourists/it's not a tourist trap	1	2	3	4	X
8. You could combine it with other activities such as visiting family, a business trip or a stop along the way to another destination	1	2	3	4	X
9. Friends told you good things about it	1	2	3	4	X

**[NOW SKIP TO Q6]**

[IF NO (CODE 2) IN Q3, ASK Q5a/5b]

- 5a. I'm going to read some reasons that may or may not explain why you have never made a pleasure trip to South Eastern Ontario. Please tell me whether you STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE OR STRONGLY DISAGREE that you have never made a pleasure trip to South Eastern Ontario because...

ROTATE	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree	Don't Know
1. You don't know anything about it or what it offers	1	2	3	4	X
2. It doesn't seem like a real vacation because it's so close to home	1	2	3	4	X
3. It offers the same activities that are in Quebec, so you'd rather stay and support your local economy	1	2	3	4	X
4. The attractions seem a little boring	1	2	3	4	X
5. There's no big cities	1	2	3	4	X
6. It offers mainly outdoor activities, which you're not interested in	1	2	3	4	X
7. It doesn't seem to have many children's activities	1	2	3	4	X
8. It doesn't seem to have many arts, special events or cultural activities	1	2	3	4	X
9. There's not enough activities to fill a vacation with	1	2	3	4	X
10. It not a vacation destination – it's more of a short stop along the way to another place	1	2	3	4	X
11. It's not good value for the money	1	2	3	4	X
12. There's not enough information available to plan your own vacation	1	2	3	4	X
13. There's not good or not enough package deals	1	2	3	4	



5b. Are there any other reasons why you have you never considered making a pleasure trip to South Eastern Ontario?

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**[ASK ALL]**

6. I'm going to read a list of the attractions and activities that are currently offered within the South Eastern Ontario region. Please tell me how interested you would be in participating in each of these activities, either by yourself or with your family, if you were planning a vacation or get-away there. Would you be VERY INTERESTED, SOMEWHAT INTERESTED, NOT VERY INTERESTED OR NOT INTERESTED AT ALL in...**[READ LIST. ENTER ONE ANSWER FOR EACH]**

ROTATE	Not Interested At All	Not Very Interested	Somewhat Interested	Very Interested	Don't Know
Visiting white sand beaches with warm water	1	2	3	4	X
Day-cruises	1	2	3	4	X
Kayaking or canoeing	1	2	3	4	X
Other water activities such as windsurfing, sailing or diving	1	2	3	4	X
Cycling	1	2	3	4	X
Golfing	1	2	3	4	X
Tasting unique local foods that the region specializes in	1	2	3	4	X
Shopping in small craft, antique or gift shops	1	2	3	4	X
Visiting small towns and villages	1	2	3	4	X
City sightseeing on your own	1	2	3	4	X
Organized city sightseeing trips	1	2	3	4	X
Places of historical interest	1	2	3	4	X
Wineries or micro-breweries	1	2	3	4	X
Festivals, fairs and events	1	2	3	4	X
Arts, museums and galleries	1	2	3	4	X
Live theatre	1	2	3	4	X
Touring by car or RV	1	2	3	4	X
Camping	1	2	3	4	X
Visiting national or provincial nature parks	1	2	3	4	X
Hiking / climbing	1	2	3	4	X
Fishing / ice fishing	1	2	3	4	X
Hunting	1	2	3	4	X
Observing wildlife / bird watching	1	2	3	4	X
Seeing beautiful scenery	1	2	3	4	X
Staying at a resort	1	2	3	4	X
Staying in bed-and-breakfasts	1	2	3	4	X
Relaxing at a spa	1	2	3	4	X
Going to a casino	1	2	3	4	X
Visiting a castle	1	2	3	4	X

7. Based on everything you've heard about this South Eastern Ontario region, how likely would you plan a pleasure trip there within the next 2 years, on a scale of 1 to 10 where "10" means Extremely Likely and "1" means Extremely Unlikely?



Extremely Unlikely									Extremely Likely
1	2	3	4	5	6	7	8	9	10

[IF RATING OF "6" TO "10" IN Q7, ASK Q8a/8b/8c]

8a. What time of year do you think you would plan your South Eastern Ontario vacation for? [READ]

Spring.....1  
 Summer .....2  
 Autumn.....3  
 or, Winter.....4

[DO NOT READ]

Don't know ..... X



8b. And, about how many days do you think you would spend visiting South Eastern Ontario?

ENTER NUMBER OF DAYS: \_\_\_\_\_

8c. How would you prefer to plan your trip to South Eastern Ontario? Would you..., [READ]

Prefer to plan and choose each aspect of the trip yourself . 1

Prefer the convenience of purchasing a package deal  
or all-inclusive vacation ..... 2

[DO NOT READ]

Don't Know ..... X

[ASK ALL]

9. Please think of everything you've now heard or know about South Eastern Ontario as a pleasure travel destination. Do you STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE OR STRONGLY DISAGREE that South Eastern Ontario is a place that...[READ LIST. ENTER ONE ANSWER FOR EACH]

ROTATE

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree	Don't Know
1. Is great for having fun and being constantly entertained	1	2	3	4	X
2. Offers excellent value for the money	1	2	3	4	X
3. Is great for enjoying nature and outdoor activities	1	2	3	4	X
4. Has great arts, festivals and cultural events	1	2	3	4	X
5. Offers some great attractions that you can't find in Quebec	1	2	3	4	X
6. Offers a shorter drive to your favourite vacation activities	1	2	3	4	X
7. Offers dining and shopping experiences that have a unique local flavour	1	2	3	4	X
8. Offers a more down-to-earth experience and is not a tourist trap	1	2	3	4	X

These last few questions are just to help us classify your answers along with those of other people we surveyed.

D1. Including yourself, how many people are there in your household in each of the following age ( [ENTER NUMBER OF HOUSEHOLD MEMBERS BESIDE EACH AGE GROUP]



0-5 years .....

6-12 years .....

13-17 years .....

18+ years .....

TOTAL PEOPLE IN YOUR  
HOUSEHOLD.....

PROGRAMMER: ENSURE THAT INDIVIDUAL AGE GROUPS ADD CORRECTLY TO TOTAL PEOPLE IN HOUSEHOLD. ANSWERS MUST RANGE FROM 0 TO 15 FOR FIRST 3 AGE GROUPS. FOR 18+ YEARS, THE RANGE MUST BE 1 to 15 WITH AN INSTRUCTION SAYING "REMEMBER TO INCLUDE YOURSELF IN THE 18+ AGE GROUP".

D2. At present, do you work ...[READ]

- Full-time, that is 35 hours or more a week ..... 1
- Part-time, that is less than 35 hours a week ..... 2
- or, are you Not working ..... 3

D3. And finally, which of these categories best describes the total income for your household before taxes and other deductions? [READ]

- Under \$25,000 ..... 1
- \$25,000 to \$39,999 ..... 2
- \$40,000 to \$59,999 ..... 3
- \$60,000 to \$79,999 ..... 4
- \$80,000 to \$100,000 ..... 5
- Over \$100,000 ..... 6
- Don't know/refused ..... X

THANK YOU VERY MUCH FOR YOUR HELP