

SOUTH EASTERN ONTARIO

CONSUMER INSIGHTS SURVEY

Wave 1 Summer 2019

Final Report

October 8, 2019

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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 8, 2019

Introduction

Using consumer databases we surveyed South Eastern Ontario visitors to better understand the traveller journey in the region.

As tourism continues to grow, governments, businesses, and other tourism organizations across the globe are realizing the competitive advantages that timely and regular consumer insights help to create. In our region, a deeper understanding of our traveller audience can benefit start-up entrepreneurs, well-established businesses, travellers and more. Furthermore, with robust data we can begin to make strategic decisions and investments that position South Eastern Ontario for growth.

Beginning in 2018/19, we made it our strategic priority to be the hub for gathering data and research in the region. To do this, we launched an ambitious Multi-Year Research Plan with a host of primary and secondary research initiatives to fill the tourism information and data gap at the regional and local level.

Our Consumer Insights Survey provides 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. We are confident that the results presented in this report will provide readers with practical and useful information for securing visitors.

Twenty31 Consulting conducted this survey in summer 2019. We will deploy a second wave in the winter to support tracking and comparison of results, and a clearer picture of tourism performance in the region based on seasonality.

Summary and Growth Insights

Highlighting the authentic, locally focussed and natural assets can help set South Eastern Ontario apart as an inspiring destination.

The survey highlighted the importance of destination brand image and how it can serve to inspire travellers. The study confirmed that familiarity and interest in South Eastern Ontario are high, and there is a strong pool of repeat visitors who are very satisfied after visiting. For all destinations, especially those less visited, using locally focussed, authentic and natural assets and experiences to reach top of mind status will be essential for brand building.

Our analyses of the reasons why travellers enjoy their trip and/or want to return continues to be based upon the beauty of the region, how much there is to see, food and drink offerings, relaxation felt and friendly people met. Securing new visitors will involve strategically marketing what travellers aspire to and making sure that each of the destinations' incredible signature experiences stand out. Key attractions, whether a festival/event or historic village, need to be more recognizable and easy to find – especially online.

Although travellers are overwhelmingly independent when in the region, they have a desire for more comprehensive planning information. Travellers continue to mention that discounts, deals and packages and more details about what there is to do and how to get around would make their trip planning easier.

There are opportunities for accommodation providers to play a role in influencing overnight travellers to book a trip by sharing information about the experiences available in the destination. This can be done by featuring maps, calendars and options for experience bookings on their websites. Destinations are more than a single offering, product, or service.

Finally, destination marketers and businesses will need to be more strategic, taking into consideration the demographic variations in how people search, book, and experience when in the destination.

Summary and Growth Insights, continued

The areas for growth and improvement require strong partnerships, such as those between hotels/inns and operators, to make sure information meets traveller needs.

Issue	Solution
Inspiration/Pre-planning	Travellers continue to emphasize user-friendly and integrated planning tools such as interactive maps, travel apps, itineraries, and packages. Since experiences are a main motivating draw for the region's visitors, keeping residents in the loop on offerings/activities for the VFR market and integrating accommodations with operators is vital. Additionally, all tourism businesses need an online presence, especially on social media.
Booking	Online direct and phone booking via hotels/inns continues to be the primary booking method for overnight travellers. Destination marketers and operators need to collaborate to provide more booking options and information about what there is to see and do in the region to influence booking.
Length of stay	More packages and itineraries are needed to extend length of stay and help guide visitors through the region. Packages can help increase awareness of places to explore and activities to engage in.
Affordability	Although travellers feel a South Eastern Ontario trip provides good value for money, promotions and discounts give more incentive to book an overnight stay.

South Eastern Ontario Traveller Profile

Actual Visitation

Prince Edward County, Kingston and 1000 Islands
Gananoque were the most visited destinations.

Booking

Online direct is the top way travellers book
their accommodations.

Trip Spend

Almost two thirds (63%) of travellers spend
less than \$450 per trip.

Travel Party

53% of respondents travel as a couple.

Main Purpose

86% of travellers visited for leisure purposes.

Length of Stay

A two night (39%) trip was the most
common for overnight travellers.

Planning

Travel planning is most likely to take place
within 3 weeks of a trip (51%).

Planning Sources

Friends and/or relatives (37%) and social media
(37%) dominate for travel planning inspiration.

METHODOLOGY

Overview

The Consumer Insights Survey was deployed in summer 2019 by RTO9 and key destinations in the region.



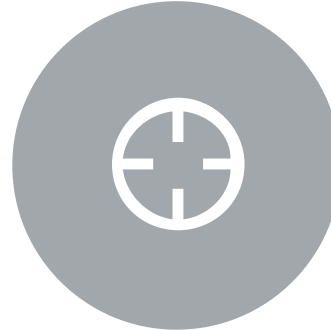
METHOD

- Online
- 11 Minute Questionnaire
- Fieldwork from July 3 – August 9, 2019



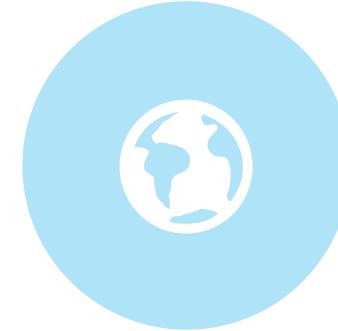
SAMPLE SIZE

- 3,573 total respondents
- South Eastern Ontario (2,528), Prince Edward County (346), Bay of Quinte (67), Kingston (73), 1000 Islands Gananoque (311), 1000 Islands Brockville (85) and Cornwall (163)



TARGET

- 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 seven Destination Marketing Organizations (DMOs). Social media was also used to reach the target group

Questionnaires

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

Separate questionnaires were developed for the South Eastern Ontario region and eight key destinations (Bay of Quinte, Prince Edward County, Lennox & Addington/Frontenac, Rideau Canal, Kingston, 1000 Islands Gananoque, 1000 Islands Brockville, Cornwall & S,D&G Counties). 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

Sample Size

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

RTO9 and six of the destinations confirmed participation by deploying their questionnaires during the fieldwork phase. In total there were 3,573 respondents, this was a 45% increase from the 2018/19 pilot survey.

The following number of responses came from each of the destinations:

- South Eastern Ontario n=2,528
- Prince Edward County n=346
- Bay of Quinte n=67
- Kingston n=73
- 1000 Islands Gananoque n=311
- 1000 Islands Brockville n=85
- Cornwall & S,D&G Counties =163

Communication

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



The consumer databases that were utilized, included in total 57,264 contacts.

Destination Name	Database Contacts (#)	Response Rate (%)
Bay of Quinte	1,850	4%
Prince Edward County	6,237	6%
Lennox & Addington/ Frontenac	3,500	-
Rideau Canal	0	-
Kingston	4,660	2%
1000 Islands Gananoque	15,000	2%
1000 Islands Brockville	1,300	7%
Cornwall & S,D&G Counties	1,300	13%
South Eastern Ontario	23,417	11%

Twitter, Facebook, and e-blasts were also used to encourage responses. Additionally, some DMOs partnered with tourism organizations within their destination to reach more consumers. For example, Kingston worked with Kingston Cruises to distribute their survey link.

Lessons Learned

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

The pilot survey provided an opportunity for process improvement.

- Issue: Minor changes were made to the questionnaire that allowed for more targeted information from overnight travellers over day-trippers. Unfortunately, as a result of the changes we achieved a lower sample size than anticipated for some questions.
- Solution: For the winter wave we will revert back to the questionnaire logic used during the 2018/19 pilot to help obtain a higher sample size.

A consumer survey can provide insightful destination specific research not currently available elsewhere.

- Issue: DMO/DMP participation rates significantly improved this year, however, the surveys deployed at different times over the course of the fieldwork period which impacted the response rates achieved.
- Solution: Efforts to improve understanding of the value and benefits of participating in this research initiative and the importance of the defined survey timeline will continue. We will provide continued support in the weeks leading up to the fieldwork period so that DMO/DMP social media and marketing staff can plan survey deployment efforts well in advance.

Databases need to be up to date with new consumers added regularly.

- Issue: Despite best efforts, 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 and boost the number of consumers of their lists.

TRAVELLER PROFILE

Traveller Profile Tracking

	2018-19 (summer pilot)	2019-20 (summer wave 1)
Familiarity	49% ¹	45% ¹
Interest	94% ²	96% ²
Likelihood	87% ³	89% ³
Actual Visitation	Prince Edward County (49%) Kingston (46%) Gananoque (37%)	Kingston (56%) Prince Edward County (48%) Gananoque (36%)
Main Purpose	Leisure (89%)	Leisure (86%)
Primary Reason	VFR (11%) Sightseeing (10%) Visit small towns and villages (9%)	VFR (15%) Sightseeing (10%) Visit small towns and villages (7%)

Traveller Profile Tracking

	2018-19 (summer pilot)	2019-20 (summer wave 1)
Planning Timeframe	Within 3 weeks of trip (57%) 1 – 2 months before (29%)	Within 3 weeks of trip (51%) 1 – 2 months before (32%)
Planning Sources	Friends and/or relatives (36%) Direct with hotel/accommodation (36%) Destination marketing website (29%)	Friends and/or relatives (37%) Social Media (37%) Direct with hotel/accommodation (34%)
Travel Party	Couples (53%)	Couples (53%)
Types of Activities	Going to local restaurants (45%) Visiting the waterfront (35%) Visit small town and village (34%)	Going to local restaurants (60%) Sightseeing (53%) Visiting the waterfront (47%)
Trip Enjoyment	98%	99%
Likelihood of Return	91%	95%

Traveller Profile Tracking

	2018-19 (summer pilot)	2019-20 (summer wave 1)
Length of Stay	2 -3 nights (49%)	2 - 3 nights (62%)
Accommodations	Hotel/Inn (30%) Friends/Family (20%) B&B (8%)	Hotel/Inn (39%) Friends/Family (17%) AirBnb/VRBO (10%)
Booking Method	Online – direct (39%)	Online – direct (41%)
Trip Spend	< \$450 (74%) \$450 - \$999 (18%)	< \$450 (63%) \$450 - \$999 (28%)
Travel Style	FIT (95%)	FIT (92%)

REGIONAL RESULTS

Where is South Eastern Ontario?

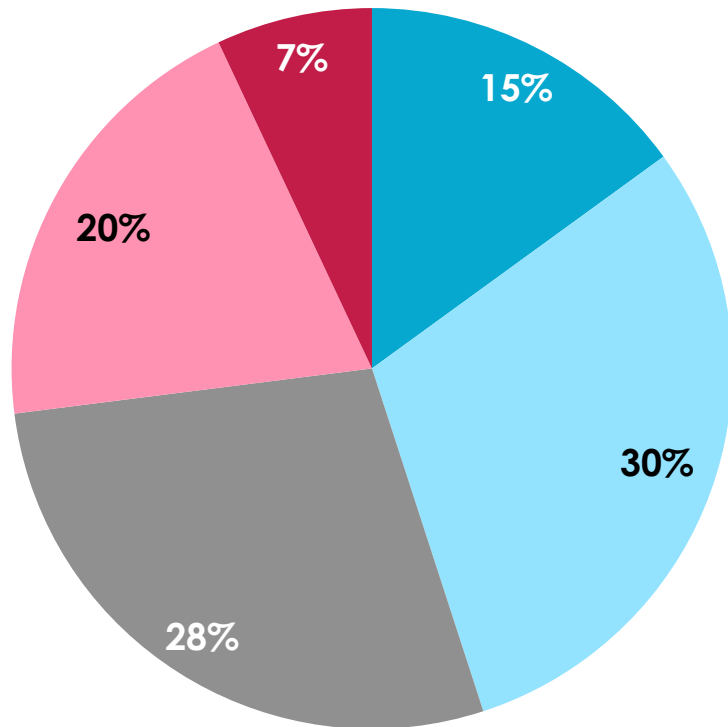
To provide a reference point, a regional map was included for respondents to identify destinations relative to other well-known cities in Ontario.



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= 2528



- Extremely familiar
- Moderately familiar
- Somewhat familiar
- Slightly familiar
- Not at all familiar

INSIGHT

Familiarity can be an awareness or set of perceptions about a destination.

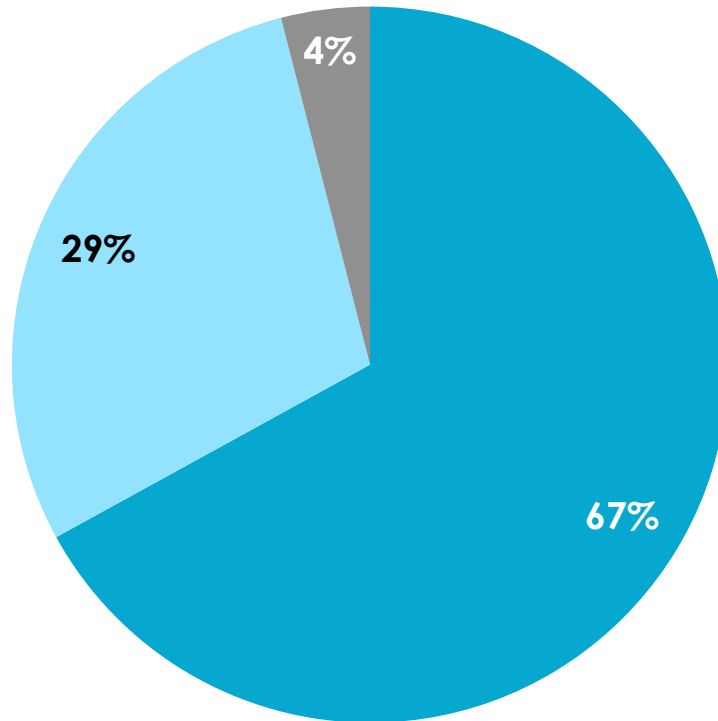
Most respondents are familiar with South Eastern Ontario; 58% expressed moderate/some familiarity and 15% were extremely familiar.

