

RTO 9 Consumer
Perception/Brand
Research Report
2021

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The purpose is to maintain the integrity of market research analysis by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

- The research presents a current and statistically representative assessment of the market for travel to South-Eastern Ontario among travellers in Ontario and Quebec.
- The first section, **Considerers of South-Eastern Ontario (pages 7-15)**, profiles those who say they would consider taking a leisure trip to the region by a range of demographic variables, by the information channels they use to make travel decisions, by personality profile and in terms of their itinerary preference.
- The second section, **Profile of South-Eastern Ontario (pages 16-22)**, then looks at overall perceptions of the region itself in terms of familiarity compared to other destinations within Ontario, top-of-mind motivators for a visit there, assessment of relative COVID risk and top qualities associated with it.
- The third section, **Considerers of Areas Within South-Eastern Ontario (pages 23-47)**, drills down to sub-DMO level, and profiles those interested in travel to each of the sub-regional destinations by variables including age, home region, information channel and interest in visiting specific local attractions.
- The final section, **The Region In Detail (pages 48-51)**, looks at the different qualities associated with different sub-regions, and the profile of specific local destinations across the region.

- This report summarises the results of a market research study conducted by Twenty31 Consulting on behalf of the RTO 9 Regional Tourism Organization. The study was conducted online in February 2021 among a representative sample of 1,531 of the adult travelling public living in a range of source markets for the RTO 9/South East Ontario (SE Ontario) region in eastern Ontario and Quebec. It uses a questionnaire designed by Twenty31 in collaboration with RTO 9, fielded in English and French.
- A representative sample of adult consumers was drawn, and was sent by email an invitation to participate in the survey. Respondents were then screened to identify travellers. We defined travellers as those who either:
 - **Had travelled** at least 40km for an overnight leisure trip staying in paid accommodation over the past year
 - **Were likely to take** an overnight leisure trip staying in paid accommodation in the next 12 months
- Quotas were set by age and gender, and by region according to population size to ensure an accurate representation of the target market. Achieved sample sizes in each region were as follows:
 - Greater Toronto: n=731
 - Eastern Ontario: n=200
 - Ottawa: n=111
 - Montreal: n=303
 - Quebec: n=186
- The results presented here are subject to sampling tolerances. Full-sample results are accurate to within plus or minus 2.5-3%. Sampling tolerances for sub-groups will be wider.
- Note: All figures in the charts and tables in this report are expressed in percentages (%), unless otherwise indicated. Total percentages may not add to 100 because of rounding. Question wording and the base sample size is provided in the bottom of select pages.

EXECUTIVE SUMMARY - 1

Two in five will consider SE Ontario for next vacation – and more of those with children



- Just over two in five travellers in these local markets say they are likely to consider SE Ontario for their next vacation. This rises among those with children, those on higher incomes and people who frequently travel within Ontario.
- While just needing a break is given as the main reason for travel to SE Ontario, a significant number cite visiting friends or family as a motivator for travel. This is borne out in respondents' spontaneous suggestions for what would make it more likely for them to visit the region – meeting friends for a special occasion, good deals particularly on accommodation or higher awareness of attractions would all motivate people to travel there. But a significant proportion say they simply want to go further afield from their home region when they travel, while others want to wait until the threat of COVID and associated restrictions are lifted – even though the risk of infection in SE Ontario is seen as relatively low.
- Food and drink is the itinerary type with broadest appeal across the generations. Beyond this, age shapes preference to a degree, with Millennial travellers relatively more interested in active vacations involving hiking or adrenaline activities, and the Boomer market more motivated by history or winery-themed trips.
- The profile of destinations within SE Ontario is mid-ranking compared to others within the province. Toronto and Niagara Falls are the most familiar and widely visited, but Kingston and 1000 Islands have a similar level of familiarity and past visitation among this audience to destinations outside the region like Niagara-on-the-Lake. The other SE Ontario destination benchmarked at a provincial level, Prince Edward County, is a little way behind.

EXECUTIVE SUMMARY - 2

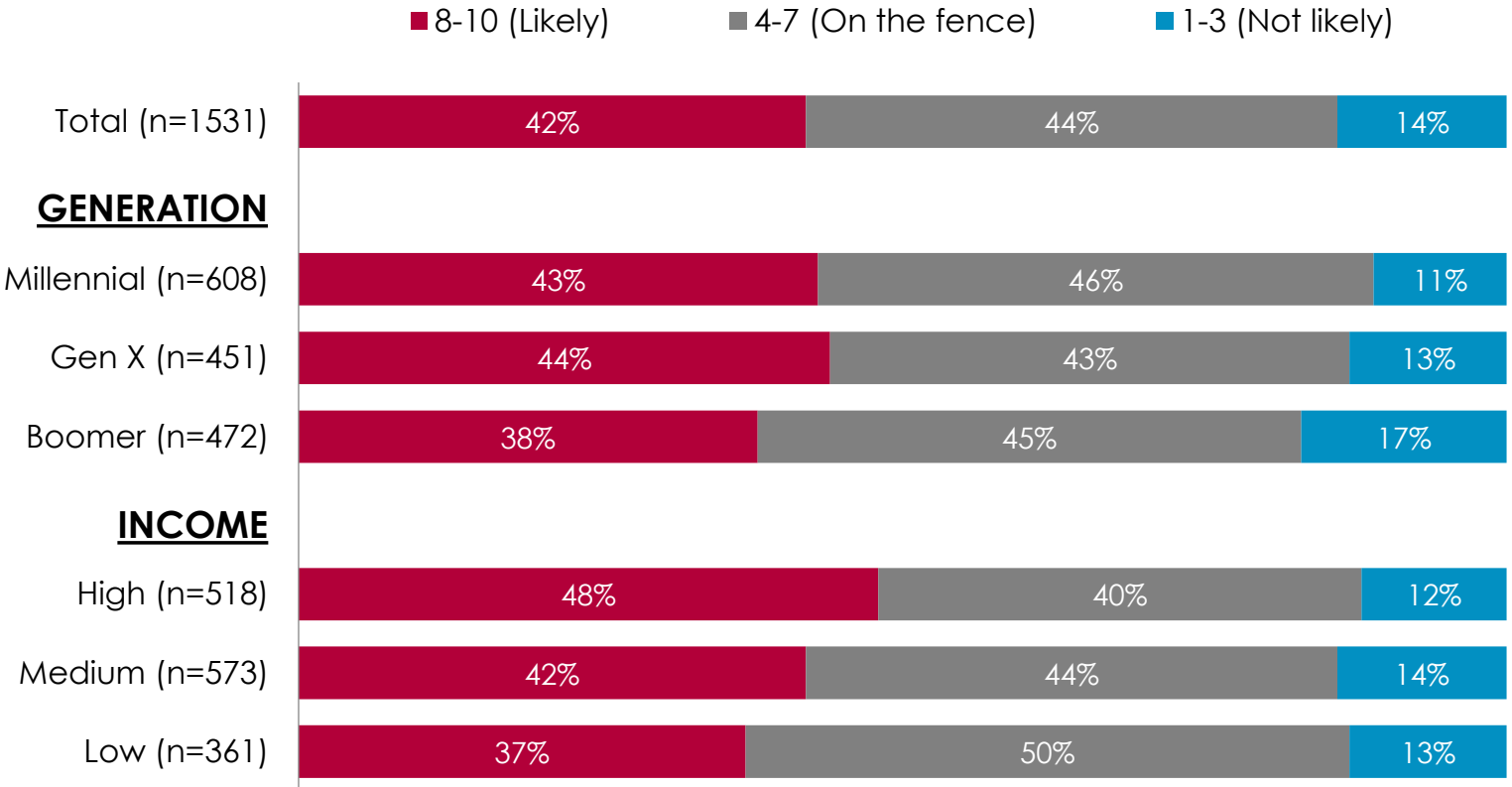
Image across the region is dominated by natural beauty and relaxation

- Looking at smaller destination communities within SE Ontario, Belleville, Cornwall and Sandbanks (as well as the 1000 Islands area) are the only destinations familiar to more than a third of travellers.
- In image terms, there is little differentiation between the areas represented by the sub-DMOs in SE Ontario. Overwhelmingly, natural beauty and relaxation are the top qualities associated with all the areas tested, though ease of access is also a defining feature of some areas (including Kingston). Conversely, for all areas, good nightlife and adrenaline activities are the qualities least associated with SE Ontario.
- There is also little differentiation in the profile and preferences of those interested in the different sub-DMO destinations. Some destinations appear to attract relatively more interest from particular areas (e.g. numbers of Montrealers interested in Kingston and Cornwall are slightly higher than average, those interested in Bay of Quinte are more weighted towards GTA residents) but broadly the picture is consistent. Referrals and recommendations from friends are the dominant source of inspiration, with travel review sites like Trip Advisor, destination websites and YouTube also important.

Section 1: Considerers of South Eastern Ontario

LIKELIHOOD OF CONSIDERING SOUTH-EAST ONTARIO FOR VACATION

More than two in five are likely to consider SE Ontario as a destination for their next leisure trip, rising to nearly half among those on higher incomes

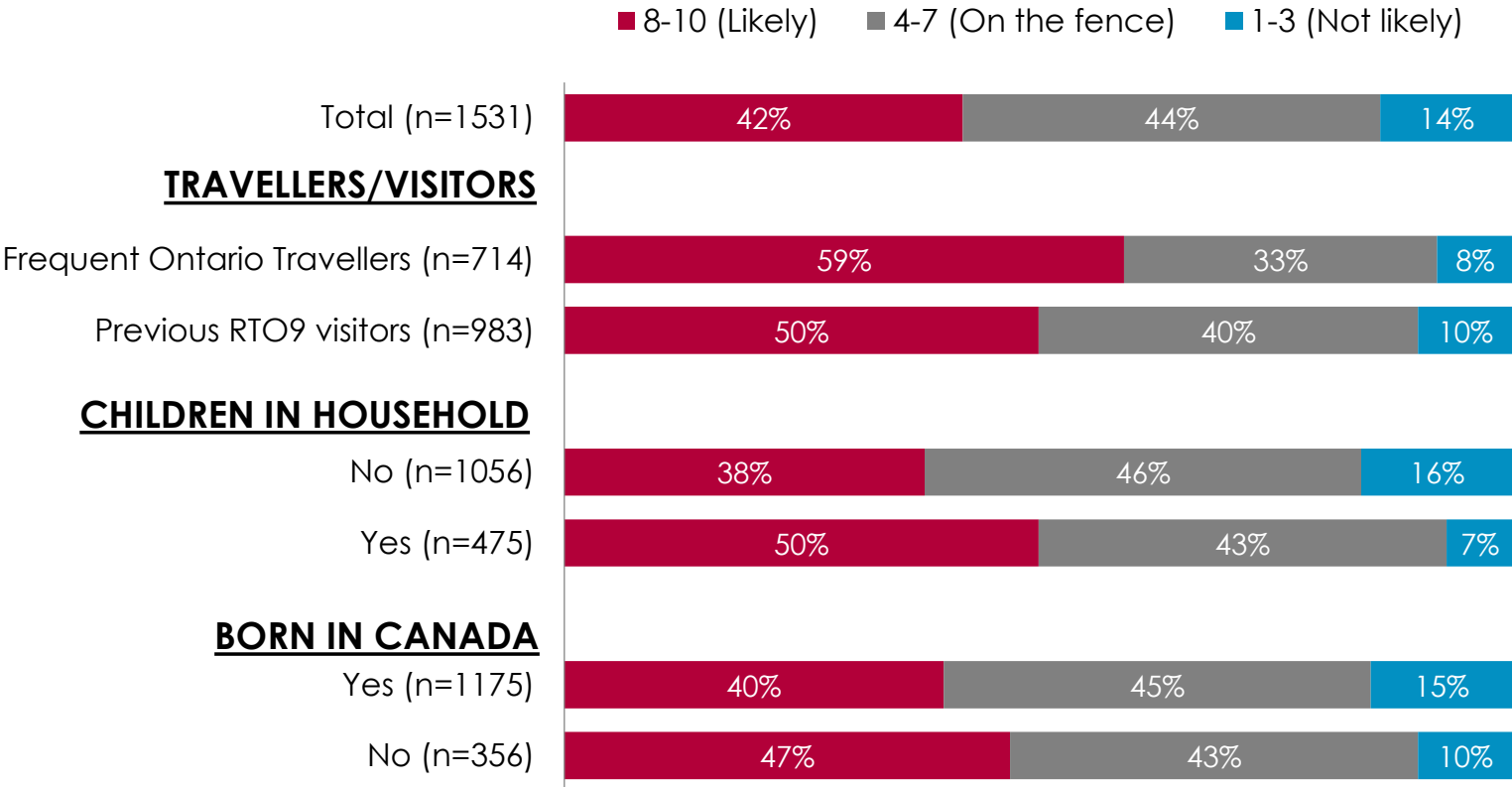


INSIGHT

There is relatively little difference in propensity to consider South-East Ontario by generation, though enthusiasm among Boomers is somewhat lower.

LIKELIHOOD OF CONSIDERING SOUTH-EAST ONTARIO FOR VACATION

Consideration of SE Ontario as a destination is significantly higher among those with children



INSIGHT

Not surprisingly, those who have previously visited SE Ontario are more likely to be considering a future visit. But frequent travel in Ontario is a stronger predictor – nearly three in five of those who regularly travel in the province say they are likely to consider SE Ontario for their next leisure trip.

