



Regional Tourism  
ORGANIZATION



## SOUTH EASTERN ONTARIO CONSUMER INSIGHTS RESEARCH – WAVE 2

A topline report based on a custom destination brand  
survey of travel consumers in Ontario and Quebec

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# ABOUT THIS RESEARCH REPORT

This report summarizes the topline findings of the second wave of consumer brand research conducted by Twenty31 Consulting on behalf of RTO 9 in February 2022. It presents a current and statistically representative assessment of the market for travel to South Eastern Ontario among travellers in Ontario and Quebec.

It covers the following themes, with relevant tracking metrics where applicable:

- 1 **Perspectives on leisure travel in 2022** – the key motivators and barriers to leisure travel this year
- 2 **Indicators of travel patterns in Canada and Ontario** – the likely destination of upcoming leisure travel, recent travel patterns within Ontario and the brand profile of leading destinations within Ontario
- 3 **Perspectives on leisure travel within South Eastern Ontario** – the level of consideration of South Eastern Ontario as a destination, how this has changed and the profile of those who consider it, spontaneous associations with the region and likely motivators to select South Eastern Ontario in future
- 4 **Perspectives on destinations within South Eastern Ontario** – the brand image of specific areas and destinations within the region, awareness and likelihood to consider them and the the brand profile and appeal of specific attractions
- 5 **Contextual issues** – the assessment of COVID risk and the awareness of the tourism staffing crisis within South Eastern Ontario and the likely impact of these on the choice of the region as a destination

A fuller description of the methodology is provided overleaf.

# THIS RESEARCH IS BASED A SURVEY OF OVER 1,000 TRAVELLERS ACROSS REGIONAL TARGET MARKETS FOR SOUTH EASTERN ONTARIO

## METHODOLOGY

- The findings detailed in this report are based on a quantitative market research survey of a representative sample of n=1,011 identified travel consumers across key regional travel markets for South Eastern Ontario:
  - The Greater Toronto Area (GTA)
  - Eastern Ontario
  - Ottawa
  - Montreal
  - Quebec
- Fieldwork was carried out online in February/March 2022, in English and French, using market research panels from Toluna/SSI. A representative sample of the adult online population in the target regions was drawn, and stratified by age, gender and region. This sample was then sent a survey invitation by email, and respondents screened to identify domestic leisure travellers.
- These were defined as those who either: 1. Had taken an overnight holiday/vacation trip in the past three years within Canada (i.e., since February 2019); and/or 2. Were likely to take an overnight holiday/vacation trip within Canada in the next 12 months (i.e., by February 2023).
- Results are representative of the online adult traveller population in each market and full-sample results are considered accurate within +/- 2 to 3 percentage points, 19 times out of 20. Sampling tolerances for results from sub-groups will be larger.
- The survey uses a questionnaire developed by Twenty31 Consulting in collaboration with RTO 9. Several questions track those asked in the first wave of this research in January 2021. However, changes to answer scales mean that tracking is indicative in some cases.
- Note that 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.

## 1 Perspectives on leisure travel in 2022

- **Leisure travel priorities and barriers in 2022 have not shifted significantly since 2021** among those in the key regional markets for South Eastern Ontario covered by this survey. Relaxation remains the top priority; however, the last year has seen an uptick in those citing the need for a break from routine and to spend time with their family as well as a slight decline in those interested in gastronomy, culture and shopping-driven trips. This context ought to be favourable for South Eastern Ontario, given its tourism offering.
- **The overwhelming majority say they plan to take a leisure trip this year;** the few who do not most commonly cite cost and COVID anxiety as a barrier.

## 2 Travel within Canada and Ontario

- **However, travel intentions have evolved a little in the context of ongoing COVID-related travel restrictions in early 2022.** The numbers who say they plan to take their next leisure trip within their own province is stable, but there has been a significant increase in those planning to travel outside their province, and a corresponding decrease in the proportions looking to go abroad for their next trip.
- **The effect of two years of the pandemic is also apparent in the pattern of leisure travel within Ontario** – the proportion reporting that they have travelled very or fairly often within the province over the last three to five years has declined, and now stands at less than two in five.
- **The profile of Ontario's main destinations remains consistent from 2021.** Toronto, Ottawa and the Niagara region remain well ahead in terms of familiarity, but two South Eastern Ontario destinations, Kingston and the 1000 Islands, continue to be better known than important destinations outside the region such as Muskoka and Algonquin Park.



### 3 Perspectives on leisure travel within South Eastern Ontario

- **Consideration of South Eastern Ontario has declined somewhat since 2021.** The proportion indicating they are likely to consider the region for their next leisure trip has fallen from 42% to 36% in the last year. This may reflect latent demand for out-of-province travel, potentially to visit friends and family, that has built up during the course of the pandemic, and a slightly different travel mindset among those willing to contemplate leisure travel during COVID.
- **The profile of South Eastern Ontario considerers remains consistent.** They are much more likely to have children in their household, and somewhat more likely to be middle to high earners, more highly educated and more concentrated in Eastern Ontario.
- **Spontaneous associations with the South Eastern Ontario brand often link it with natural beauty and relaxation.** Few negative associations are apparent. Promotions and other initiatives to reduce the cost of a trip appear most likely to incentivize travel to the region, though events and festivals in the region would also be appealing for some.
- **The value of word of mouth is apparent when it comes to selecting South Eastern Ontario as a destination.** Referrals and recommendations from family and friends are well ahead of other channels when it comes to destination inspiration and trip planning. When it comes to booking travel, accommodation or attractions, Expedia emerges as the top channel.
- **Gastronomy continues to be the most popular itinerary type for leisure travel to South Eastern Ontario,** with nearly two-thirds interested. However, around half are also interested in wildlife viewing, river cruising and history.

### 4 Perspectives on South Eastern Ontario destinations

- **The profile of different areas within South Eastern Ontario remains consistent with 2021.** Kingston, the 1000 Islands and Rideau Canal are ahead of other destinations, including Prince Edward County, in terms of profile. Consideration is clearly closely linked to familiarity – these most familiar areas are also the only destinations that a majority say they would consider for their next trip.
- **The brand image of South Eastern Ontario is consistent across all its constituent areas.** Natural beauty, accessibility and relaxation are the defining features of most of the individual areas, although Prince Edward County also has a strong association with good food and wine. This suggests that a unified marketing strategy with consistent messaging has the potential to work across the region.
- **Most leisure travellers are not familiar with specific destinations within South Eastern Ontario.** 1000 Islands is the only specific destination that a majority feels familiar with, although Belleville, Sandbanks and Cornwall are all familiar to more than two in five.
- **When it comes to individual attractions, Sandbanks, Upper Canada Village, Fort Henry and the Kingston 1000 Islands Cruises are both the most familiar and the most appealing.** Most potential Sandbanks visitors think they would likely make a day trip and bring their own food – but large majorities also think they would take part in activities across the local area.



### 5 Contextual issues

- **Despite the impact of COVID on travel patterns, there is no evidence that tourism to South Eastern Ontario is particularly likely to be hit hard.** Travellers overwhelmingly see the COVID risk in South Eastern Ontario as the same or lower than their usual destination, and a majority also tend to believe that the risk of COVID will not prevent them from taking their preferred vacation.
- **Even so, those with higher COVID risk tolerance are significantly more likely to be considering a visit to South Eastern Ontario.** This probably reflects a generally higher appetite for travel to a range of destinations.
- **Awareness of the staffing crisis is moderate, but there appears little evidence it will hit traveller numbers to the region.** Around a half say they are aware of it. On balance, travellers tend to see it as a serious problem in South Eastern Ontario – but most also say it is unlikely to impact their likelihood to choose the destination.

