SOUTH EASTERN ONTARIO

CONSUMER INSIGHTS SURVEY

Wave 2 Fall 2019

Draft Report

February 10, 2020

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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.

February 10, 2020

Introduction

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

As in our past survey reports, we highlight practical insights and strategic information for tourism organizations across South Eastern Ontario to implement into everyday business practices and planning processes.

The intended purpose of the Consumer Insights Survey is to understand 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. In the last two years we have completed a total of three surveys (Summer Pilot 2018-19 and in 2019-20 Summer Wave 1 and Fall Wave 2) using destination-specific and standardized questions.

To leverage these activities, our aim is to continue conducting two survey waves each year. While this may appear repetitive, there are many benefits associated with a multiple wave data collection approach, including 1) the ability to track and compare results over time for a deeper understanding of performance and travel behaviour in the region (e.g., travel patterns, brand assessment), and 2) the ability to monitor data for the impact of seasonality.

In addition to this survey, we have delivered a host of other primary and secondary research initiatives to fill the tourism information and data gap at the regional and local level in South Eastern Ontario. Sharing and disseminating this research, alongside other relevant resources is a priority; we encourage you to access RTO9's Research and Insights Hub for updates at https://tourismtalk.ca/research-and-insights-hub/.

Summary and Growth Insights

Knowing how travel patterns and consumer behaviour changes seasonally can help South Eastern Ontario target and appeal to high impact travellers.

In order to make the move towards sustainable tourism we collectively need to understand how seasonality impacts our success, including the ways travel patterns and behaviours shift throughout the year. Basic factors like weather, events, the school year and the number of vacation days available can all be influential. Further, with the rise of international tourism other issues like exchange rates, politics, fuel prices also play a role in travel decision-making.

There are different approaches that tourism organizations may use to target the right ("highest impact") traveller audience at the right time. When reviewing the findings, we encourage you to keep the following questions in mind:

1. How can I can I inspire and adapt my travel planning resources for travellers that have differing levels of familiarity, with my destination and the region?

2. How can my product or service be adapted and marketed to appeal to travellers with different needs and expectations (e.g., families, solo travellers, couples)?

3. Where and how can I encourage my existing customers to share their positive travel experiences with others?

4. Where can I tailor my marketing messages to align with motivators that South Eastern Ontario travellers identify as primary?

Summary and Growth Insights, continued

Limited differences were observed with respect the destinations visited and activities, however, trip lengths, spending and accommodations have varied.

The key findings describe the travel patterns and behaviour of South Eastern Ontario's recent visitors:

- **Trip lengths declined slightly.** Two to three night trips represented 62% of overnight trips in Summer (2019-20) and just 41% for Fall (2019-20).*

- **Traveller spending weakened.** Those spending between $450 - $999 dropped to 17% for Fall (2019-20), from 28% in Summer (2019-20).* The vast majority of travellers indicated that they spent less than $450 (77%) and almost half spent less than $200 (43%) in Fall (2019-20).

- **AirBnb/VRBO's prominence is on the rise.** In Fall (2019-20), 17% of respondents said they stayed in an AirBnb/VRBO property while just 5% of respondents reported it as their overnight accommodation in the Summer (2018-19).

- **Travellers were more spontaneous with trip planning.** The number of people who planned one to two months in advance dropped from 32% in Summer (2019-20) to 25% in Fall (2019-20). *

- **Slightly fewer couples visited.** Although couples remain a solid market for Ontario destinations, those travelling with friends, solo and as a family with kids increased by 3%, 2% and 3% respectively in comparison to Summer (2019-20).

- **Prince Edward County and winery visits** were among the top for actual destinations visited and main reason for travelling to the region.

- **Perceptions of value modestly decreased** by 2% between Summer (2019-20) and Fall (2019-20).

Notes: *Summer (2019-20) excludes day trippers

Summary and Growth Insights, continued

The primary reasons that motivate travellers to visit the region have remained consistent since our summer pilot survey.

	2018-19 (Summer Pilot)	2019-20 (Summer Wave 1)	2019-20 (Fall Wave 2)	
TOP 5 ACTIVITIES (4% OR GREATER)				
Visit friends and/or relatives	12	15	13	▼
Go sightseeing	11	10	9	
Visit a winery	7	7	8	
Visit small towns and villages	9	7	7	
Go on a food/wine tour	4	4	5	
OTHER TOP ACTIVITIES (2% OR GREATER)				
Go to a local restaurant	2	2	4	▲
Go shopping	2	<2	3	
Go to the waterfront	4	4	3	
Visit a beach	3	3	3	
Visit a historical site	4	4	3	
Visit a provincial/national park/conservation area	3	3	3	
Attend a concert	<2	<2	2	
Attend a food/wine event	2	2	2	
Go on a cruise	3	<2	2	

This snapshot displays the primary reasons for travel to South Eastern Ontario.

The top five activities have remained consistent since 2018-19. A slight increase is observed for 'go to a local restaurant', and a slight decrease for 'visit friends/and or relatives' between Summer and Fall in 2019-20.

Notes: A rating has been provided for activities that have a variation of (+/-) 2%.

Summary and Growth Insights, continued

A stronger emphasis on in-depth destination information can help potential travellers with limited familiarity overcome planning challenges.

✓ **Inspiration and Planning:** For the majority of travellers, a longer trip becomes a major decision that often requires more planning. To effectively transition from a day/short trip destination to a longer stay travel option, tourism organizations must share in-depth information about experiences, access and accommodations. While getting around and finding things to do is currently viewed as relatively easy, travellers continue to emphasize user-friendly and integrated planning tools such as interactive maps, travel apps, itineraries, and packages to help overcome potential planning challenges.

✓ **Booking:** Online direct and phone booking via hotels/inns continues to be the primary booking method for overnight travellers. To access new markets and travellers, the travel trade and online travel agencies need to be engaged and valued as key distribution partners. Not only can these partners offer marketing advantages for individual operators, they help to educate travellers and boost exposure for the destination as a whole.

✓ **Traveller Needs:** Tourism organizations need to consider the varying needs of travel audiences, for example, families and solo travellers require and look for vastly different amenities and supports – even when doing the same activity.

✓ **Brand Awareness:** The importance of word of mouth cannot be understated, the positive sentiment of past travellers should be leveraged to raise the profile of South Eastern Ontario and drive new visits from outside of the existing base.

South Eastern Ontario Traveller Profile

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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.

Main Purpose
80% of travellers visited for leisure purposes.

Length of Stay
A two night (28%) trip was the most common for overnight travellers.

Trip Spend
Over three quarters (77%) of travellers spend less than $450 per trip.

Planning
Travel planning is most likely to take place within 3 weeks of a trip (62%).

Travel Party
50% of respondents travel as a couple.

Planning Sources
Friends and/or relatives (40%) and social media (35%) dominate for travel planning inspiration.

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METHODOLOGY

Overview

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

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METHOD

- Online
- 11 Minute Questionnaire
- Fieldwork from November 18 – December 20, 2019

SAMPLE SIZE

- 3,155 total respondents
- South Eastern Ontario (2,569), Bay of Quinte (33), Prince Edward County (136), Lennox & Addington/Frontenac (10), Kingston (298), 1000 Islands Gananoque (61), 1000 Islands Brockville (18) and Cornwall (30)
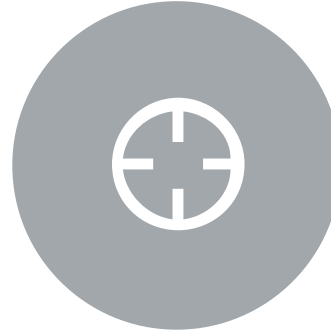
TARGET

- 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
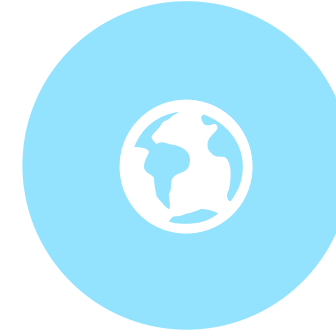
COMMUNICATION

- Consumer databases of RTO9 and seven Destination Marketing Organizations (DMOs)/ Destination Marketing Programs (DMPs). Social media was also used to reach the target group

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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:

Destination Specific	Standard
▪ Awareness ▪ Propensity to travel	▪ Reason 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 and Communication

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

RTO9 and seven of the eight destinations participated by deploying their questionnaire during the fieldwork phase. Within the consumer databases that were utilized, there were a total of 57,264 contacts.

Destination Name	Database Contacts (#)	Responses (#)	Response Rate (%)	Change vs. Summer Wave 1
Bay of Quinte	1,850	33	2%	-2%
Prince Edward County	6,237	136	2%	-4%
Lennox & Addington/ Frontenac	3,500	10	.3%	+.3%
Rideau Canal	0	0	-	-
Kingston	4,660	298	6%	+4%
1000 Islands Gananoque	15,000	61	.4%	-1.6%
1000 Islands Brockville	1,300	18	1%	-6%
Cornwall & S,D&G Counties	1,300	30	2%	-11%
South Eastern Ontario	23,417	2569	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.

TRAVELLER PROFILE

Traveller Profile Tracking

	2018-19 (Summer Pilot)	2019-20 (Summer Wave 1)	2019-20 (Fall Wave 2)
Familiarity	49%[1]	45%[1]	58%[1]
Interest	94%[2]	96%[2]	94%[2]
Likelihood	87%[3]	89%[3]	90%[3]
Actual Visitation	Prince Edward County (49%) Kingston (46%) Gananoque (37%)	Kingston (56%) Prince Edward County (48%) Gananoque (36%)	Prince Edward County (58%) Kingston (57%) Gananoque (38%)
Main Purpose	Leisure (89%)	Leisure (86%)	Leisure (80%)
Primary Reason	VFR (11%) Sightseeing (10%) Visit small towns and villages (9%)	VFR (15%) Sightseeing (10%) Visit small towns and villages (7%)	VFR (13%) Sightseeing (9%) Visit a winery (8%)

Notes: 1 extremely/moderately familiar, 2 very/fairly interested, 3 extremely/likely to travel

Traveller Profile Tracking

	2018-19 (Summer Pilot)	2019-20 (Summer Wave 1)	2019-20 (Fall Wave 2)
Planning Timeframe	Within 3 weeks of trip (57%) 1 – 2 months before (29%)	Within 3 weeks of trip (51%) 1 – 2 months before (32%)	Within 3 weeks of trip (62%) 1 – 2 months before (25%)
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%)	Friends and/or relatives (40%) Social Media (35%) Destination Marketing Website (27%)
Travel Party	Couples (53%)	Couples (53%)	Couples (50%)
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%)	Going to local restaurants (57%) Sightseeing (46%) Visiting the waterfront (38%)
Trip Enjoyment	98%	99%	98%
Likelihood of Return	91%	95%	91%

Notes: Summer (2019-20) excludes day trippers

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Traveller Profile Tracking

	2018-19 (Summer Pilot)	2019-20 (Summer Wave 1)	2019-20 (Fall Wave 2)
Length of Stay	2 -3 nights (49%)	2 - 3 nights (62%)	2 - 3 nights (41%)
Accommodations	Hotel/Inn (30%) Friends/Family (20%) B&B (8%)	Hotel/Inn (39%) Friends/Family (17%) AirBnb/VRBO (10%)	Hotel/Inn (35%) Friends/Family (17%) AirBnb/VRBO (14%)
Booking Method	Online – direct (39%)	Online – direct (41%)	Online – direct (38%)
Trip Spend	< $450 (74%) $450 - $999 (18%)	< $450 (63%) $450 - $999 (28%)	< $450 (77%) $450 - $999 (17%)
Travel Style	FIT (95%)	FIT (92%)	FIT (94%)

Notes: Summer (2019-20) excludes day trippers

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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.

1. Bay of Quinte
2. Prince Edward County
3. Lennox & Addington/Frontenac County
4. Rideau Canal
5. Kingston
6. 1000 Islands Gananoque
7. 1000 Islands Brockville
8. Cornwall & SDG Counties

Familiarity with the destination

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

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Q1: How familiar are you with South Eastern Ontario region as a tourism destination? n= 3155

- 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; 64% expressed moderate/some familiarity and 20% were extremely familiar.

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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= 3155

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

5% **1%** **30%** **64%**
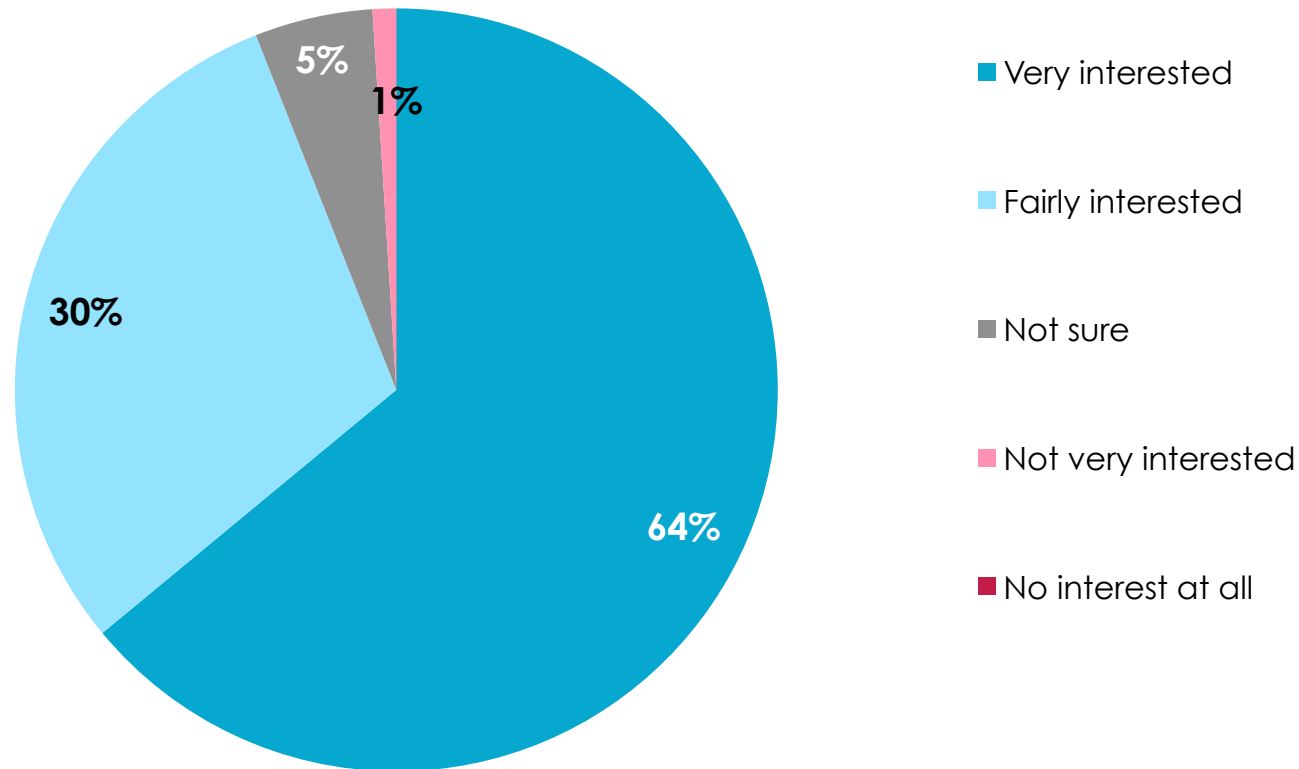
INSIGHT

An overwhelming 94% of respondents are very/fairly interested in travelling to South Eastern Ontario.