Those over the age of 70 were more likely to express extreme/moderate familiarity (56%), followed by those aged 55-69 (51%).

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= 2528



- Very interested
- Fairly interested
- Not sure
- Not very interested
- No interest at all

INSIGHT

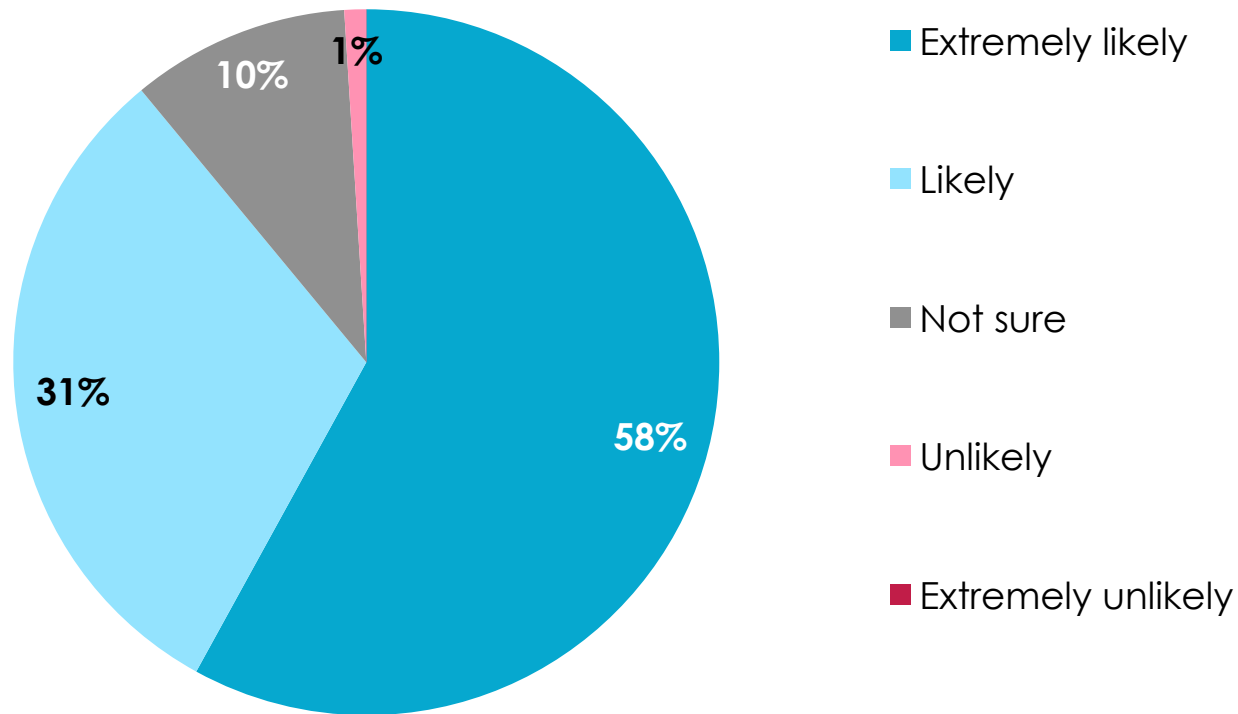
An overwhelming 96% of respondents are very/fairly interested in travelling to South Eastern Ontario.

Those aged 18-24 expressed the highest level of interest in travelling at 97%.

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= 2528



INSIGHT

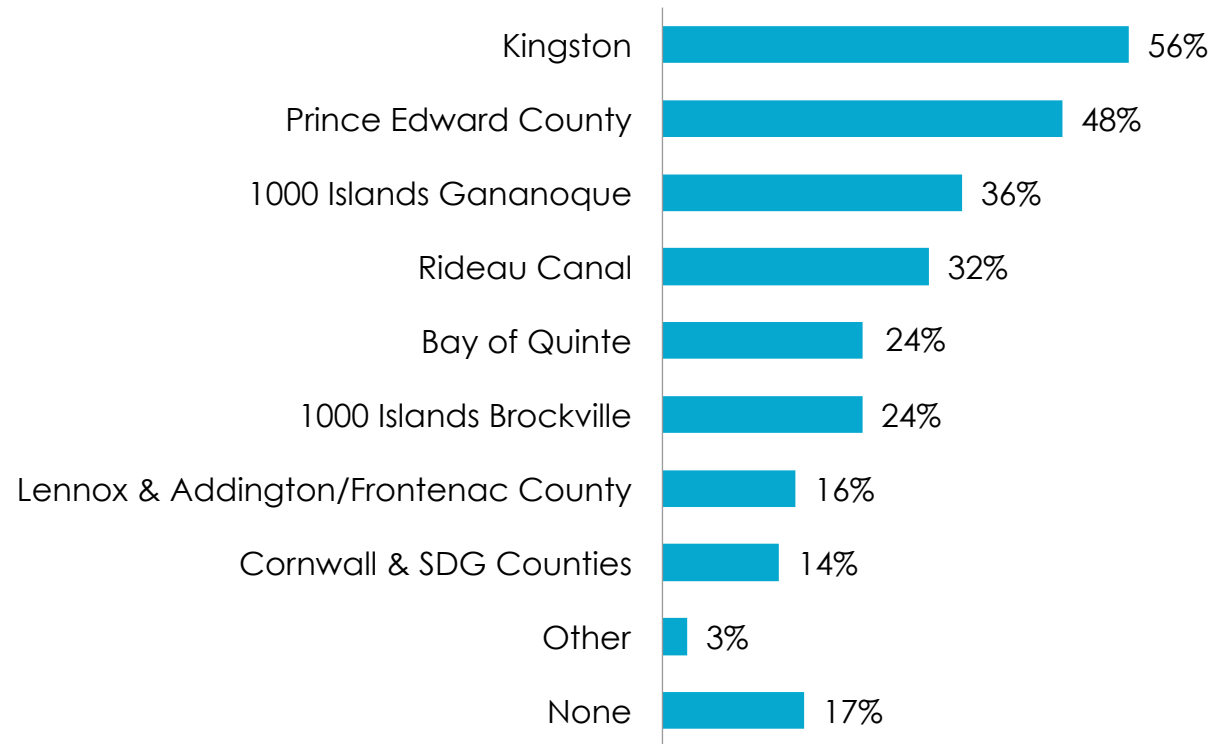
The likelihood of travelling to South Eastern Ontario for leisure purposes remains high in the next two years at 89%.

Those aged 55-69 indicated the highest likelihood to travel at 90%.

Most recent leisure trip to South Eastern Ontario

Almost half of all travellers have visited Kingston. Less than 20% of leisure travellers indicated that they did not visit South Eastern Ontario.

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= 2528



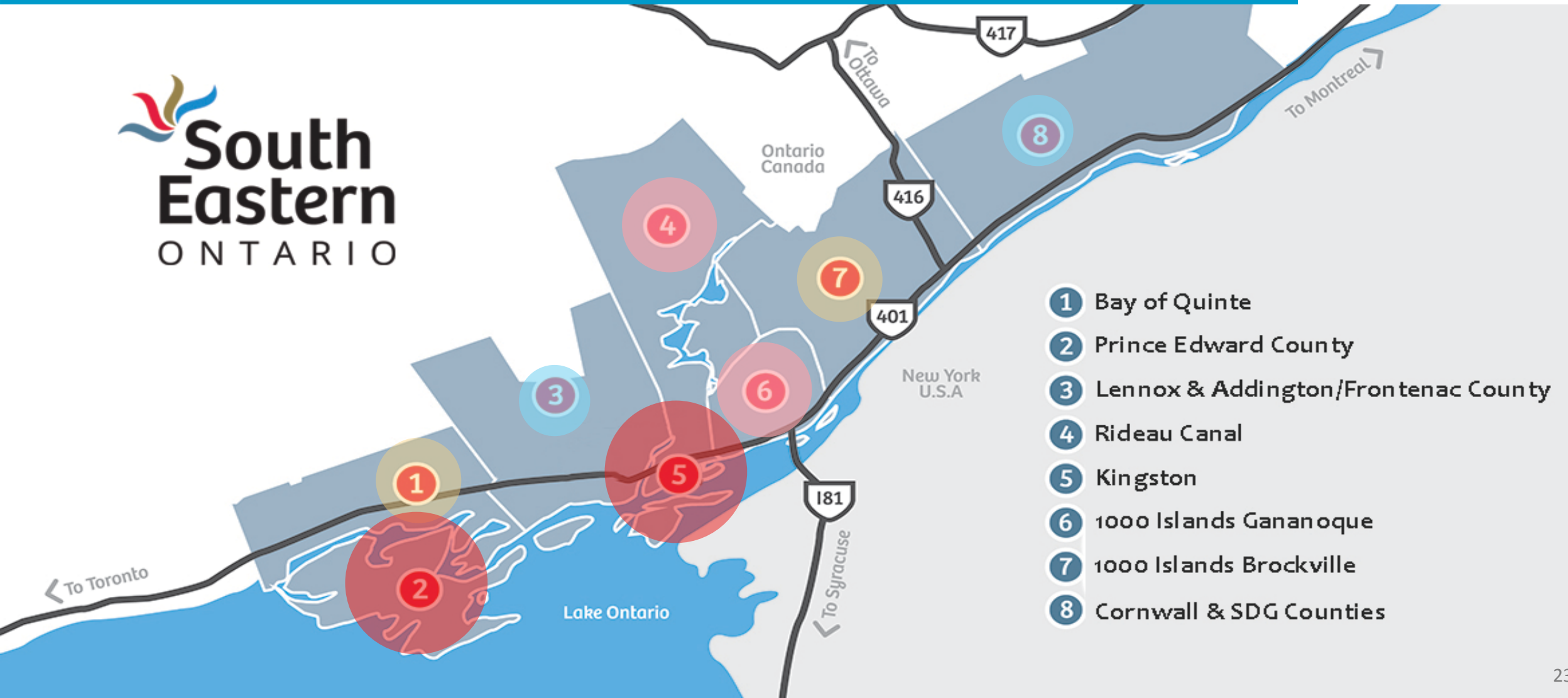
INSIGHT

The majority of leisure travellers visited Kingston (56%) and Prince Edward County (48%), and over a third (36%) visited 1000 Islands Gananoque.

A much smaller percentage (20%) of leisure travellers indicated that they did not travel to any cities in South Eastern Ontario.

Most recent leisure trip to South Eastern Ontario

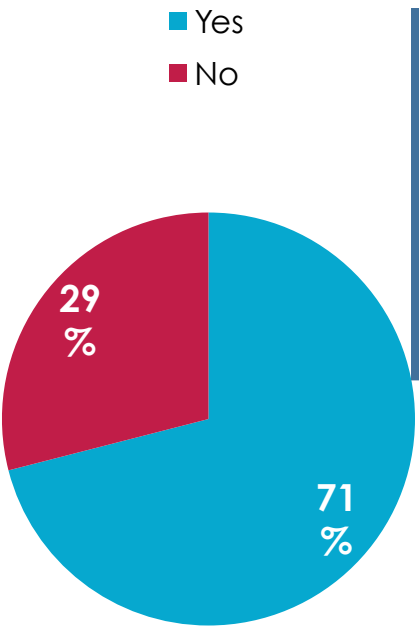
Heat map by destination



Overnight Stay or Day Trip

Almost three quarters (71%) of all travellers stayed in South Eastern Ontario overnight.

Q5: Did you stay overnight? n= 2095



	Bay Of Quinte (n=290)	Prince Edward County (n=592)	Lennox & Addington/ Frontenac County (n=130)	Rideau Canal (n=336)	Kingston (n=595)	1000 Islands Gananoque (n=384)	1000 Islands Brockville (n=303)	Cornwall & SDG Counties (n=216)
Yes	73%	74%	67%	74%	73%	70%	69%	72%
No	27%	26%	33%	26%	27%	30%	31%	28%

INSIGHT

Almost three quarters (71%) of all travellers stayed in South Eastern Ontario overnight.

Travellers visiting Rideau Canal and Prince Edward County were most likely to have stayed overnight, while those visiting Lennox & Addington/Frontenac were least likely to (67%).

Main purpose of visit

Leisure is the main purpose for visiting South Eastern Ontario.