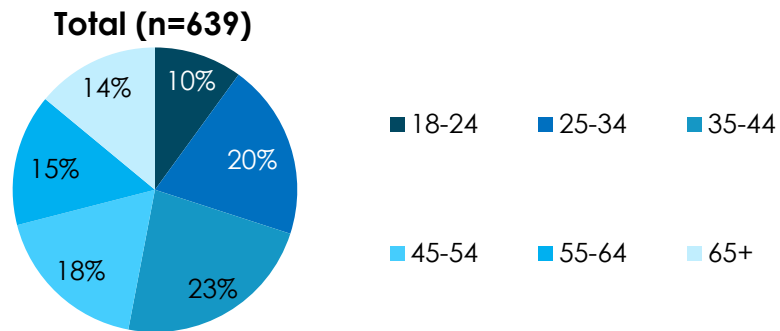
Non-native born Canadians are somewhat more likely to be considering SE Ontario as a destination

Q10: And for your next overnight leisure trip, how likely, if at all, are you to consider South-Eastern Ontario as a destination? Please use a scale of 1 to 10, where 1 means you will definitely not consider it, and 10 means you will definitely consider it? n= 1531

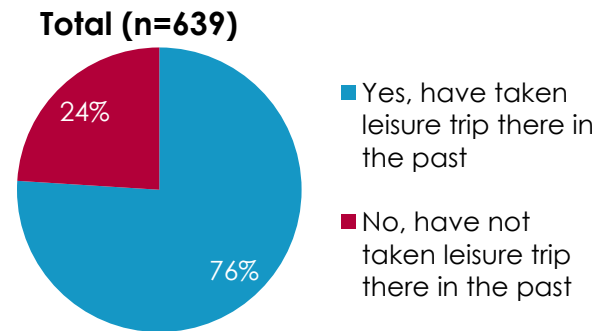
PROFILE OF THOSE CONSIDERING SE ONTARIO AS DESTINATION

Over half of those considering SE Ontario are aged under 45

AGE



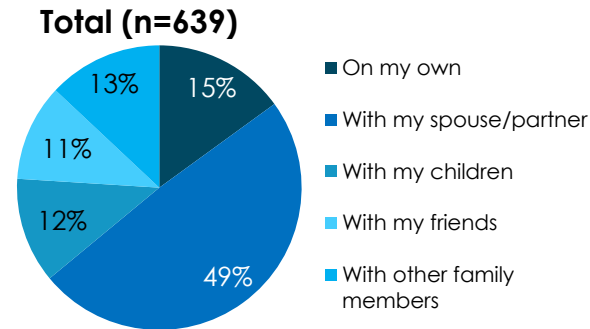
Previous Visitation



Main Trip Motivator



Travel Party



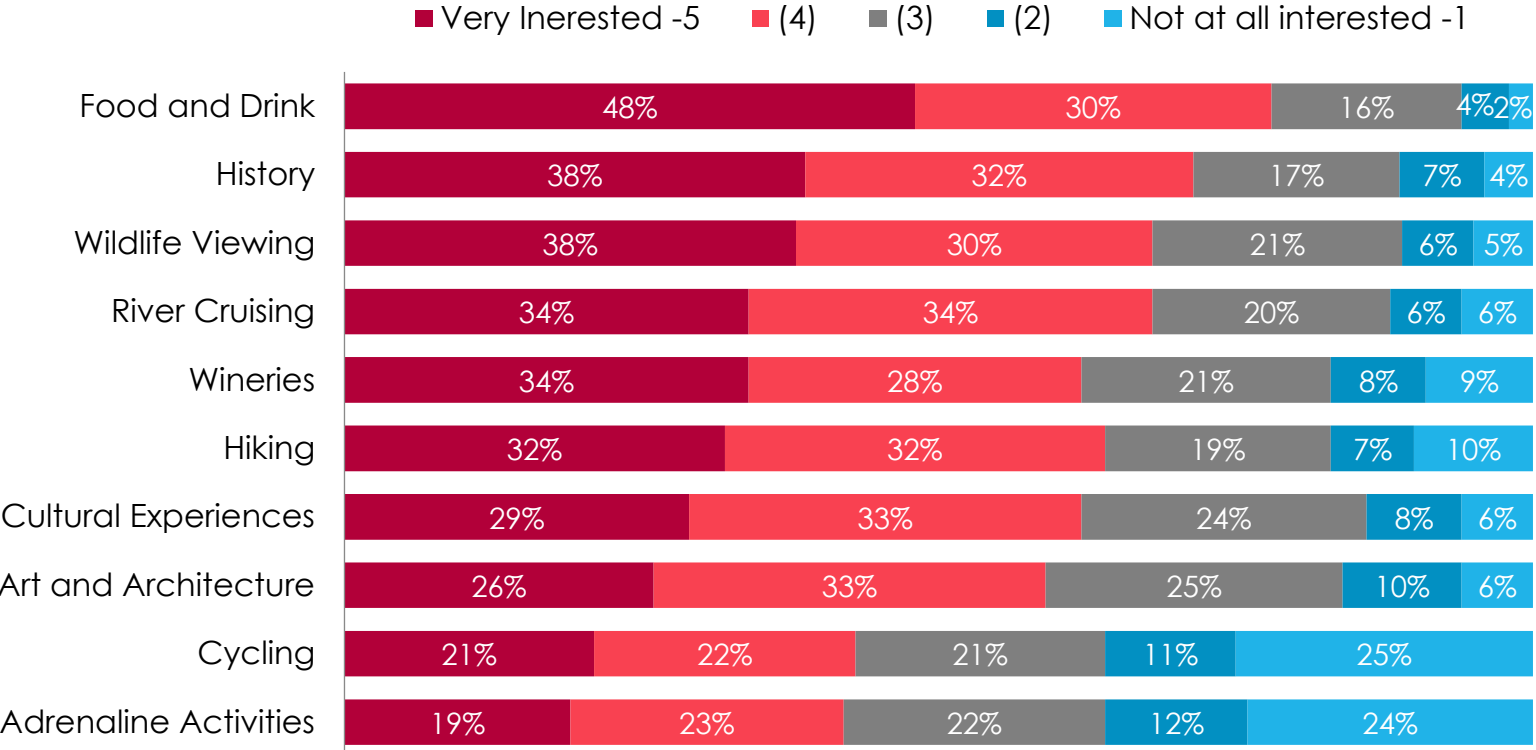
INSIGHT

Among those considering SE Ontario, needing a break (39%), or the desire to visit friends or family (23%) are the most common reasons for planning a leisure trip over the next year. Relatively few (7%) say their main motivation for travel is the availability of good deals at their destination.

These findings suggest that the couples market is the most promising for SE Ontario – nearly half (49%) of those considering it as a destination say they will travel with a spouse or partner. The number of solo travellers (15%) is surprisingly high.

INTEREST IN ITINERARY TYPES AMONG SE ONTARIO CONSIDERERS

Interest is highest in food and drink, history and wildlife-related itineraries



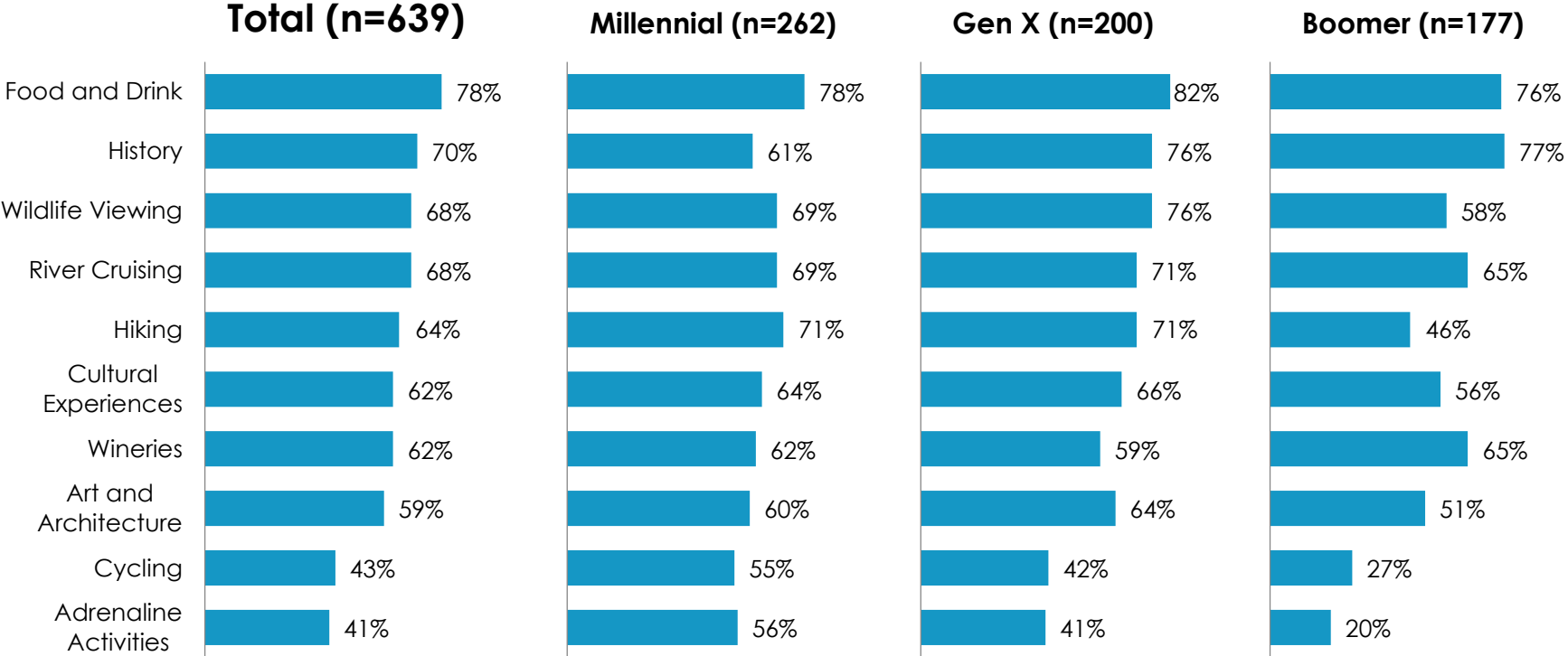
INSIGHT

There is broad interest among those considering a holiday in SE Ontario in a range of different itineraries, although food and drink has the broadest appeal, with nearly half (48%) declaring themselves 'very' interested.

Interest is markedly lower among the most physically demanding itineraries tested here – cycling (with only 21% very interested) and adrenaline activities (19%).

INTEREST IN ITINERARY TYPES – BY GENERATION

Distinct patterns of interest by generation, with history and wine itineraries most popular among Boomers, but interest in river cruising and history highest among Gen X



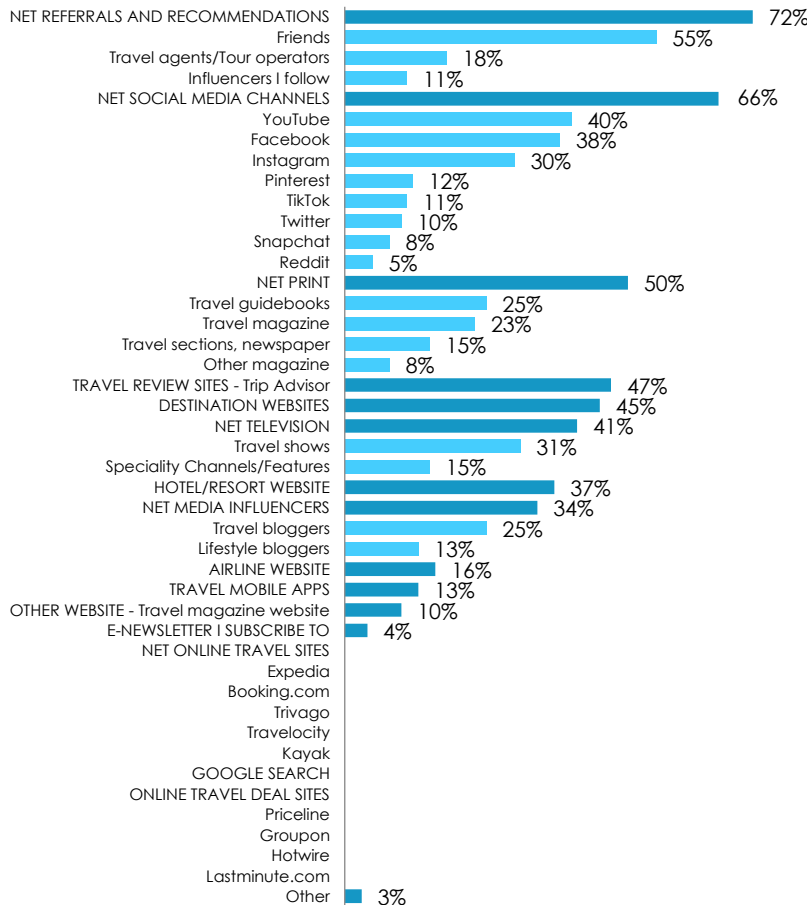
INSIGHT

Not surprisingly, interest in the most active itinerary types is strongly linked with age – over half of Millennial respondents say they are interested in cycling (55%) and adrenaline activities (56%), but this tails off sharply among older age groups. Food and drink and cultural experiences are popular across the generations.

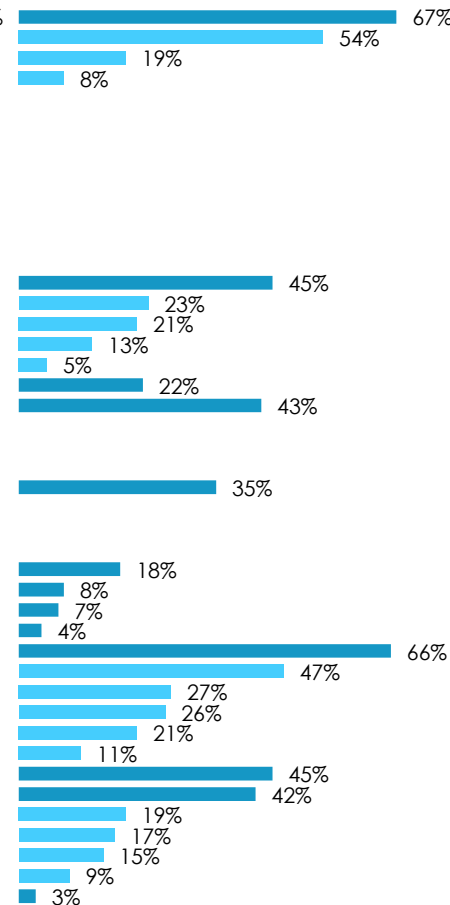
KEY INFLUENCE/INFORMATION CHANNELS

Personal referrals and recommendations and social media most strongly drive destination inspiration