Likelihood of travel to the region

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

Q3: What is the likelihood that you will travel to South Eastern Ontario for leisure purposes in the next two (2) years? n= 3155

Pie chart:
- 1%
- 9%
- 29%
- 61%

Legend:
- Extremely likely
- Likely
- Not sure
- Unlikely
- Extremely unlikely
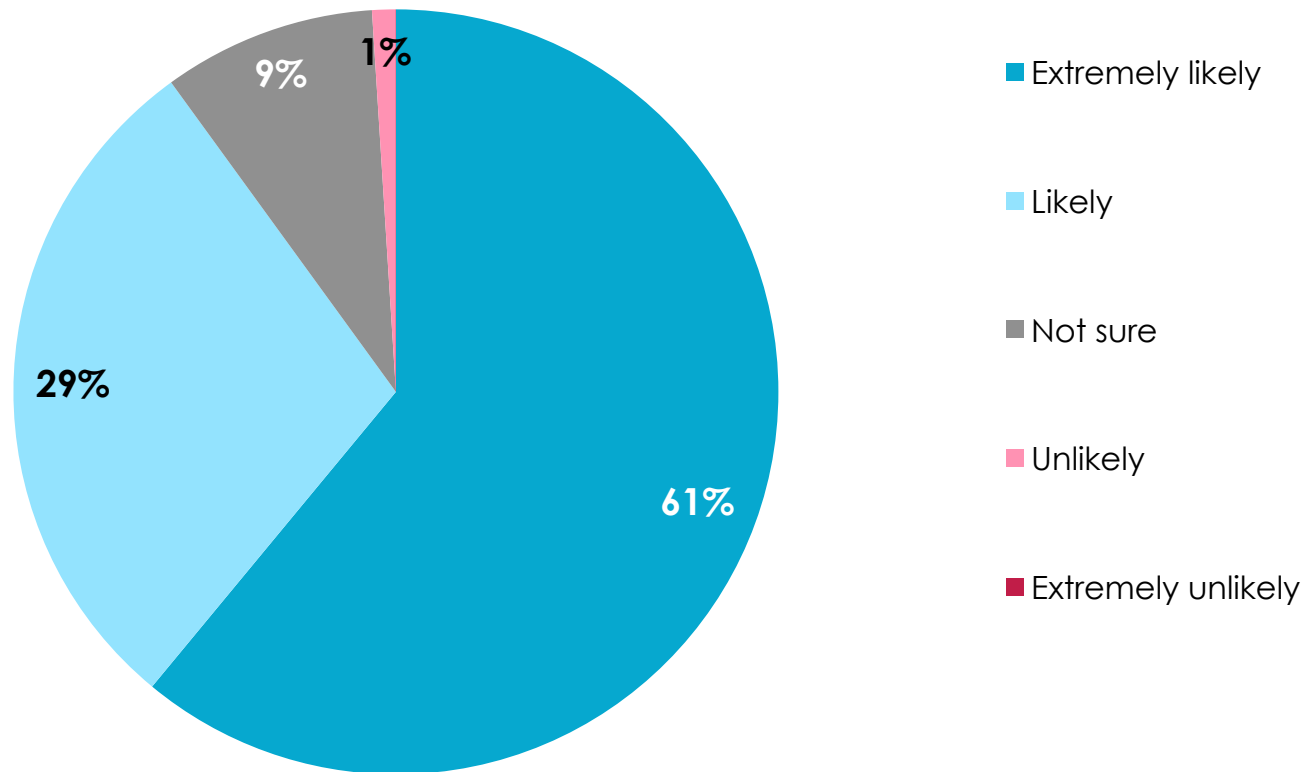
INSIGHT

The likelihood of travelling to South Eastern Ontario for leisure purposes remains high in the next two years at 90%.

Most recent leisure trip to South Eastern Ontario

Over half of all travellers have visited Kingston and Prince Edward County. Less than 15% 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= 3155

Region	Percentage
Bay of Quinte	27%
Prince Edward County	58%
Lennox & Addington/Frontenac	20%
Rideau Canal	31%
Kingston	57%
1000 Islands Gananoque	38%
1000 Islands Brockville	25%
Cornwall & SDG Counties	14%
Other	3%
None	15%
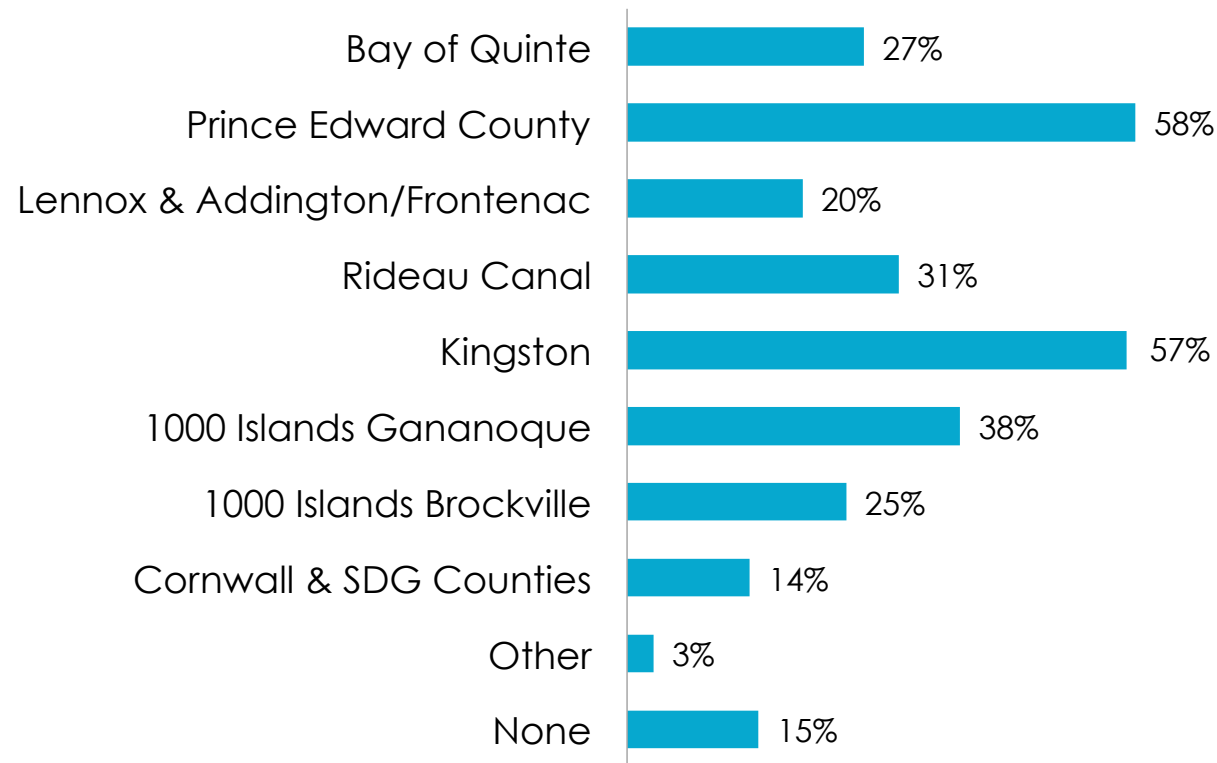
INSIGHT

The majority of leisure travellers visited Kingston (57%) and Prince Edward County (58%), and over a third (38%) visited 1000 Islands Gananoque.

A much smaller percentage (15%) of leisure travellers indicated that they did not travel to any cities in South Eastern Ontario.

Most recent leisure trip to South Eastern Ontario

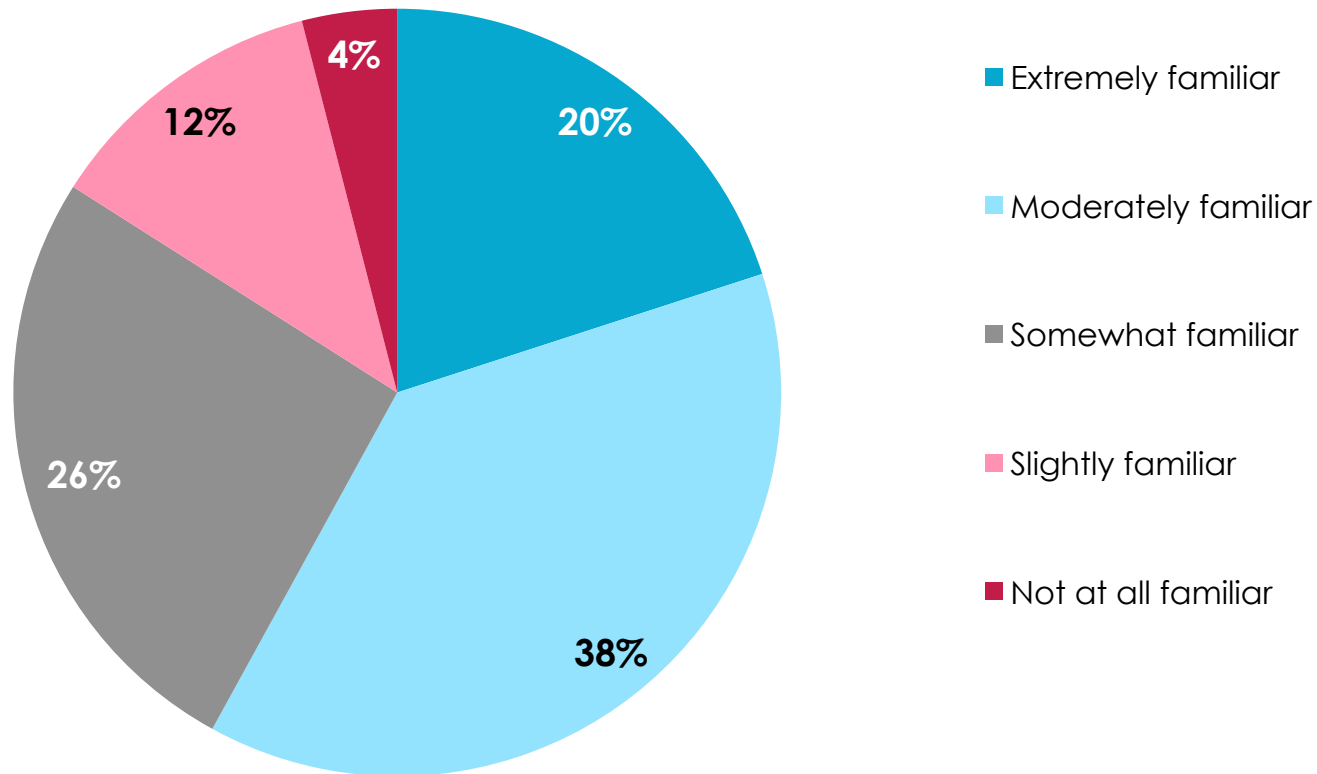Heat map by destination

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1. Bay of Quinte
2. Prince Edward County
3. Lennox & Addington/Frontenac County
4. Rideau Canal
5. Kingston
6. 1000 Islands Gananoque
7. 1000 Islands Brockville
8. Cornwall & SDG Counties

23
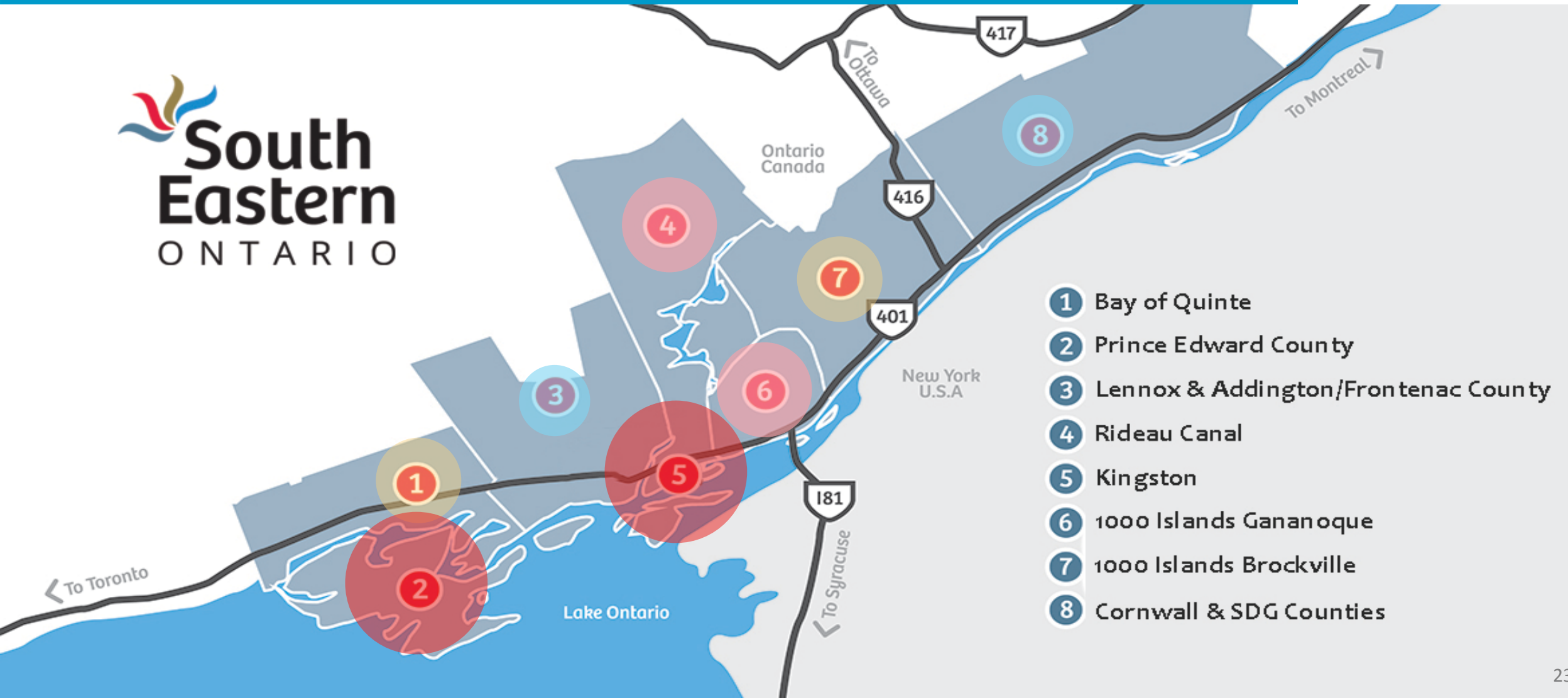
Overnight Stay or Day Trip

The majority (65%) of all travellers stayed in South Eastern Ontario overnight.

Q5: Did you stay overnight? n= 2693

■ Yes ■ No

	Bay Of Quinte (n=854)	Prince Edward County (n=1828)	Lennox & Addington/ Frontenac County (n=628)	Rideau Canal (n=986)	Kingston (n=1810)	1000 Islands Brockville (n=1193)	1000 Islands Brockville (n=778)	Cornwall & SDG Counties (n=433)	Other (n=86)
Yes	64%	68%	59%	65%	65%	62%	56%	58%	70%
No	36%	32%	41%	35%	35%	38%	44%	42%	30%

35%

65%

INSIGHT

The majority(65%) of all travellers stayed in South Eastern Ontario overnight.

Travellers visiting Prince Edward County were most likely to have stayed overnight, while those visiting 1000 Islands Brockville were least likely to (56%).

Main purpose of visit

Leisure is the main purpose for visiting South Eastern Ontario.

Q6: What was the main purpose of your visit? n= 2693

Total	Bay Of Quinte (n=854)	Prince Edward County (n=1828)	Lennox & Addington/ Frontenac County (n=628)	Rideau Canal (n=986)	Kingston (n=1810)	1000 Islands Gananoque (n=1193)	1000 Islands Brockville (n=778)	Cornwall & SDG Counties (n=433)	Other (n=86)
Leisure	80%	81%	82%	83%	81%	80%	85%	84%	80%	77%
Visiting friends and/or relatives	30%	35%	31%	36%	30%	32%	26%	28%	29%	40%
Sporting event/ tournament	5%	6%	4%	6%	5%	5%	5%	5%	9%	1%
Business trip	2%	2%	2%	3%	3%	3%	2%	2%	4%	6%
Conference/ convention	2%	3%	2%	3%	3%	2%	2%	2%	4%	5%

INSIGHT

Across all destinations, leisure was the main purpose for travel, cited by 80% of respondents.