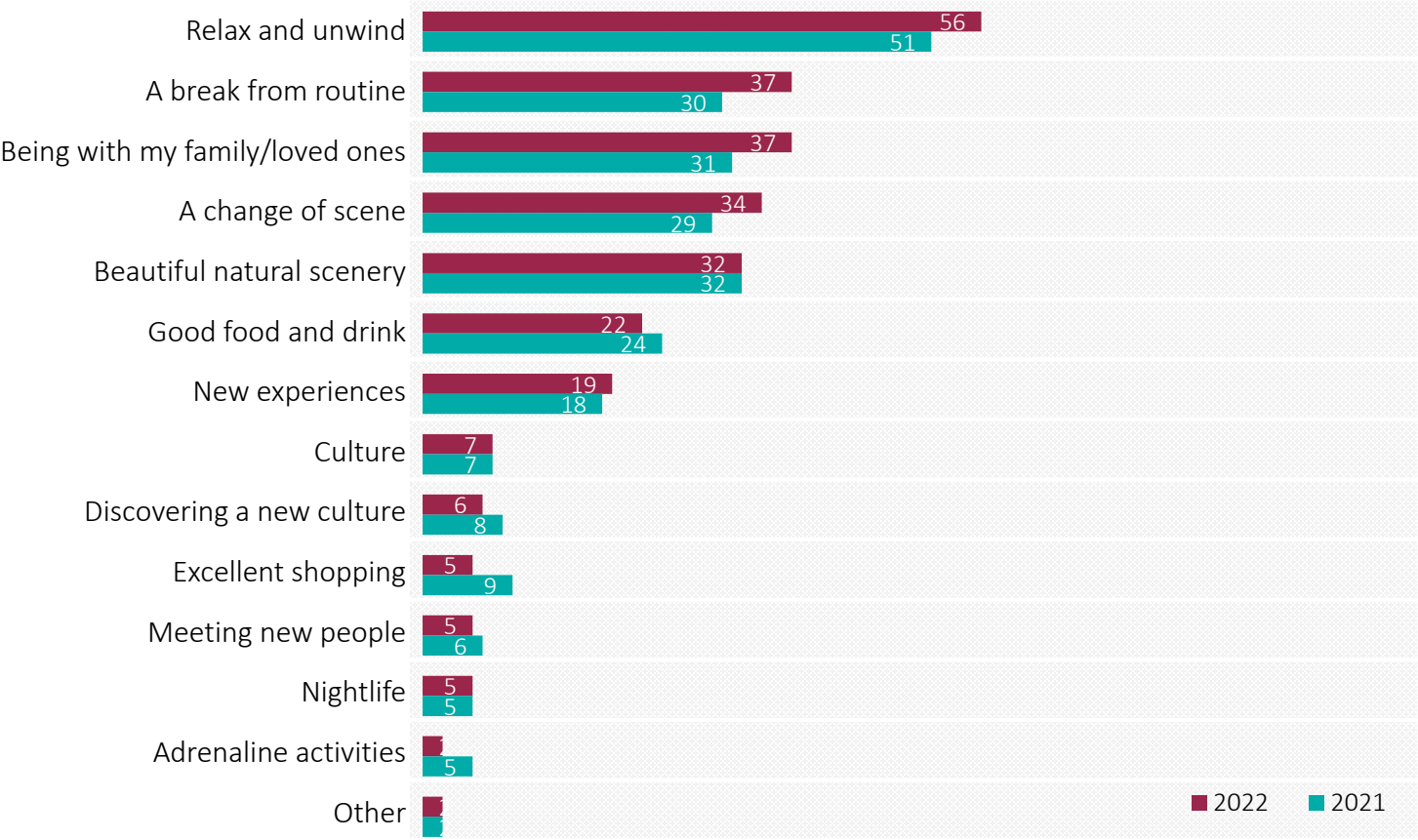


## SECTION 1: PERSPECTIVES ON LEISURE TRAVEL IN 2022

- Travel priorities for 2022 and motivations for upcoming trips
- Barriers among those not intending to travel

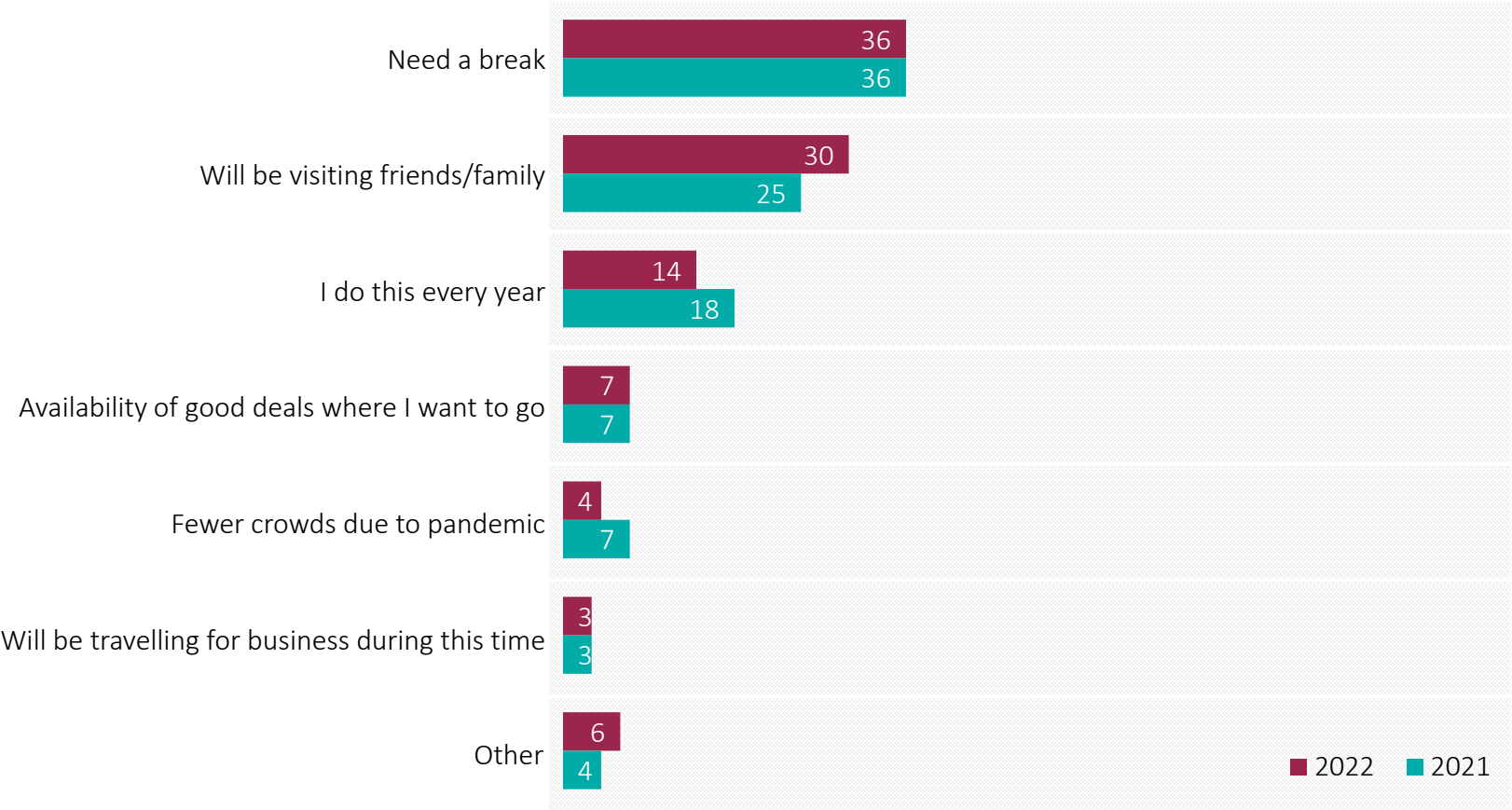
# TRAVEL PRIORITIES FOR LEISURE TRIP IN NEXT 12 MONTHS

Relaxation remains top travel priority; increases since 2021 in those wanting a break from routine and time with family, while food and drink, shopping and culture see slight declines year-on-year as priorities