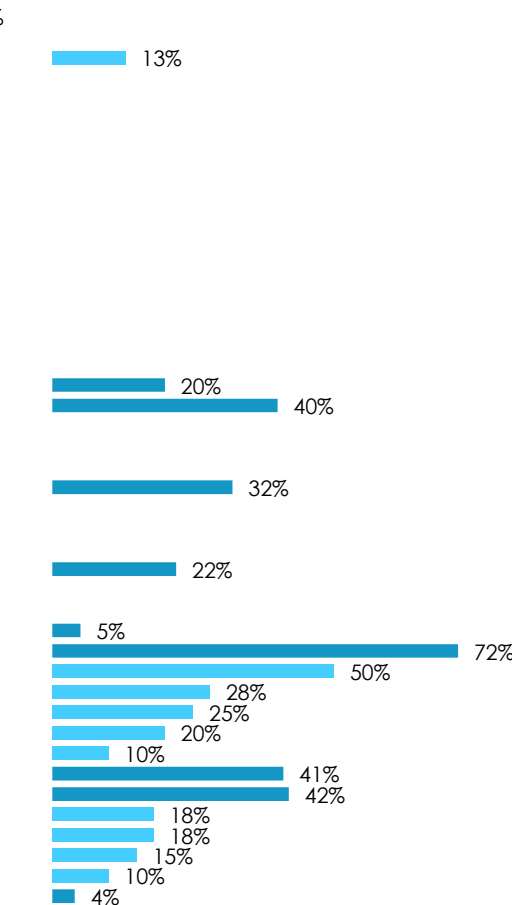
Most important sources for inspiration



Planning



Booking



INSIGHT

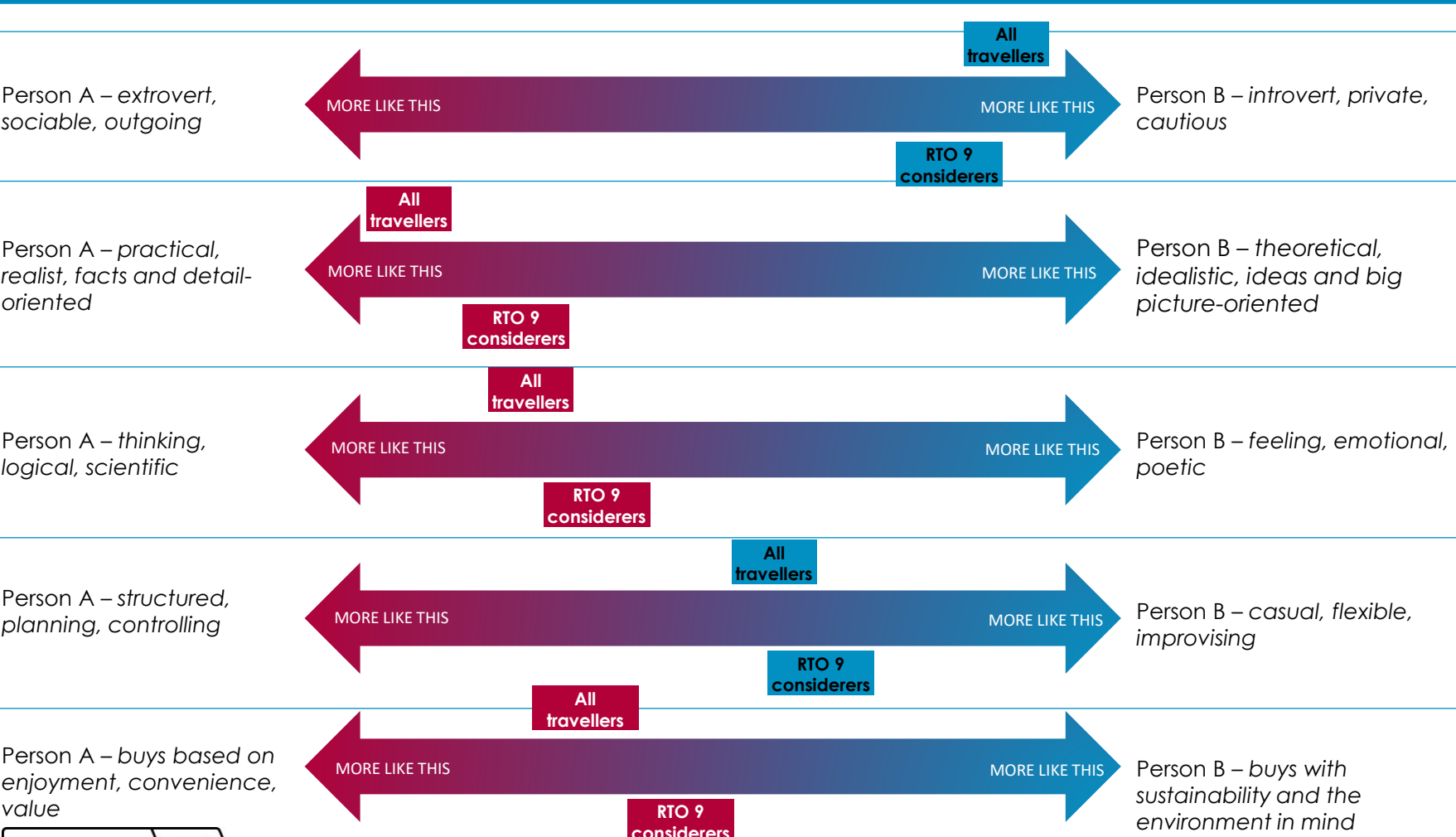
When it comes to seeking inspiration on **destination choice**, friends, YouTube and Facebook are the most important sources.

Referrals are also important when it comes to **planning** a trip, but online travel sites and print media are also significant.

Online travel sites like Expedia or booking.com are used by nearly three-quarters when it comes to **booking** accommodation or attractions, while two in five say they use destination websites.

PERSONALITY PROFILE OF SE ONTARIO CONSIDERERS

No major difference in personality characteristics of those considering SE Ontario – though they are slightly more idealistic and emotional than travellers overall



INSIGHT

Respondents were asked to rate themselves on a personality spectrum across a number of characteristics.

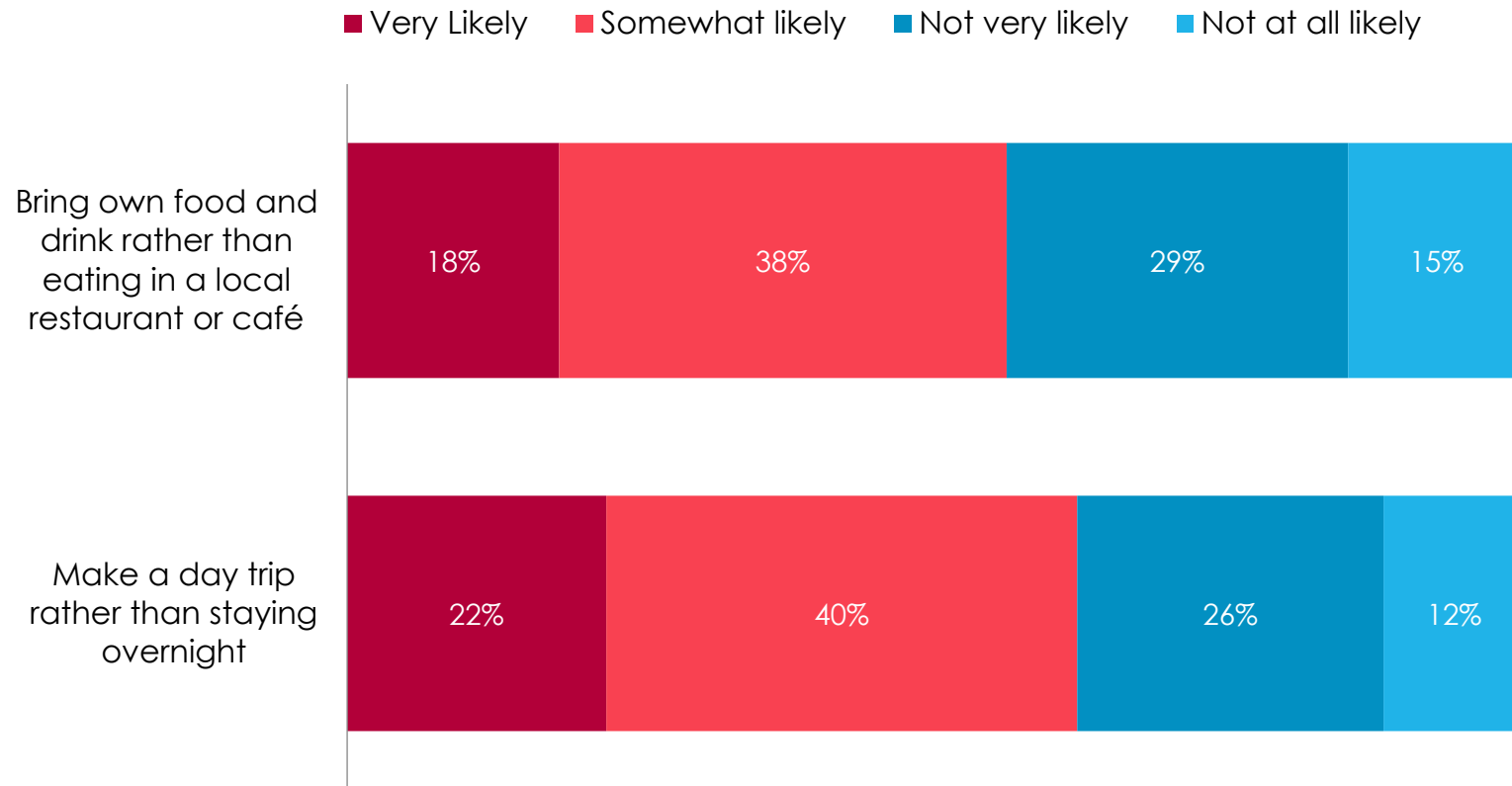
There were few dramatic differences, but RTO 9 considerers emerged as slightly more idealistic and emotional than travellers overall.

SE Ontario considerers also emerged as somewhat more focused on sustainability than travellers as a whole.

Q25: And finally, some questions about you. Which of the following people is more like you? You may be much more like one, or much more like the other, or somewhere between the two. Please use the scale below to respond. Q26: When it comes to the way you make decisions, which of the following people is more like you? Again, please use the scale below to respond. Q27: When it comes to processing information, which of the following people is more like you? Again, please use the scale below to respond. Q28: When it comes to the way you prefer to live your life, which of the following people is more like you? Again, please use the scale below to respond. Q29: When it comes to the way you prefer to live your life, which of the following people is more like you? Again, please use the scale below to respond. n= 1531

SANDBANKS VISITOR INTENTIONS

More than half of those planning to visit Sandbanks on a future trip to SE Ontario think they would take a day trip and self-cater



Base: Those who expect to visit Sandbanks on future trip to SE Ontario (n=736)

INSIGHT

The Sandbanks Provincial Park, and Prince Edward County more generally, has been affected by over-tourism in recent years.

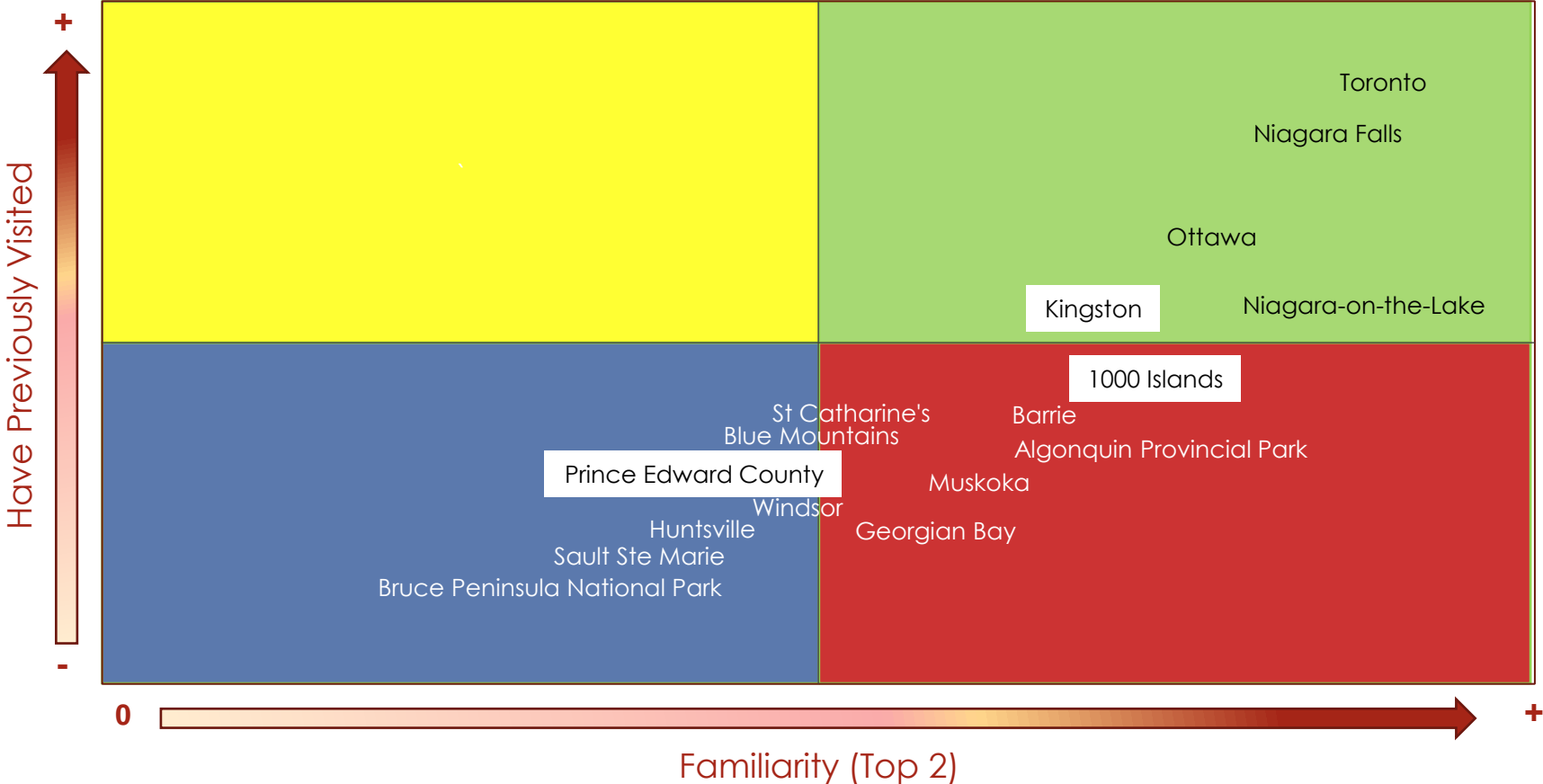
These results suggest that only a minority of those who anticipate visiting Sandbanks on a future trip to SE Ontario will support the tourism economy by using local accommodation or restaurants while they are there.

Older travellers appear more likely to use local restaurants (59%) and stay overnight (47%).

Section 2: Profile of the South Eastern Ontario Region

PROFILE OF DESTINATIONS WITHIN ONTARIO

Toronto and Niagara Falls clearly the standout destinations within the province



INSIGHT

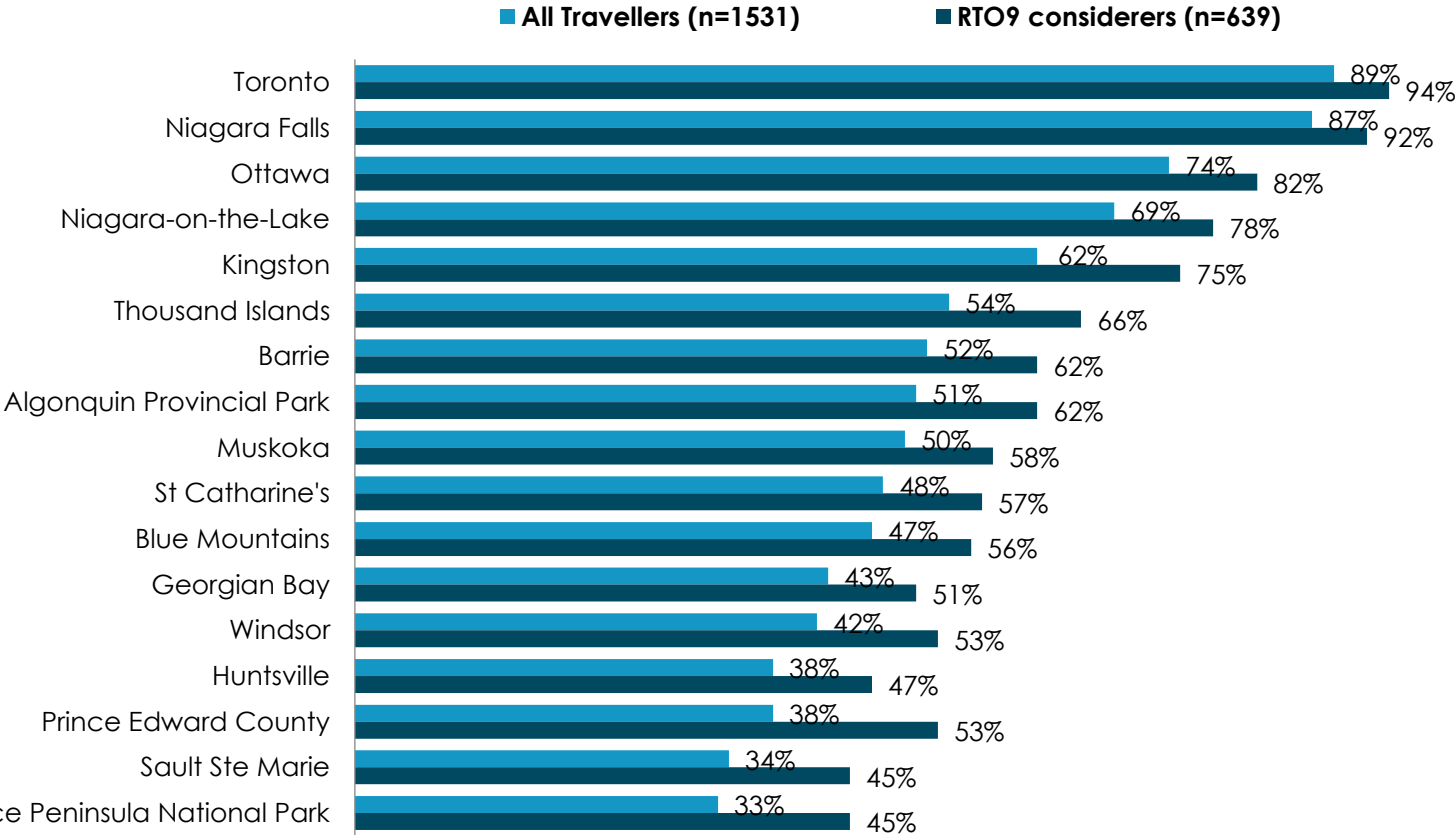
Respondents were asked how familiar they felt with a range of destinations within Ontario, and which they had previously visited.