For 30% of all respondents, visiting friends and/or relatives (VFR) was the main purpose. This is consistent with the trend we have seen in the region – travellers are likely to combine leisure and VFR.

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= 2693

Reason	%
Visit friends and/or relatives	13%
Go sightseeing	9%
Visit a winery	8%
Visit small towns and villages	7%
Go on a food/wine tour	5%
Go to a local restaurant	4%
Visit a provincial/national park/conservation area	3%
Go shopping	3%
Go to the waterfront	3%
Visit a beach	3%
Visit a historical site	3%
Go on a cruise	2%
Visit islands	2%
Go trailer camping	2%
Attend a food/wine event	2%
Attend a concert	2%
Go boating	1%
Go hiking	1%
Attend a theater performance	1%
Go tent camping	1%

Reason	%
Go golfing	1%
Attend an arts festival	1%
Attend a sports event	1%
Attend a conference/convention	1%
Participate in a sports event	1%
Visit a brewery	1%
Go motorcycling	1%
Attend a show	1%
Visit a farm or farmers market	1%
Go paddling	1%
Go cycling	1%
Attend a fair	1%
Visit a museum	1%
Visit a distillery	1%
Go to a resort	1%
Visit a theme/amusement park, zoo, aquarium	1%
Go to a casino	1%
Attend a unique hands-on event/workshop	1%
Other	7%

INSIGHT

South Eastern Ontario travellers connect with their friends and/or relatives when in the region, and also take part in sightseeing, culture and heritage (small towns and villages, shopping, historical site visits), food and drink (restaurants, winery visits, food/ wine tours) and the outdoor (parks, waterfront, beaches) activities.

Seasonality by month

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

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Q8: When did you visit? If your trip occurred over multiple months please indicate when you started your trip n= 2693

Total		Monday (n=434)	Tuesday (n=436)	Wednesday (n=537)	Thursday (n=713)	Friday (n=1229)	Saturday (n=1682)	Sunday (n=1204)
January	1%	2%	2%	1%	1%	1%	2%	2%
February	1%	1%	1%	2%	2%	1%	1%	1%
March	2%	1%	1%	1%	1%	2%	2%	2%
April	2%	3%	3%	2%	3%	3%	2%	2%
May	6%	7%	6%	7%	7%	8%	7%	7%
June	11%	10%	12%	11%	12%	11%	11%	10%
July	21%	22%	23%	24%	22%	22%	22%	21%
August	22%	23%	25%	25%	26%	23%	21%	22%
September	13%	13%	13%	13%	12%	13%	13%	14%
October	11%	11%	8%	8%	8%	10%	11%	12%
November	6%	6%	5%	4%	5%	5%	6%	6%
December	2%	1%	1%	1%	1%	2%	2%	2%

INSIGHT

The months of June to October were the top travel months; with July (21%) and August (22%) noted as the most popular.

June (11%), September (13%) and October (11%) are considered the secondary travel months.

December through April received a lower amount of visitors, ranging from 1% to 2% of visits.

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Peak days

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

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Q9: What day(s) of the week was your visit? n= 2693

Day	Percentage
Monday	16%
Tuesday	16%
Wednesday	20%
Thursday	26%
Friday	46%
Saturday	62%
Sunday	45%
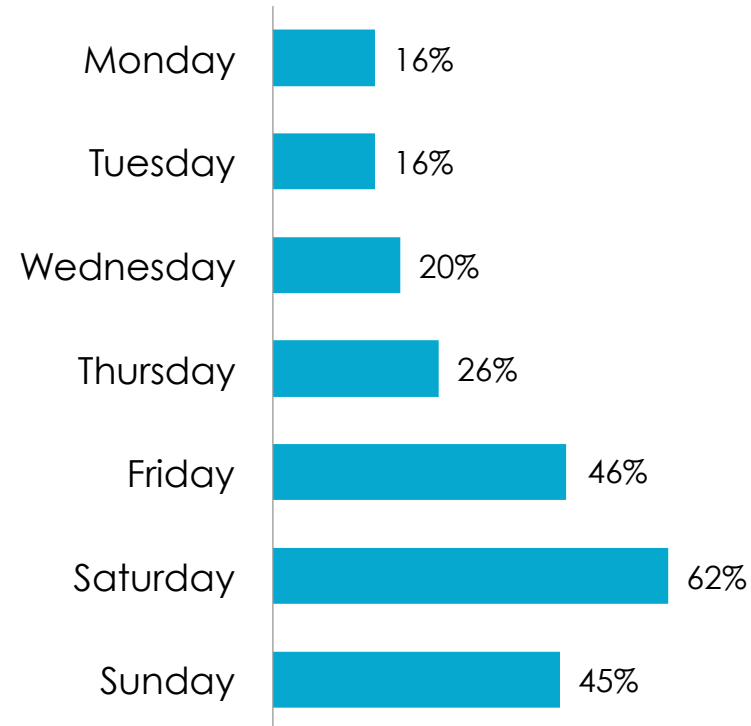
INSIGHT

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

Saturday was the peak day (62%), while Friday (46%) and Sunday (45%) received a slightly lower percentage of visits.

Monday through Wednesday were the least common days for visiting.

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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= 2693

Pie chart legend:
- While you were here — 5%
- The week of the visit — 18%
- 1 week before the visit — 13%
- 2 weeks before the visit — 14%
- 3 weeks before the visit — 12%
- 1-2 months before the visit — 25%
- 3-5 months before the visit — 9%
- More than 6 months before the visit — 4%
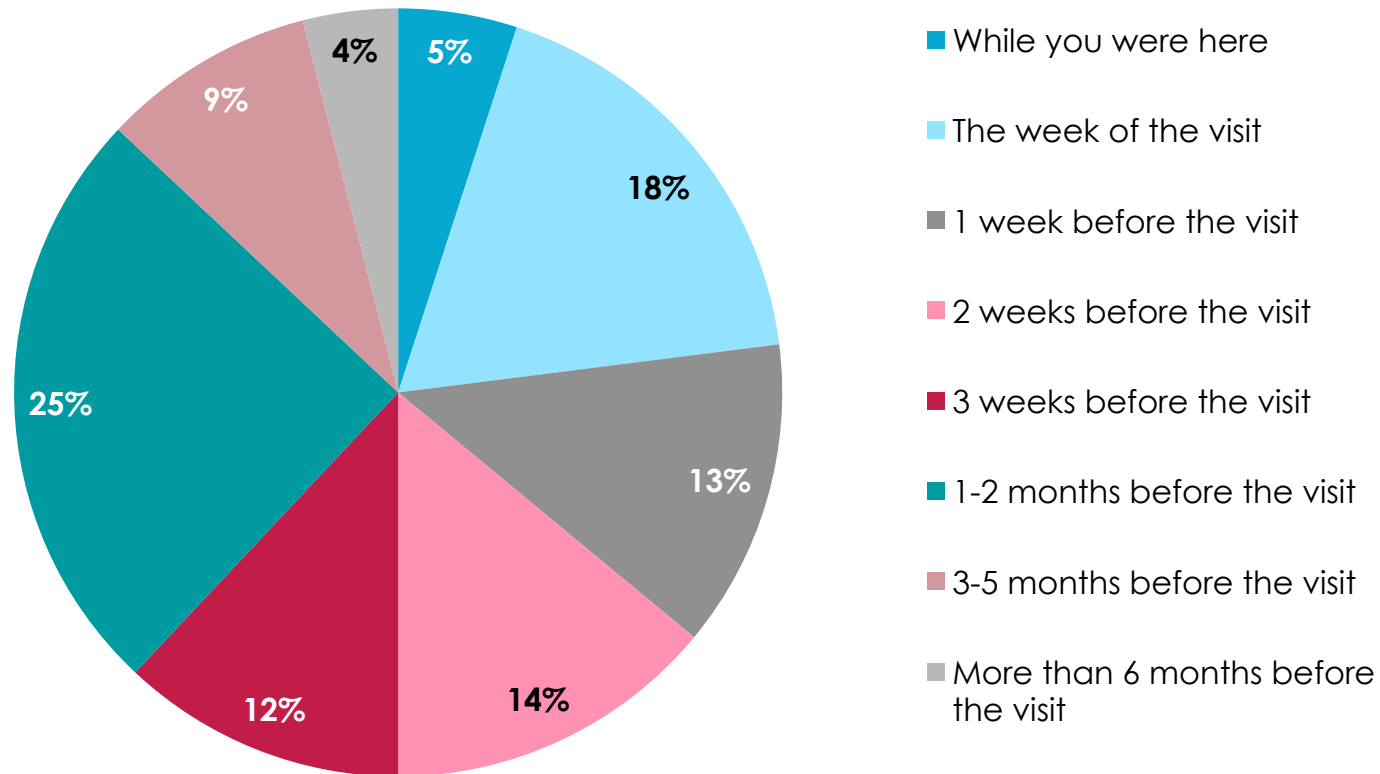
INSIGHT

62% 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 (87%) of are planning within 2 months of departure.

Only a small amount (13%) 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= 2693

Category	Percentage
Returning Trip	92%
I visited less than a year ago	53%
I visited 2 years ago	14%
I visited 3-5 years ago	10%
I visited 10+ years ago	8%
I visited between 5-10 years ago	6%
This was my first visit	8%
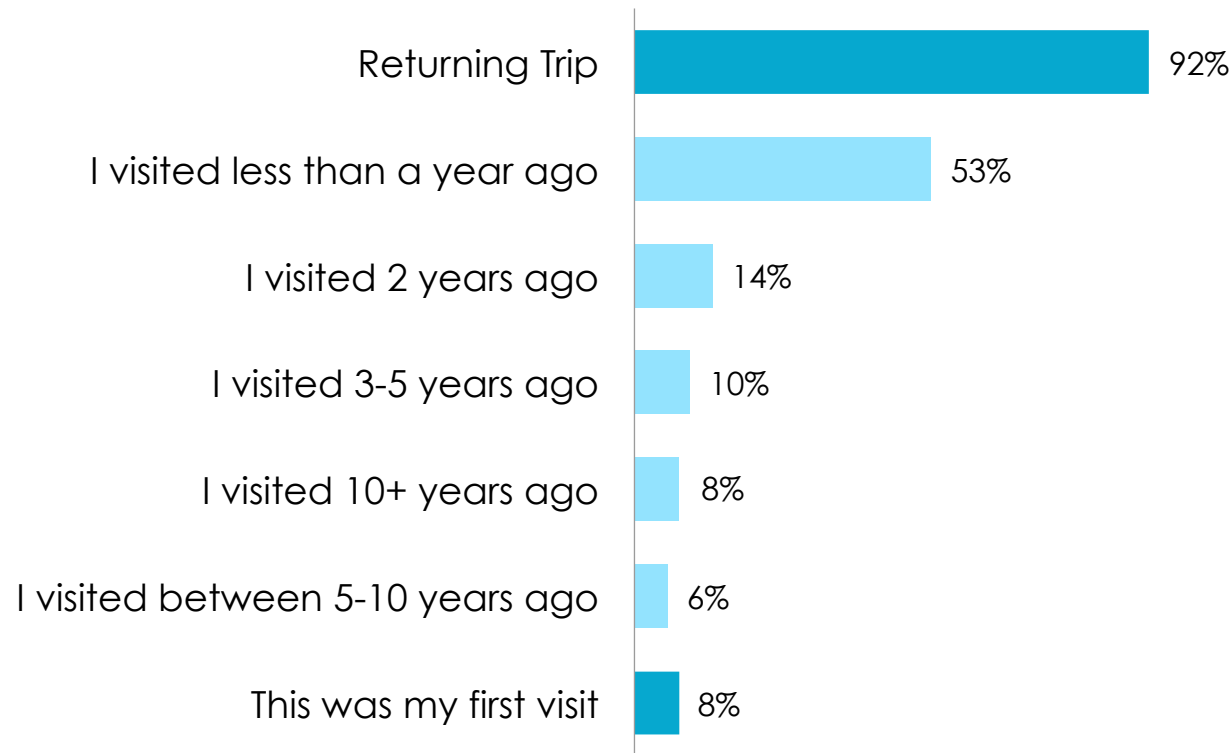
INSIGHT

Repeat visitation is high at 92%, the majority of travellers stated that they visited less than a year ago.

A small number (8%) are first time visitors – including 20% of travellers from the Metro/Greater Toronto Area.

Travel companions

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

Q12: Who were you primarily travelling with? n= 2693

Travel companion	Percentage
With spouse/partner	50%
With family, no kids	8%
With family, kids	16%
Myself	8%
With friends	17%
With my business colleagues/team	1%
With my sports team/coach	0%
Other	1%
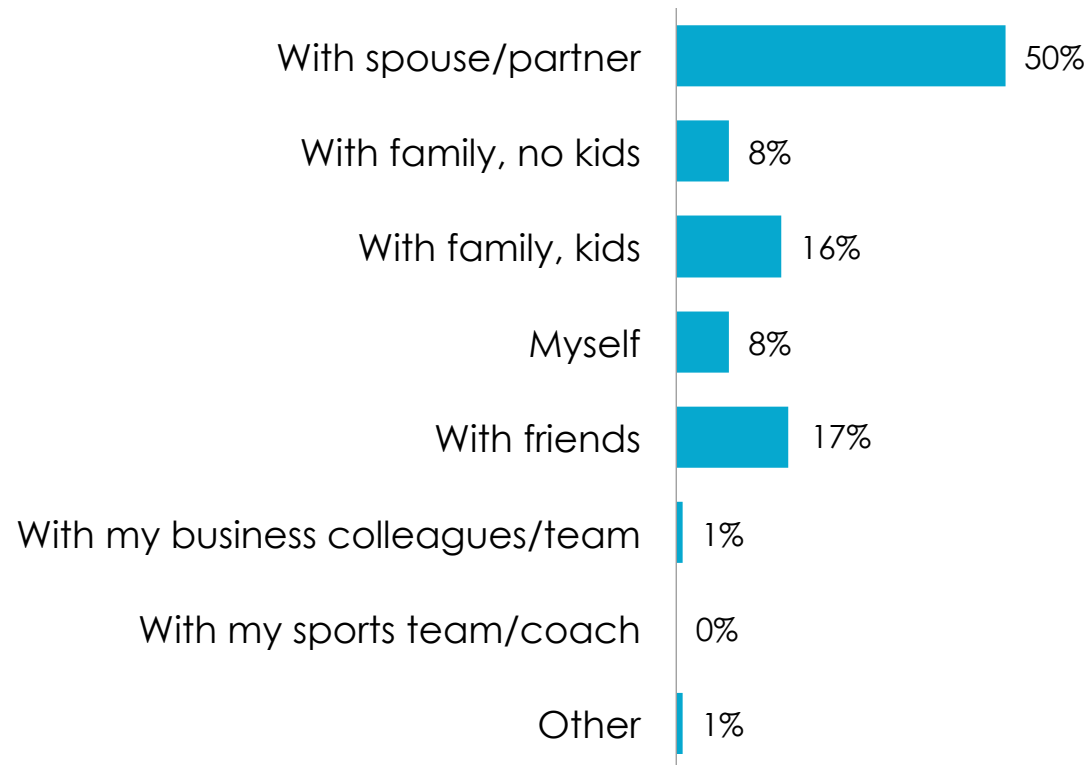
INSIGHT

South Eastern Ontario travellers are more likely to visit with a spouse/ partner (50%), or as family including kids (16%).

Travelling with friends was the third most common travel party (17%).

Relatively few – just 16% - 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 participated in.