Q6: What was the main purpose of your visit? n= 1488

	Total	Bay Of Quinte (n=290)	Prince Edward County (n=592)	Lennox & Addington/ Frontenac County (n=130)	Rideau Canal (n=336)	Kingston (n=595)	1000 Islands Gananoque (n=384)	1000 Islands Brockville (n=303)	Cornwall & SDG Counties (n=216)
Leisure	86%	66%	67%	61%	67%	65%	66%	64%	62%
Visiting friends and/or relatives	38%	33%	27%	33%	29%	30%	24%	29%	31%
Sporting event /tournament	8%	8%	6%	6%	8%	7%	7%	8%	9%
Business trip	4%	4%	4%	5%	4%	3%	3%	3%	4%
Conference /convention	4%	3%	3%	4%	4%	3%	2%	3%	4%

INSIGHT

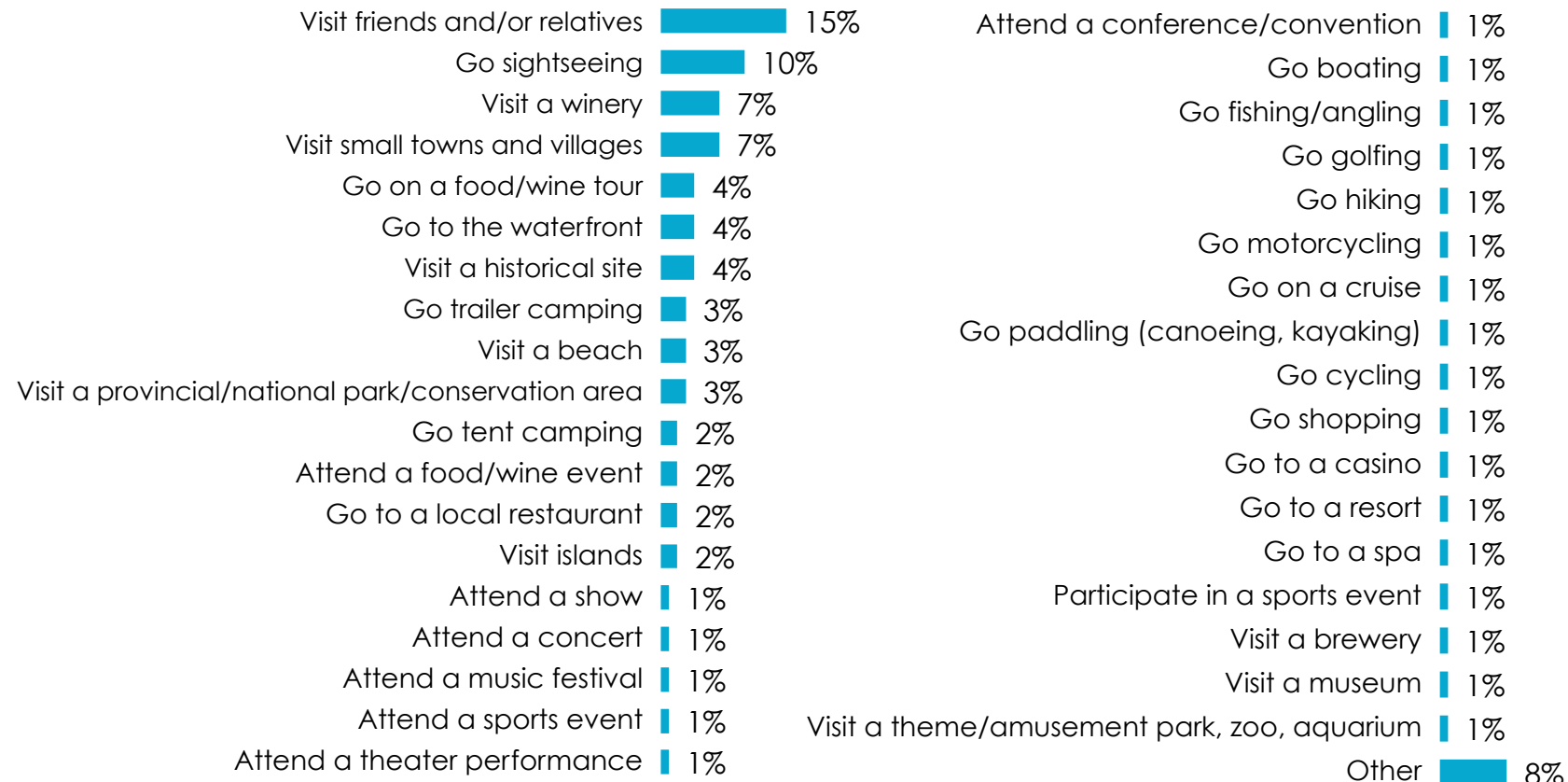
Across all destinations, leisure was the main purpose for travel, cited by 86% of respondents.

For 38% of all respondents, visiting friends and/or relatives (VFR) was the main purpose for travel, signifying once again that travellers are likely to 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 waterfront activities.

Q7: What was your primary reason for travel to South Eastern Ontario? n= 1488



INSIGHT

What's clear is that South Eastern Ontario travellers connect with their friends and/or relatives when in the region, but they are also sightseeing and taking in culture and heritage (small towns and villages, historical site visits), food and drink (winery visits, food/wine tours) and the outdoors (waterfront, camping).

Seasonality by month

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

Q8: When did you visit? If your trip occurred over multiple months please indicate when you started your trip n= 1488

	Total	Monday (n=357)	Tuesday (n=381)	Wednesday (n=416)	Thursday (n=544)	Friday (n=886)	Saturday (n=1015)	Sunday (n=826)
January	2%	3%	2%	2%	1%	2%	2%	2%
February	2%	1%	2%	2%	1%	2%	2%	2%
March	3%	3%	3%	3%	2%	2%	3%	2%
April	6%	4%	4%	5%	5%	6%	6%	6%
May	11%	7%	8%	8%	11%	12%	11%	11%
June	19%	21%	21%	19%	19%	19%	19%	19%
July	28%	34%	33%	35%	33%	27%	28%	29%
August	15%	17%	17%	16%	17%	16%	15%	15%
September	8%	5%	6%	7%	6%	8%	8%	7%
October	3%	4%	3%	3%	3%	3%	3%	3%
November	1%	--	--	--	1%	2%	1%	2%
December	2%	1%	1%	--	1%	1%	2%	2%

INSIGHT

The months of May to August were the most common for travel; with June (19%), July (28%) and August (15%) noted as the most popular.

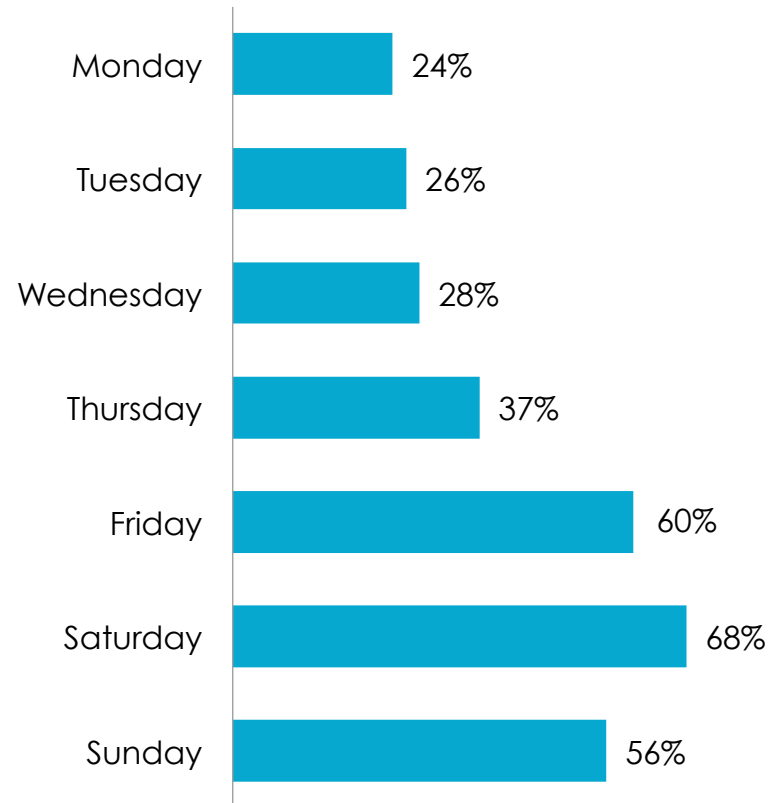
April (6%) and September (8%) are considered the secondary travel months for the region.

March and October received a lower but equal amount of visitors (3%).

Peak days

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

Q9: What day(s) of the week was your visit? n= 1488



INSIGHT

South Eastern Ontario travellers are more likely to visit on the weekend.

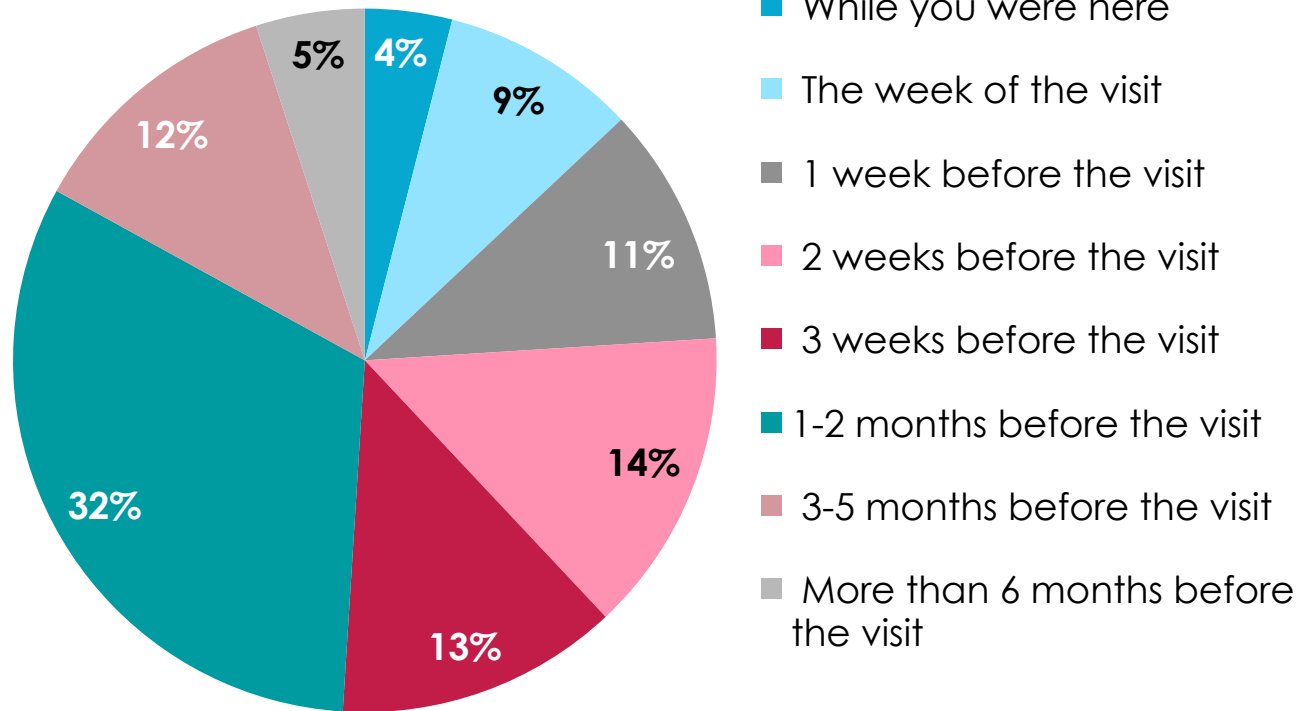
Saturday was the peak day (68%), while Friday (60%) and Sunday (56%) received a slightly lower percentage of visits.

Monday through Wednesday were the least common days for visiting.

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.

Q10: When did you start planning your trip? n= 1488



INSIGHT

51% of travellers are likely to begin planning their trip 1-3 weeks before, the same week of travel or when in the destination.

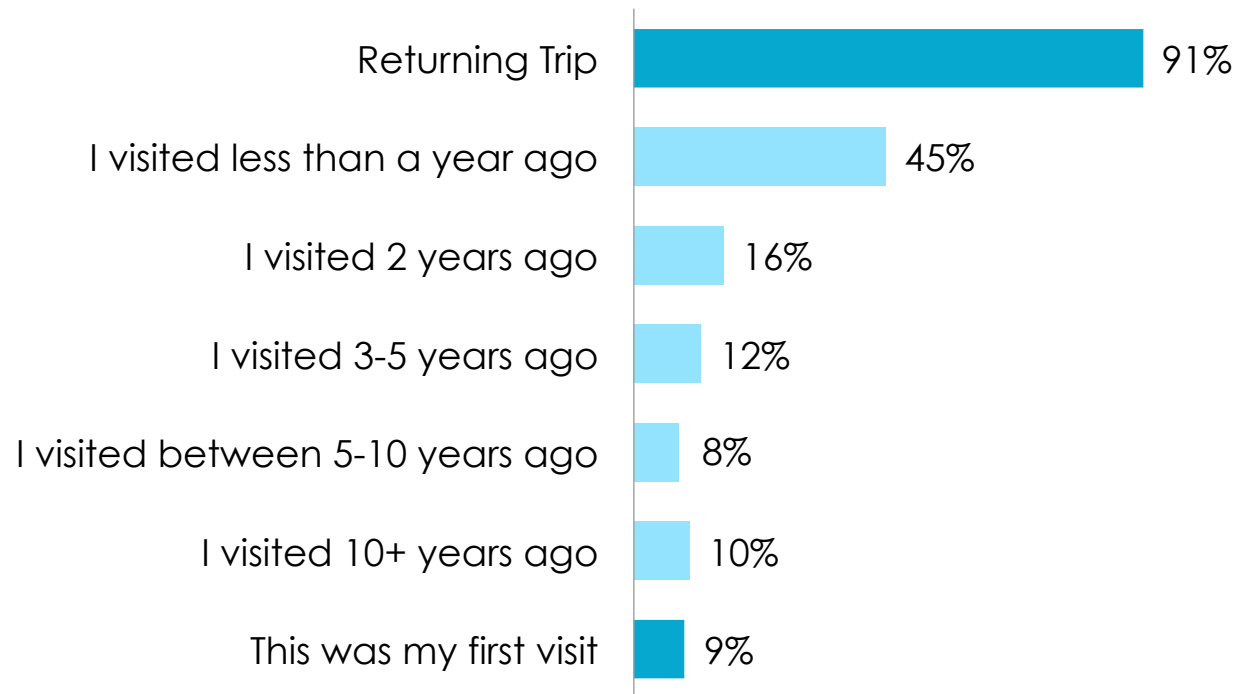
More generally, the vast majority (83%) of are planning within 2 months of departure.