This clearly shows the link between the two measures of destination profile – the destinations people feel most familiar with – including Kingston - are also those they are more likely to have visited in the past.

The two other SE Ontario destinations tested here rate in the middle of the pack in terms of profile, with 1000 Islands somewhat more familiar, and more visited, than Prince Edward County.

FAMILIARITY WITH ONTARIO DESTINATIONS

Those considering SE Ontario for a future holiday are generally more familiar with the whole range of Ontario destinations – particularly those within SE Ontario itself



INSIGHT

Those who say they would consider SE Ontario as a future holiday destination are particularly likely to be familiar with specific destinations within SE Ontario, including Kingston (75% familiar, vs 62% among all travellers) and Prince Edward County (53%, vs 38% among all travellers).

REASONS TO VISIT SE ONTARIO – KEY THEMES IN COMMENTS

Many say they simply want to get away when they travel, but others say that deals on accommodation or more awareness of attractions would encourage them to visit

Nothing - want to get away from home region

I am happy with what they have to offer but I like to travel to different destinations and see new things and since I have been to this area already I am more likely to travel to a different and new area before going back
Male, 45-54, GTA

I would travel to [SE Ontario] if I could get a good price or a big discount in an all-inclusive hotel or a B&B
Female, 35-44, Montreal

If things are re-opened to a point, but international travel is still not a possibility. Travelling within the province, as I have done in recent years, would then be more likely.
Male, 35-44, GTA

Lower COVID restrictions/threat

Knowing it is safe to travel according to health regulations
Female, 65+, GTA

My friends are all spread out in the area. It would have to be for a special occasion and a special activity or show
Female, Eastern Ontario, 35-44

A special occasion

Incentive like a free night when booking two. Or like Ottawa does - \$100 back when booking two nights.
Female, 45-54, Ottawa

A good deal on accommodation

I think I would need to look at a brochure to see the travel destinations and the different amusements you could do in SE Ontario
Male, 35-44, Quebec

Knowing about things to do there and good areas to visit. Also discounts and travel deals make me more likely to travel places.
Male, 35-44, Eastern Ontario

More awareness of attractions there

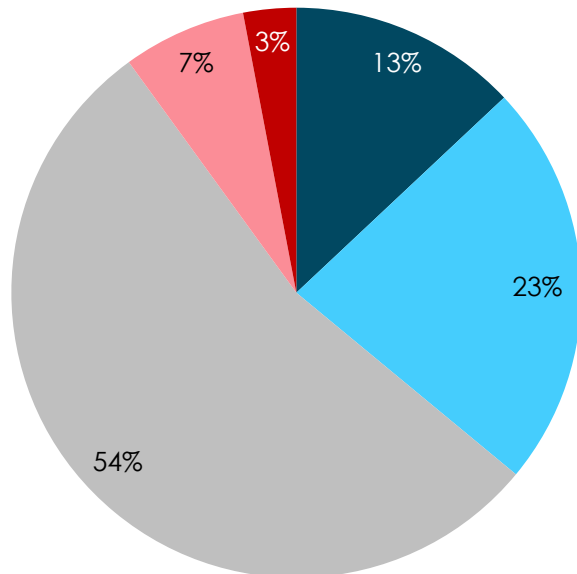
ASSESSMENT OF COVID RISK IN SE ONTARIO

Those considering SE Ontario share general assessment that risk of COVID-19 there is the same or lower as their regular vacation destinations

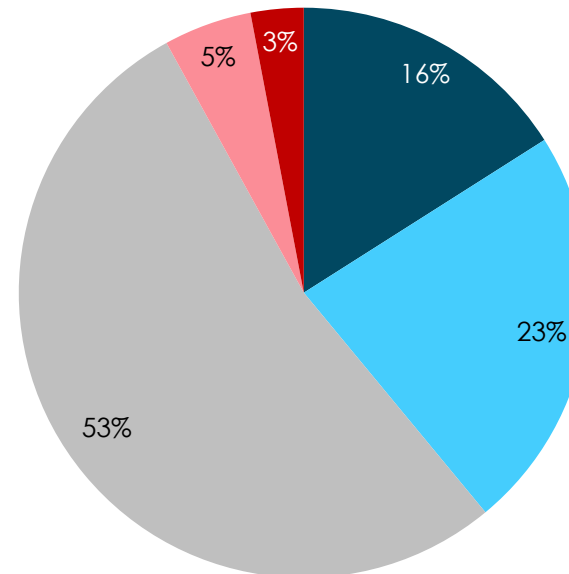
- Risk is much lower in South-Eastern Ontario
- Risk is about the same
- Risk is much higher in South-Eastern Ontario

- Risk is somewhat lower in South-Eastern Ontario
- Risk is somewhat higher in South-Eastern Ontario

All Travellers (n=1531)



RTO 9 considerers (n=639)



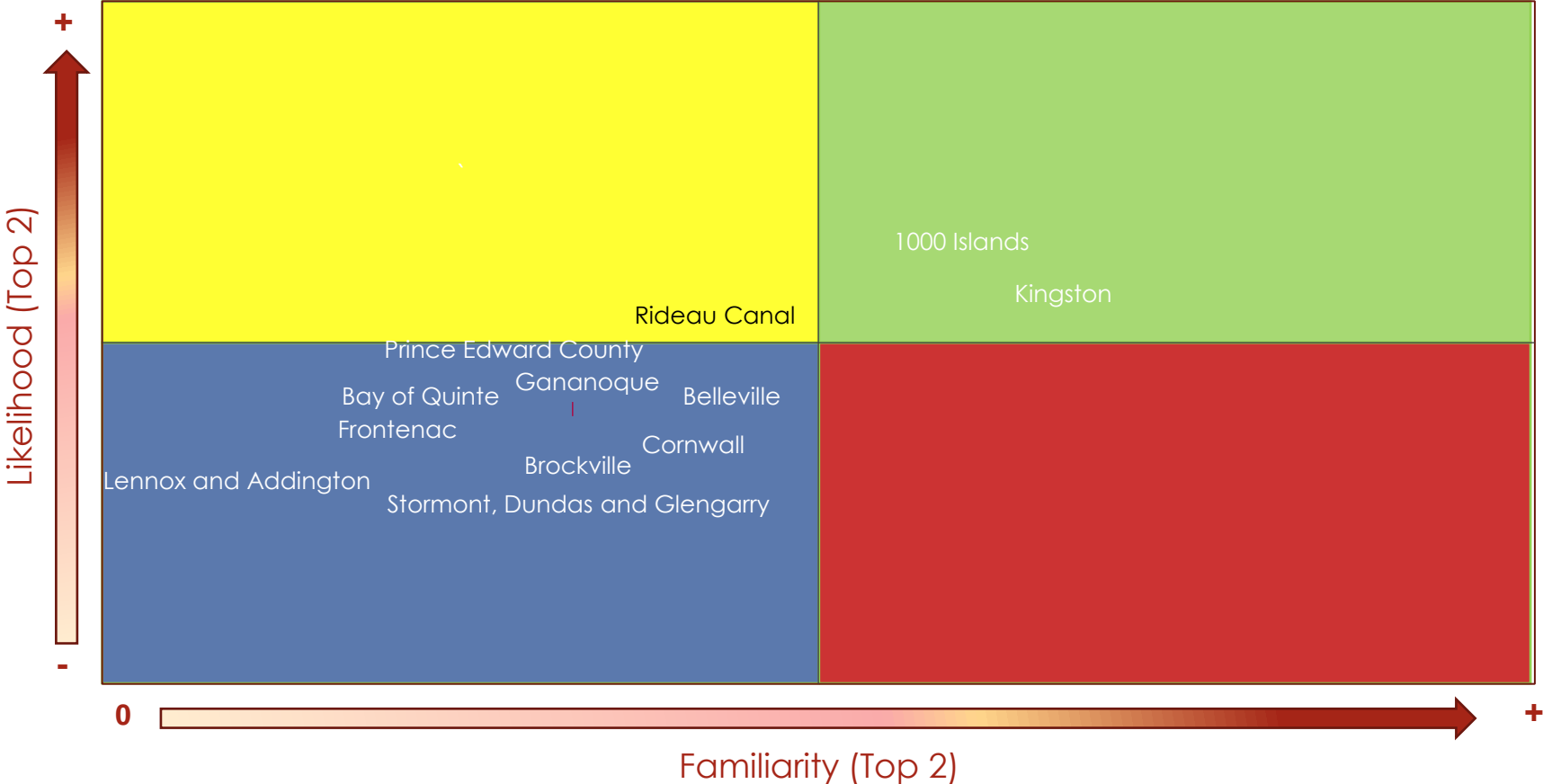
INSIGHT

The numbers assessing the risk of COVID-19 as higher in SE Ontario than their regular vacation destinations is marginally lower (8%) among those who are considering RTO 9 as a possible future vacation destination.

This suggests that perception of COVID-19 risk within the region is not a major factor driving propensity to travel for leisure to SE Ontario specifically.

PROFILE OF DESTINATIONS WITHIN SOUTH EAST ONTARIO

1000 Islands and Kingston are the stand-out destinations within the region both in terms of profile and likelihood to visit

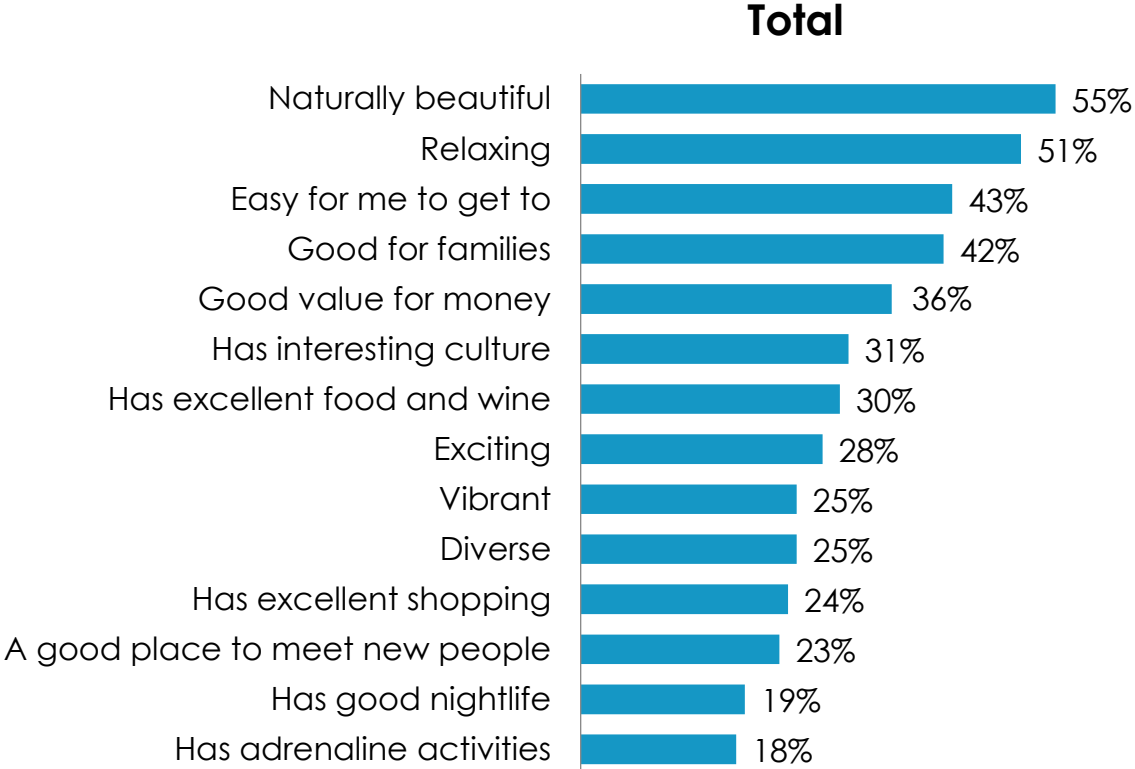


INSIGHT

It is clear that likelihood to visit is strongly correlated with destination profile – the destinations that travellers are most likely to be considering visiting are also those with which they feel most familiar. Thus, Lennox and Addington and Stormont, Dundas and Glengarry can expect to increase visitation if they are able to raise their profile.

QUALITIES ASSOCIATED WITH SE ONTARIO DESTINATIONS

Natural beauty and relaxation are associated with SE Ontario destinations by a majority



INSIGHT

Natural beauty, relaxation, accessibility and suitability for families are the qualities most commonly associated with the various destinations within South-East Ontario.

The qualities least associated reflect the fact that this is a substantially rural destination – it is much less associated with shopping, nightlife, meeting new people or adrenaline activities.