Q13: What did you do while you were here? n= 2693

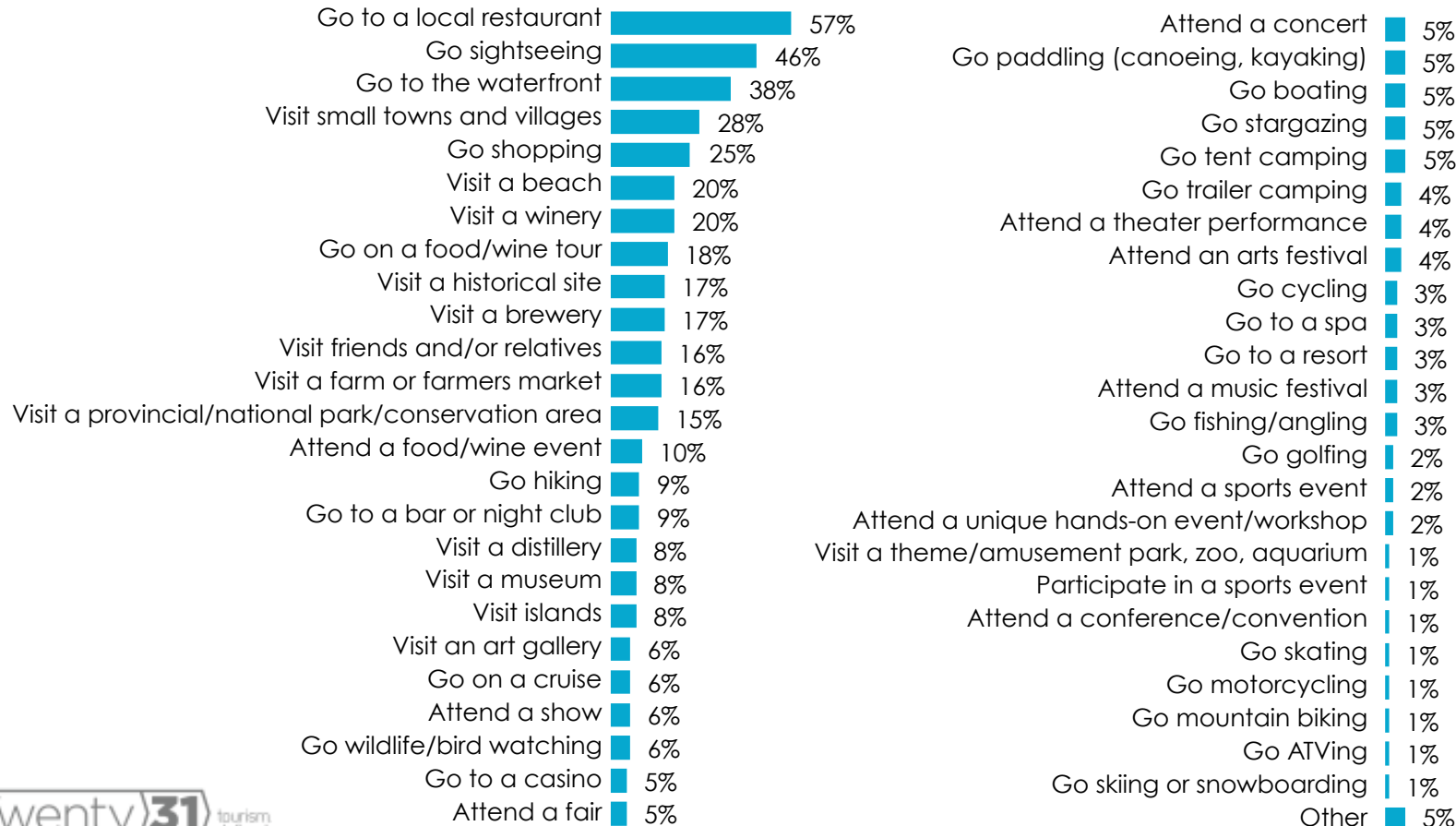| Activity	%
Go to a local restaurant	57%
Go sightseeing	46%
Go to the waterfront	38%
Visit small towns and villages	28%
Go shopping	25%
Visit a beach	20%
Visit a winery	20%
Go on a food/wine tour	18%
Visit a historical site	17%
Visit a brewery	17%
Visit friends and/or relatives	16%
Visit a farm or farmers market	16%
Visit a provincial/national park/conservation area	15%
Attend a food/wine event	10%
Go hiking	9%
Go to a bar or night club	9%
Visit a distillery	8%
Visit a museum	8%
Visit islands	8%
Visit an art gallery	6%
Go on a cruise	6%
Attend a show	6%
Go wildlife/bird watching	6%
Go to a casino	5%
Attend a fair	5%

Activity	%
Attend a concert	5%
Go paddling (canoeing, kayaking)	5%
Go boating	5%
Go stargazing	5%
Go tent camping	5%
Go trailer camping	4%
Attend a theater performance	4%
Attend an arts festival	4%
Go cycling	3%
Go to a spa	3%
Go to a resort	3%
Attend a music festival	3%
Go fishing/angling	3%
Go golfing	2%
Attend a sports event	2%
Attend a unique hands-on event/workshop	2%
Visit a theme/amusement park, zoo, aquarium	1%
Participate in a sports event	1%
Attend a conference/convention	1%
Go skating	1%
Go motorcycling	1%
Go mountain biking	1%
Go ATVing	1%
Go skiing or snowboarding	1%
Other	5%

INSIGHT

As highlighted, the top 10 activities undertaken reflect the following, in addition to sightseeing:
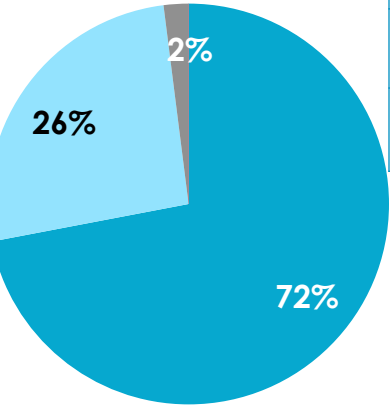
1. Food and Drink (local restaurants, winery visits, food/ wine tours, brewery visits)
2. Outdoor Activities (going to the waterfront, beach visit)
3. Culture and Heritage (small towns and villages, shopping, historical sights)

Twenty 31 tourism defined.

32

Trip enjoyment

South Eastern Ontario travellers are highly satisfied with their trips.

Q14: Did you enjoy your trip? n= 2693

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

	Bay Of Quinte (n=854)	Prince Edward County (n=1828)	Lennox & Addington/ Frontenac County (n=628)	Kingston (n=986)	1000 Islands Gananoque (n=1810)	1000 Islands Brockville (n=1193)	Cornwall & SDG Counties (n=778)	South Eastern Ontario (n=443)	Other (n=86)
Really enjoyed the trip	80%	77%	80%	75%	76%	75%	76%	72%	79%
Enjoyed the trip	19%	22%	20%	24%	23%	23%	22%	25%	19%
The trip was OK	1%	1%	--	1%	1%	2%	2%	3%	2%
Did not enjoy the trip	--	--	--	--	--	--	--	--	--

INSIGHT

Across all destinations, trip satisfaction is high. Travellers to the Bay of Quinte, Lennox & Addington/Frontenac County and Prince Edward Country, expressed the highest satisfaction levels.

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= 2693

- Extremely likely
- Likely
- Not sure
- Unlikely
- Extremely unlikely
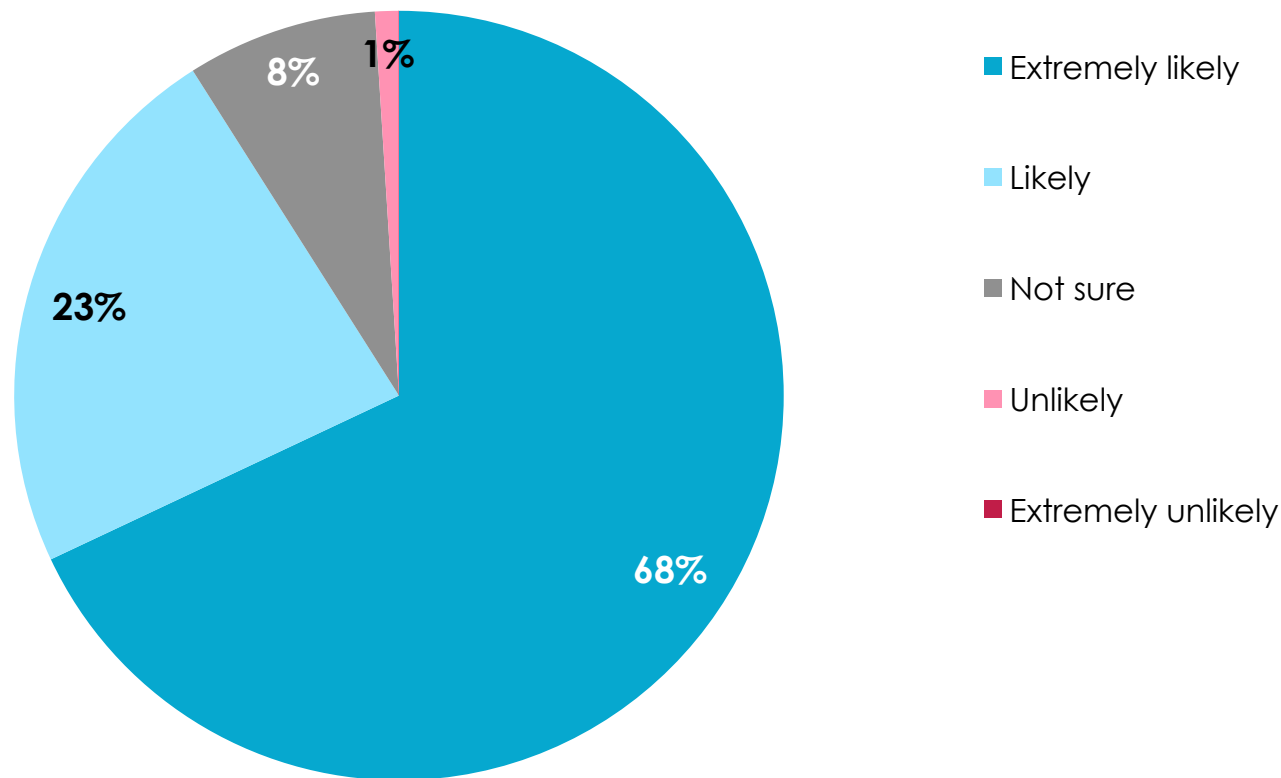
INSIGHT

Respondents expressed a high likelihood for return travel to South Eastern Ontario (68%), which is positive.

This was a slight decrease in comparison to the summer survey wave where 73% expressed a high likelihood for return.

Planning sources

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

RTO 9
Regional Tourism
ORGANIZATION

Q18: What sources of information did you use to plan your trip? n= 2693

Source	Percentage
Spoke To A Friend And/Or Relative	40%
Social Media	35%
Destination Marketing Website	27%
Online Booking Site	26%
Direct With Hotel/Accommodation	25%
A Brochure/Travel Guide	12%
Visitor Information Centre	10%
The Great Waterway Website	7%
Travel Agent	1%
Tour Operator	1%
Other	16%
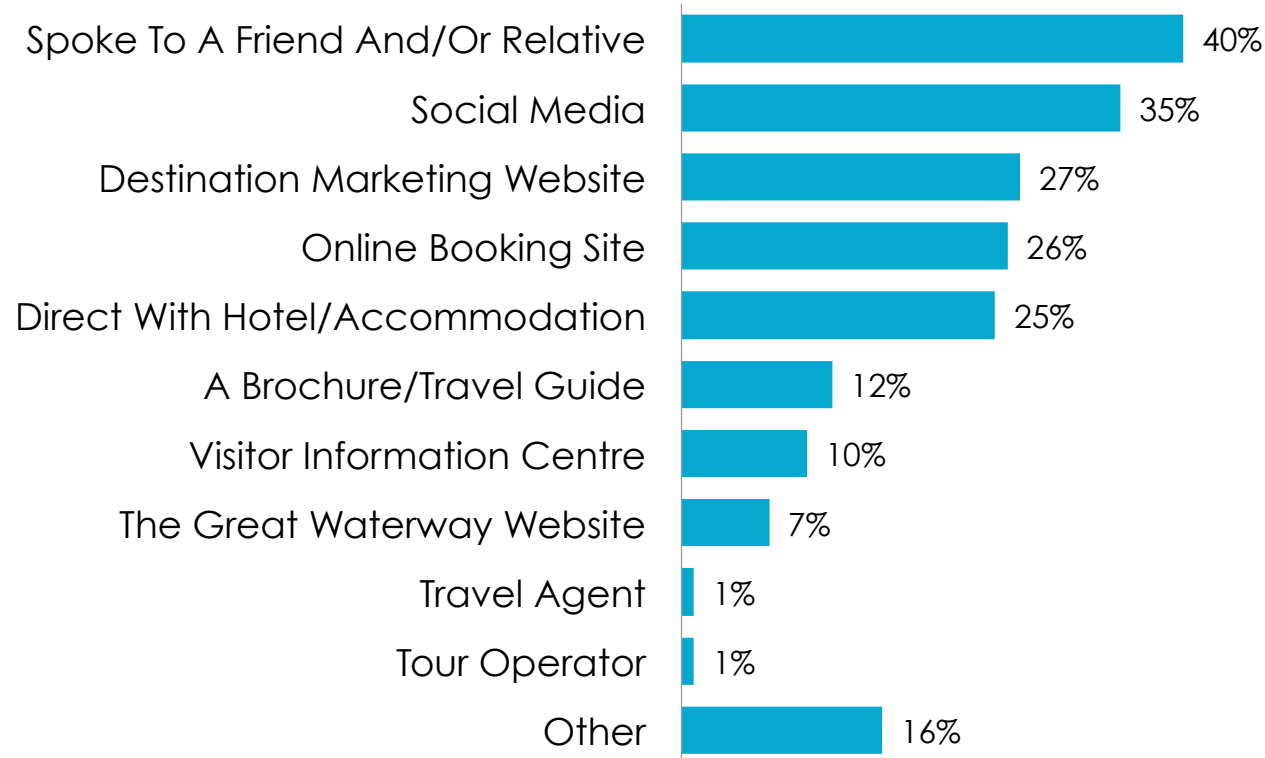
INSIGHT

South Eastern Ontario travellers relied on friends and/or relatives, they used social media and their destination marketing website for trip planning and inspiration.

They also commonly used online booking sites and a hotel/accommodation.

Twenty31 tourism defined.

Planning sources, online

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

RTO 9
Regional Tourism
ORGANIZATION

Q18, i. Online Booking Site: What sources of information did you use to plan your trip? n= 2693

TripAdvisor 16%

Expedia 10%

Booking.com 7%

Travelocity 1%

Kayak 1%
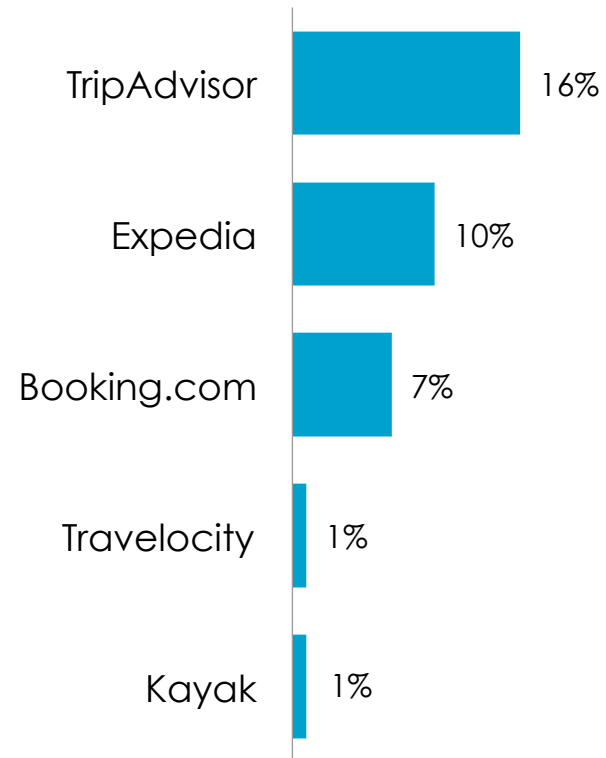
INSIGHT

The use of online booking sites continue to play an important role for South Eastern Ontario travel planning.