# PRIMARY MOTIVATION FOR PLANNED LEISURE TRIPS

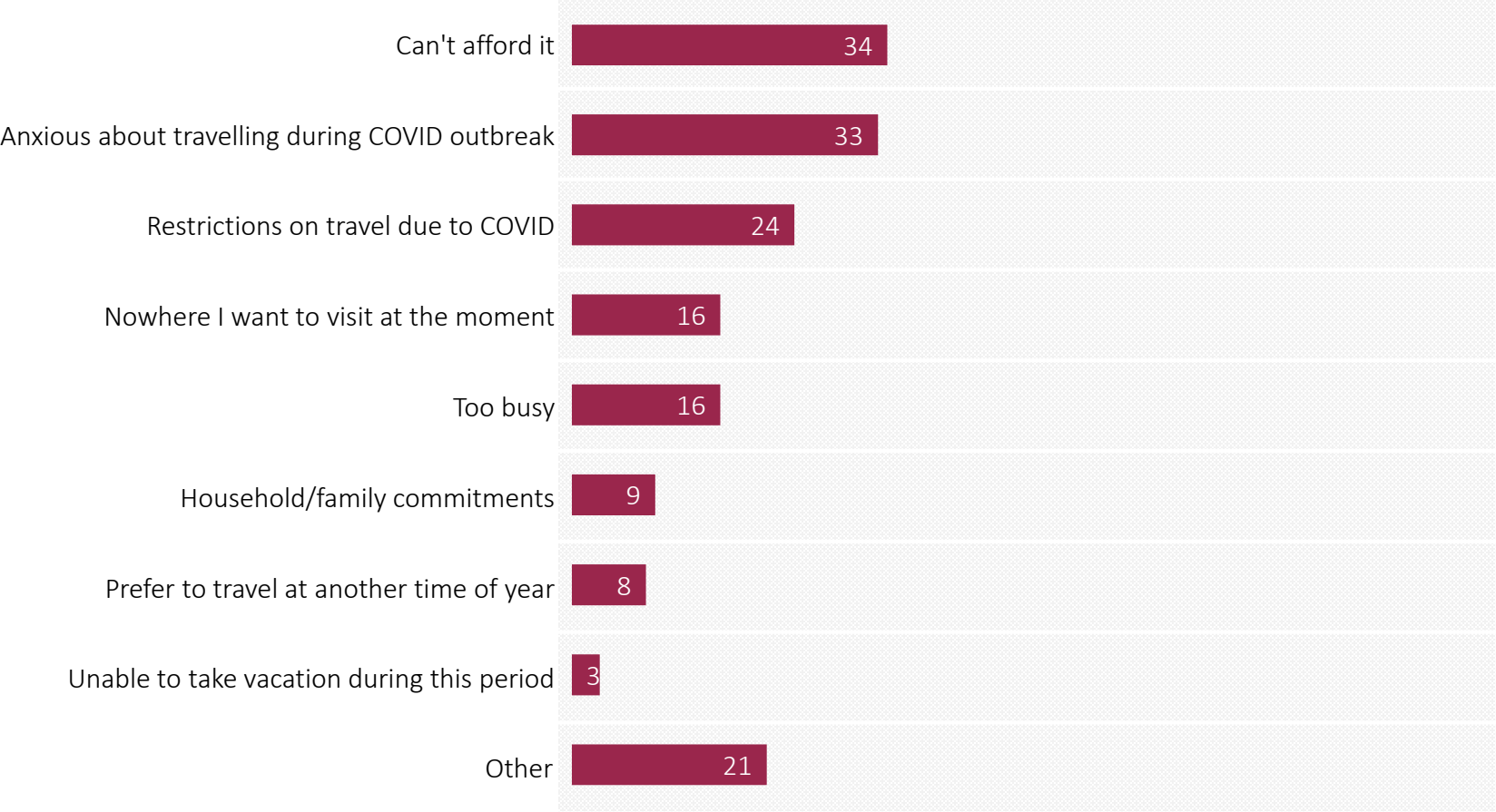
Visiting friends and family has increased as a motivation for a leisure trip in 2022, with habit declining a little





# BARRIERS TO TRAVEL

Cost, COVID anxiety and travel restrictions are main reasons given by the few who do not plan an overnight leisure trip in next year





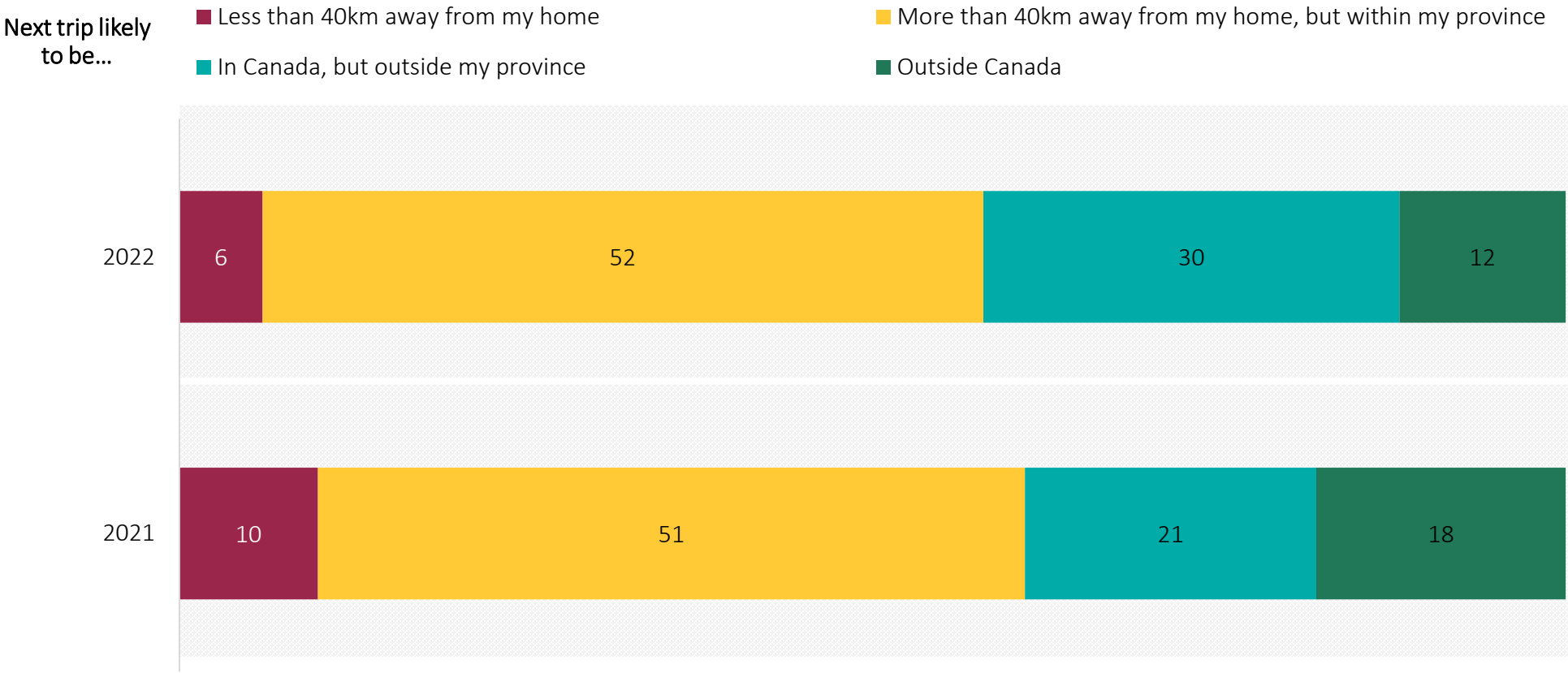
## SECTION 2: TRAVEL WITHIN CANADA AND ONTARIO