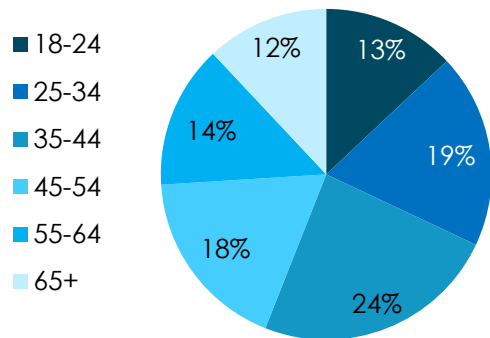
**Section 3: Considerers of Areas Within South Eastern
Ontario**

PROFILE OF CONSIDERERS OF PRINCE EDWARD COUNTY

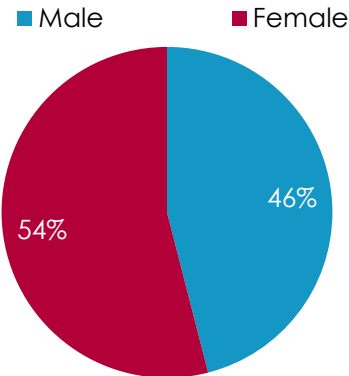
Those considering Prince Edward County skew slightly female (54%), with over half from the GTA (54%)

PRINCE EDWARD COUNTY

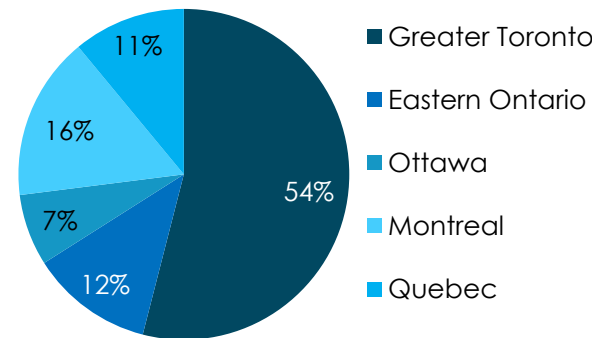
AGE



GENDER



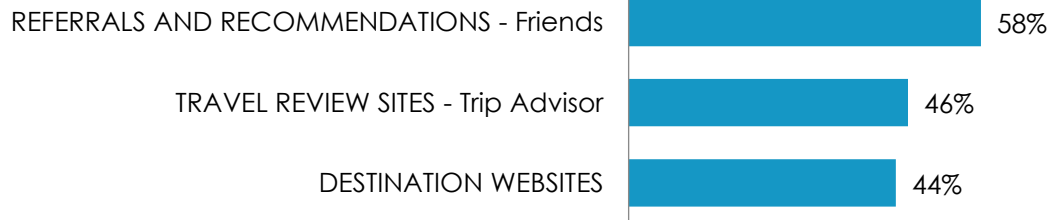
PROVINCE



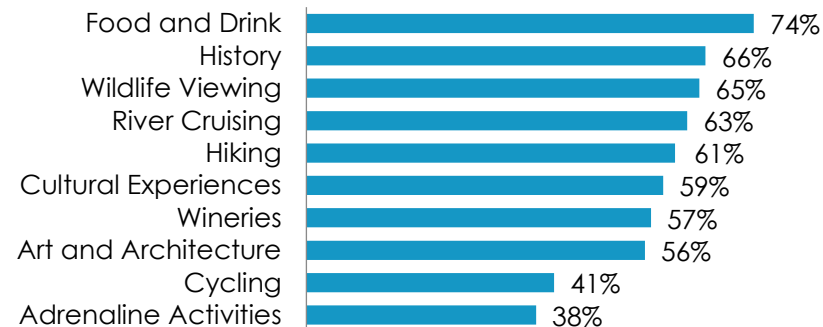
INSIGHT

As with other areas within SE Ontario, those interested in travelling to Prince Edward County are most likely to be interested in food and drink itineraries (74%) – though history (66%) and wildlife viewing (65%) are not far behind. Less than a third (32%) are under 35.

Inspiration Sources



Top vacation activity type



PRINCE EDWARD COUNTY: IMAGE AND ATTRACTIONS

Natural beauty, relaxation and wine top associations with the County; Sandbanks clearly the highest-profile attraction

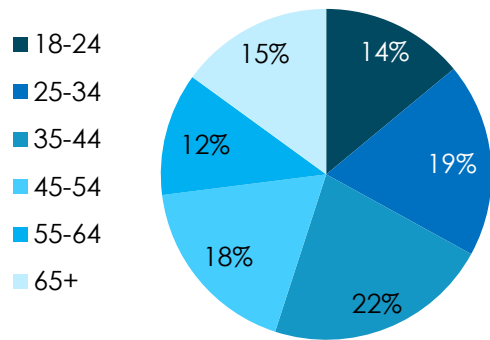
	Prince Edward County
Top 5 Qualities (Q14)	
Naturally beautiful	38%
Relaxing	34%
Has excellent food and wine	29%
Good for families	22%
Easy for me to get to	21%
Top 3 Attractions Likely to Visit (Q16)	
Sandbanks Provincial Park	48%
Sandbanks Estate Winery	41%
Prince Edward County Lavender Farm	41%

PROFILE OF CONSIDERERS OF KINGSTON

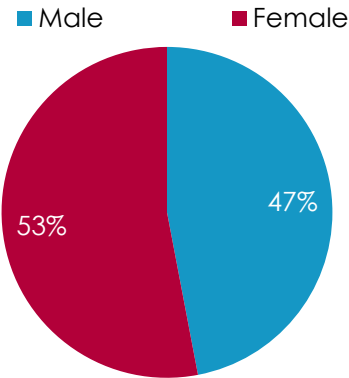
A slightly higher proportion of those considering Kingston are from Montreal (19%)

KINGSTON

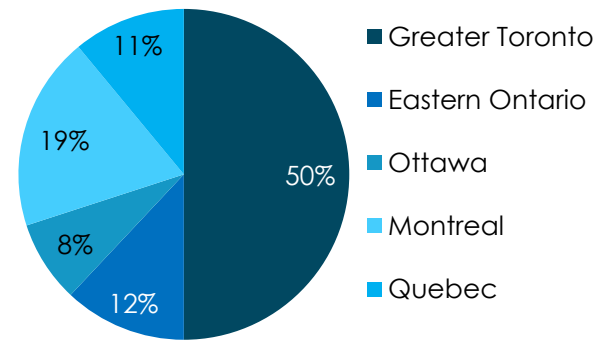
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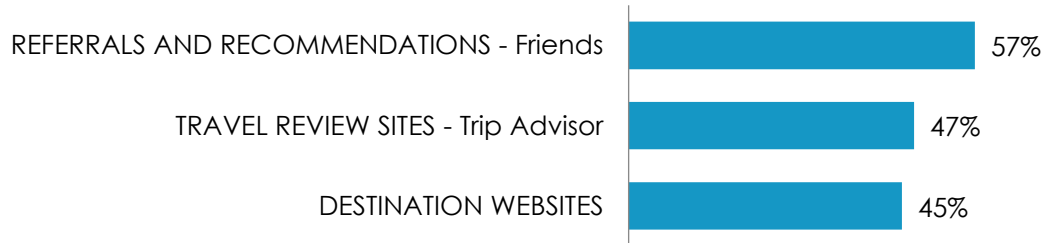
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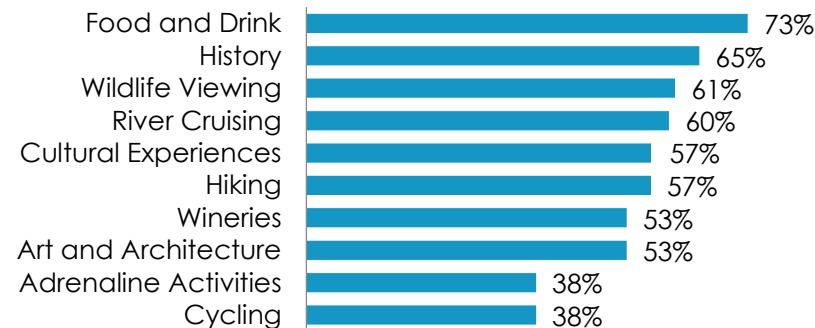
INSIGHT

Food and drink (73%) and history (65%) are the preferred itinerary types of those travellers that say they would consider Kingston as a destination. The popularity of wildlife viewing (61%) and river cruising (60%) suggests they are not only interested in urban attractions.

Inspiration Sources



Top vacation activity type



KINGSTON: IMAGE AND ATTRACTIONS

Accessibility is top association with Kingston, along with natural beauty: 1000 Islands Cruises is top attraction, suggesting that Kingston brand also encompasses 1000 Islands



Kingston	
Top 5 Qualities (Q14)	
Easy for me to get to	27%
Naturally beautiful	26%
Relaxing	25%
Good for families	24%
Good value for money	19%
Top 3 Attractions Likely to Visit (Q16)	
Kingston 1000 Islands Cruises	50%
Fort Henry National Historic Site	39%
Kingston Trolley Tours	37%

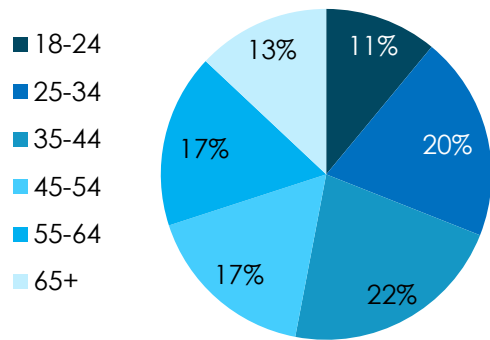
Q25: For each of the destinations within South-Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination
 Q16: And which would you consider visiting on a possible future leisure trip to South-Eastern Ontario?. n= 695

PROFILE OF CONSIDERERS OF GANANOQUE

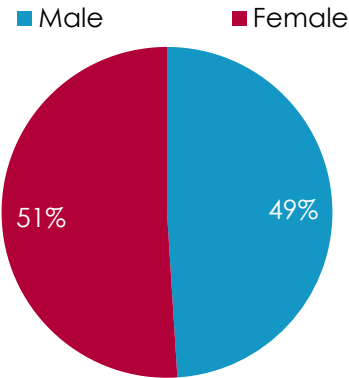
Over a third of those considering Gananoque are in the 45-64 age group (34%)

GANANOQUE

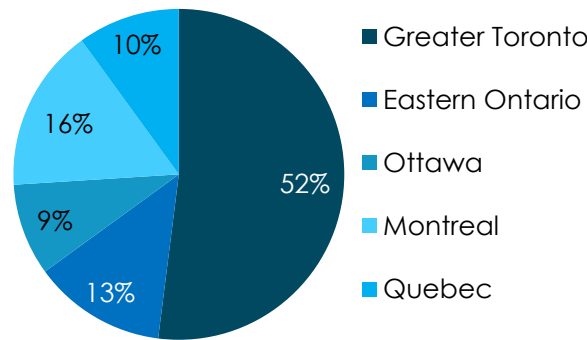
AGE



GENDER



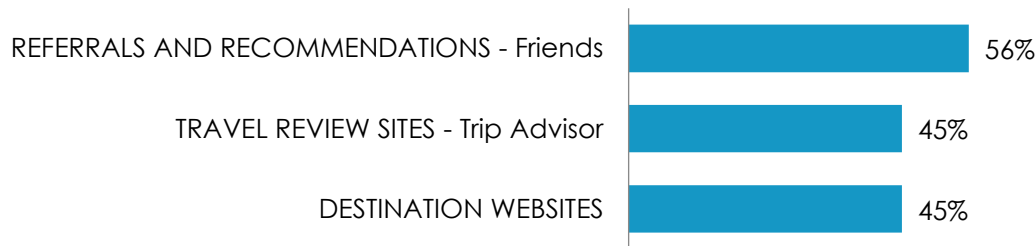
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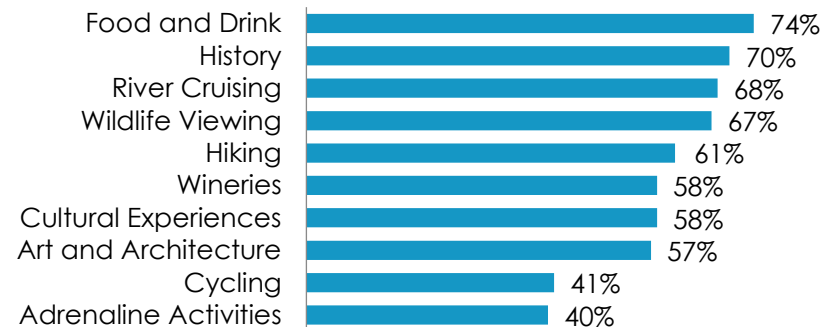
INSIGHT

A little over half of those considering Gananoque are from the GTA (52%). They are broadly balanced by gender (49% male, 51% female) and share the preference for itineraries focused on food and drink (74%), history (70%) and river cruising (68%).

Inspiration Sources



Top vacation activity type



GANANOQUE: IMAGE AND ATTRACTIONS

Natural beauty is top brand association with Gananoque by some distance; Boat Line and Heritage Museum the highest-profile attractions



Gananoque	
Top 5 Qualities (Q14)	
Naturally beautiful	43%
Relaxing	33%
Easy for me to get to	24%
Good for families	19%
Good value for money	18%
Top 3 Attractions Likely to Visit (Q16)	
Gananoque Boat Line	39%
1000 Islands Heritage Museum	38%
1000 Islands Helicopter Tours	37%

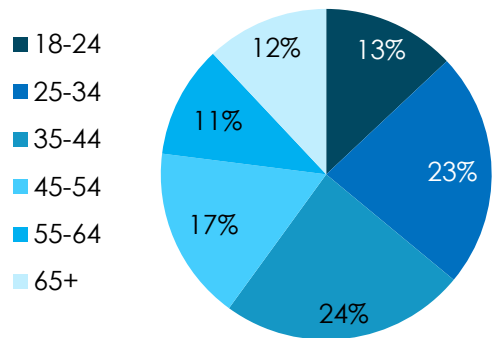
Q25: For each of the destinations within South-Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination
 Q16: And which would you consider visiting on a possible future leisure trip to South-Eastern Ontario?. n= 344

PROFILE OF CONSIDERERS OF CORNWALL

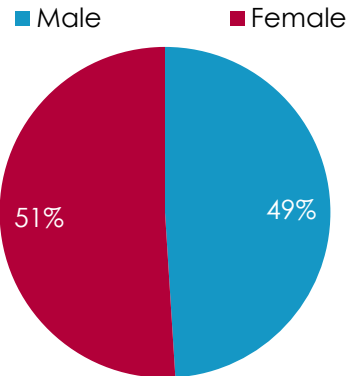
A higher proportion than average of those considering Cornwall are from Montreal (22%)

CORNWALL

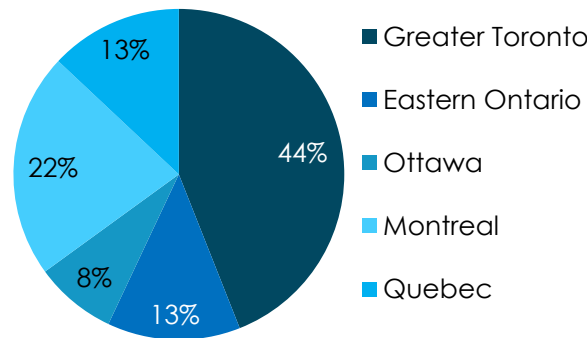
AGE



GENDER



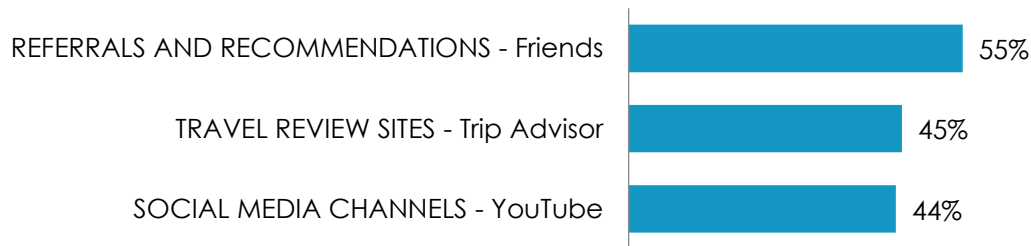
PROVINCE



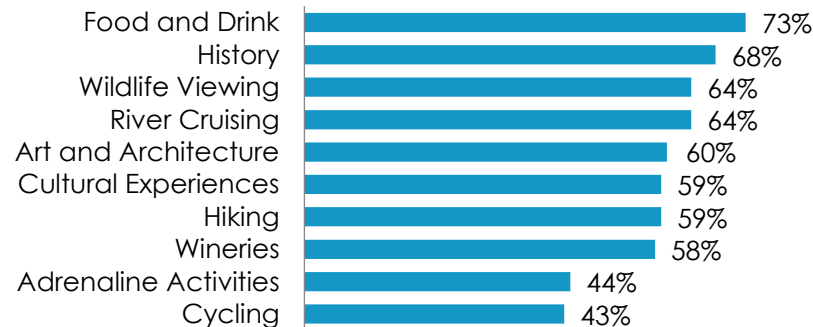
INSIGHT

With more than a third aged under 35, those considering Cornwall are somewhat younger in profile than for other areas within South-Eastern Ontario. Perhaps as a consequence of this, they cite YouTube as one of their top inspiration sources (44%).