Trip Advisor and Expedia take the top spots for online booking sites. Travellers from the Greater Toronto Area were more likely to identify the use of Trip Advisor.

Twenty 31 tourism defined.

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= 2693

Source	Percentage
Facebook	22%
Instagram	13%
Trip Advisor	9%
Twitter	1%
YouTube	1%
Pinterest	1%
Other	0%
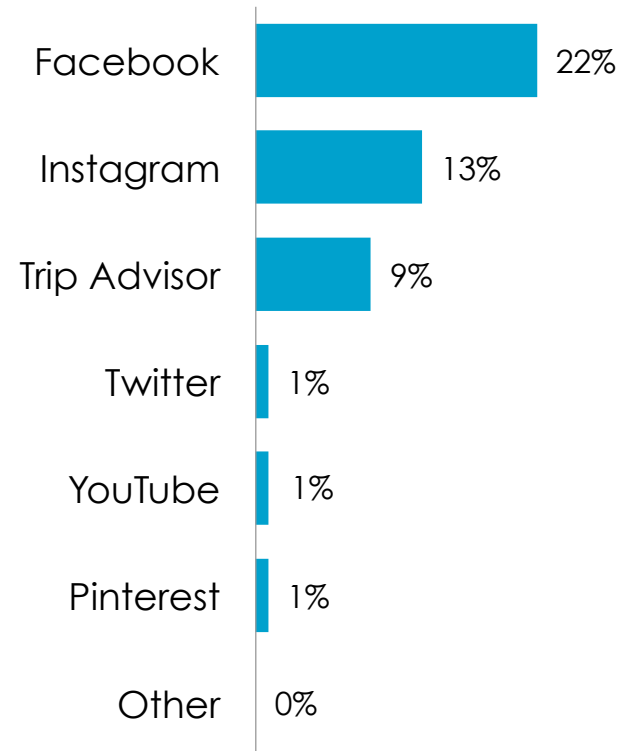
INSIGHT

Social media has deepened its value as a trip planning resource across tourism destinations. For South Eastern Ontario, Facebook (22%) was reported as the platform of choice, followed by Instagram (13%).

Travellers from within the region used Facebook as a planning resource more than travellers from other Ontario markets.

Twenty**31** tourism defined.

Length of stay

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

Q19: How long did you stay for? n= 2693

Length of stay	Percentage
The day	30%
1 night	16%
2 nights	28%
3 nights	13%
4-7 nights	8%
More than 1 week	4%
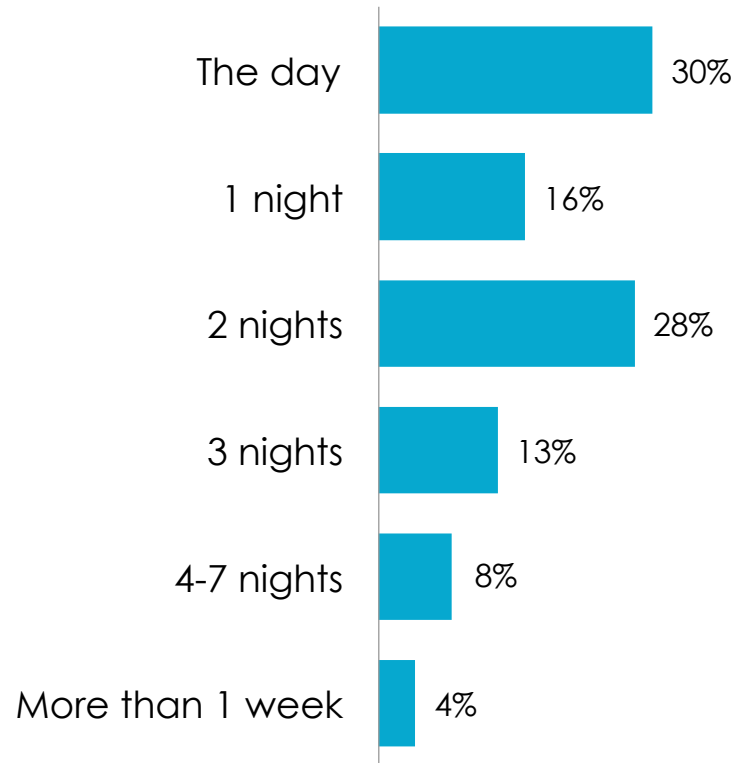
INSIGHT

The majority of overnight trips were 1 – 2 nights (44%).

The most common length of stay was a two night trip (28%), and this was more common for travellers from the Metro/Greater Toronto Area.

Accommodations

Hotel is the preferred accommodation choice for travellers.

Q20: Where did you stay while on your trip? n= 1762

Accommodation	%
Hotel/Inn	35%
With Friends/Family	17%
AirBnb/ VRBO (Vacation Rentals by Owner)	14%
Bed & Breakfast	7%
Motel	5%
Rented Cottage	5%
Campground / Tent	5%
Campground / Trailer	5%
Other	3%
My own Cottage	2%
Marina	1%
Alternative Accommodations	1%
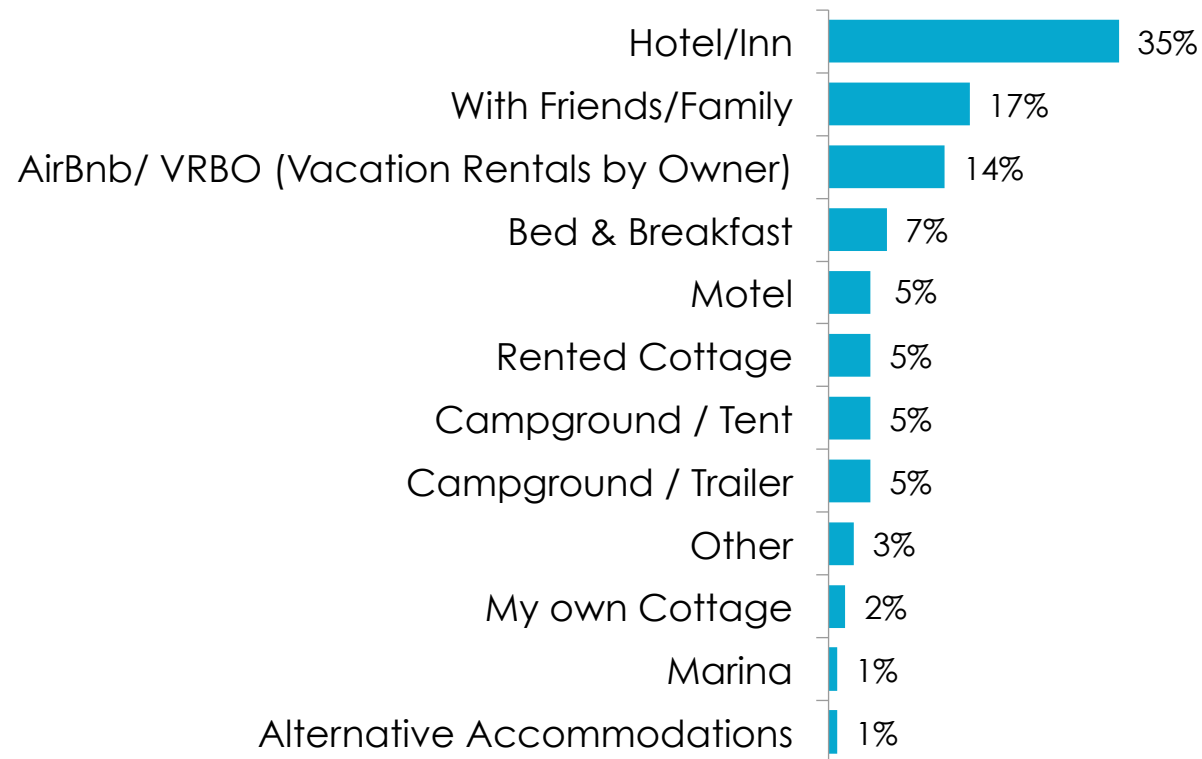
INSIGHT

The accommodations sector appears to be changing in the region.

35% of travellers stayed in a hotel/inn or with friends/family (17%). AirBnb/VRBO was chosen by 14% of travellers, compared to 10% reported in Summer 2019-20.

All other options have remained relatively consistent.

Actual booking

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

RTO 9
Regional Tourism ORGANIZATION

Q21: How did you book your overnight stay? n= 1762

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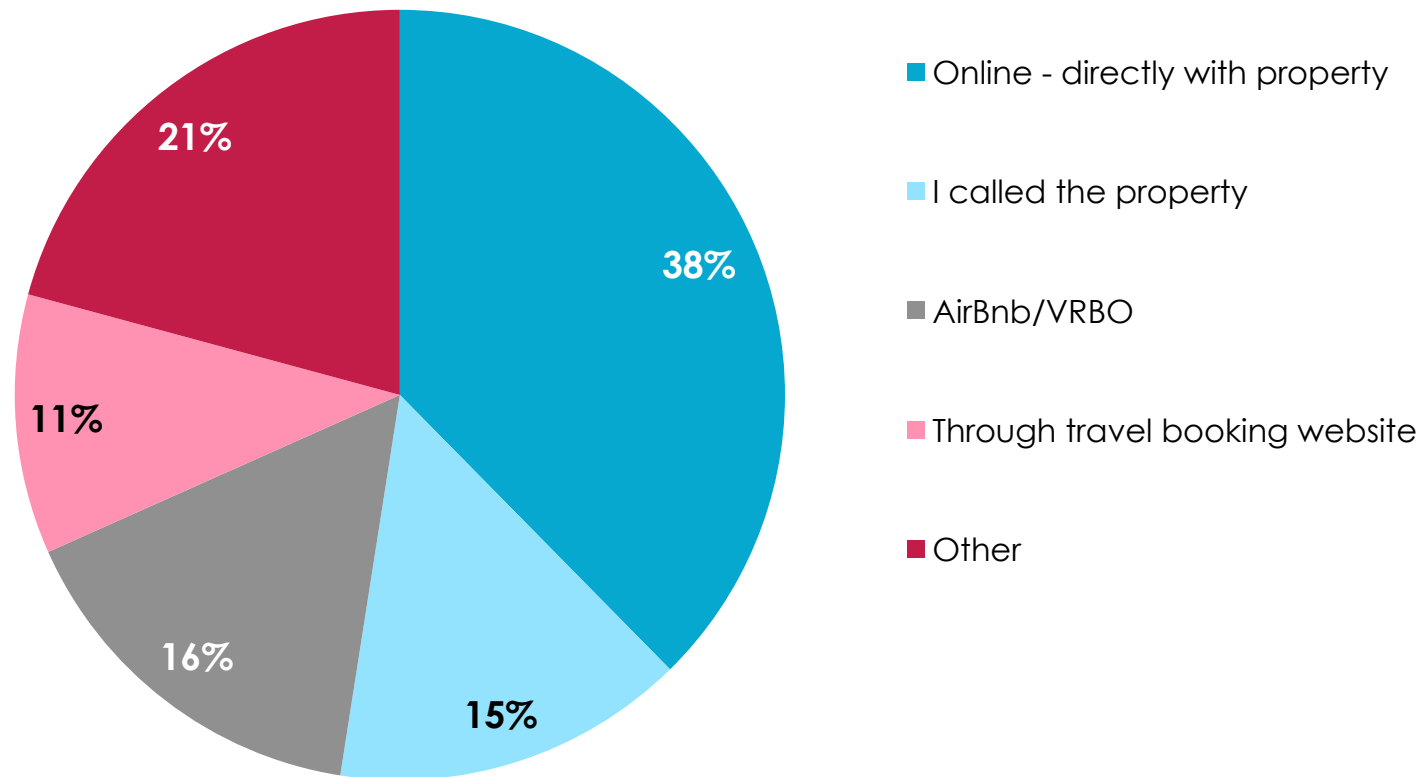
INSIGHT

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

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

Twenty 31 tourism defined.

Estimated trip spending

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

RTO 9
Regional Tourism
ORGANIZATION

Q22: How much did you spend on your trip including accommodations? n= 2693

- ■ < $100 — 20%
- ■ $100-$199 — 23%
- ■ $200-$299 — 16%
- ■ $300-$449 — 18%
- ■ $450-$999 — 17%
- ■ $1,000+ — 6%
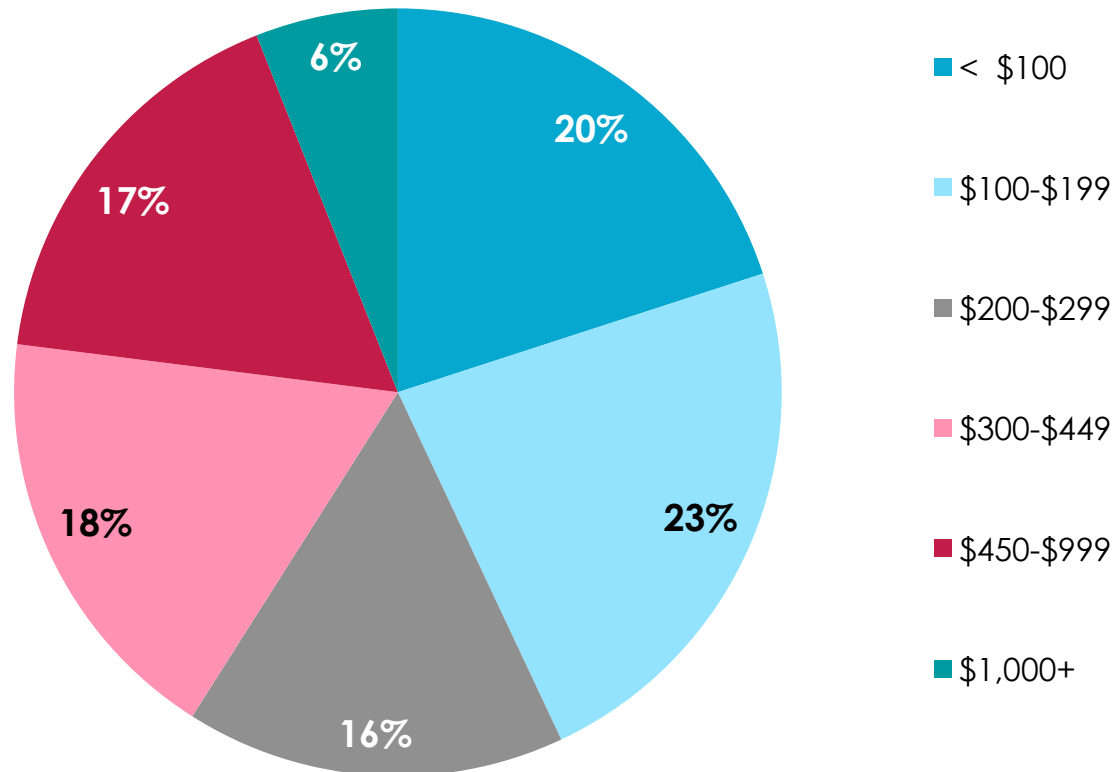
INSIGHT

Over three quarters of (77%) 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.

Twenty 31 tourism defined.