- Likely destination of next trip
- Frequency of travel within Ontario
- Profile of frequent Ontario leisure travellers
- Familiarity with key Ontario destinations



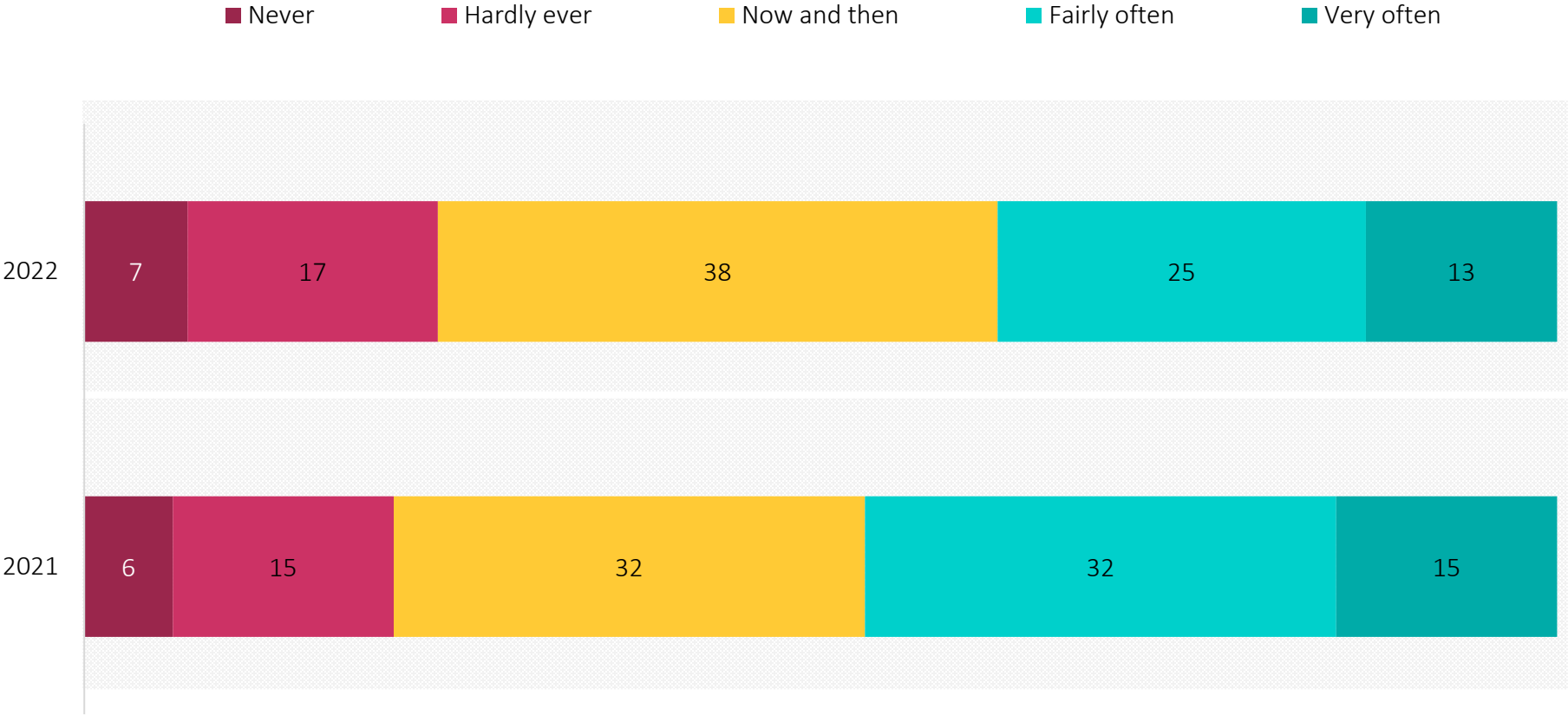
# LIKELY DESTINATION OF NEXT LEISURE TRIP

Likelihood of taking domestic leisure trip outside own province has grown since last year, with fewer planning foreign trip amid pandemic restrictions in early 2022



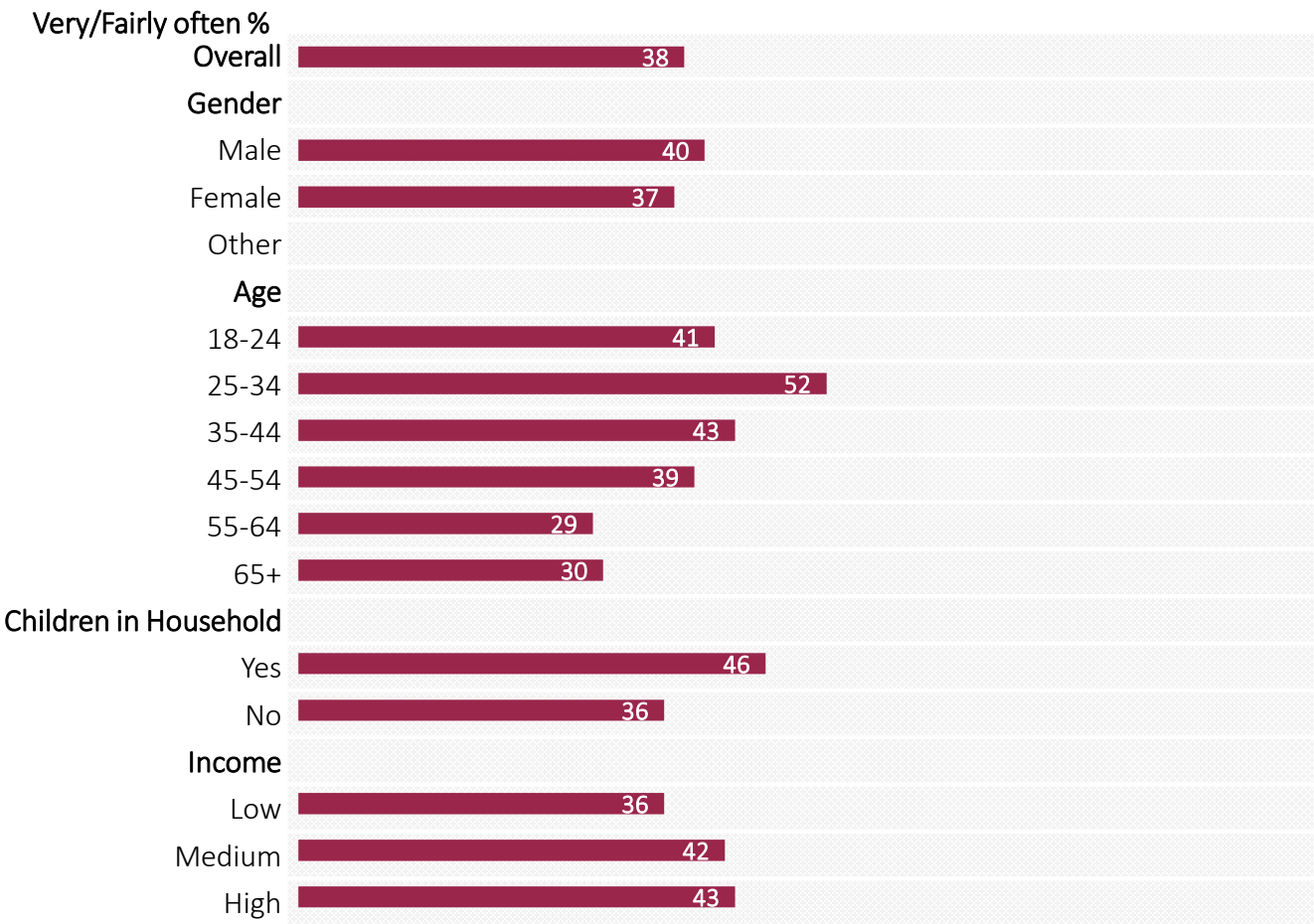
# FREQUENCY OF LEISURE TRAVEL WITHIN ONTARIO