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= 1488



INSIGHT

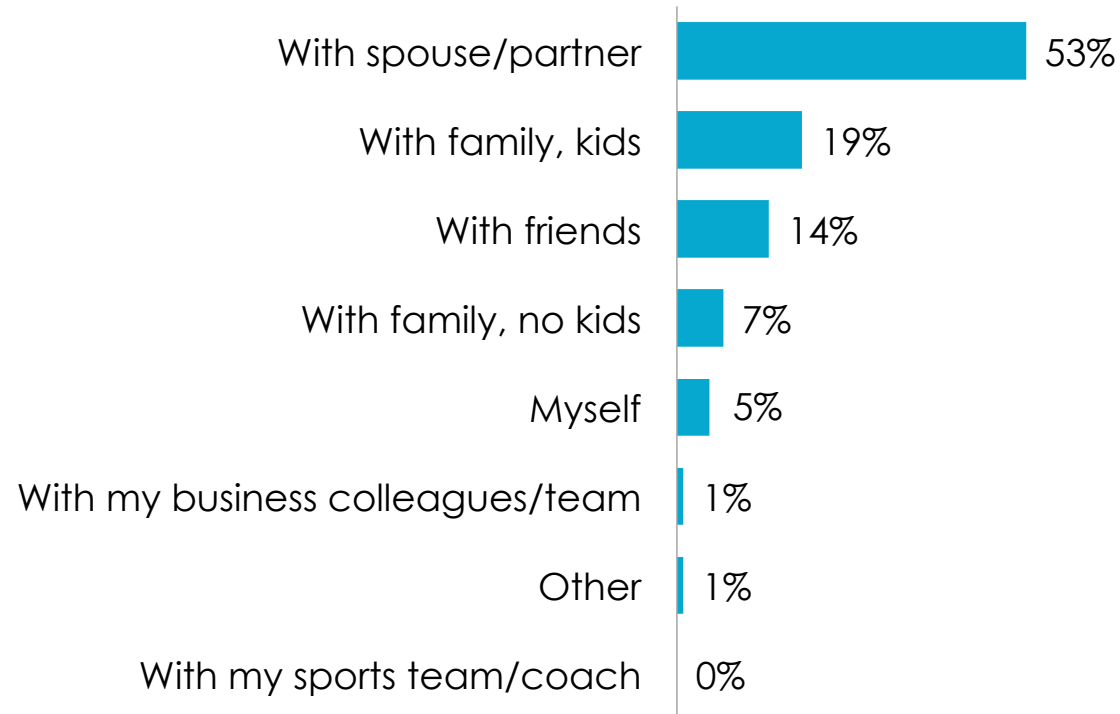
Repeat visitation is high at 91%, the majority of travellers stated that they visited less than a year ago.

A small number (9%) are first time visitors – including 13% of travellers aged 25 – 39 and 14% of those from the Metro Toronto Area.

Travel companions

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

Q12: Who were you primarily travelling with? n= 1488



INSIGHT

South Eastern Ontario travellers are more likely to visit with a spouse/partner (53%), or as family including kids (19%).

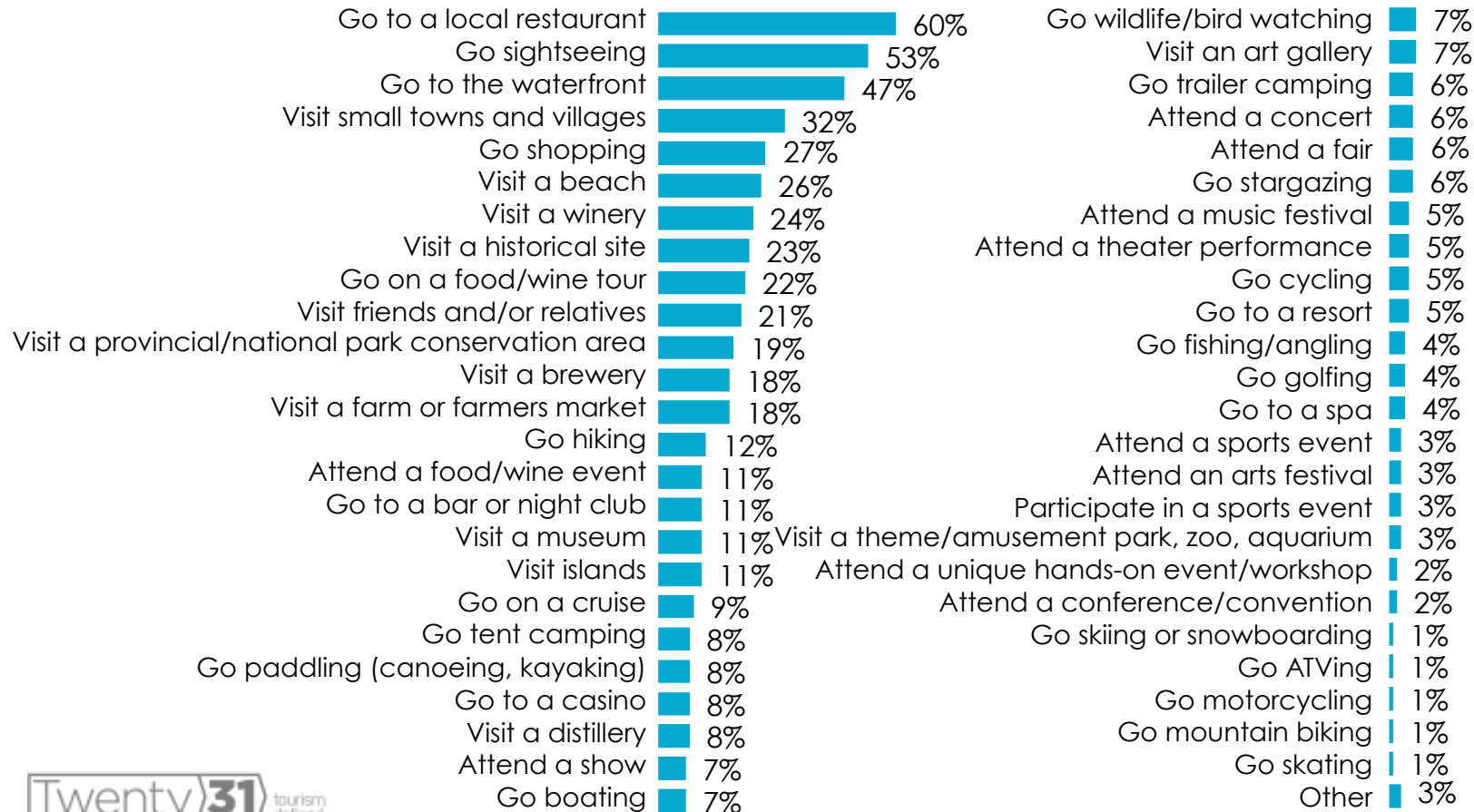
Travelling with friends was the third most common travel party (14%).

Relatively few – just 12% - travelled as a family (no kids) or alone.

Types of activities

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

Q13: What did you do while you were here? n=1488



INSIGHT

As highlighted, the top 10 activities undertaken reflect the following, in addition to sightseeing and VFR:

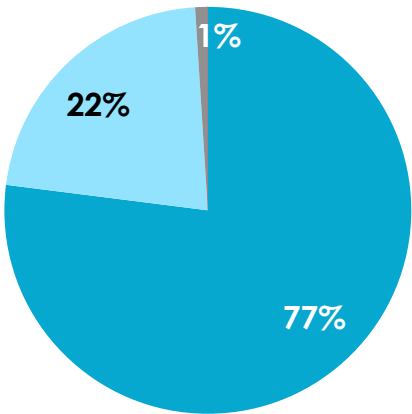
1. Food and Drink (local restaurants, winery visits, food/wine tours, brewery visits and farm/farmer's markets visits)
2. Outdoor Activities (going to the waterfront, beach visit and provincial/national park/conservation areas)
3. Culture and Heritage (small towns and villages, historical sights and shopping)

Trip enjoyment

South Eastern Ontario travellers are highly satisfied with their trips.

Q14: Did you enjoy your trip? n= 1488

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



	Bay Of Quinte (n=660)	Prince Edward County (n=1215)	Lennox & Addington/ Frontenac County (n=146)	Rideau Canal (n=809)	Kingston (n=1407)	1000 Islands Gananoque (n=906)	1000 Islands Brockville (n=612)	Cornwall & SDG Counties (n=364)
Really enjoyed the trip	84%	81%	82%	78%	78%	81%	83%	74%
Enjoyed the trip	16%	19%	16%	20%	21%	17%	17%	25%
The trip was OK	--	--	1%	1%	1%	1%	--	1%
Did not enjoy the trip	--	--	--	--	--	--	--	--

INSIGHT

Across all destinations, trip satisfaction is high. Travellers to the Bay of Quinte, Prince Edward Country, and Brockville 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= 1488



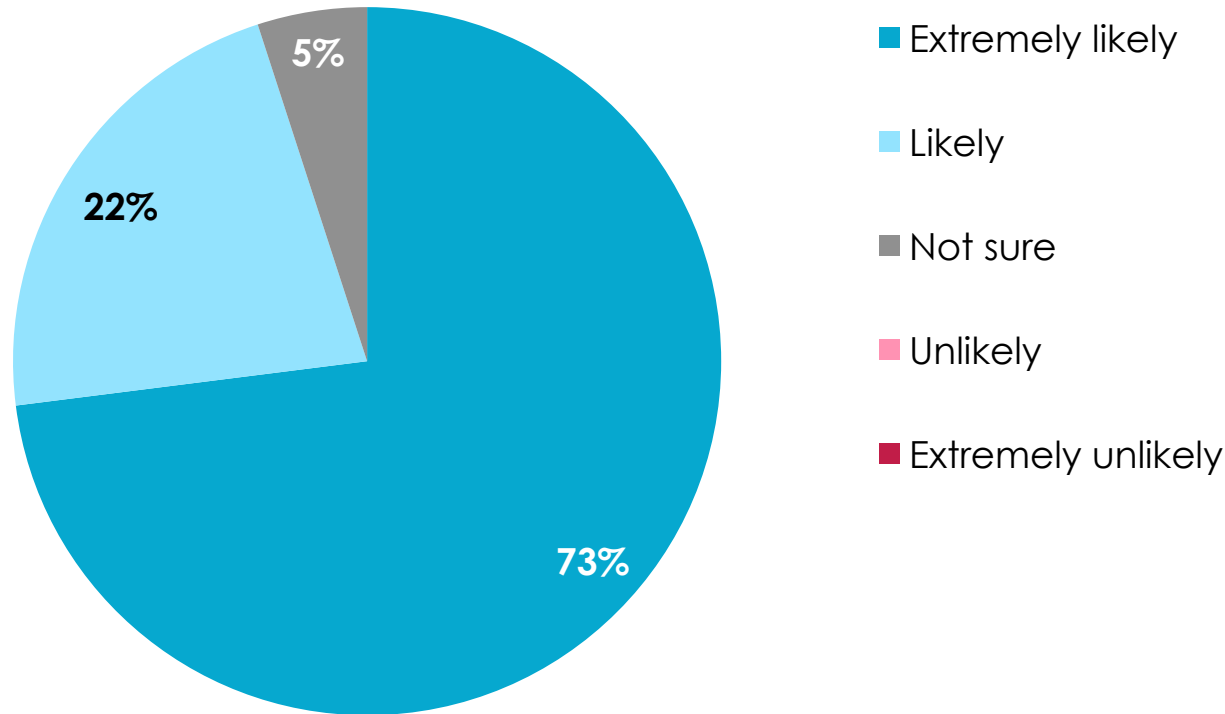
	Total
LIKE	
Beautiful place to visit again (scenery)	37%
Explore many other places / many destinations to visit	16%
Amazing / good trip	13%
Beautiful beaches / Waterfront / Lakes	11%
Relaxing trip	11%
Friendly people	10%
Delicious food / good restaurants	16%
Positive views	8%
Great weather	7%
Many options for wineries / breweries	7%
Trip with family / friends	11%
Had a good experience / fun time	6%
Visit historic places	5%
Shows / concerts / events	5%
Interesting small towns	5%
Many options for markets / shopping malls	4%
Amazing driving / cycling / biking / hiking experience	4%

	Total
Beautiful islands	3%
Good quality wines	2%
Activities / games	2%
Good accommodation facility	2%
Easy accessible day trip / close proximity	2%
Amazing cruise trip	1%
Boating / sailing	1%
Camping	1%
Cleanliness	1%
Good shopping experience	1%
Different culture	1%
Beautiful parks	1%
Affordable pricing	1%
Visit museum	1%
Not crowded	1%
DISLIKE	
Bad weather	1%
Others	5%

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= 1488



INSIGHT

Respondents expressed a high likelihood for return travel to South Eastern Ontario (73%), which is positive. This was however a slight decrease against trip satisfaction (77%).

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= 1488



	Total
LIKE	
Explore many other places / many destinations to visit	37%
Beautiful place to visit again (scenery)	19%
Easy accessible day trip / close proximity	13%
Meet family / friends	13%
Had a good experience / fun time	11%
More variety of wineries / breweries	6%
Beautiful beaches / waterfront / lakes	5%
Positive views	5%
More fun activities / games	3%
Relaxing trip	3%
Good restaurants	3%
Trip with family / friends	3%
Affordable pricing	2%
Amazing driving / cycling / biking / hiking experience	2%
Beautiful islands	2%
Leisure vacation	2%
Visit historic / adventure places	2%

	Total
Nice / friendly people	2%
Delicious food	2%
Good shopping experience	2%
Shows / concerts / events	2%
Amazing cruise trip	1%
Boating / sailing	1%
Camping	1%
Enjoyable (Unspecified)	1%
Good quality wines	1%
Varieties of festival / cultural events	1%
Golf	1%
Fishing experience	1%
Good resorts / accomodation facilities	1%
Visit museums, art and galleries	1%
DISLIKE	
Others	2%
None	1%

Planning sources

Word of mouth and social media are the most popular sources for trip planning.