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= 2693

- ■ The trip offered excellent value
- ■ The trip offered very good value
- ■ The trip offered good value
- ■ The trip offered poor value
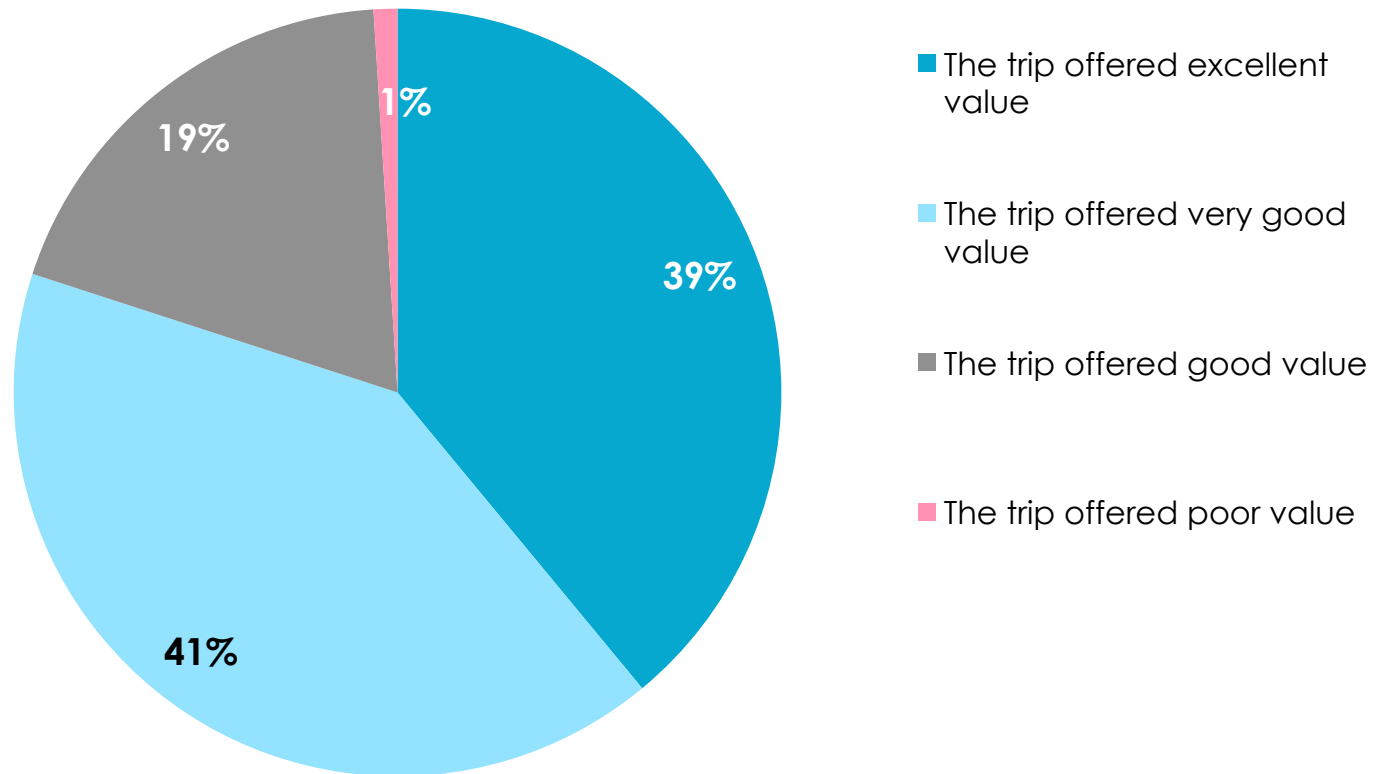
INSIGHT

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= 2693

Pie chart legend:
- Friends and/or relatives — 69%
- Social Media — 34%
- Travel Guides/Maps — 13%
- Online Advertising — 11%
- Publications/News Outlets/Article — 9%
- Travel Information Centre — 7%
- An Event — 6%
- TV/Radio Ads — 3%
- Bloggers — 2%

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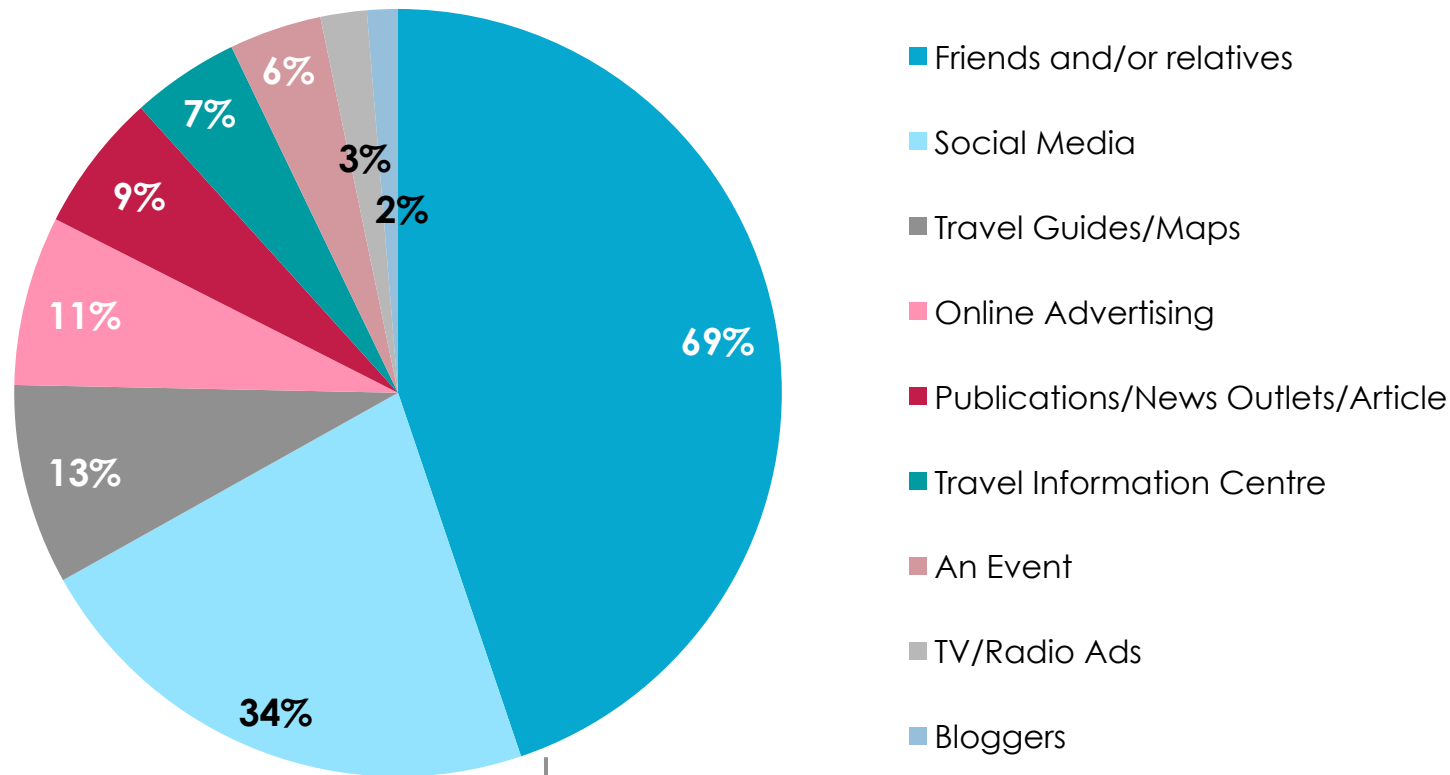
INSIGHT

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.

Bloggers and TV/Radio ads are viewed as less influential.

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= 2693

- Car
- Motorcycle
- Boat
- Bicycle
- Bus
- Motorcoach/Tour Bus
- Plane
- Train

1%   1%
1%   2%
1%

94%
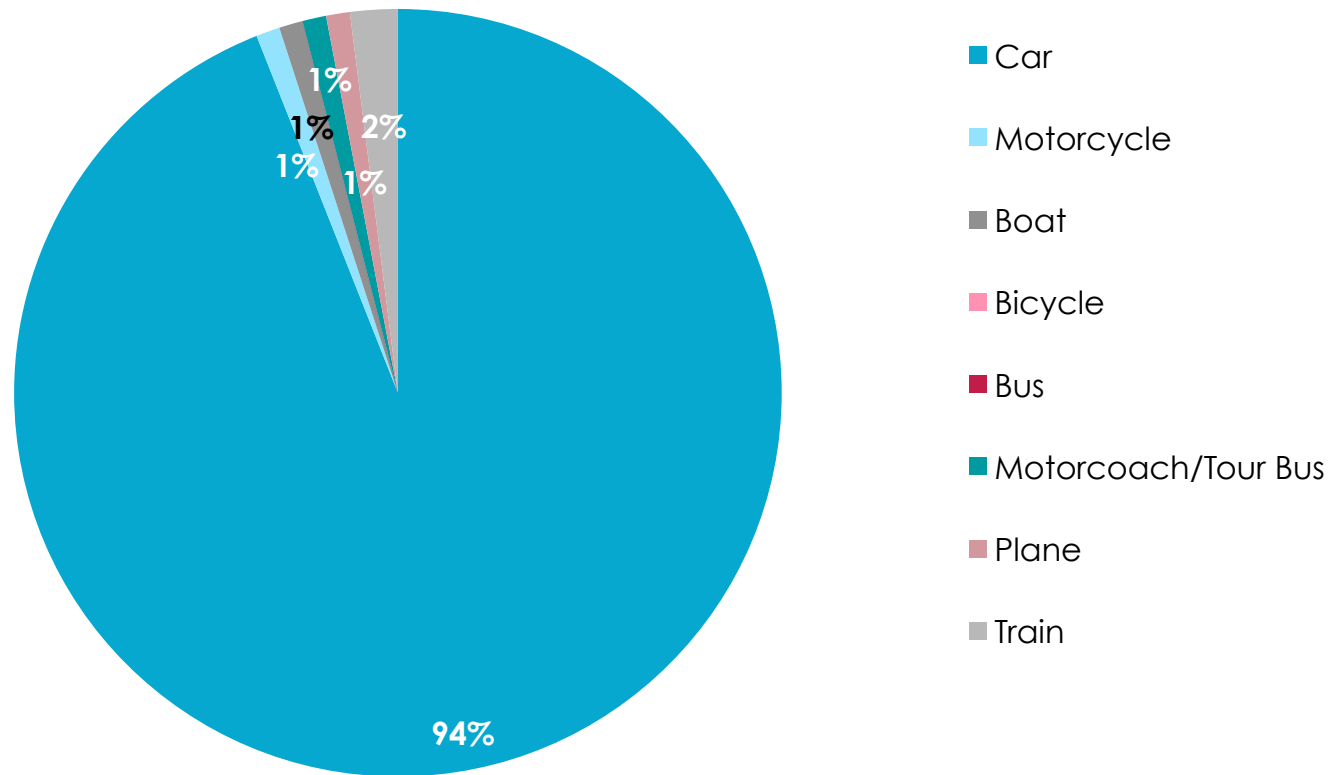
INSIGHT

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 you trip to South Eastern Ontario: i) Part of a tour ii) Fully Independent iii) Package deal n= 2693

- Please specify which tour
- Fully independent
- Package deal
- Other
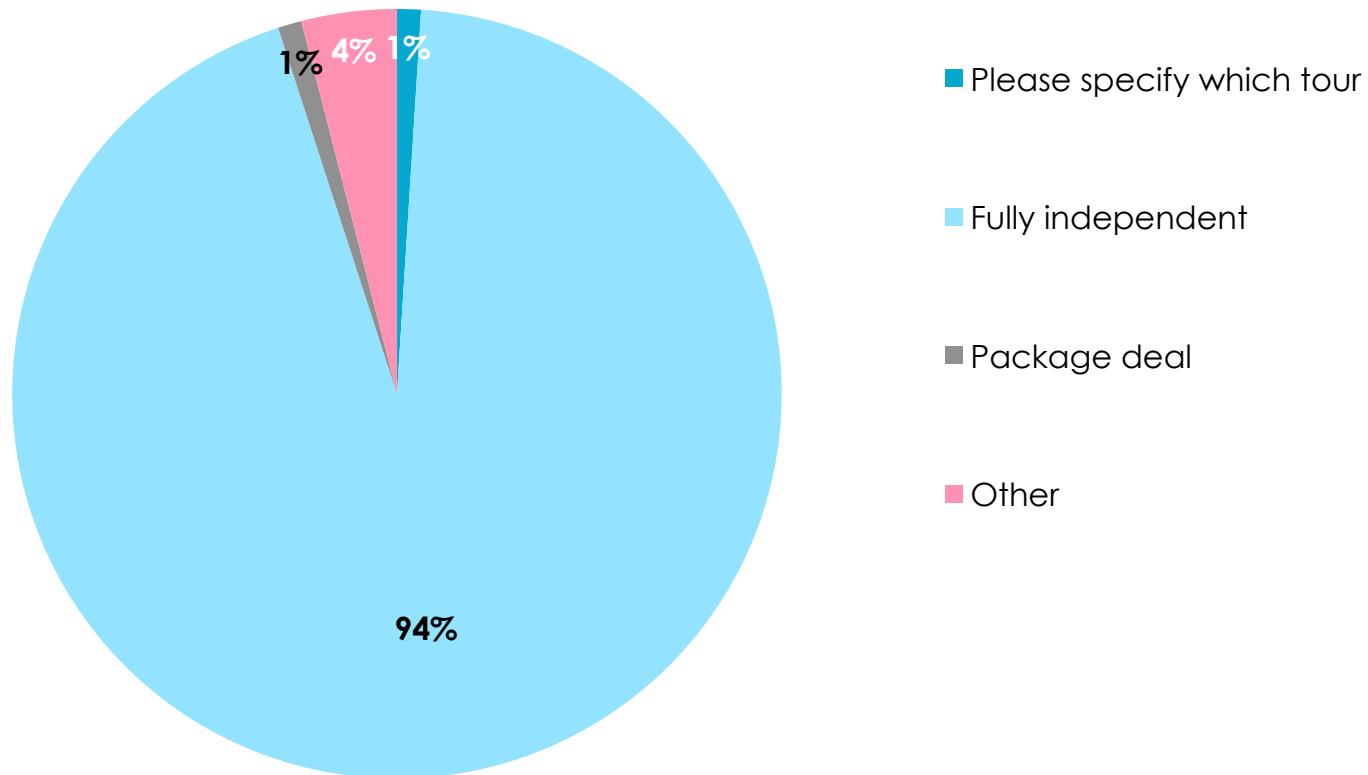
INSIGHT

A fully independent travel style is chosen by 94% 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 <u>outside of South Eastern Ontario</u> have you travelled to in the last two (2) years for leisure? n=2528