The impact of the COVID-19 pandemic is apparent in declining numbers who report that they have travelled extensively within Ontario in the last three to five years



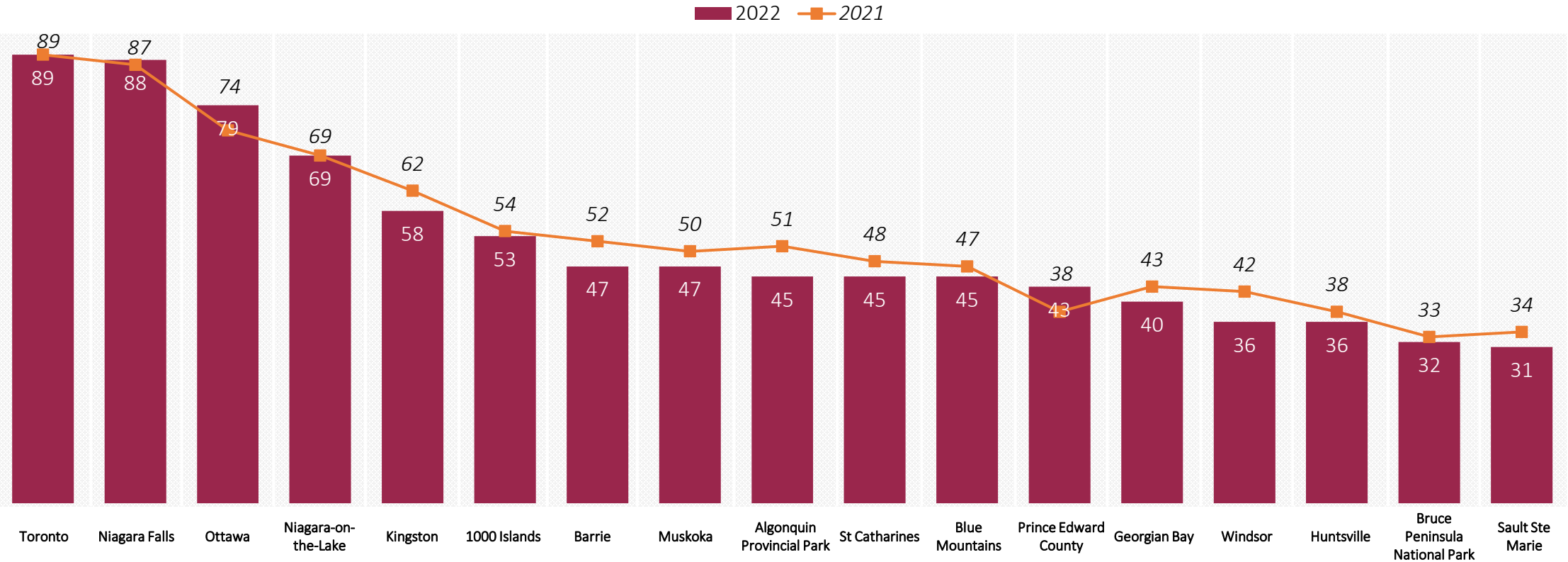
# PROFILE OF LEISURE TRAVELLERS IN ONTARIO

25-34 year olds, those with children and those on higher incomes somewhat more likely to be frequent leisure travellers in Ontario

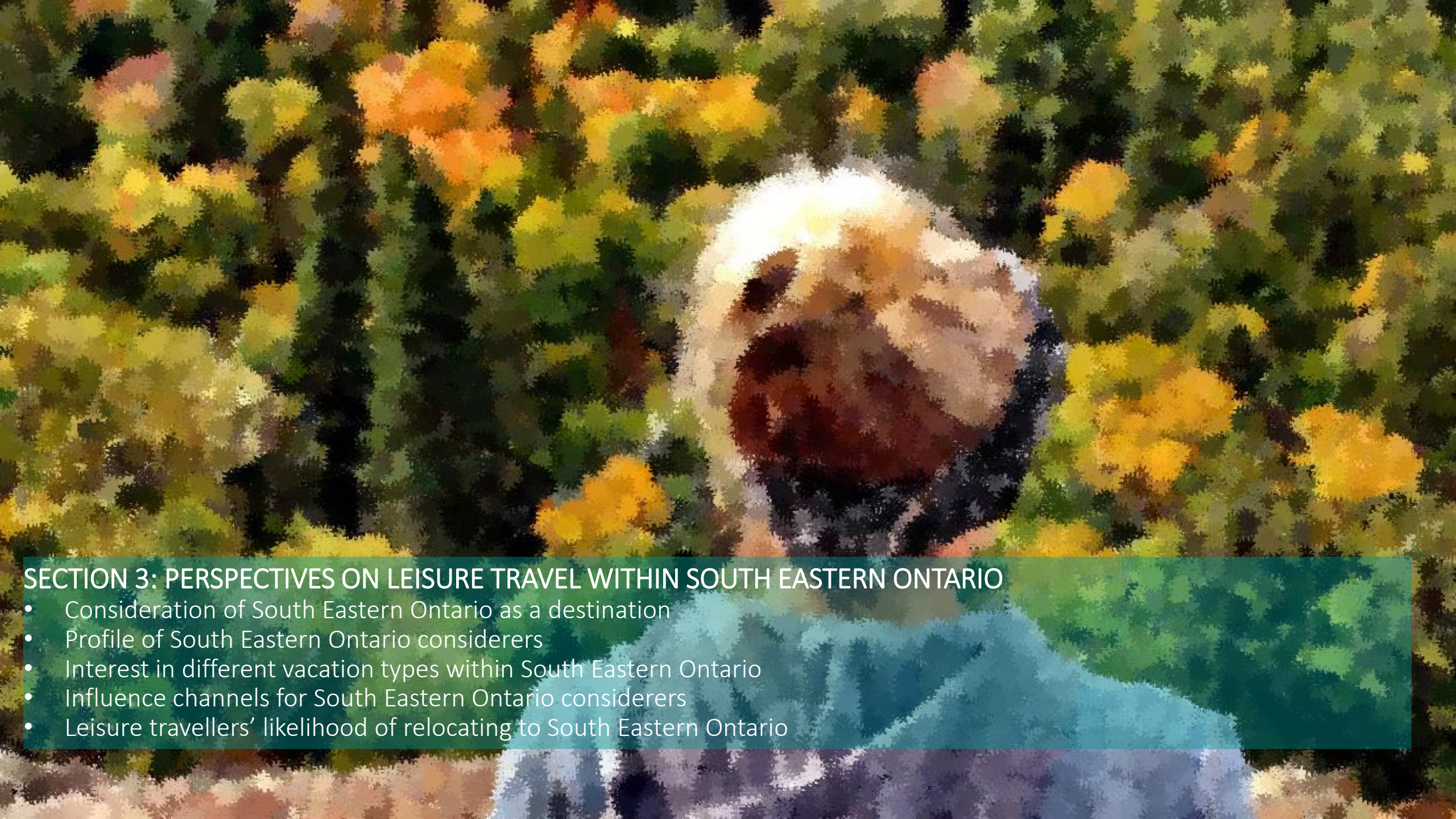


# FAMILIARITY WITH TOURISM OFFERING OF LEADING DESTINATIONS WITHIN ONTARIO

Toronto, Niagara and Ottawa remain the only Ontario destinations known by large majorities, but Kingston and Thousand Islands are ahead of Muskoka and Algonquin Park in terms of profile