Q18: What sources of information did you use to plan your trip? n= 1488



INSIGHT

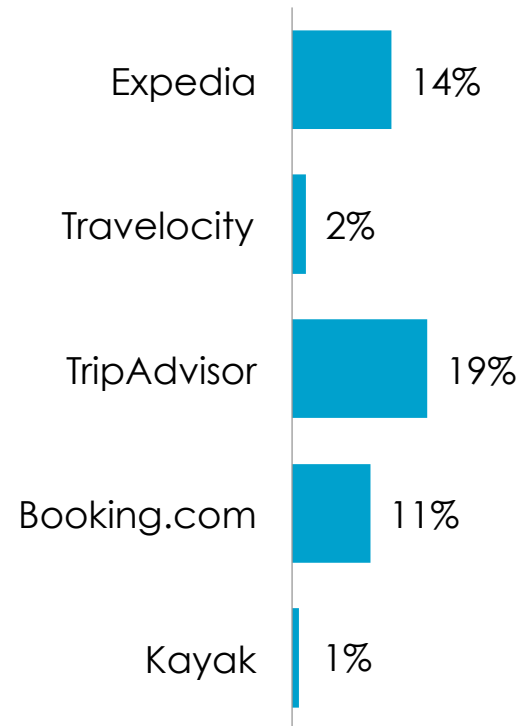
South Eastern Ontario travellers relied on friends and/or relatives, they used social media and engaged directly with their hotel/accommodation for trip planning and inspiration.

They also commonly used online booking sites and destination marketing websites.

Planning sources, online

Online booking sites are an increasingly popular way for travellers to plan their trips to the region.

Q18, i. Online Booking Site: What sources of information did you use to plan your trip? n= 1488



INSIGHT

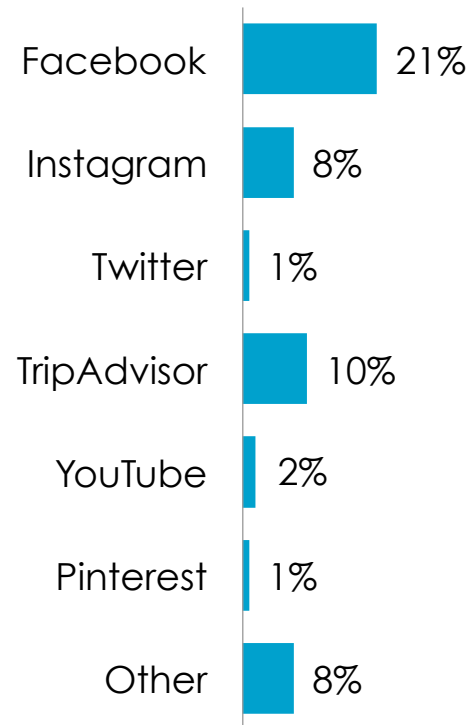
The use of online booking sites for trip planning is on the rise for South Eastern Ontario.

Compared to last year, a much higher percentage of travellers reported using an online booking site (2 % last year vs. 33% this year).

Planning sources, social media

Social media has become 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= 1488



INSIGHT

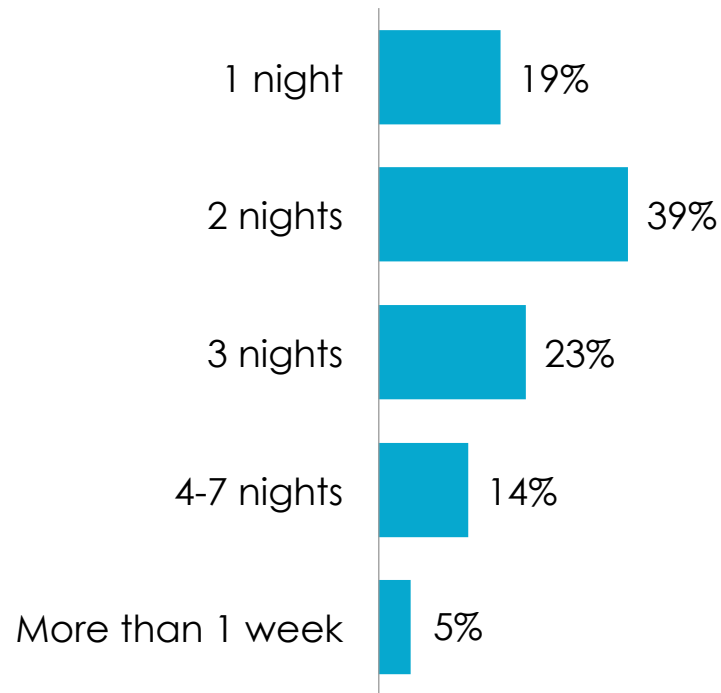
Social media was used more frequently this year.

Facebook was reported as the platform of choice, followed by Instagram.

Length of stay

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

Q19: How long did you stay for? n= 1488



INSIGHT

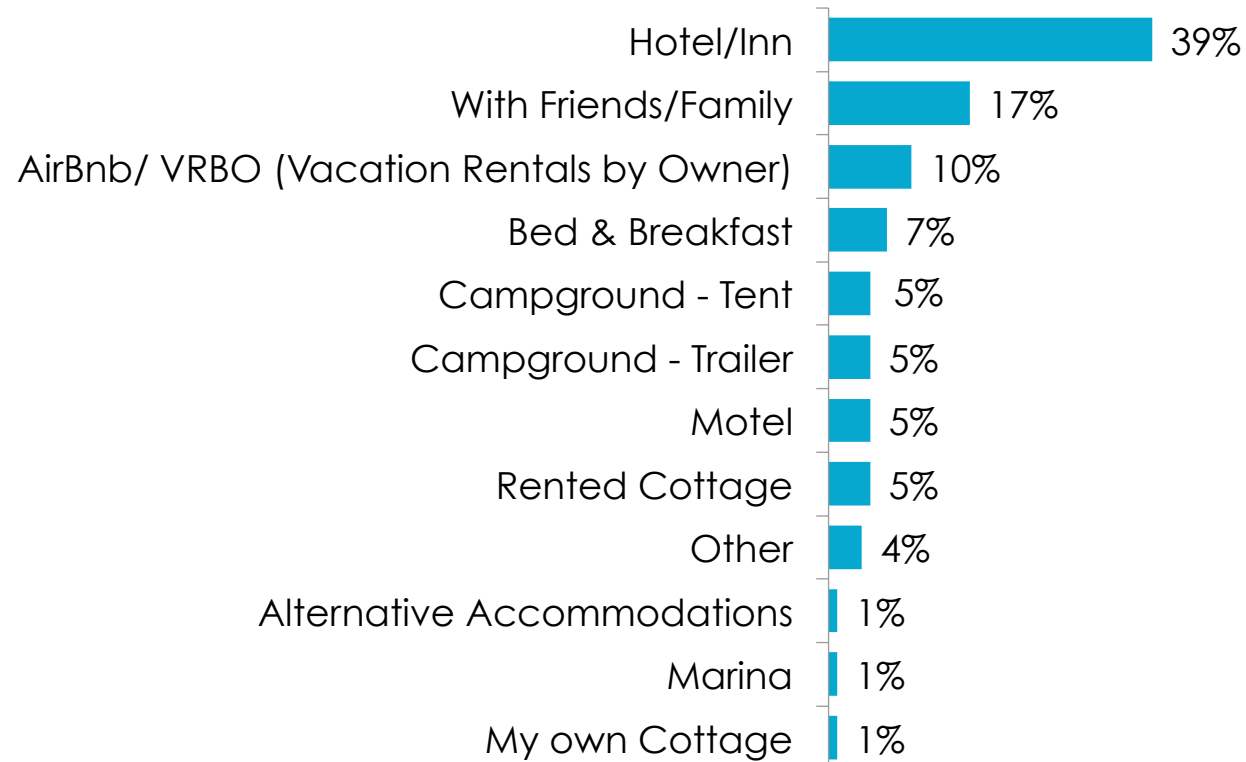
The majority of overnight trips were 2 –3 nights (62%).

The most common length of stay was a two night trip (39%), and this was more common for travellers aged 18-24 and 25-39.

Accommodations

Hotel is the preferred accommodation choice for travellers.

Q20: Where did you stay while on your trip? n= 1488



INSIGHT

39% of travellers stayed in a hotel/inn or with friends/family (17%).

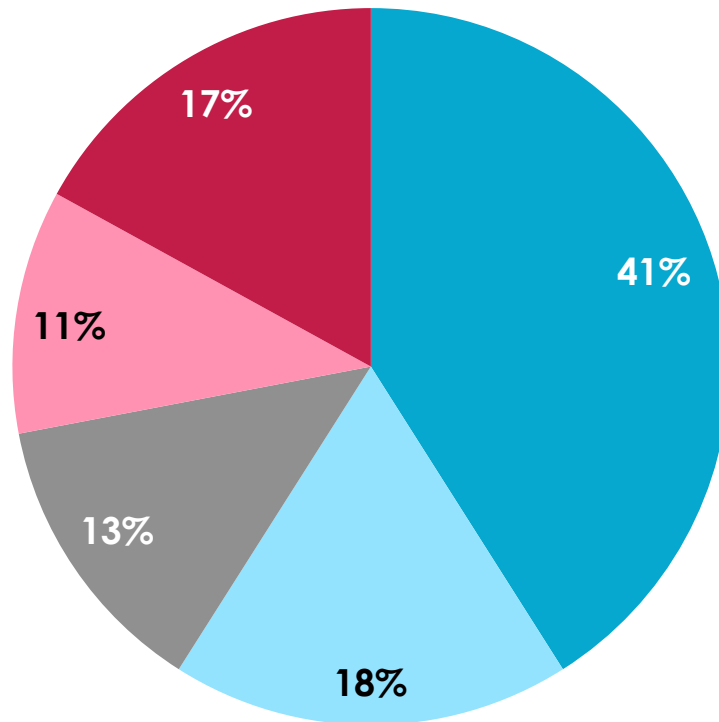
AirBnb/VRBO appears to be growing with 10% of travellers reporting that they stayed at one, including 19% of travellers aged 25-39.

In some cases travellers that responded 'Other' stayed in multiple accommodation types while on their trip.

Actual booking

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

Q21: How did you book your overnight stay? n= 1488



- Online - directly with property (e.g., hotel website)
- I called the property
- Through travel booking website (e.g., Expedia, TripAdvisor)
- AirBnb/VRBO (Vacation Rentals by Owner)
- Other

INSIGHT

When it comes to booking an overnight stay, travellers are primarily booking online directly with their chosen accommodation property.

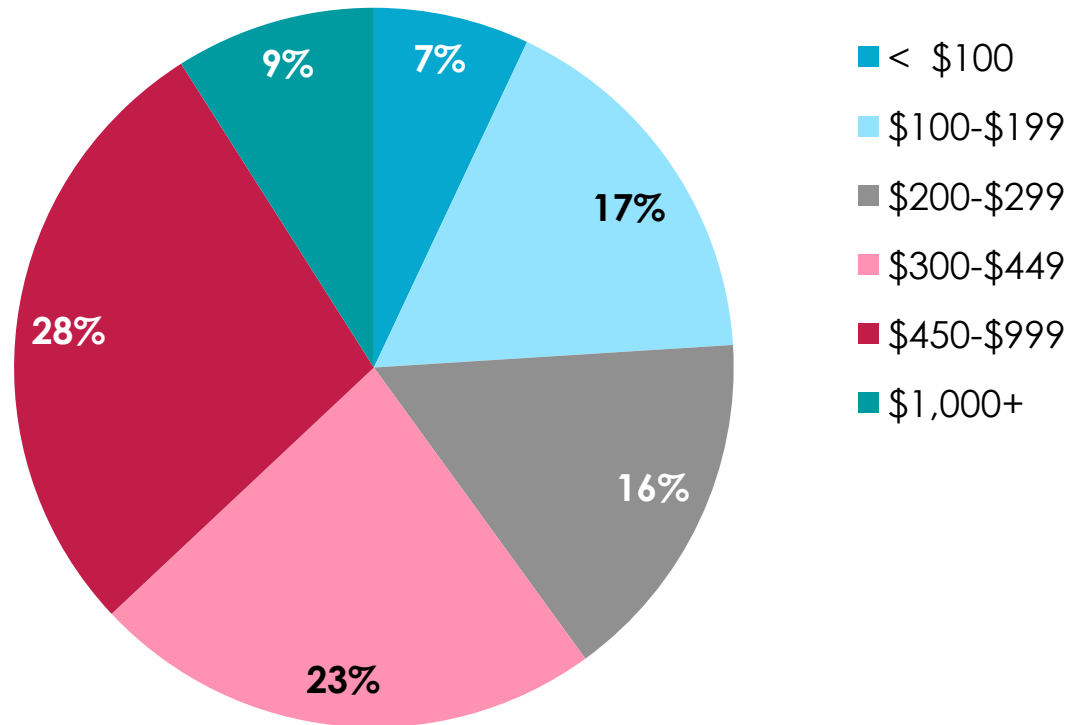
Only 13% of travellers aged 25-39 called the property.

In some cases 'Other' reflected travellers that stayed with friends/family.