1. Toronto
2. Niagara Falls
3. Ottawa
4. Muskoka
5. London
6. South Western Ontario
7. Northern Ontario
8. Algonquin Park
9. Peterborough
10. Collingwood
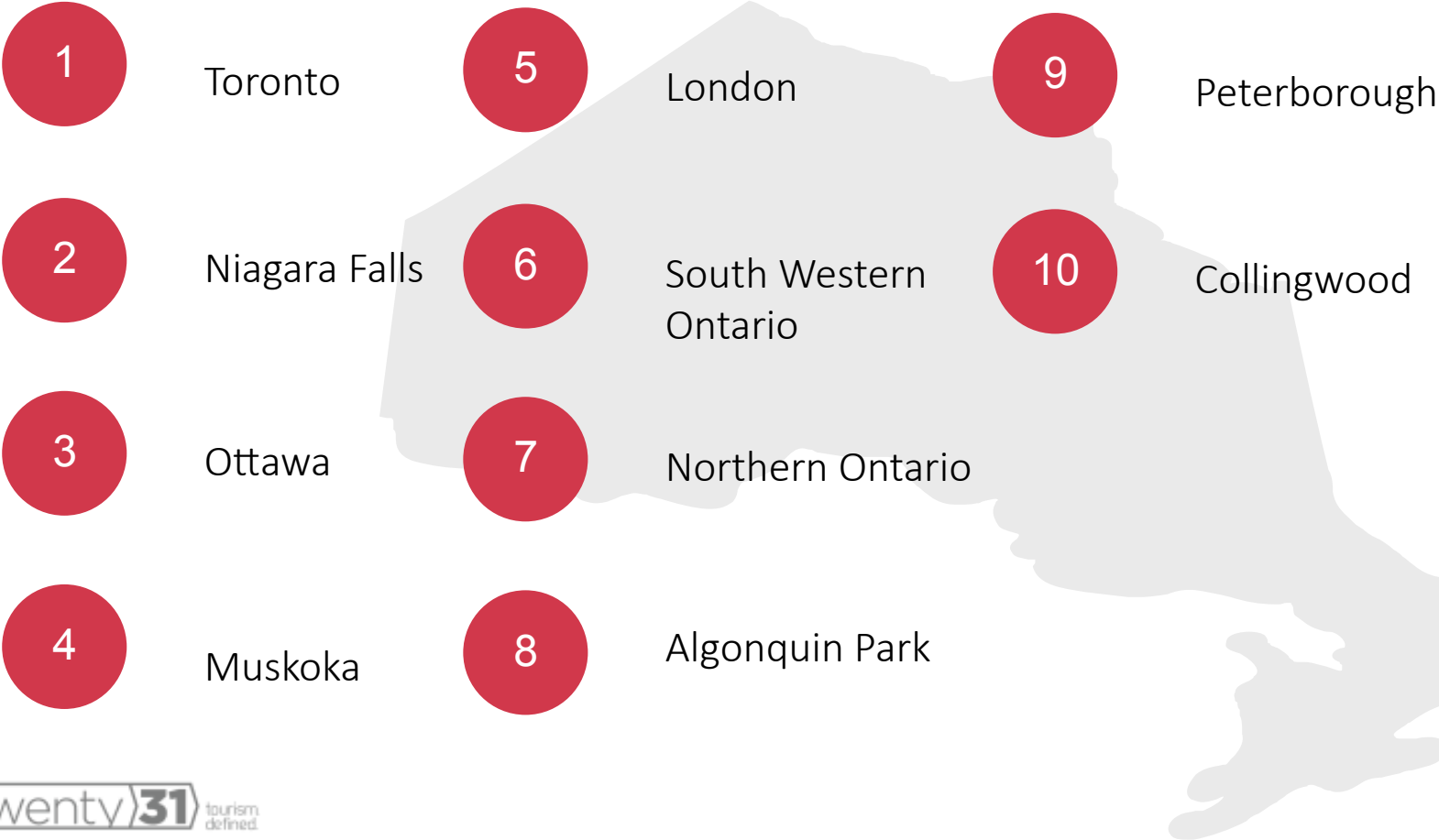
INSIGHT

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

1 Quebec

2 Montreal

3 New York

4 Florida

5 British Columbia

6 United States

7 Mexico

8 Cuba

9 Nova Scotia

10 Alberta

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= 3155

Activity	%
Go sightseeing	62%
Go to a local restaurant	59%
Go shopping	54%
Go to the waterfront	40%
Visit small towns and villages	34%
Visit a beach	34%
Visit a historical site	28%
Visit friends and/or relatives	25%
Visit a provincial/national park/conservation area	24%
Visit a museum	23%
Visit a farm or farmers market	20%
Go on a food/wine tour	20%
Go hiking	19%
Visit a brewery	19%
Go to a bar or night club	18%
Visit a winery	18%
Go to a resort	16%
Attend a show	15%
Attend a concert	13%
Visit an art gallery	12%
Visit islands	12%
Visit a distillery	11%
Attend a food/wine event	11%
Go to a casino	11%
Go wildlife/bird watching	11%
Go to a spa	11%
Attend a theater performance	9%

Activity	%
Visit a theme/amusement park, zoo, aquarium	9%
Go paddling (canoeing, kayaking)	8%
Go boating	8%
Attend a fair	8%
Go stargazing	8%
Go on a cruise	7%
Attend a music festival	6%
Attend a sports event	6%
Go tent camping	6%
Attend an arts festival	6%
Go cycling	5%
Go trailer camping	5%
Go fishing/angling	4%
Go golfing	4%
Go skiing or snowboarding	3%
Attend a unique hands-on event/workshop	3%
Attend a conference/convention	3%
Participate in a sports event	2%
Go diving	2%
Go skating	2%
Go ATVing	2%
Go mountain biking	1%
Go motorcycling	1%
Go snowmobiling	1%
Go hunting	1%
Other	5%

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.

Respondent Profile (n=3155)

Q30: What is your age?

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

Pie chart: 6% 1%, 25%, 28%, 39%

Q31: Where do you currently live?

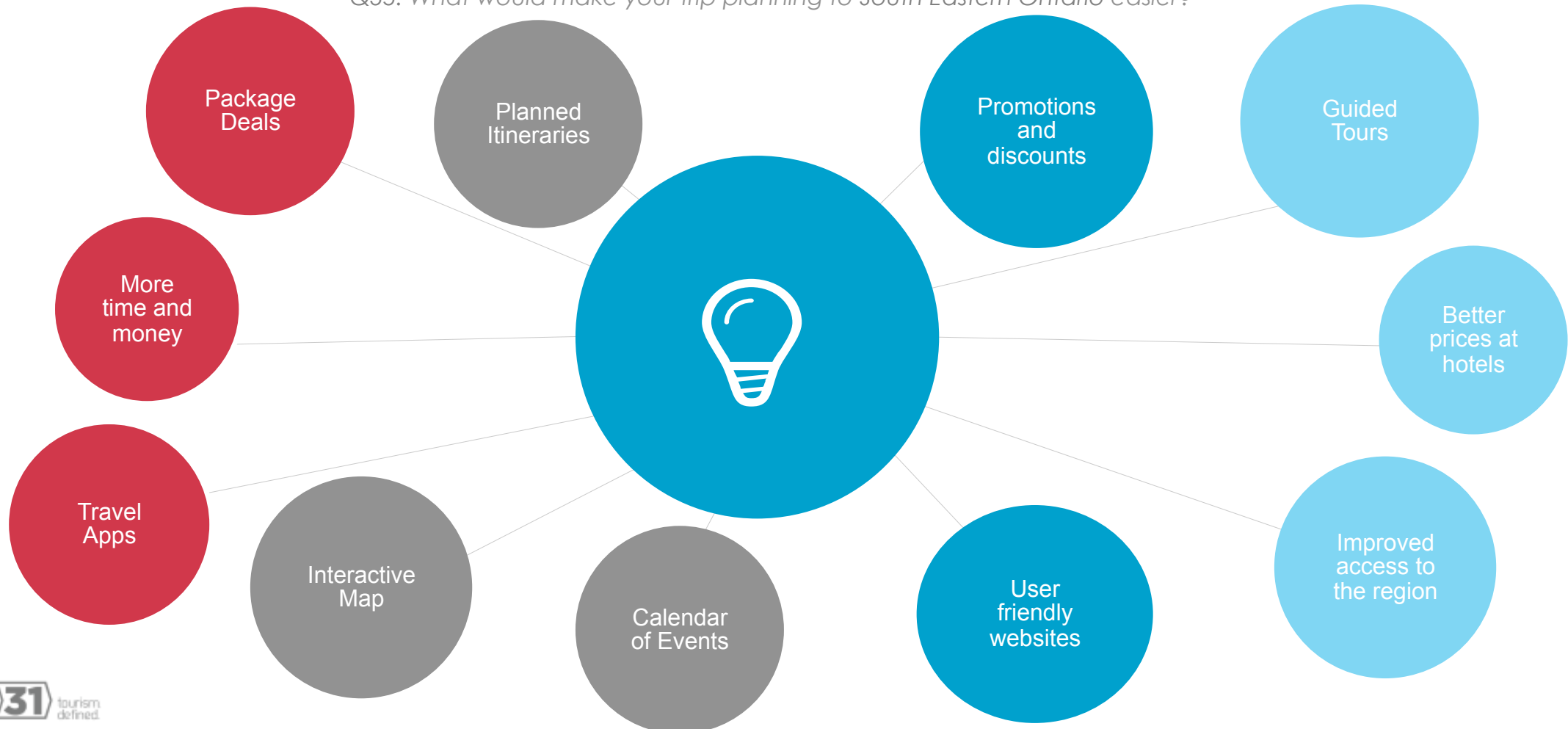| Location	%
Greater Toronto Area	20%
Ottawa	16%
The Rest of Ontario	13%
Metro Toronto	11%
Kingston	10%
Quebec	3%
Brockville	2%
Cornwall	2%
Lindsay/Peterborough/Kawarthas	2%
Quinte West	2%
Belleville	2%
Prince Edward County	2%
Napanee	2%
Haliburton Highlands and Ottawa Valley	1%
Northumberland County	1%
New York State	1%
Other	11%

Q33: What is your highest level of education?

Level	%
Less than high school	
High school diploma or equivalent	8%
Some College	10%
College/associate diploma	29%
Some undergraduate University	5%
Undergraduate University degree	28%
Graduate degree or higher	18%
Prefer not to say	2%

Q32: Identify my gender as

Gender	%
Female	77%
Male	21%
Prefer not to say	2%
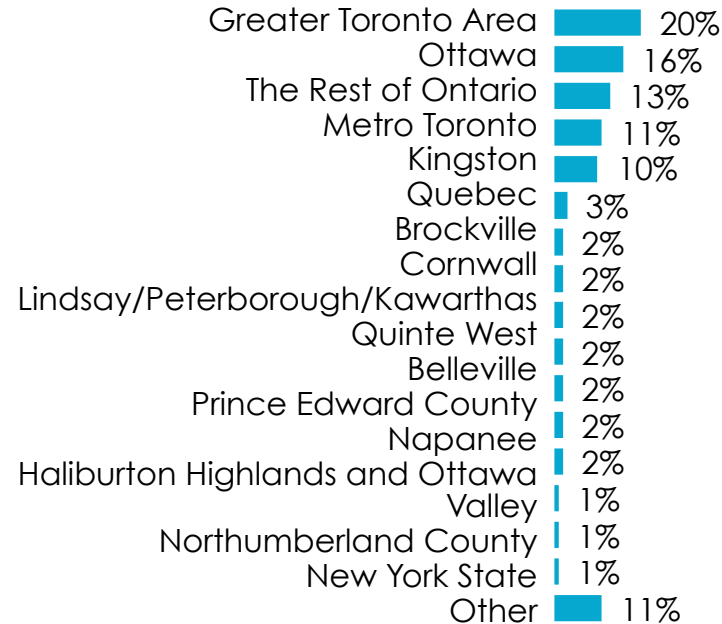
Q34: What is your approximate annual household income?

Income	%
< $30,000	4%
$30,000-$69,999	20%
$70,000-$99,999	19%
$100,000-$149,999	18%
$150,000-$199,999	8%
> $200,000	3%
Prefer not to say	28%
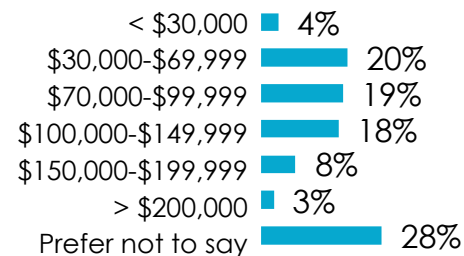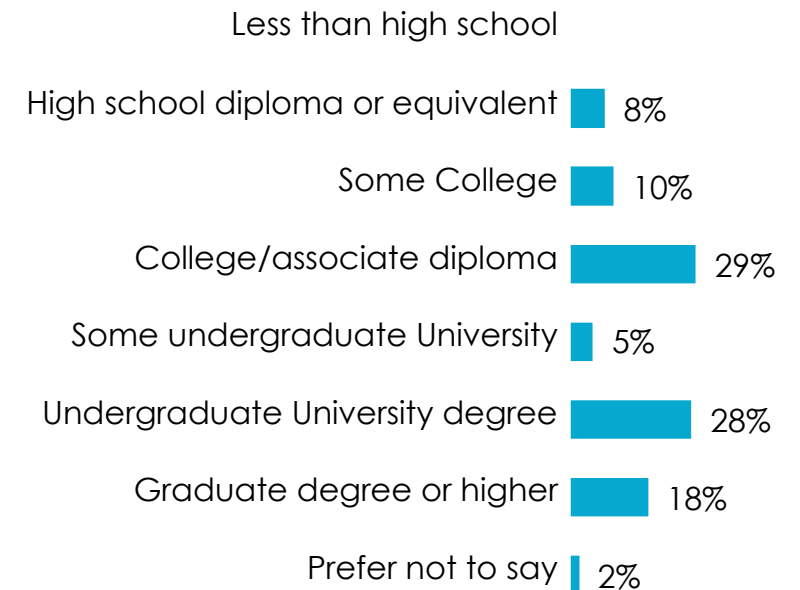
DESTINATION RESULTS

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.

Familiarity

Q1: How familiar are you with (destination name) as a tourism destination?

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Extremely familiar	42%	45%	30%	37%	13%	56%	33%
Moderately familiar	39%	35%	30%	37%	41%	28%	43%
Somewhat familiar	15%	13%	30%	18%	25%	17%	13%
Slightly familiar	3%	7%	10%	5%	21%	--	7%
Not at all familiar	--	1%	--	3%	--	--	3%

Interest in travel to the region

Q2: How interested are you in travelling to (destination name) for a leisure trip?

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Very interested	67%	92%	60%	60%	67%	50%	47%
Fairly interested	24%	5%	40%	31%	30%	44%	30%
Not sure	3%	1%	--	5%	3%	6%	13%
Not very interested	6%	1%	--	2%	--	--	7%
No interest at all	--	1%	--	2%	--	--	3%

Likelihood

Q3: What is the likelihood that you will travel to (destination name) for leisure purposes in the next two (2) years?

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Extremely likely	76%	89%	70%	68%	44%	83%	49%
Likely	21%	7%	30%	21%	38%	11%	30%
Not sure	--	3%	--	7%	18%	6%	7%
Unlikely	3%	--	--	2%	--	--	7%
Extremely unlikely	--	1%	--	2%	--	--	7%

Most recent leisure trip to 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?

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Bay of Quinte	73%	35%	70%	29%	16%	11%	23%
Prince Edward County	82%	89%	90%	60%	43%	39%	30%
Lennox & Addington/ Frontenac County	45%	16%	100%	30%	11%	17%	17%
Rideau Canal	27%	26%	40%	35%	30%	44%	43%
Kingston	76%	56%	90%	73%	44%	83%	67%
1000 Islands Gananoque	36%	18%	60%	52%	39%	56%	43%
1000 Islands Brockville	15%	10%	10%	30%	21%	83%	40%
Cornwall & SDG Counties	3%	4%	--	12%	8%	39%	60%
Other	3%	1%	10%	4%	2%	--	--
None	9%	6%	--	10%	23%	--	13%

Overnight Stay or Day Trip

Q5: Did you stay overnight?

	Bay Of Quinte (n=854)	Prince Edward County (n=1828)	Lennox & Addington/ Frontenac County (n=628)	Rideau Canal (n=986)	Kingston (n=1810)	1000 Islands Brockville (n=1193)	1000 Islands Brockville (n=778)	Cornwall & SDG Counties (n=433)	Other (n=86)
Yes	64%	68%	59%	65%	65%	62%	56%	58%	70%
No	36%	32%	41%	35%	35%	38%	44%	42%	30%

Peak days

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

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Monday	17%	29%	--	22%	15%	28%	23%
Tuesday	27%	20%	--	20%	21%	17%	27%
Wednesday	23%	25%	20%	28%	23%	11%	23%
Thursday	27%	36%	30%	32%	32%	39%	27%
Friday	43%	58%	20%	43%	40%	33%	62%
Saturday	67%	73%	60%	56%	57%	56%	81%
Sunday	33%	59%	40%	41%	57%	28%	50%

Planning timeframe

Q10: When did you start planning your trip?

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
While you were here	10%	6%	10%	5%	2%	6%	--
The week of the visit	24%	13%	40%	23%	19%	27%	19%
1 week before the visit	3%	13%	10%	10%	17%	6%	15%
2 weeks before the visit	20%	13%	10%	16%	9%	11%	12%
3 weeks before the visit	20%	13%	--	9%	21%	11%	12%
1-2 months before the visit	10%	24%	10%	21%	19%	11%	34%
3-5 months before the visit	13%	12%	20%	10%	9%	22%	--
More than 6 months before the visit	--	6%	--	6%	4%	6%	8%

First time or repeat visit

Q11: Was this your first visit to the region?