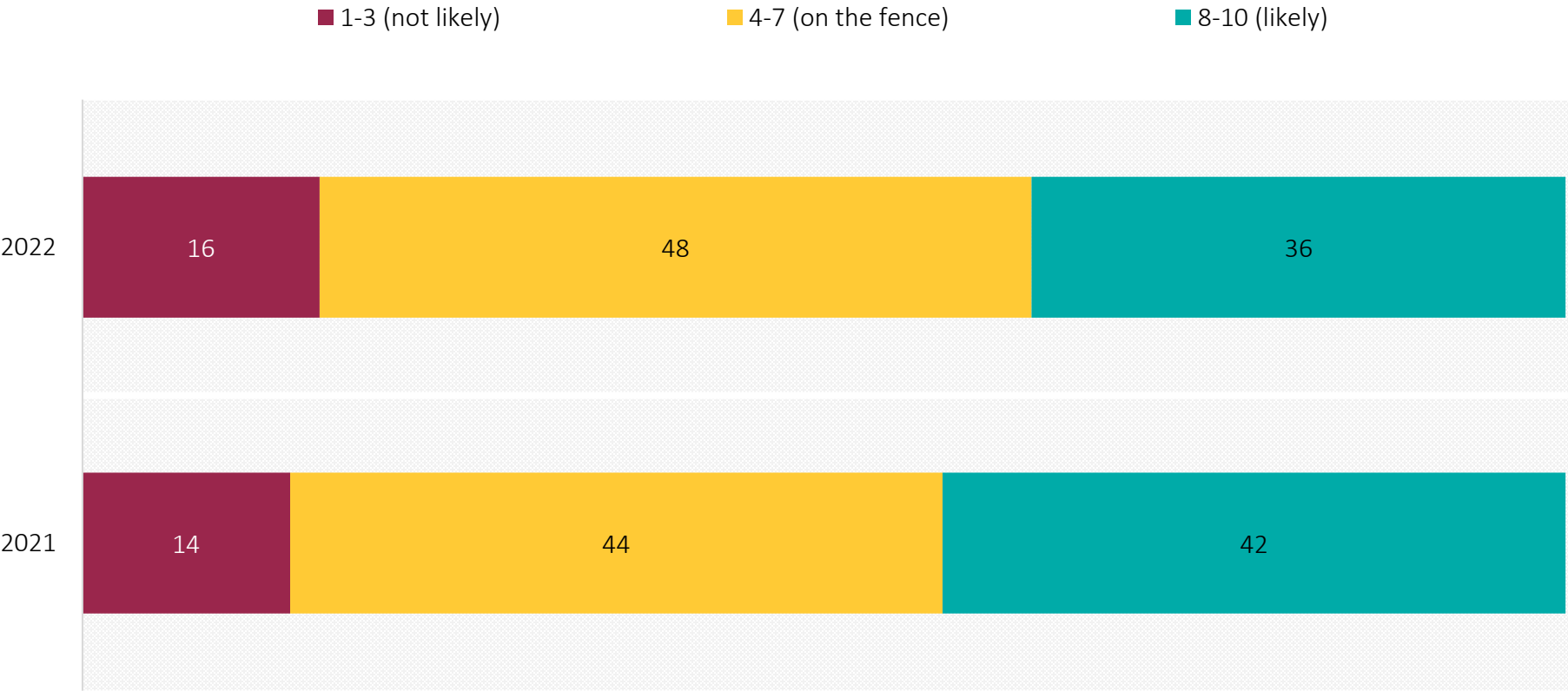
### SECTION 3: PERSPECTIVES ON LEISURE TRAVEL WITHIN SOUTH EASTERN ONTARIO

- Consideration of South Eastern Ontario as a destination
- Profile of South Eastern Ontario considerers
- Interest in different vacation types within South Eastern Ontario
- Influence channels for South Eastern Ontario considerers
- Leisure travellers' likelihood of relocating to South Eastern Ontario



# CONSIDERATION OF SOUTH EASTERN ONTARIO FOR NEXT LEISURE TRIP

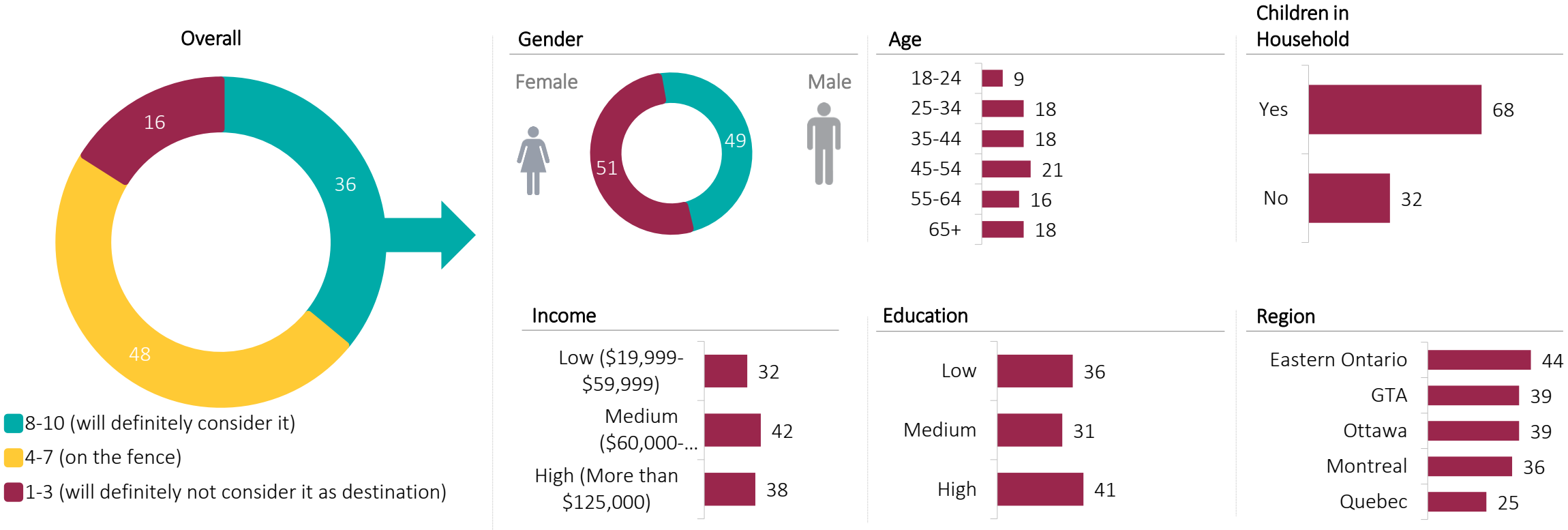
Some decline in proportion strongly considering South Eastern Ontario for next leisure trip, potentially due to increase in numbers looking at trips outside of own province