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= 1488



INSIGHT

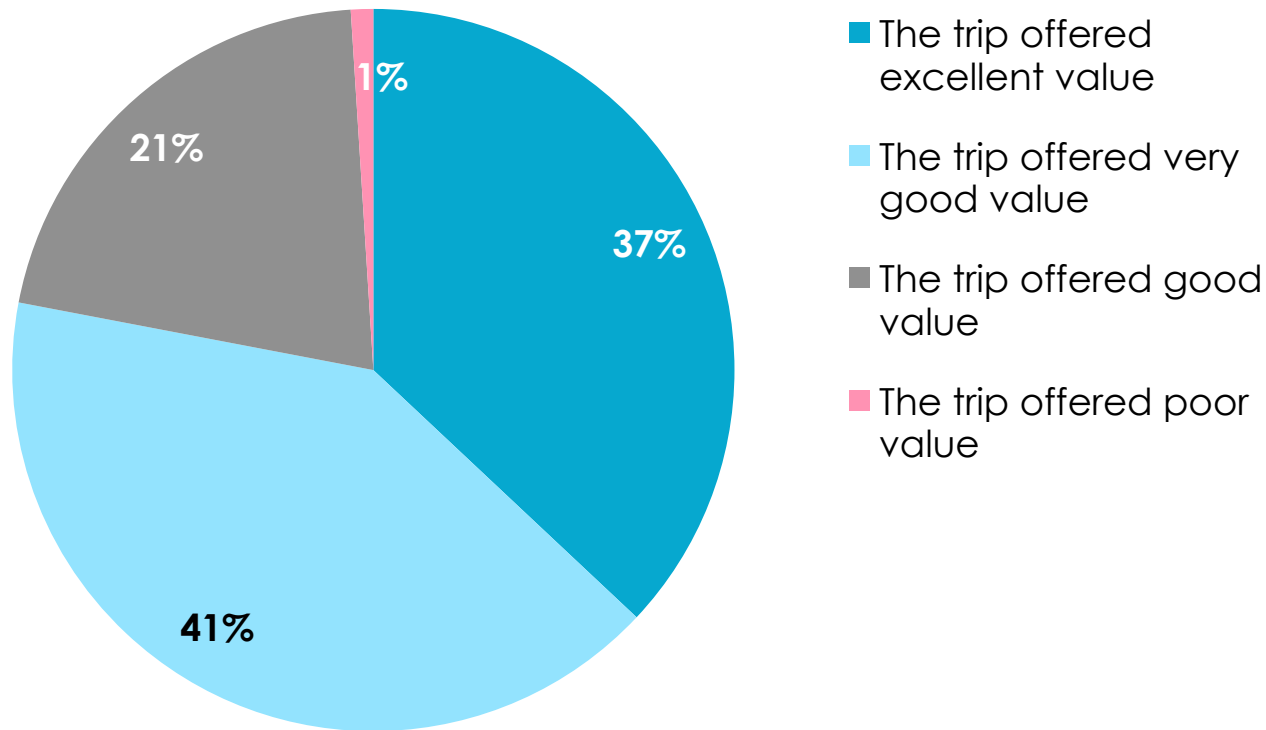
Close to two thirds (63%) of travellers spend less than \$450 per trip.

Factors like few high-end hotel options, shorter trip lengths and overnight visits with friends and/or family impact the amount travellers spend when travelling in the region.

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= 1488



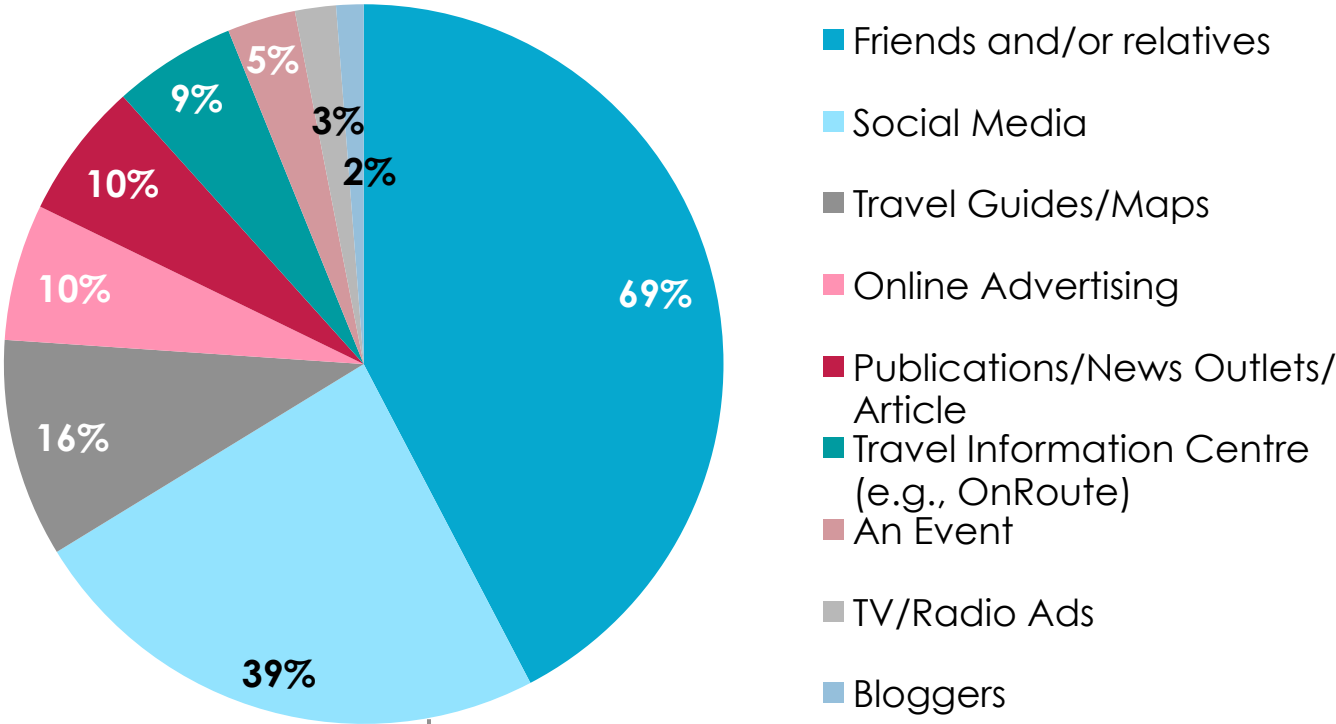
INSIGHT

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= 1488



INSIGHT

The vast majority of travellers continue to hear about the region through friends and/or relatives.

Other important sources are Social Media, Travel Guides/Maps and Online Ads.

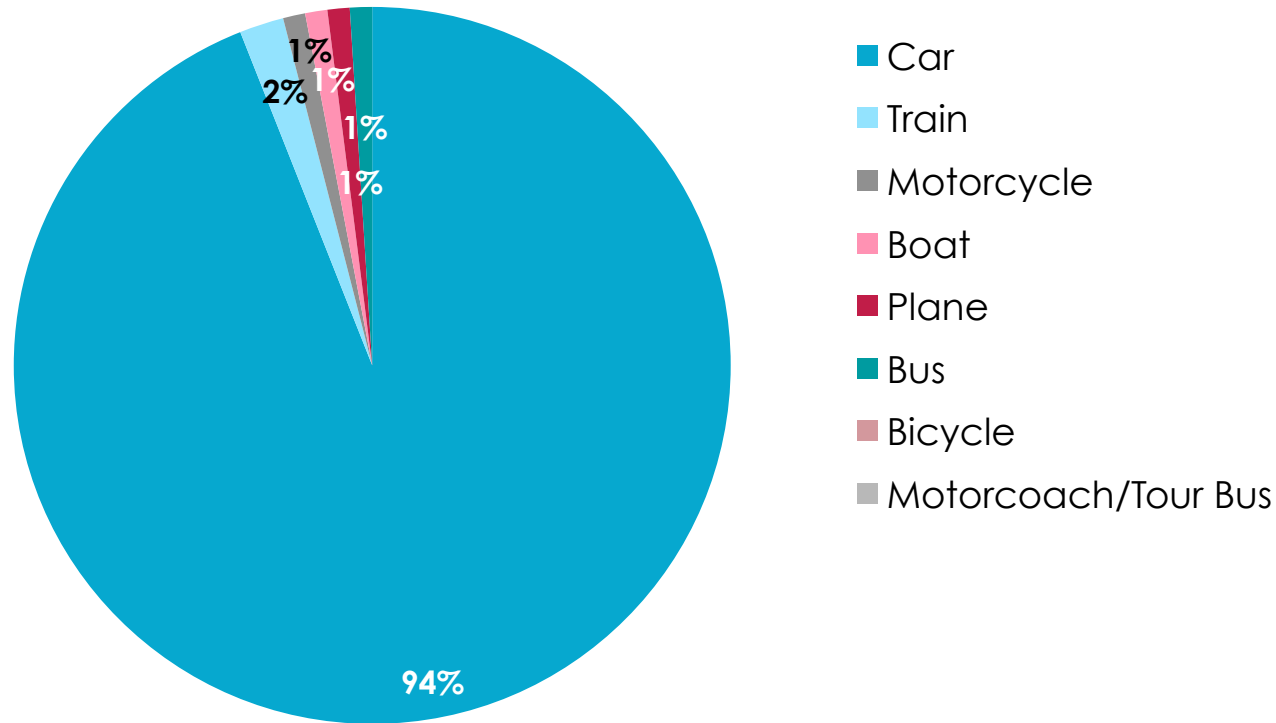
Currently, bloggers and TV/Radio ads are not viewed as key sources of influence.

● Facebook, Instagram and TripAdvisor are the most popular social media platforms.

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= 1488



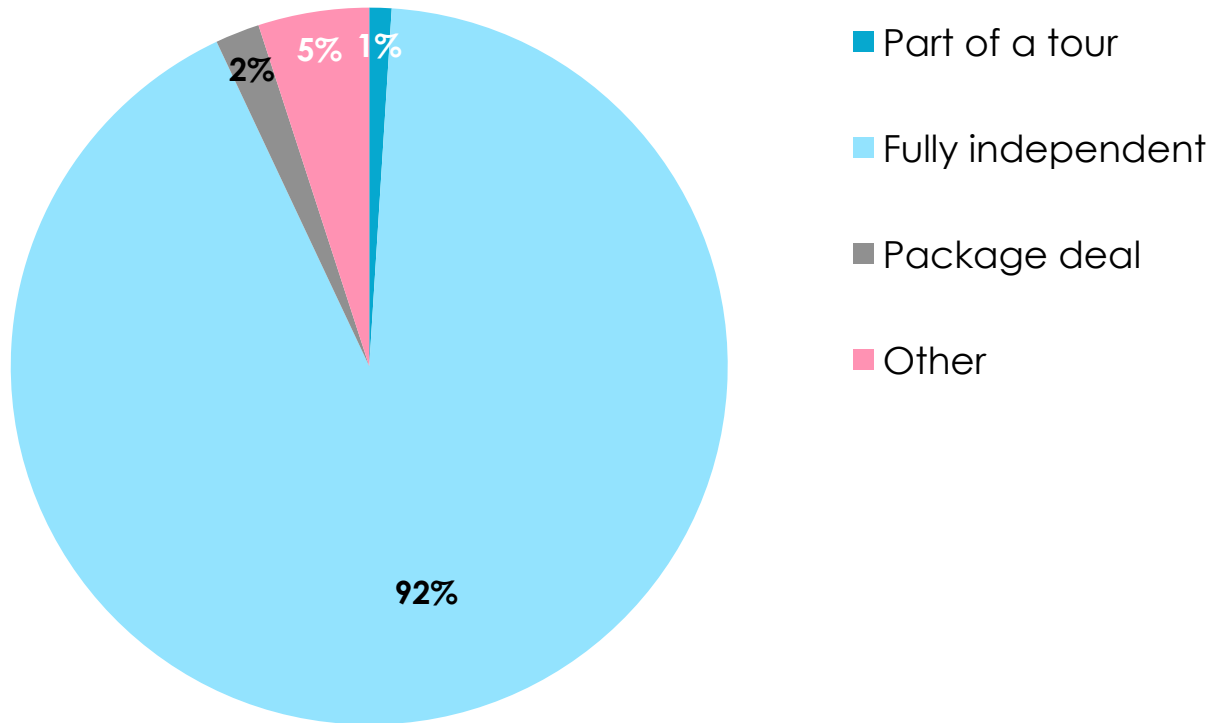
INSIGHT

Travel by car was the primary means of transport to reach the destination, confirming the importance of the region's short-haul drive markets.

Package vs. FIT

Travellers prefer fully independent travel over tours or package deals.

Q26: Was your trip to South Eastern Ontario: i) Part of a tour ii) Fully Independent iii) Package deal n= 1488



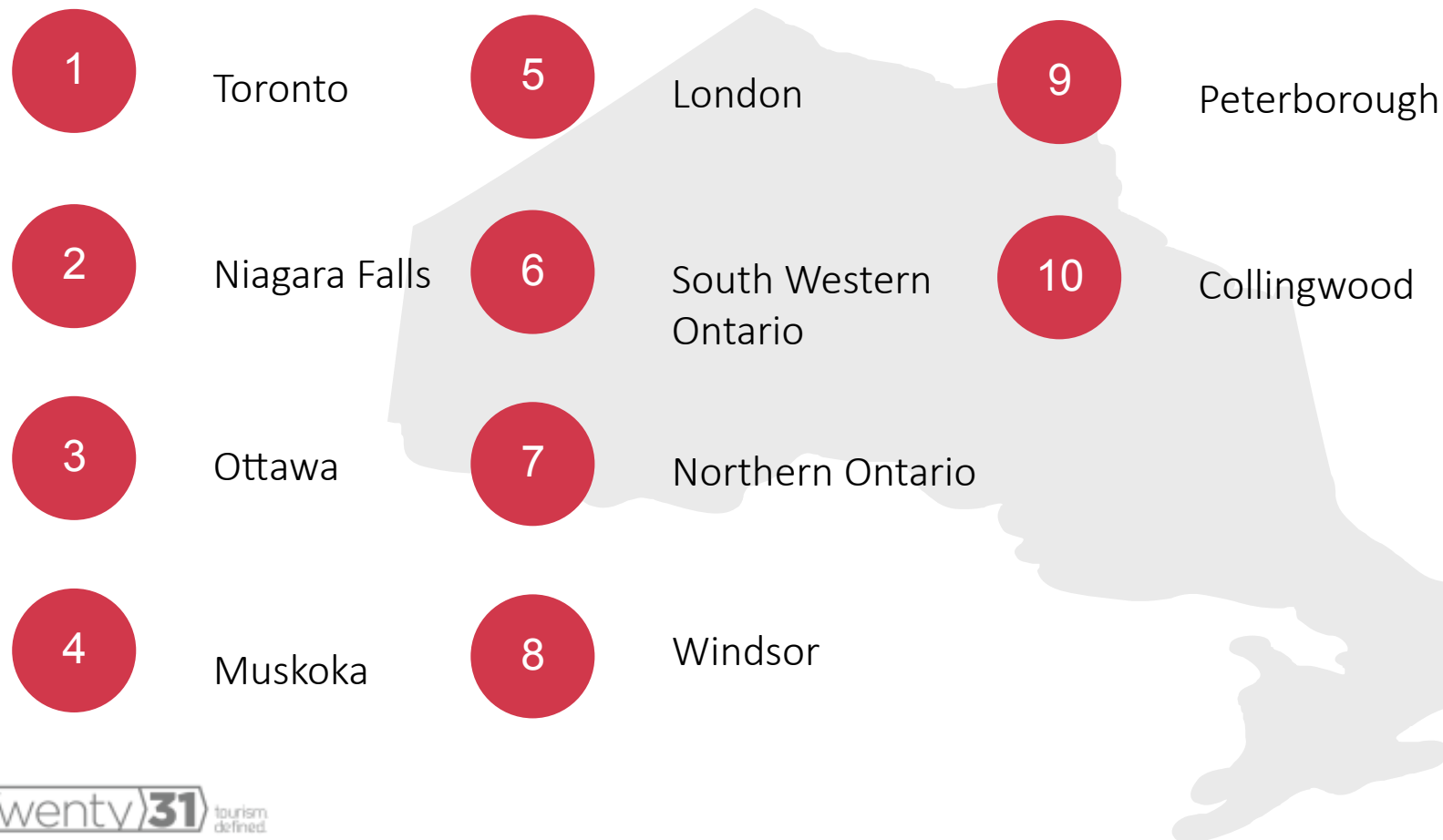
INSIGHT

A fully independent travel style is chosen by 92% of travellers.