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Returning trip	93%	91%	100%	95%	94%	94%	96%
I visited less than a year ago	80%	54%	80%	67%	64%	72%	65%
I visited 2 years ago	3%	13%	--	10%	13%	6%	12%
I visited 3-5 years ago	--	7%	--	6%	6%	6%	8%
I visited 10+ years ago	10%	10%	10%	7%	2%	6%	8%
I visited between 5-10 years ago	--	6%	10%	4%	9%	6%	4%
This was my first visit	7%	9%	--	5%	6%	6%	4%

Travel companions

Q12: Who were you primarily travelling with?

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
With spouse/partner	47%	48%	40%	53%	60%	50%	46%
With family, no kids	3%	8%	--	6%	11%	6%	8%
With family, kids	23%	17%	30%	16%	19%	17%	38%
Myself	7%	8%	10%	11%	4%	11%	--
With friends	17%	19%	10%	12%	2%	17%	8%
With my business colleagues/team	3%	--	--	1%	--	--	--
With my sports team/coach	--	--	--	--	--	--	--
Other	--	--	10%	1%	4%	--	--

Trip enjoyment

Q14: Did you enjoy your trip?

	Bay Of Quinte (n=854)	Prince Edward County (n=1828)	Lennox & Addington/ Frontenac County (n=628)	Kingston (n=986)	1000 Islands Gananoque (n=1810)	1000 Islands Brockville (n=1193)	Cornwall & SDG Counties (n=778)	South Eastern Ontario (n=443)	Other (n=86)
Really enjoyed the trip	80%	77%	80%	75%	76%	75%	76%	72%	79%
Enjoyed the trip	19%	22%	20%	24%	23%	23%	22%	25%	19%
The trip was OK	1%	1%	--	1%	1%	2%	2%	3%	2%
Did not enjoy the trip	--	--	--	--	--	--	--	--	--

Likelihood of returning to South Eastern Ontario for a leisure trip

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

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Extremely likely	76%	87%	60%	69%	55%	66%	53%
Likely	17%	8%	20%	22%	34%	17%	31%
Not sure	7%	3%	--	9%	11%	17%	12%
Unlikely	--	2%	10%	--	--	--	4%
Extremely unlikely	--	--	10%	--	--	--	--

Planning sources

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

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Spoke to a friend and/or relative	37%	42%	30%	37%	32%	44%	42%
Social media	53%	59%	20%	34%	17%	39%	50%
Destination marketing website	30%	42%	10%	31%	23%	6%	19%
Online booking site	27%	21%	--	27%	21%	17%	23%
Direct with hotel/accommodation	17%	27%	--	26%	36%	17%	38%
A brochure/travel guide	3%	9%	10%	13%	15%	11%	12%
Visitor Information Centre	7%	4%	10%	17%	11%	11%	12%
The Great Waterway website	3%	2%	--	5%	11%	--	8%
Travel Agent	--	2%	--	2%	4%	--	--
Tour Operator	3%	1%	--	1%	--	--	--
Other	10%	12%	60%	16%	13%	17%	23%

Planning sources, online

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

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Online booking site	27%	21%	--	27%	21%	17%	23%
Trip Advisor	10%	11%	--	17%	13%	6%	12%
Expedia	7%	7%	--	7%	11%	6%	4%
Booking.com	7%	5%	--	7%	9%	6%	8%
Travelocity	7%	2%	--	1%	--	--	--
Kayak	--	--	--	--	--	--	--

Planning sources, social media

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

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Social media	53%	59%	20%	34%	17%	39%	50%
Facebook	47%	24%	20%	24%	11%	33%	38%
Instagram	7%	44%	--	7%	--	--	4%
Trip Advisor	7%	1%	--	2%	--	--	--
Twitter	7%	7%	--	10%	11%	6%	12%
YouTube	--	2%	--	1%	--	6%	4%
Pinterest	--	2%	--	--	--	--	--
Other	--	--	--	--	--	--	--

Length of stay

Q19: How long did you stay for?

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
The day	43%	16%	60%	34%	32%	44%	38%
1 night	17%	18%	10%	13%	11%	11%	12%
2 nights	23%	29%	10%	21%	30%	11%	27%
3 nights	7%	20%	10%	12%	13%	11%	4%
4-7 nights	7%	12%	10%	10%	9%	17%	15%
More than 1 week	3%	6%	--	10%	6%	6%	4%

Accommodations

Q20: Where did you stay while on your trip? n= 1762

	Bay Of Quinte (n=17)	Prince Edward County (n=107)	Lennox & Addington/ Frontenac County (n=4)	Kingston (n=167)	1000 Islands Gananoque (n=30)	1000 Islands Brockville (n=9)	Cornwall & SDG Counties (n=14)
Hotel/Inn	7%	5%	10%	11%	4%	--	8%
With Friends/Family	7%	6%	20%	3%	9%	6%	12%
AirBnb/ VRBO	7%	2%	10%	4%	6%	6%	--
Bed & Breakfast	--	11%	10%	3%	--	6%	4%
Motel	10%	7%	10%	2%	2%	--	8%
Rented Cottage	13%	2%	10%	3%	4%	11%	--
Campground / Tent	--	2%	10%	6%	6%	--	4%
Campground / Trailer	10%	4%	10%	9%	2%	11%	--
My own Cottage	7%	5%	--	2%	--	6%	--
Marina	--	2%	--	2%	--	--	4%
Alternative Accommodations	--	3%	--	2%	9%	--	--
Other	10%	3%	--	6%	4%	--	8%

Actual booking

Q21: How did you book your overnight stay?

	Bay Of Quinte (n=17)	Prince Edward County (n=107)	Lennox & Addington/ Frontenac County (n=4)	Kingston (n=167)	1000 Islands Gananoque (n=30)	1000 Islands Brockville (n=9)	Cornwall & SDG Counties (n=14)
Online / directly with property	53%	36%	--	40%	53%	44%	36%
AirBnb /VRBO	--	31%	--	8%	10%	--	7%
I called the property	18%	9%	--	19%	3%	11%	29%
Through travel booking website	12%	5%	--	14%	13%	22%	7%
Other	18%	20%	100%	19%	20%	22%	21%

Estimated trip spending

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

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
< $100	20%	15%	50%	19%	17%	28%	23%
$100-$199	27%	20%	40%	18%	19%	21%	23%
$200-$299	13%	9%	10%	14%	17%	28%	15%
$300-$449	17%	20%	--	15%	15%	11%	20%
$450-$999	13%	18%	--	23%	23%	6%	15%
$1,000+	10%	18%	--	11%	9%	6%	4%

Perception of value

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

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
The trip offered excellent value	50%	48%	60%	41%	45%	60%	43%
The trip offered good value	30%	18%	--	17%	21%	6%	19%
The trip offered very good value	20%	32%	40%	41%	34%	28%	38%
The trip offered poor value	--	2%	--	1%	--	6%	--

Influencers

Q24: How did you hear about this region?

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Friends and/or relatives	73%	77%	40%	67%	49%	72%	65%
Social media	27%	45%	--	23%	15%	28%	35%
Travel Guides/Maps	7%	6%	--	12%	26%	6%	15%
Online Advertising	3%	6%	--	12%	15%	--	19%
Publications/News Outlets/Article	3%	5%	--	9%	6%	11%	8%
Travel Information Centre	3%	4%	--	9%	13%	6%	8%
An Event	3%	2%	--	8%	4%	11%	--
TV/Radio Ads	7%	2%	10%	3%	2%	11%	--
Bloggers	7%	6%	--	1%	2%	0%	--
Other	20%	10%	60%	25%	28%	22%	12%

Influencers, social media

Q24, ii. a-g Social Media: How did you hear about this region?

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Social media	27%	45%	--	23%	15%	28%	35%
Facebook	23%	21%	--	20%	9%	28%	35%
Trip Advisor	7%	5%	--	5%	9%	--	8%
Instagram	--	35%	--	5%	--	--	--
Twitter	--	--	--	2%	--	--	--
YouTube	--	1%	--	1%	--	6%	4%
Pinterest	--	2%	--	--	--	--	--
Other	--	--	--	--	--	--	--

How they got here

Q25: How did you travel to the region?

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Car	83%	98%	90%	88%	87%	94%	92%
Train	3%	1%	--	4%	2%	--	4%
Motorcycle	3%	--	--	1%	--	--	4%
Boat	7%	--	--	1%	6%	--	--
Motorcoach/Tour Bus	--	--	10%	2%	4%	--	--
Plane	--	2%	--	3%	--	6%	--
Bicycle	--	--	--	--	--	--	--
Bus	3%	--	--	1%	--	--	--

Package vs. FIT

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

	Bay Of Quinte (n=30)	Prince Edward County (n=128)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=267)	1000 Islands Gananoque (n=47)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=26)
Please specify which tour	3%	--	--	2%	--	--	--
Fully independent	90%	95%	100%	93%	91%	94%	96%
Package deal	--	2%	--	1%	2%	--	4%
Other	7%	3%	--	3%	6%	6%	0%

Types of activities sought during leisure trips

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

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Go sightseeing	48%	54%	40%	62%	67%	50%	63%
Go to a local restaurant	36%	61%	60%	58%	69%	56%	53%
Go shopping	55%	48%	50%	58%	67%	72%	60%
Go to the waterfront	27%	38%	40%	36%	46%	44%	40%
Visit small towns and villages	24%	35%	40%	30%	41%	33%	40%
Visit a beach	27%	46%	20%	28%	39%	22%	30%
Visit a historical site	18%	24%	20%	31%	26%	17%	33%
Visit friends and/or relatives	21%	24%	20%	25%	13%	17%	27%
Visit a provincial/national park/conservation area	18%	24%	30%	18%	26%	17%	30%
Visit a museum	15%	17%	20%	27%	26%	17%	27%
Visit a farm or farmers market	15%	26%	20%	22%	25%	33%	30%
Go on a food/wine tour	21%	23%	0%	18%	16%	11%	3%
Go hiking	9%	17%	40%	13%	10%	6%	17%
Visit a brewery	21%	30%	0%	16%	10%	6%	10%
Go to a bar or night club	24%	17%	0%	21%	16%	11%	3%
Visit a winery	21%	26%	0%	14%	16%	6%	10%
Go to a resort	12%	11%	0%	15%	16%	0%	13%
Attend a show	12%	10%	10%	18%	11%	11%	7%
Attend a concert	9%	11%	0%	18%	11%	6%	7%
Visit an art gallery	9%	10%	10%	12%	11%	22%	10%
Visit islands	6%	5%	20%	13%	23%	17%	13%
Visit a distillery	3%	17%	0%	10%	5%	0%	7%
Attend a food/wine event	18%	12%	0%	12%	13%	6%	7%
Go to a casino	6%	4%	10%	10%	21%	11%	7%
Go wildlife/bird watching	9%	7%	20%	10%	13%	11%	10%
Go to a spa	12%	14%	0%	10%	8%	6%	7%

Types of activities sought during leisure trips

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

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Attend a theater performance	3%	4%	10%	10%	13%	--	3%
Visit a theme/amusement park, zoo, aquarium	--	7%	10%	10%	15%	--	10%
Go paddling	9%	10%	30%	4%	10%	6%	13%
Go boating	9%	7%	10%	5%	10%	11%	7%
Attend a fair	3%	2%	10%	8%	11%	11%	7%
Go stargazing	3%	9%	10%	5%	10%	17%	3%
Go on a cruise	3%	1%	10%	9%	11%	11%	3%
Attend a music festival	9%	1%	--	9%	5%	--	10%
Attend a sports event	6%	3%	--	5%	5%	--	7%
Go tent camping	6%	10%	20%	2%	3%	--	10%
Attend an arts festival	12%	4%	--	11%	7%	6%	3%
Go cycling	3%	2%	20%	4%	7%	--	10%
Go trailer camping	3%	5%	10%	3%	11%	11%	7%
Go fishing/angling	9%	1%	10%	3%	5%	11%	7%
Go golfing	3%	1%	--	3%	5%	--	--
Go skiing or snowboarding	3%	1%	--	2%	3%	--	3%
Attend a unique hands-on event/workshop	--	1%	--	6%	2%	--	--
Attend a conference/convention	3%	1%	--	6%	--	--	3%
Participate in a sports event	6%	1%	10%	2%	2%	--	3%
Go diving	3%	1%	10%	1%	--	--	3%
Go skating	3%	3%	--	1%	--	6%	3%
Go ATVing	--	1%	--	--	--	--	--
Go mountain biking	--	1%	--	--	2%	--	--
Go motorcycling	--	1%	--	1%	2%	--	--
Go snowmobiling	6%	--	--	--	--	--	--
Other	9%	2%	--	7%	5%	11%	7%

Respondent Profile

Q30: What is your age?

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Over 70	6%	2%	30%	8%	16%	17%	13%
55-69	30%	15%	10%	48%	64%	61%	23%
40-54	36%	27%	40%	28%	18%	17%	27%
25-39	24%	51%	20%	13%	2%	6%	23%
18-24	0%	3%	--	1%	--	--	7%
Prefer not to say	3%	1%	--	2%	--	--	7%

Respondent Profile

Q31: Where do you currently live?

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Quinte West	24%	3%	--	1%	--	--	--
Belleville	42%	4%	--	1%	2%	6%	--
Prince Edward County	3%	11%	--	--	2%	--	--
Napanee	--	--	30%	3%	--	--	--
Kingston	--	5%	10%	30%	5%	--	3%
Brockville	--	--	--	2%	3%	61%	--
Cornwall	--	--	--	--	5%	11%	50%
Metro Toronto	15%	21%	10%	6%	10%	6%	--
Greater Toronto Area	--	17%	--	6%	16%	6%	--
Haliburton Highlands and Ottawa Valley	--	--	--	1%	2%	6%	--
Northumberland County	3%	2%	--	1%	--	--	--
Lindsay/Peterborough/Kawarthas	--	1%	--	2%	3%	--	--
Ottawa	3%	13%	--	10%	8%	--	7%
The Rest of Ontario	--	8%	10%	12%	15%	--	17%
Quebec	--	5%	--	4%	7%	--	--
New York State	3%	1%	--	1%	2%	--	--
Other	6%	7%	40%	18%	21%	6%	23%

Respondent Profile

Q32: Identify my gender as:

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Female	67%	82%	70%	68%	64%	83%	83%
Male	30%	15%	30%	30%	34%	17%	10%
Prefer not to say	3%	3%	0%	2%	2%	0%	7%

Respondent Profile

Q33: What is your highest level of education?

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
Less than high school	--	1%	--	--	--	--	--
High school diploma or equivalent	12%	5%	10%	11%	13%	0%	10%
Some College	9%	6%	--	8%	16%	6%	0%
College/associate diploma	27%	20%	30%	31%	34%	44%	37%
Some undergraduate University	12%	7%	10%	6%	11%	--	3%
Undergraduate University degree	21%	38%	30%	23%	13%	33%	27%
Graduate degree or higher	15%	21%	20%	17%	8%	17%	17%
Prefer not to say	3%	1%	--	2%	3%	--	7%

Respondent Profile

Q34: What is your approximate annual household income?

	Bay Of Quinte (n=33)	Prince Edward County (n=136)	Lennox & Addington/ Frontenac County (n=10)	Kingston (n=298)	1000 Islands Gananoque (n=61)	1000 Islands Brockville (n=18)	Cornwall & SDG Counties (n=30)
< $30,000	15%	4%	20%	5%	8%	6%	10%
$30,000-$69,999	33%	18%	10%	18%	18%	22%	10%
$70,000-$99,999	3%	13%	20%	22%	18%	17%	13%
$100,000-$149,999	12%	19%	20%	16%	15%	22%	17%
$150,000-$199,999	12%	13%	10%	8%	5%	--	3%
> $200,000	6%	9%	--	3%	--	6%	3%
Prefer not to say	18%	24%	20%	28%	36%	28%	43%

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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