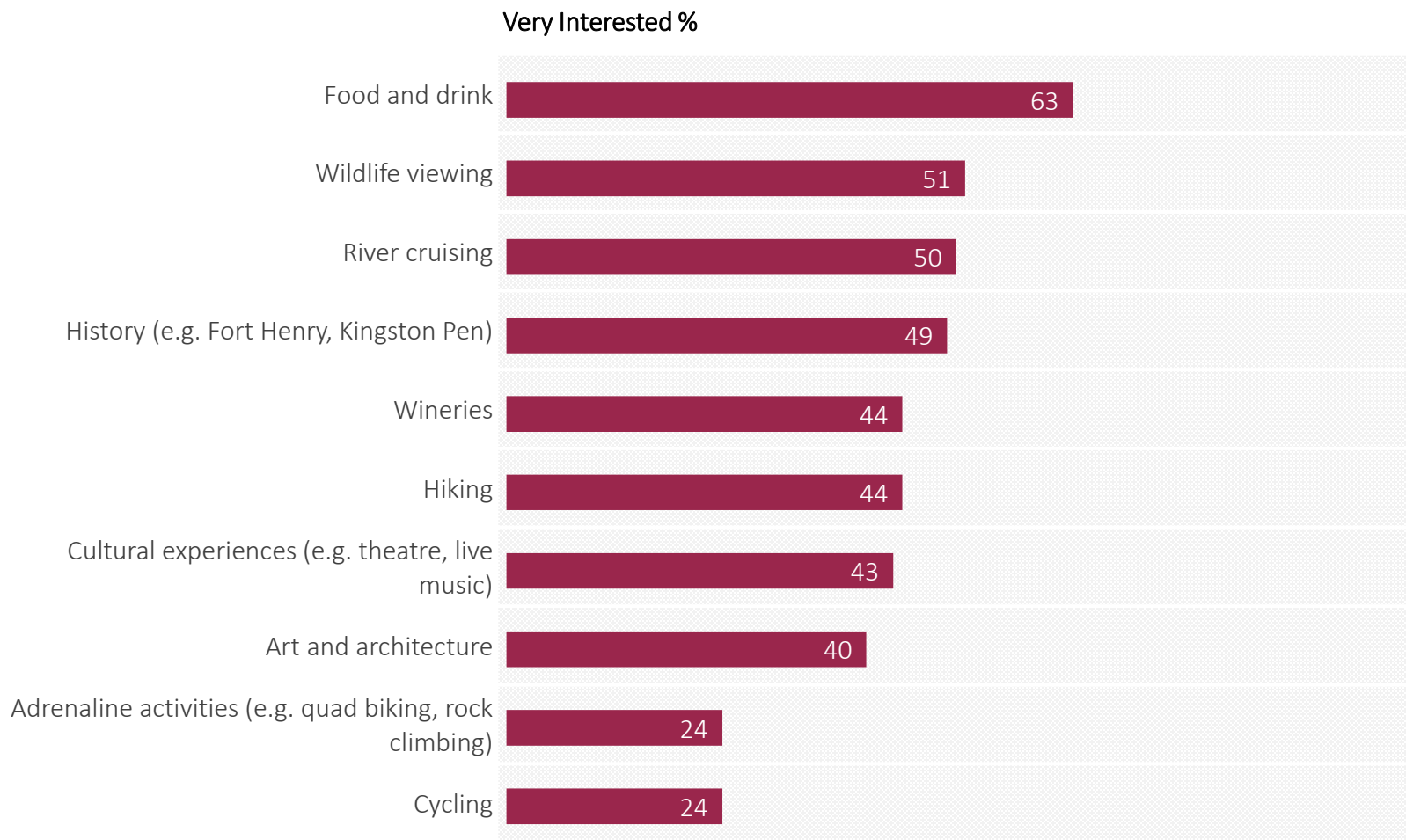
# PROFILE OF SOUTH EASTERN ONTARIO CONSIDERERS

Those considering South Eastern Ontario much more likely to have children in household, and somewhat more likely to live in Eastern Ontario, be middle-aged and have higher levels of education



# INTEREST IN TYPES OF VACATION IN SOUTH EASTERN ONTARIO

Nearly two-thirds would be interested in a gastronomy-focused vacation in South Eastern Ontario, with around half also interested in wildlife viewing, river cruising or history-themed trips



Word cloud analysis of spontaneous associations with South Eastern Ontario highlight the importance of natural beauty and relaxation to the brand – but relatively generic words suggest many do not know the region in depth



# INCENTIVES TO VISIT SOUTH EASTERN ONTARIO

Spontaneous comments suggest that many feel price would be the main motivator to encourage them to visit South Eastern Ontario – though shows, festivals and cultural events also emerge as a potential spur to visit

*If there was a festival or a something special going on. Or if there was a travel promotion or a new restaurant opening*  
Guelph

*A special deal on a return train ticket from Quebec or Montreal*  
Quebec City

*Honestly - just finances, I would have been recently if I could afford to. A few of the areas there are on my top destinations within Ontario.*  
Mississauga

*Perhaps interesting cultural events, concerts, historical or ecological tours...*  
Montreal

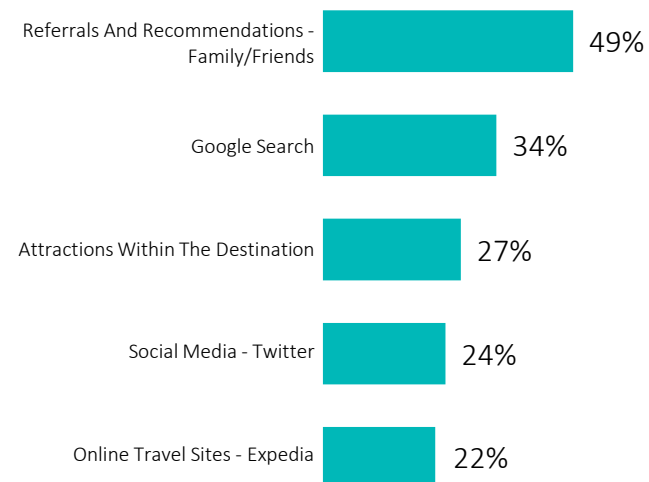
*I don't think there is anything that would make me more likely to consider for my next overnight stay, I really enjoy South Eastern Ontario but I do prefer going up north for cottage vacations.*  
Waterloo

*If the cost of renting a cottage was not so outrageous. The rental costs are up by 50% over 2021.*  
Toronto

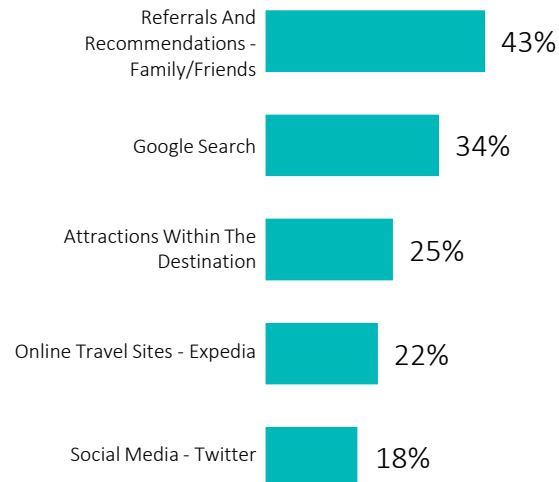
# TOP 5 INFLUENCE CHANNELS FOR THOSE CONSIDERING SOUTH EASTERN ONTARIO

Referrals from family and friends and generic Google search are most significant channels for destination inspiration and trip planning, while Expedia tops the list of preferred booking channels