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.

Q27: What other Ontario locations outside of South Eastern Ontario have you travelled to in the last two (2) years for leisure? n=2528



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.

Q28: Which other locations outside of Ontario have you traveled to for a leisure trip in the last two (2) years? n=2528



INSIGHT

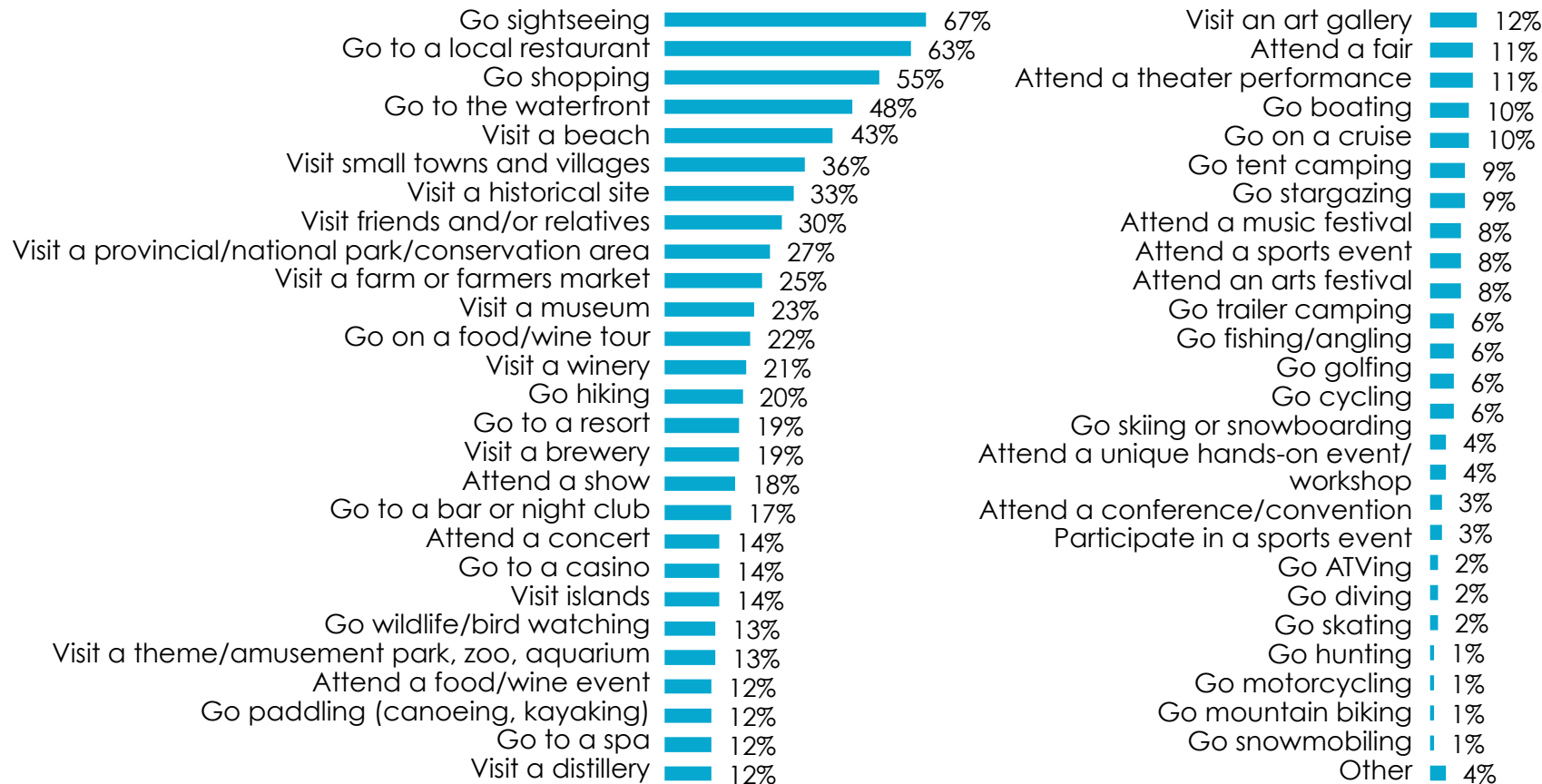
The destinations mentioned were primarily within Canada and the United States, the top mentions were more likely to be located on the east coast.

Mexico and Caribbean destinations, such as Cuba and Dominican Republic, were also frequently noted.

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.

Q29: What activities did you do while on your last leisure trip? n= 2528



INSIGHT

Travellers are likely to engage in the same types of activities, whether in South Eastern Ontario or elsewhere.

This signifies an opportunity to increase traveller's awareness about South Eastern Ontario's offerings in these areas across all destinations. Specific efforts should be made to highlight the regions locally focussed, authentic and natural assets and experiences, and what makes them different and unique.

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.

Q35: What would make your trip planning to South Eastern Ontario easier?

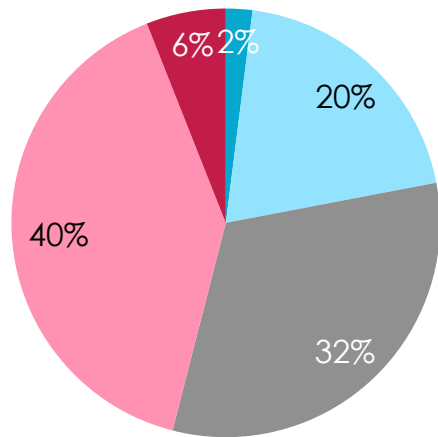


Respondent Profile (n=2528)

Q30: What is your age?

■ 18-24 ■ 25-39 ■ 40-54

■ 55-69 ■ Over 70



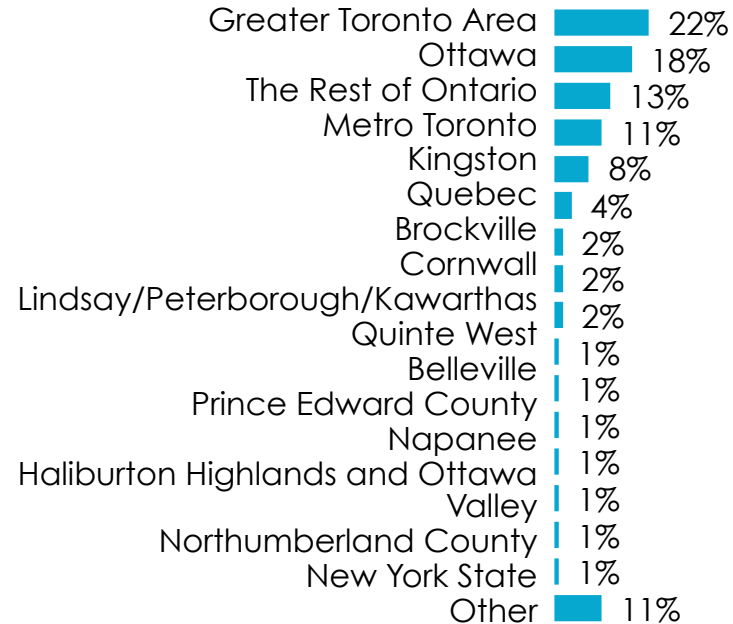
Q32: Identify my gender as

Female ■ 77%

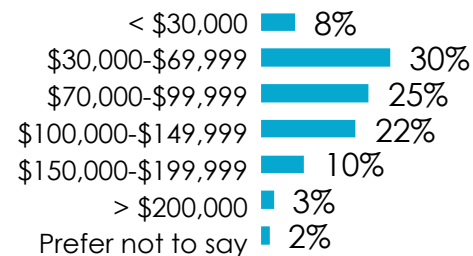
Male ■ 21%

Prefer not to say ■ 2%

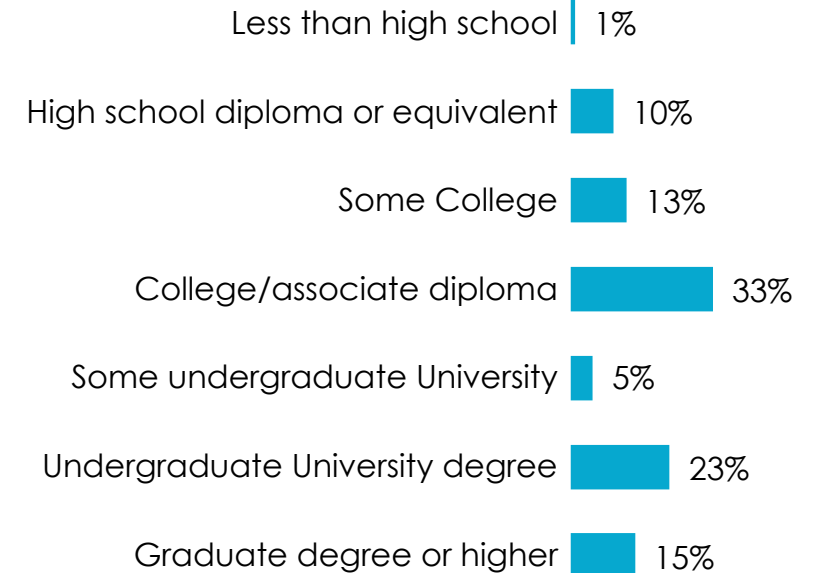
Q31: Where do you currently live?



Q34: What is your approximate annual household income?



Q33: What is your highest level of education?



DESTINATION RESULTS

Overview of destination-specific questions

Destination specific questions allowed us to explore and measure awareness and propensity to travel across the region.

Destination specific questions included within each questionnaire allowed us to measure awareness and propensity to travel across the region. There were three key questions asked:

1. How familiar are you with (destination name) as a tourism destination?
2. How interested are you in travelling to the destination for a leisure trip?
3. What is the likelihood that you will travel to the destination for leisure purposes in the next two (2) years?

This section also includes standardized questions with a destination breakout, where possible and most relevant. No interpretive insights are provided. Questions that are excluded from this summary, can be found in aggregate within the Regional Results section.

It is important to note that due to small sample sizes results should be interpreted with caution.

Q2: How familiar are you with (destination name) as a tourism destination? n= 1045

	Bay Of Quinte (n=67)	Prince Edward County (n=346)	Kingston (n=73)	1000 Islands Gananoque (n=311)	1000 Islands Brockville (n=85)	Cornwall & SDG Counties (n=163)
Extremely familiar	42%	47%	50%	20%	49%	37%
Moderately familiar	36%	38%	36%	31%	34%	36%
Somewhat familiar	10%	10%	11%	20%	7%	16%
Slightly familiar	9%	4%	3%	23%	8%	10%
Not at all familiar	3%	1%	--	6%	2%	1%

Likelihood of travel to the region

Q3: How interested are you in travelling to (destination name) for a leisure trip? n=1045

	Bay Of Quinte (n=67)	Prince Edward County (n=346)	Kingston (n=73)	1000 Islands Gananoque (n=311)	1000 Islands Brockville (n=85)	Cornwall & SDG Counties (n=163)
Very interested	60%	96%	85%	67%	69%	42%
Fairly interested	31%	4%	15%	29%	27%	36%
Not sure	6%	--	1%	4%	4%	15%
Not very interested	3%	--	--	--	--	6%
No interest at all	--	--	--	--	--	1%

Most recent leisure trip to South Eastern Ontario

Q4: What is the likelihood that you will travel to (destination name) for leisure purposes in the next two (2) years? n= 1045

	Bay Of Quinte (n=67)	Prince Edward County (n=346)	Kingston (n=73)	1000 Islands Gananoque (n=311)	1000 Islands Brockville (n=85)	Cornwall & SDG Counties (n=163)
Extremely likely	75%	88%	85%	42%	66%	59%
Likely	21%	11%	15%	35%	28%	26%
Not sure	3%	1%	--	23%	5%	10%
Unlikely	1%	--	--	--	1%	4%
Extremely unlikely	--	--	--	--	--	1%

Peak days

Q10: What day(s) of the week was your visit? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Monday	29%	31%	22%	20%	21%	26%
Tuesday	39%	18%	20%	23%	21%	25%
Wednesday	47%	22%	22%	29%	35%	31%
Thursday	63%	32%	28%	45%	47%	43%
Friday	74%	65%	57%	57%	58%	69%
Saturday	76%	78%	63%	61%	58%	80%
Sunday	68%	67%	52%	46%	40%	61%