Inspiration Sources



Top vacation activity type



CORNWALL: IMAGE AND ATTRACTIONS

Relaxation tops the list of qualities associated with Cornwall, with Upper Canada Village an attraction with significant appeal – nearly half say they will visit (46%)



Cornwall	
Top 5 Qualities (Q14)	
Relaxing	29%
Good for families	24%
Easy for me to get to	24%
Naturally beautiful	23%
Good value for money	18%
Top 3 Attractions Likely to Visit (Q16)	
Upper Canada Village	46%
Historic SDG Jail	37%
Lamoureux Park	34%

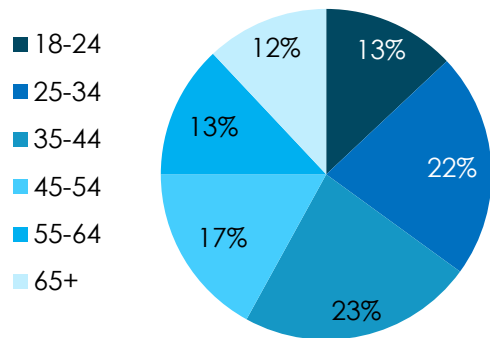
Q25: For each of the destinations within South-Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination
 Q16: And which would you consider visiting on a possible future leisure trip to South-Eastern Ontario?. n= 376

PROFILE OF CONSIDERERS OF BELLEVILLE

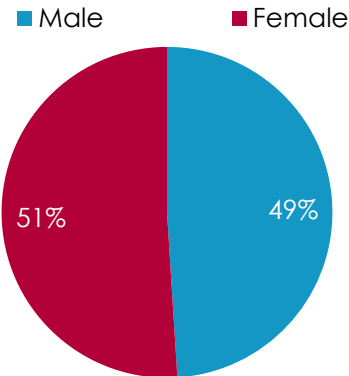
Two-thirds of those considering Belleville are from the GTA or Eastern Ontario (66%)

BELLEVILLE

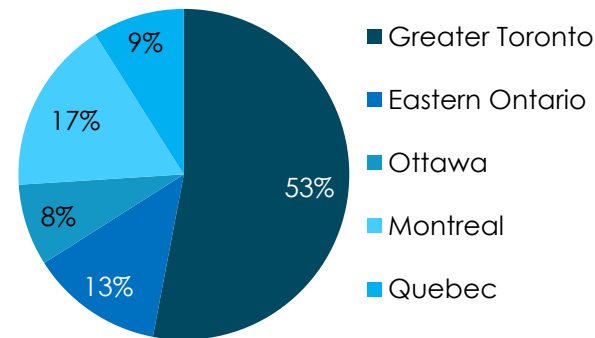
AGE



GENDER



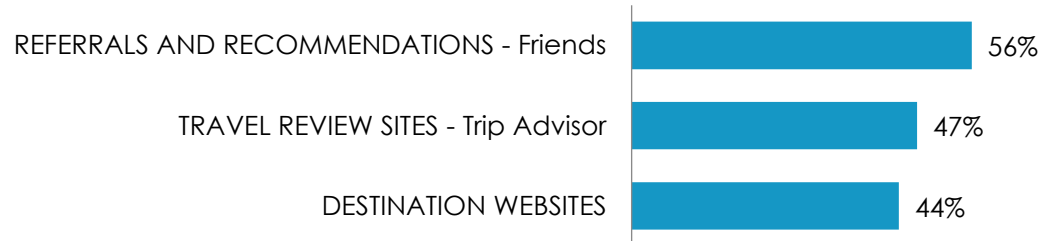
PROVINCE



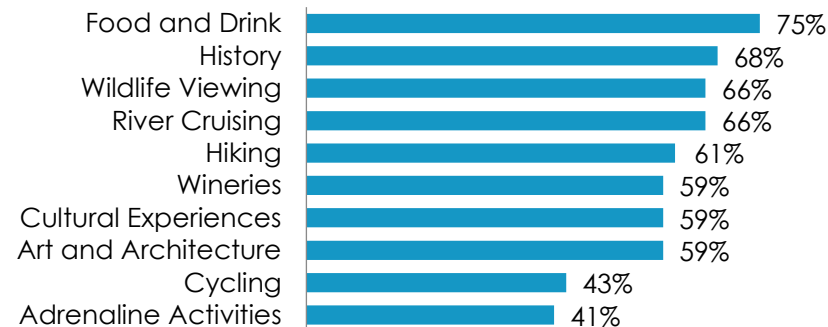
INSIGHT

Nearly half (45%) of those considering Belleville are in the 25-44 age group. They share the preference of travellers generally for itineraries focused on food and drink (75%) and history (68%).

Inspiration Sources



Top vacation activity type



BELLEVILLE: IMAGE AND ATTRACTIONS

No standout quality associated with Belleville, but ease of access narrowly tops the list, mentioned by 27%. More than two in five say that Lost Villages Museum appeals



Belleville	
Top 5 Qualities (Q14)	
Easy for me to get to	27%
Relaxing	26%
Good value for money	22%
Naturally beautiful	21%
Good for families	18%
Top 3 Attractions Likely to Visit (Q16)	
The Lost Villages Museum	41%
Bon Echo Provincial Park	38%
Big Sandy Bay	36%

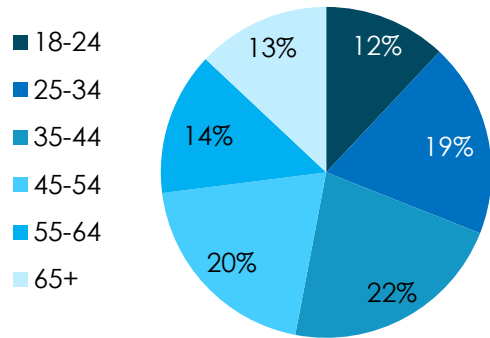
Q25: For each of the destinations within South-Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination
 Q16: And which would you consider visiting on a possible future leisure trip to South-Eastern Ontario?. n= 379

PROFILE OF CONSIDERERS OF BAY OF QUINTE

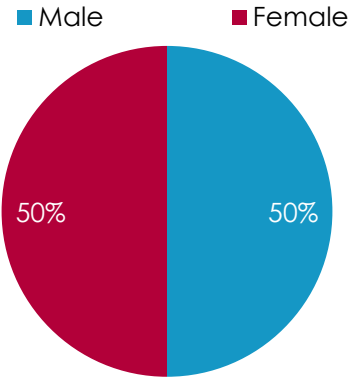
Those considering Bay of Quinte are more likely than average to be from the GTA (55%)

BAY OF QUINTE

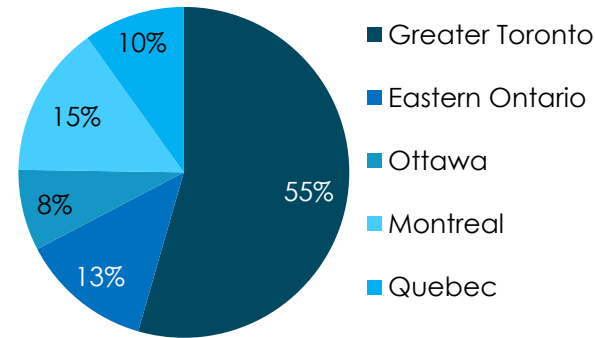
AGE



GENDER



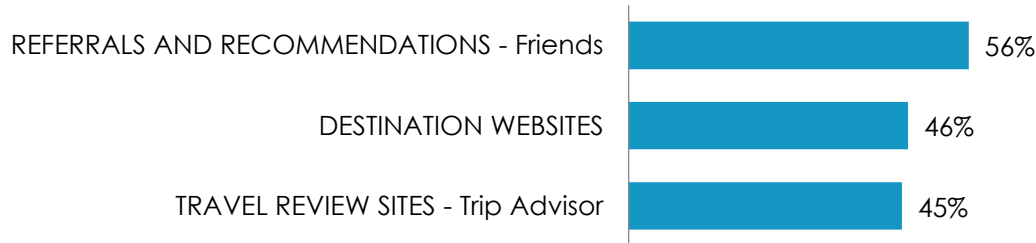
PROVINCE



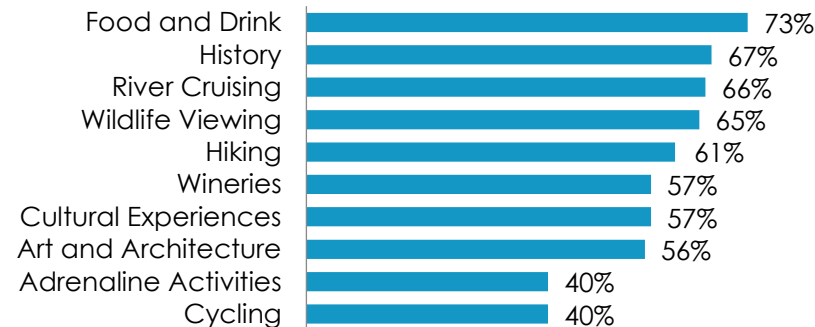
INSIGHT

Bay of Quinte considerers share the preferences of travellers in general for itineraries focused on food and drink (73%), history (67%), river cruising (66%) and wildlife viewing (65%).

Inspiration Sources



Top vacation activity type



BAY OF QUINTE: IMAGE AND ATTRACTIONS

Natural beauty is quality most associated with Bay of Quinte, mentioned by over a third (36%), with Presqu'ile Provincial Park narrowly the most appealing attraction

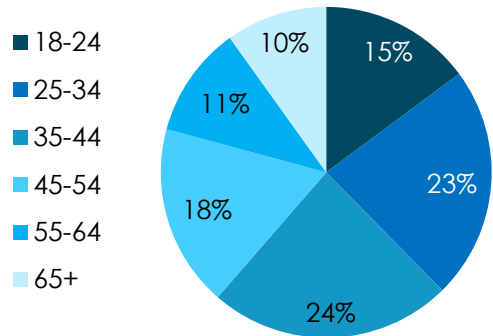
	Bay of Quinte
Top 5 Qualities (Q14)	
Naturally beautiful	36%
Relaxing	29%
Easy for me to get to	21%
Good for families	18%
Good value for money	15%
Top 3 Attractions Likely to Visit (Q16)	
Presqu'ile Provincial Park	38%
Huff Estates Inn and Winery	37%
Glanmore National Historic Site	37%

PROFILE OF CONSIDERERS OF FRONTENAC

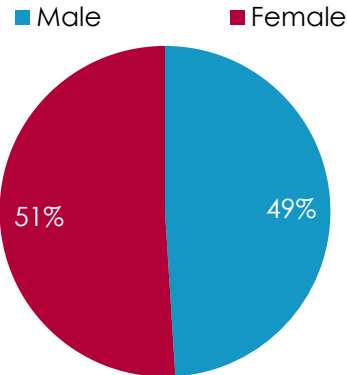
Those considering Frontenac have a slightly younger age profile than average, with nearly two in five under 35 (38%)

FRONTENAC

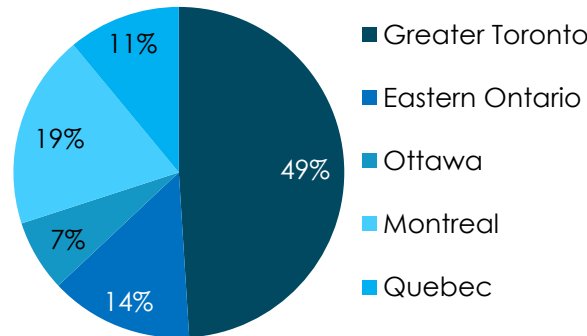
AGE



GENDER



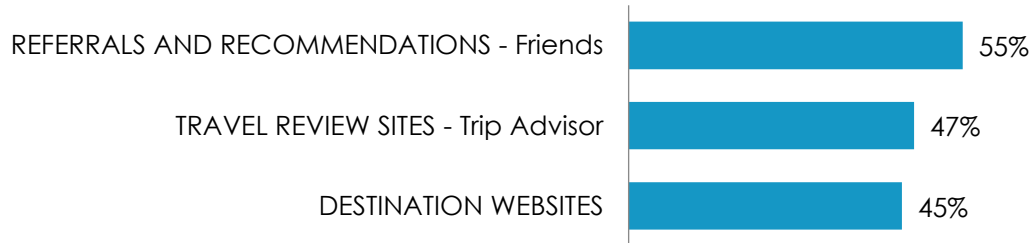
PROVINCE



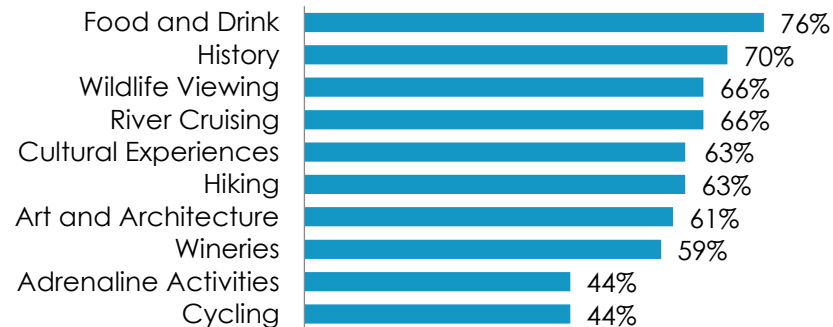
INSIGHT

The proportion of Frontenac considerers from Montreal is slightly above average, at 19%. They also list destination websites as one of their inspiration sources (45%). Otherwise, their itinerary preferences are in line with those of travellers in general.

Inspiration Sources



Top vacation activity type



FRONTENAC: IMAGE AND ATTRACTIONS

Natural beauty and relaxation the standout qualities associated with Frontenac, with the Frontenac Arch and MacKinnon breweries the most appealing attractions



Frontenac	
Top 5 Qualities (Q14)	
Naturally beautiful	30%
Relaxing	27%
Easy for me to get to	20%
Has interesting culture	18%
Good for families	17%
Top 3 Attractions Likely to Visit (Q16)	
Frontenac Arch Biosphere	34%
MacKinnon Brothers Brewing Co.	34%
Fairfield House	27%

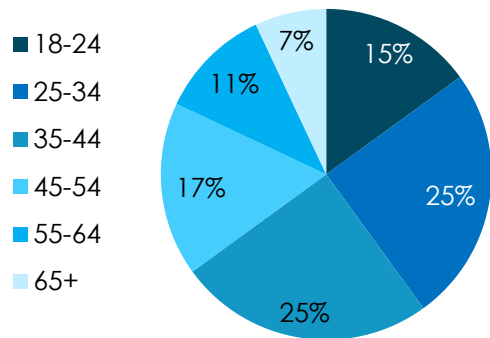
Q25: For each of the destinations within South-Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination
 Q16: And which would you consider visiting on a possible future leisure trip to South-Eastern Ontario?. n= 293

PROFILE OF CONSIDERERS OF LENNOX AND ADDINGTON

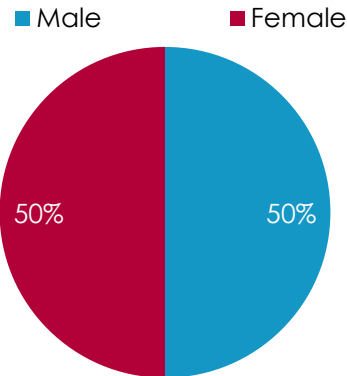
Lennox and Addington considerers are slightly more likely than average to be from the GTA (53%) and have a younger age profile, with 40% under 35

LENNOX AND ADDINGTON

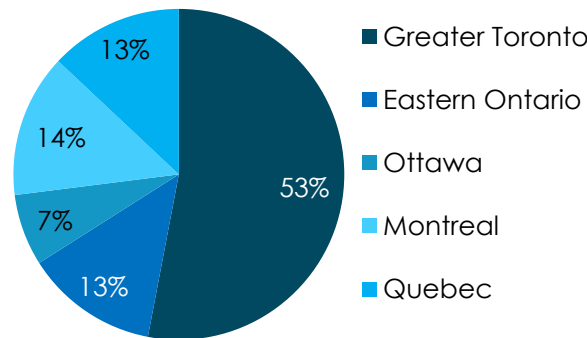
AGE



GENDER



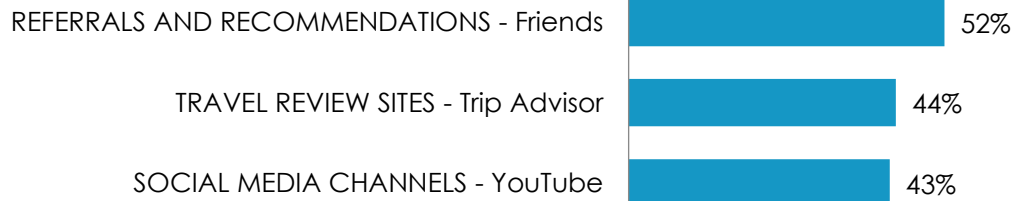
PROVINCE



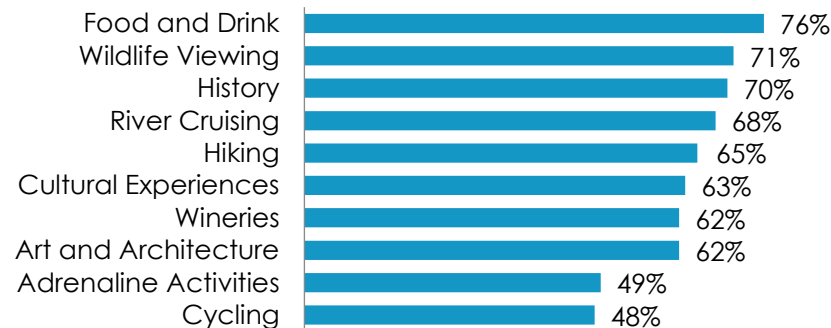
INSIGHT

Wildlife viewing is more popular than average as an itinerary type among those considering Lennox and Addington – it is mentioned by 71%, second only to food and drink (76%).

Inspiration Sources



Top vacation activity type



LENNOX AND ADDINGTON: IMAGE AND ATTRACTIONS

L&A is clearly most associated with relaxation and natural beauty. Dark Sky Viewing Area, which over a third say they will likely visit on a trip there, is standout attraction.



Lennox and Addington	
Top 5 Qualities (Q14)	
Relaxing	28%
Naturally beautiful	23%
Good for families	18%
Easy for me to get to	17%
Exciting	17%
Top 3 Attractions Likely to Visit (Q16)	
Lennox and Addington County Dark Sky Viewing Area	35%
The Blockhouse Museum	33%
Lennox and Addington County Museum & Archives	32%

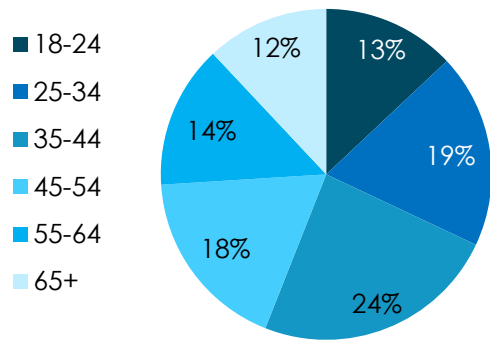
Q25: For each of the destinations within South-Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination
 Q16: And which would you consider visiting on a possible future leisure trip to South-Eastern Ontario?. n= 209

PROFILE OF CONSIDERERS OF RIDEAU CANAL

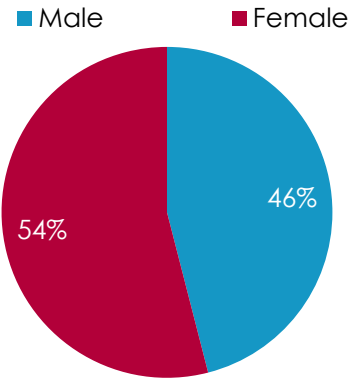
More than half of those considering the Rideau Canal are aged between 35 and 64 (56%), and they skew slightly female (54%)

RIDEAU CANAL

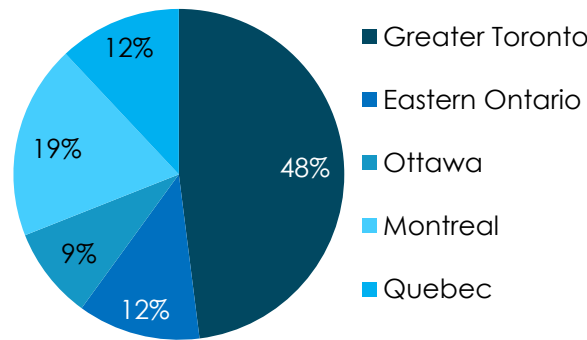
AGE



GENDER



PROVINCE

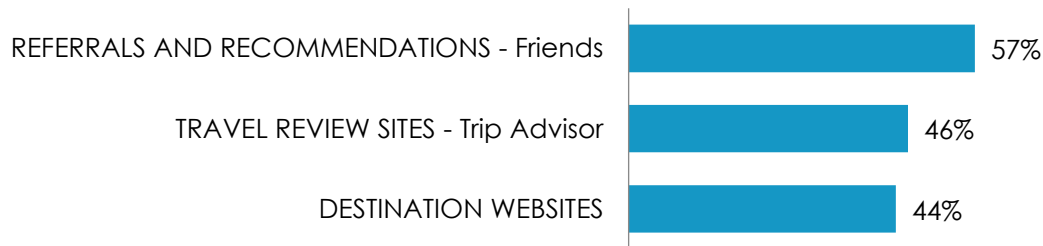


INSIGHT

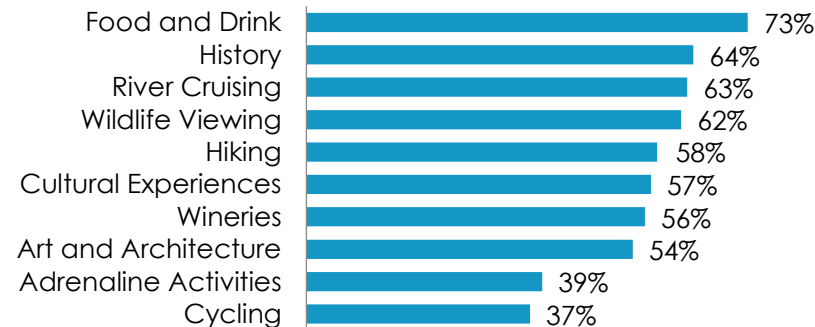
While river cruising is mentioned by 63% as a preferred itinerary type of those interested in visiting the Rideau Canal, even more mention food and drink (73%) and history (64%).

Nearly one in five (19%) are from Montreal.

Inspiration Sources



Top vacation activity type



RIDEAU CANAL: IMAGE AND ATTRACTIONS

Natural beauty is quality most associated with Rideau Canal, ahead of relaxation. Rideau Trail is top attraction, with more than two in five likely to visit (41%)



	Rideau Canal
Top 5 Qualities (Q14)	
Naturally beautiful	38%
Relaxing	29%
Good for families	25%
Easy for me to get to	22%
Exciting	17%
Top 3 Attractions Likely to Visit (Q16)	
Rideau Trail	41%
Foley Mountain Conservation Area	34%
Westport Brewing Company	32%

Q25: For each of the destinations within South-Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination
 Q16: And which would you consider visiting on a possible future leisure trip to South-Eastern Ontario?. n= 550

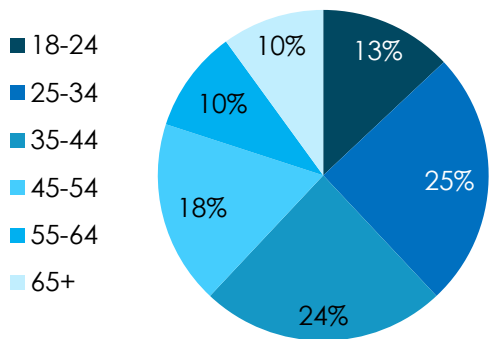
PROFILE OF CONSIDERERS OF STORMONT, DUNDAS & GLENGARRY



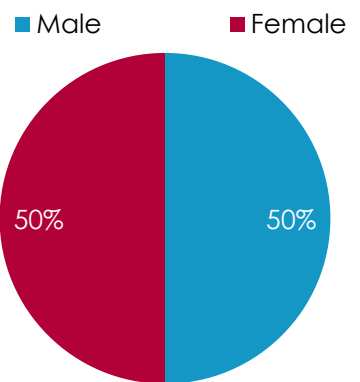
Those considering SDG Counties as a destination are slightly more likely to be from the GTA (52%) and slightly younger, with 38% aged under 35

STORMONT, DUNDAS AND GLENGARRY

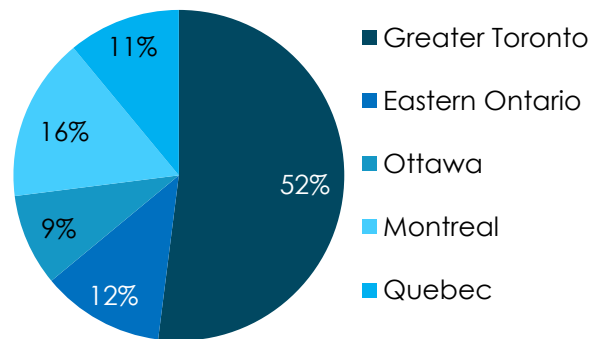
AGE



GENDER



PROVINCE



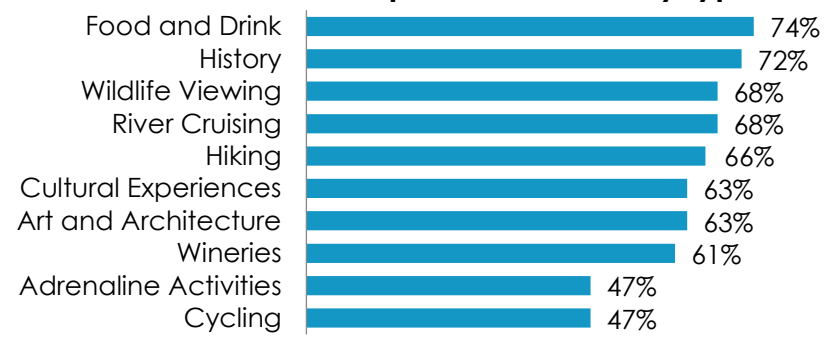
INSIGHT

The itinerary preferences of those considering SDG Counties as a destination mirror those of travellers more generally, with food and drink (74%), history (72%) and wildlife viewing (68%) most popular.

Inspiration Sources



Top vacation activity type



Q30: How old are you? Q32: Are you...? S1A. Which province do you live in? Q22: When you choose a destination within Canada for a leisure trip, which of the following sources are usually most important in inspiring you? Q15: Thinking about a possible future trip to South-Eastern Ontario, how interested, if at all, would you be in a vacation focused on the following types of activities? Please use the scale below, where 1 means you would not be at all interested in that type of vacation within South-Eastern Ontario, and 5 means you would be very interested. n= 462

STORMONT, DUNDAS & GLENGARRY: IMAGE AND ATTRACTIONS

No one standout quality for SDG Counties, but relaxation, natural beauty and ease of access all mentioned by more than a third, and Cataraqi Trail has appeal for 35%

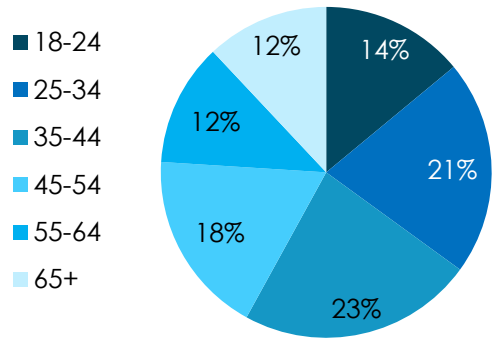
Stormont, Dundas and Glengarry	
Top 5 Qualities (Q14)	
Relaxing	26%
Naturally beautiful	23%
Easy for me to get to	21%
Good value for money	20%
Good for families	20%
Top 3 Attractions Likely to Visit (Q16)	
The Cataraqi Trail	35%
MacKinnon Brothers Brewing Co.	34%
Shorelines Casino	31%

PROFILE OF CONSIDERERS OF BROCKVILLE

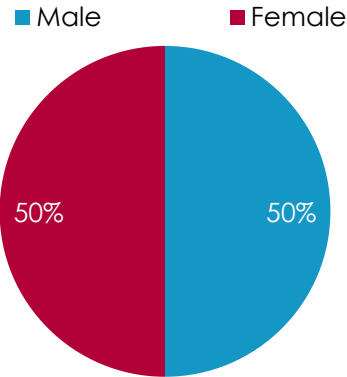
Destination websites are the second most important source of inspiration for those considering Brockville (46%)

BROCKVILLE

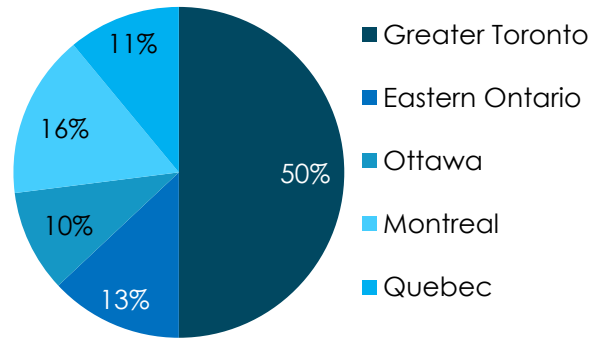
AGE



GENDER



PROVINCE



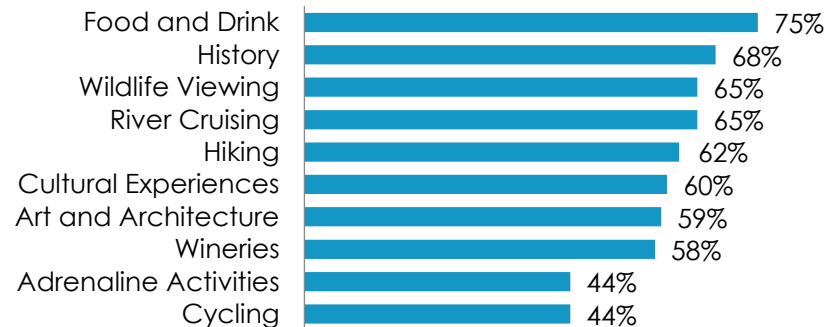
INSIGHT

Itinerary preferences for those considering Brockville are in line with those of travellers more generally, with food and drink (75%), history (68%) and wildlife viewing (65%) most popular.