Q11: When did you start planning your trip? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
While you were here	5%	2%	--	2%	2%	3%
The week of the visit	21%	12%	13%	7%	16%	12%
1 week before the visit	8%	11%	15%	14%	21%	12%
2 weeks before the visit	26%	8%	11%	9%	9%	15%
3 weeks before the visit	3%	12%	11%	11%	16%	10%
1-2 months before the visit	26%	33%	32%	41%	26%	27%
3-5 months before the visit	11%	16%	9%	10%	5%	16%
More than 6 months before the visit	--	6%	9%	6%	5%	5%

First time or repeat visit

Q12: Was this your first visit to the region? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Returning Trip	97%	92%	98%	90%	95%	96%
I visited less than a year ago	61%	56%	61%	38%	63%	61%
I visited 2 years ago	21%	13%	13%	17%	5%	15%
I visited 3-5 years ago	5%	11%	7%	14%	14%	8%
I visited between 5-10 years ago	3%	5%	7%	9%	2%	4%
I visited 10+ years ago	8%	8%	11%	12%	12%	8%
This was my first visit	3%	8%	2%	10%	5%	4%

Q13: Who were you primarily travelling with? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
With spouse/partner	32%	51%	50%	52%	51%	38%
With family, no kids	--	7%	7%	11%	12%	9%
With family, kids	34%	21%	30%	23%	9%	37%
Myself	16%	3%	4%	3%	7%	1%
With friends	18%	16%	7%	10%	19%	15%
With my business colleagues/team	--	1%	2%	--	--	--
With my sports team/coach	--	--	--	1%	--	--
Other	--	1%	--	--	2%	--

Likelihood of returning to South Eastern Ontario for a leisure trip

Q17: How likely are you to return to South Eastern Ontario for an overnight leisure trip within the next two (2) years? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Extremely likely	89%	88%	87%	65%	72%	74%
Likely	8%	9%	13%	27%	26%	20%
Not sure	3%	3%	--	8%	2%	6%
Unlikely	--	--	--	--	--	--
Extremely unlikely	--	--	--	--	--	--

Q19: What sources of information did you use to plan your trip? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Social media	74%	67%	48%	24%	40%	60%
Spoke to a friend and/or relative	58%	39%	30%	28%	37%	43%
Direct with hotel/accommodation	26%	36%	39%	40%	16%	33%
Destination marketing website	32%	42%	17%	28%	33%	19%
Online booking site	29%	24%	43%	27%	23%	27%
A brochure/travel guide	26%	8%	9%	26%	33%	15%
Visitor Information Centre	21%	5%	13%	23%	23%	8%
The Great Waterway website	8%	1%	2%	5%	14%	3%
Travel Agent	--	--	2%	1%	2%	3%
Tour Operator	--	2%	2%	1%	--	1%
Other	--	11%	4%	10%	12%	13%

Q19, i. Online Booking Site: What sources of information did you use to plan your trip? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Online booking site	29%	24%	43%	27%	23%	27%
Trip Advisor	16%	15%	17%	19%	9%	15%
Expedia	18%	5%	22%	12%	9%	16%
Booking.com	11%	8%	11%	6%	9%	8%
Travelocity	--	--	2%	3%	--	4%
Kayak	--	--	2%	--	--	1%

Q19, vi. Social Media: What sources of information did you use to plan your trip? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Social Media	74%	67%	48%	24%	40%	60%
Facebook	55%	23%	35%	12%	26%	46%
Instagram	16%	55%	9%	1%	2%	6%
Trip Advisor	13%	9%	7%	9%	12%	11%
You Tube	5%	1%	--	3%	5%	3%
Twitter	--	2%	2%	--	2%	2%
Pinterest	8%	1%	2%	1%	--	--
Other	5%	7%	9%	6%	7%	13%

Q20: How long did you stay for? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
1 night	23%	20%	24%	19%	23%	16%
2 nights	29%	40%	43%	39%	34%	39%
3 nights	11%	24%	22%	20%	19%	22%
4- 7 nights	21%	13%	11%	21%	12%	19%
More than 1 week	16%	3%	--	1%	12%	4%

Q22: How did you book your overnight stay? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Online - directly with property (e.g., hotel website)	26%	35%	46%	41%	39%	40%
Through travel booking website (e.g., Expedia, TripAdvisor)	21%	7%	15%	15%	7%	15%
AirBnb/VRBO (Vacation Rentals by Owner)	3%	34%	7%	9%	5%	13%
I called the property	24%	9%	15%	20%	28%	18%
Other	26%	15%	17%	15%	21%	14%

Estimated trip spending

Q23: How much did you spend on your trip including accommodations? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
< \$100	11%	5%	7%	3%	12%	14%
\$100-\$199	13%	16%	20%	15%	19%	14%
\$200-\$299	24%	15%	17%	15%	14%	17%
\$300-\$449	20%	17%	9%	26%	27%	23%
\$450-\$999	24%	34%	40%	29%	12%	23%
\$1,000+	8%	13%	7%	12%	16%	9%

Q24: Compared to other trips and destinations, do you feel that your trip offered value for money? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
The trip offered excellent value	50%	44%	43%	33%	51%	42%
The trip offered very good value	29%	36%	35%	40%	40%	37%
The trip offered good value	16%	19%	22%	26%	9%	20%
The trip offered poor value	5%	1%	--	1%	--	1%

Q25: How did you hear about this region? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Friends and/or relatives	79%	79%	67%	55%	74%	62%
Social Media	61%	51%	52%	35%	28%	57%
Travel Guides/Maps	21%	11%	4%	27%	14%	12%
Online Advertising	11%	7%	2%	21%	19%	12%
Publications/News Outlets/Articles	16%	5%	2%	16%	21%	11%
Travel Information Centre	13%	5%	2%	19%	12%	6%
An event	5%	2%	7%	6%	12%	10%
Bloggers	3%	6%	--	1%	2%	2%
TV/Radio Ads	5%	1%	--	3%	7%	6%

Q25, ii. a-g Social Media: How did you hear about this region? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Social Media	61%	51%	52%	35%	28%	57%
Facebook	37%	14%	28%	13%	19%	40%
Instagram	18%	34%	2%	1%	2%	4%
Trip Advisor	21%	3%	7%	8%	5%	6%
You Tube	3%	2%	--	1%	--	1%
Twitter	3%	2%	2%	1%	--	--
Pinterest	--	2%	2%	--	2%	--
Other	13%	12%	22%	16%	7%	16%

How they got here

Q26: How did you travel to the region? n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Car	91%	98%	98%	93%	87%	99%
Motorcycle	3%	--	--	3%	--	--
Boat	3%	--	--	2%	7%	--
Bicycle	--	--	--	--	2%	--
Bus	--	--	--	--	2%	--
Motorcoach/Tour Bus	--	--	--	--	--	--
Plane	--	1%	2%	1%	2%	1%
Train	3%	1%	--	1%	--	--

Package vs. FIT

Q27: Was your trip to South Eastern Ontario: i) Part of a tour ii) Fully Independent iii) Package deal n= 660

	Bay Of Quinte (n=38)	Prince Edward County (n=285)	Kingston (n=46)	1000 Islands Gananoque (n=155)	1000 Islands Brockville (n=43)	Cornwall & SDG Counties (n=93)
Part of a tour	3%	1%	2%	1%	--	--
Fully independent	86%	95%	90%	93%	95%	96%
Package deal	3%	--	4%	4%	2%	--
Other	8%	4%	4%	2%	2%	4%

Ways to improve trip planning

Q36: What would make your trip planning to South Eastern Ontario easier? N=(1045)

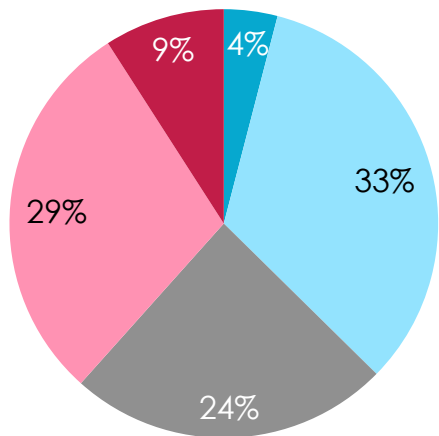
	Total
Accommodation / Hotels	6%
Good accommodations / variety of options	3%
Pet-friendly accommodations	1%
Details of hotels / restaurants	1%
Details on family friendly accommodation / places to visit	1%
Inspiration / Planning Tools (General)	32%
Easy access to all the information needed / hotels / events	4%
In-depth information about accommodation and destination	5%
Awareness about events / activities / places etc.	1%
Calendar of events / activities	2%
Exciting event	1%
Travel guide booklet / newsletter	1%
Brochures	1%
Planned itineraries	4%
Better promotions	1%
Email reminders / notification	1%
Social media presence (Blogs / Articles)	3%
Details on local hotspots / sightseeing lists	3%
Details on all vineyard's / wine tours	1%
Tour guide (Guided tour)	1%
Recommendations by people (Word of mouth)	1%
One stop travel centre for restaurants / bookings etc.	1%

	Total
Travel agent / planner	1%
Inspiration / Planning Tools (Technology)	12%
Interactive map	4%
User-friendly travel app / website	6%
Integrated travel website which links hotels and other travel activities	2%
Accessibility / Transportation	7%
Better traffic / road conditions	2%
Convenient travel	1%
Easy accessible transportation (Availability of Car/Bus/Train)	4%
Budget / Pricing	27%
More money / funding	6%
Discounts / deals / coupons / freebies	8%
Cheaper accommodation	3%
Cheaper train fare / air fare / gas / transportation	2%
All-inclusive package deal (Accommodation / Activities / Tours)	1%
Details on pricing	1%
Other	6%
More leisure time	3%
General information	11%
Nothing / Its already pretty easy / Have all the necessary resources	20%
Don't know / Can't think of anything	8%

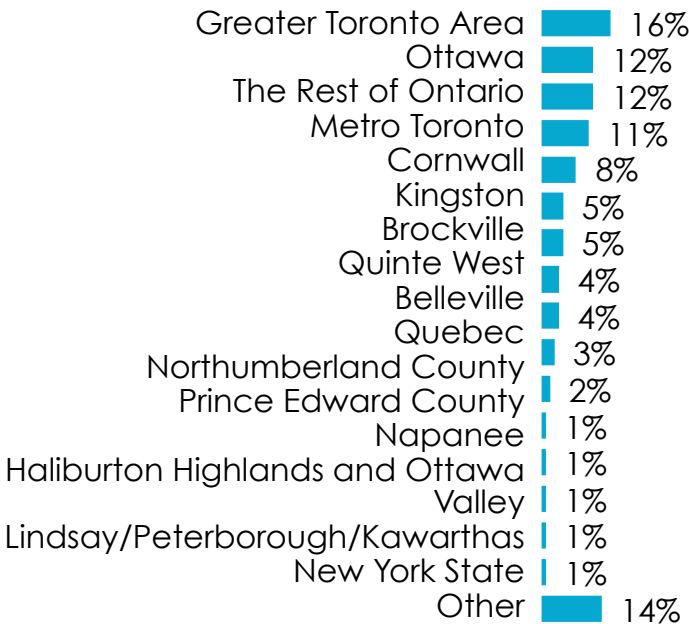
Respondent Profile (n= 1045)

Q31: What is your age?

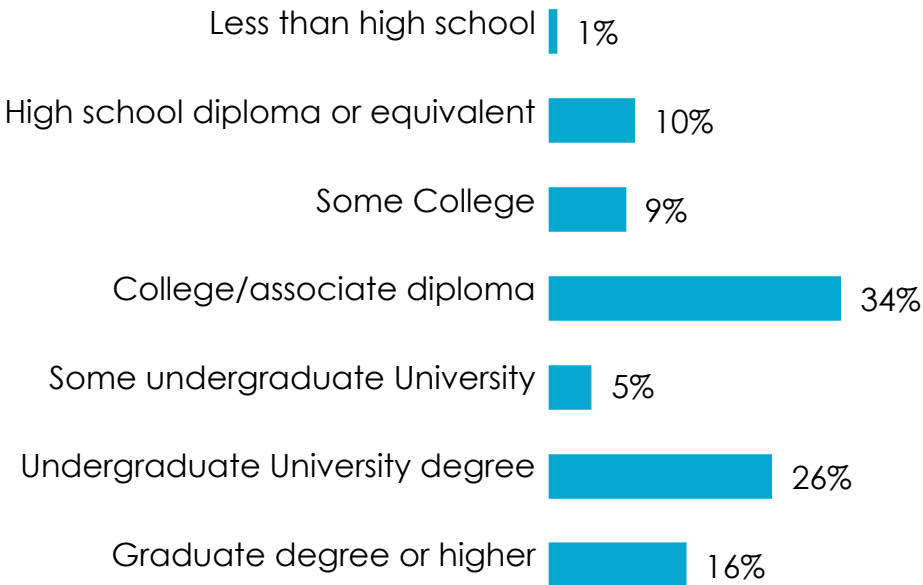
■ 18-24 ■ 25-39 ■ 40-54
■ 55-69 ■ Over 70



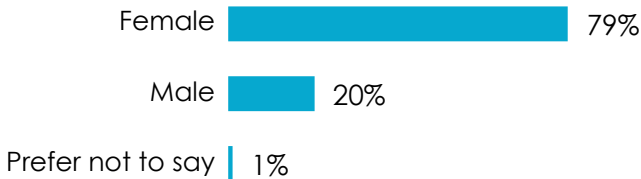
Q32: Where do you currently live?



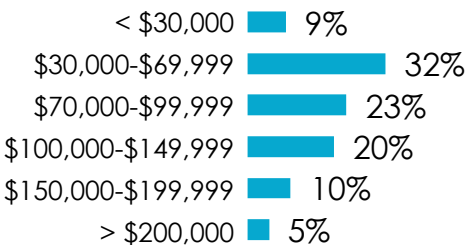
Q34: What is your highest level of education?



Q33: Identify my gender as



Q35: What is your approximate annual household income?



Twenty31 Consulting is a research and innovation based management consultancy working with senior leaders of travel and tourism organizations to define and build sustainable, competitive advantage.

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