Inspiration Sources



Top vacation activity type



BROCKVILLE: IMAGE AND ATTRACTIONS

Relaxation and ease of access are top qualities for Brockville, mentioned by more than a quarter. Brockville Museum and Railway Tunnel hold most appeal as attractions



Brockville	
Top 5 Qualities (Q14)	
Relaxing	28%
Easy for me to get to	27%
Naturally beautiful	25%
Good for families	23%
Good value for money	21%
Top 3 Attractions Likely to Visit (Q16)	
Brockville Museum	36%
Brockville Railway Tunnel	34%
Brockville Arts Centre	32%

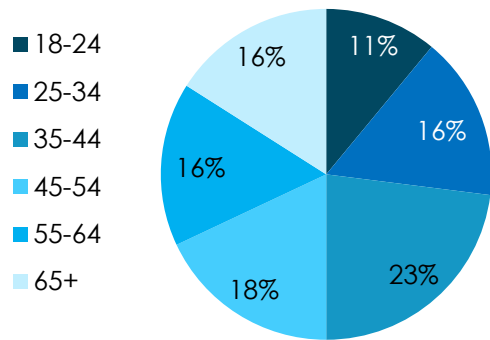
Q25: For each of the destinations within South-Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination
 Q16: And which would you consider visiting on a possible future leisure trip to South-Eastern Ontario?. n= 323

PROFILE OF CONSIDERERS OF 1000 ISLANDS

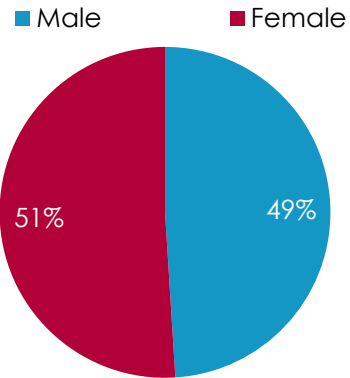
Those considering 1000 Islands skew somewhat older, with nearly a third (32%) over 55

1000 ISLANDS

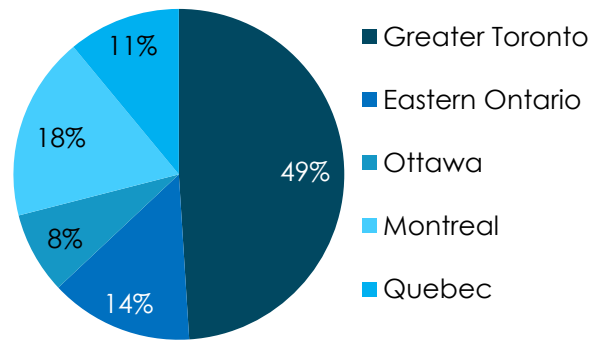
AGE



GENDER



PROVINCE



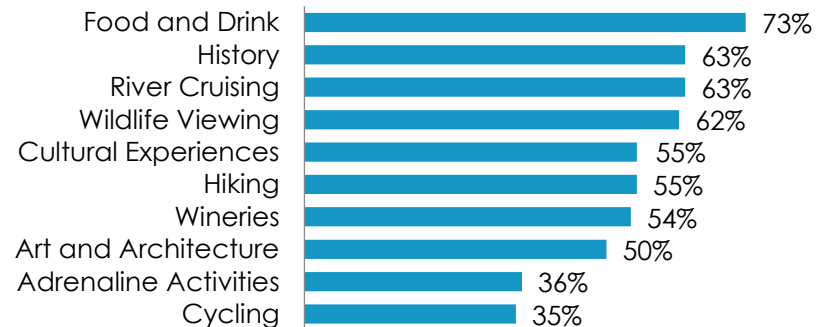
INSIGHT

The itinerary preferences of those considering 1000 Islands are broadly in line with those of travellers as a whole, with food and drink (73%), history (63%) and river cruising (63%) most popular.

Inspiration Sources



Top vacation activity type



1000 ISLANDS: IMAGE AND ATTRACTIONS

Natural beauty is clearly the standout quality associated with 1000 Islands, mentioned by over half. Nearly as many (46%) say they will likely visit the National Park when there

1000 Islands	
Top 5 Qualities (Q14)	
Naturally beautiful	52%
Relaxing	37%
Good for families	26%
Easy for me to get to	21%
Exciting	19%
Top 3 Attractions Likely to Visit (Q16)	
Thousand Islands National Park	46%
OLG Casino Thousand Islands	36%
1000 Islands Kayaking	36%

**Section 4: The Region in Detail: South Eastern Ontario
Destinations and Attractions**

ATTRACTIONS WITHIN SE ONTARIO – PROFILE AND INTEREST

1000 Islands, Sandbanks and Kingston attractions have the highest profile

	Have heard of	Would Visit
Kingston 1000 Islands Cruises	55%	50%
Sandbanks Provincial Park	54%	48%
Upper Canada Village	53%	46%
Kingston Penitentiary	48%	36%
Thousand Islands National Park	47%	46%
National Air Force Museum	46%	36%
1000 Islands Heritage Museum	42%	38%
Fort Henry National Historic Site	42%	39%
Rideau Trail	42%	41%
1000 Islands Kayaking	41%	36%
1000 Islands Helicopter Tours	40%	37%
Frontenac Provincial Park	40%	37%
OLG Casino Thousand Islands	40%	36%
Gananoque Boat Line	39%	39%
Bon Echo Provincial Park	38%	38%
Kingston Trolley Tours	35%	37%
Prince Edward County Lavender Farm	35%	41%
The Lost Villages Museum	35%	41%
Thousand Islands Playhouse	35%	37%
Fairfield House	34%	27%
Historic SDG Jail	34%	37%
Lamoureux Park	34%	34%
Presqu'île Provincial Park	34%	38%
Prince Edward County Arts Trail	34%	36%
Sandbanks Estate Winery	34%	41%
Brockville Railway Tunnel	33%	34%
Shorelines Casino	33%	31%

	Have heard of	Would Visit
Brockville Arts Centre	32%	32%
Brockville Museum	32%	36%
Cornwall Community Museum	32%	33%
Prince Edward County Taste Trail	32%	40%
The Grand Theatre, Kingston	32%	34%
The Regent Theatre	32%	34%
Big Sandy Bay	31%	36%
Grills Orchards	31%	30%
Huff Estates Inn and Winery	31%	37%
Macaulay Heritage Park	31%	33%
MacKinnon Brothers Brewing Co.	31%	34%
The Cataraqui Trail	31%	35%
Westport Brewing Company	31%	32%
Batawa Ski Hill	30%	30%
Frontenac Arch Biosphere	30%	34%
Lennox and Addington County Dark Sky Viewing Area	30%	35%
Le Boat	29%	28%
Lennox and Addington County Museum & Archives	29%	32%
Agnes Etherington Art Centre	28%	32%
Glanmore National Historic Site	28%	37%
K&P Trail	28%	32%
North Frontenac Dark Sky Preserve	28%	33%
Parrott's Bay Conservation Area	28%	32%
Fulford Place	27%	31%
The Blockhouse Museum	27%	33%
Foley Mountain Conservation Area	26%	34%

INSIGHT

The attractions that enjoy the highest profile among travellers within Ontario and Quebec are also those associated with the destinations that are best-known – 1000 Islands and Kingston, as well as Sandbanks.

Awareness is moderate to low for most, however, with only the 1000 Islands Cruises, Sandbanks Provincial Park and Upper Canada Village known to more than half. Encouragingly, more than a third say they would be interested in visiting most attractions.

DMOs in the region should consider what can be done to promote those attractions where stated interest in visiting is relatively high despite lower awareness – these include the PEC Taste Trail, Sandbanks Estate Winery and the Lost Villages Museum.

QUALITIES ASSOCIATED WITH SE ONTARIO DESTINATIONS

Relatively little differentiation in image of different areas within SE Ontario

INSIGHT

When travellers are asked to evaluate different areas within SE Ontario, a consistent picture emerges.

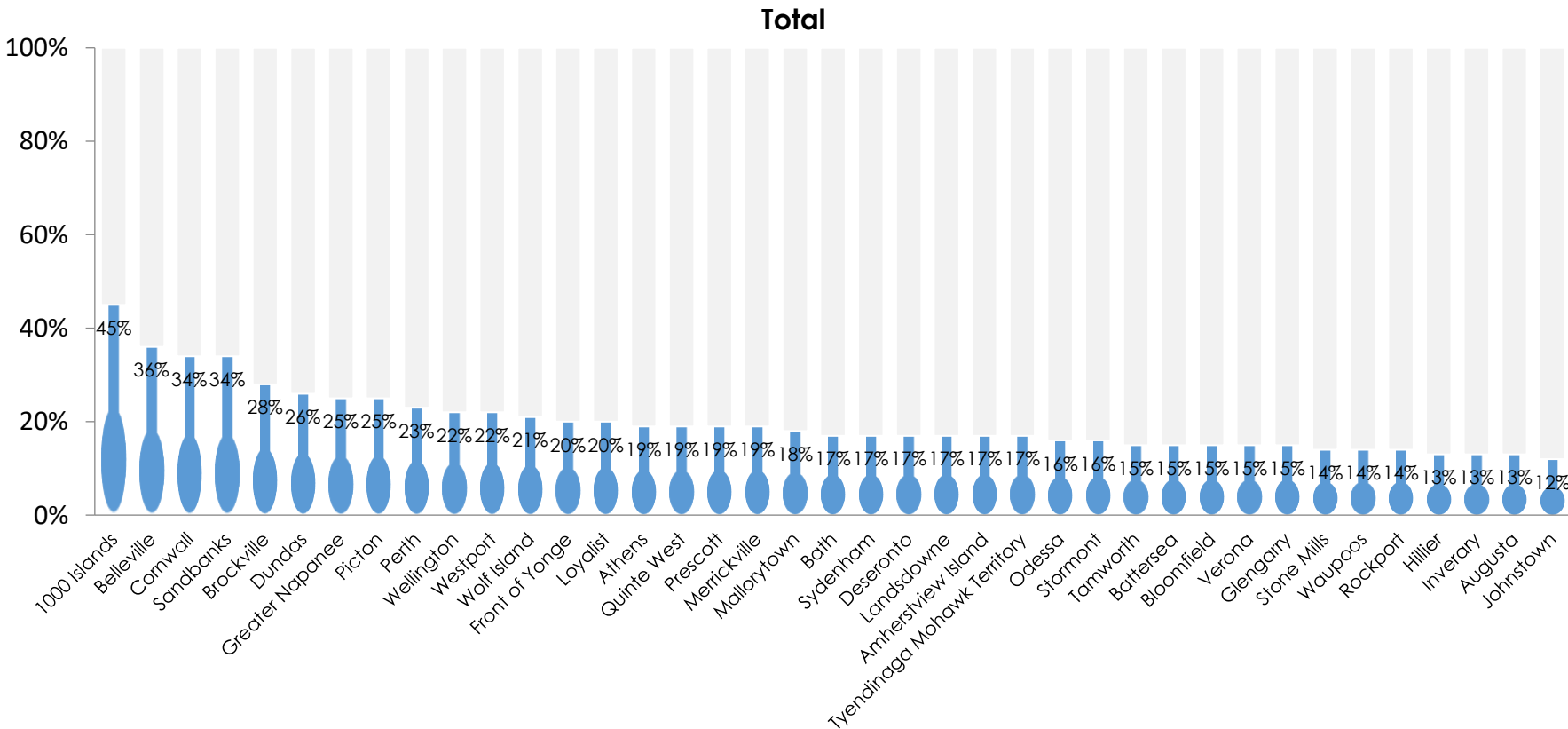
Natural beauty or the opportunity for relaxation is the top quality associated with all but three areas – Kingston, Belleville and Cornwall are most commonly seen as ‘easy for me to get to’.

There is even more consensus about the least associated quality – for all areas, this is either nightlife or adrenaline activities.

	Kingston (n=954)	1000 Islands (n=827)	Rideau Canal (n=766)	Belleville (n=630)	Cornwall (n=602)	Prince Edward County (n=591)	Brockville (n=526)	Gananoque (n=504)	Bay of Quinte (n=444)	Frontenac (n=396)	Stormont, Dundas and Glengarry (n=350)	Lennox and Addington (n=307)
Likely to consider?	57%	64%	54%	38%	38%	49%	35%	37%	41%	36%	30%	29%
Familiarity	62%	54%	50%	41%	39%	39%	34%	33%	29%	26%	23%	20%
Most Associated												
Easy for me to get to	31%	--	--	32%	28%	--	--	--	--	--	--	--
Naturally beautiful	25%	52%	38%	--	--	36%	22%	39%	36%	29%	24%	23%
Relaxing	--	36%	28%	27%	25%	31%	29%	32%	29%	26%	26%	26%
Least Associated												
Diverse	--	7%	--	--	--	--	--	--	--	--	--	--
Has excellent shopping	--	--	7%	--	--	--	--	6%	--	--	--	--
Has good nightlife	10%	5%	6%	7%	7%	6%	6%	5%	9%	8%	8%	8%
Has adrenaline activities	5%	--	--	6%	8%	7%	5%	--	7%	6%	5%	9%

PROFILE OF SPECIFIC DESTINATIONS WITHIN SE ONTARIO

Most destinations within the region have a relatively low profile, with 1000 Islands the main exception



INSIGHT

Only three destination communities plus 1000 Islands are familiar to more than a third of travellers – Belleville, Cornwall and Sandbanks. The majority tested here are familiar to less than one in five.

Q18: Here are some specific destinations within South-Eastern Ontario. How familiar, if at all, are you with each as a tourism destination? Please answer using the scale below, where 1 means you are not familiar at all, and 5 means you are very familiar. n= 1531

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VANCOUVER

TORONTO

NEW YORK

BERLIN

CAPETOWN

LONDON