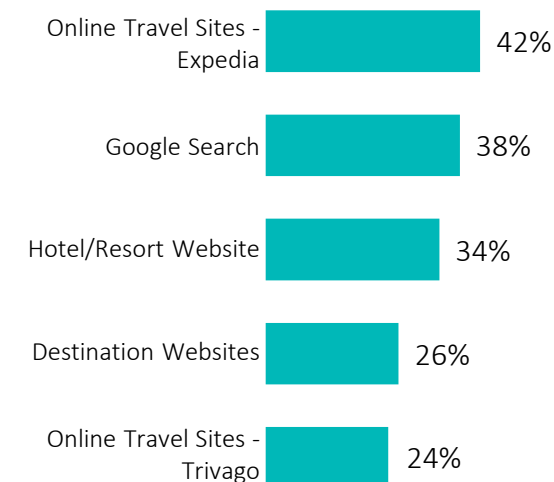
## Inspiration



## Planning

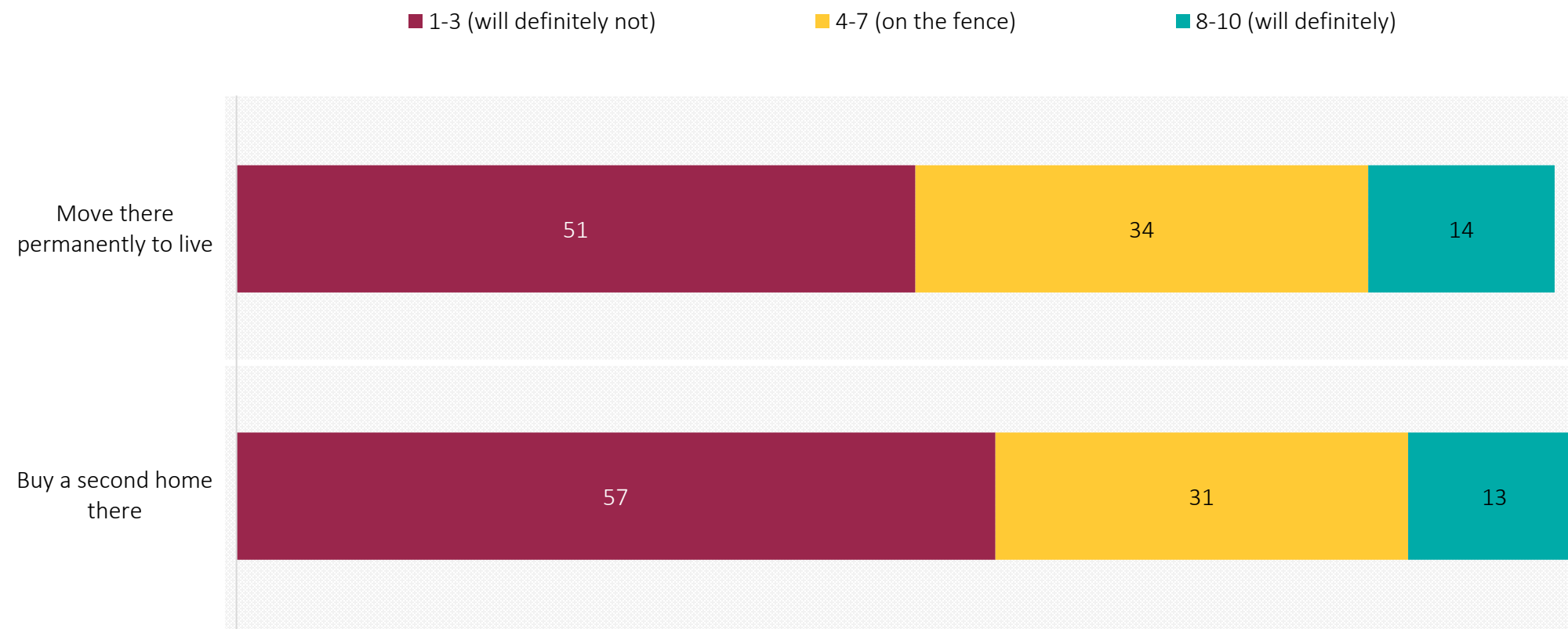


## Booking



# PREVIOUS LEISURE TRAVELLERS' LIKELIHOOD TO RELOCATE TO SOUTH EASTERN ONTARIO

A small but significant proportion – around one in seven - of those who have visited South Eastern Ontario for leisure in the past express an intention to move there permanently or buy property







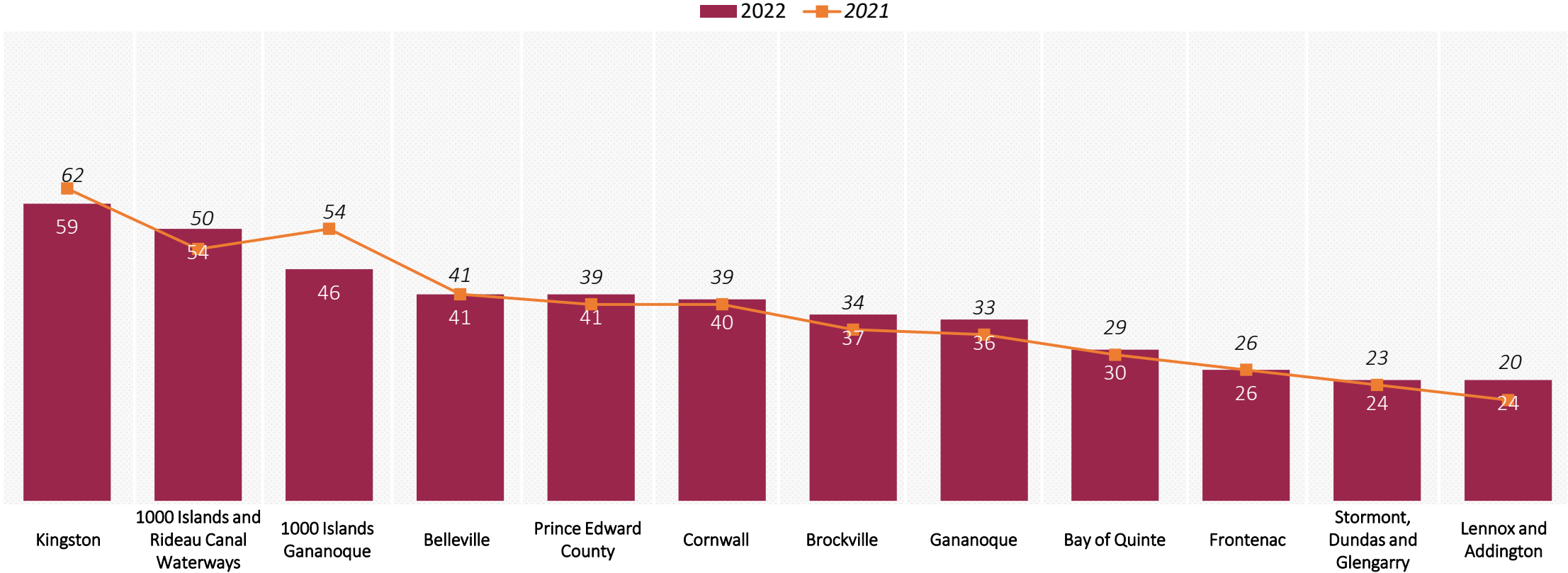
## SECTION 4: PERSPECTIVES ON SOUTH EASTERN ONTARIO DESTINATIONS

- Familiarity with major areas within South Eastern Ontario
- Likelihood of considering major areas within South Eastern Ontario
- Brand associations with major areas within South Eastern Ontario
- Profile of specific destinations within South Eastern Ontario
- Profile and appeal of specific attractions within South Eastern Ontario

# FAMILIARITY WITH AREAS WITHIN SOUTH EASTERN ONTARIO

Familiarity within areas within South Eastern Ontario has changed little from 2021, with Kingston, 1000 Islands and Rideau Canal most well known

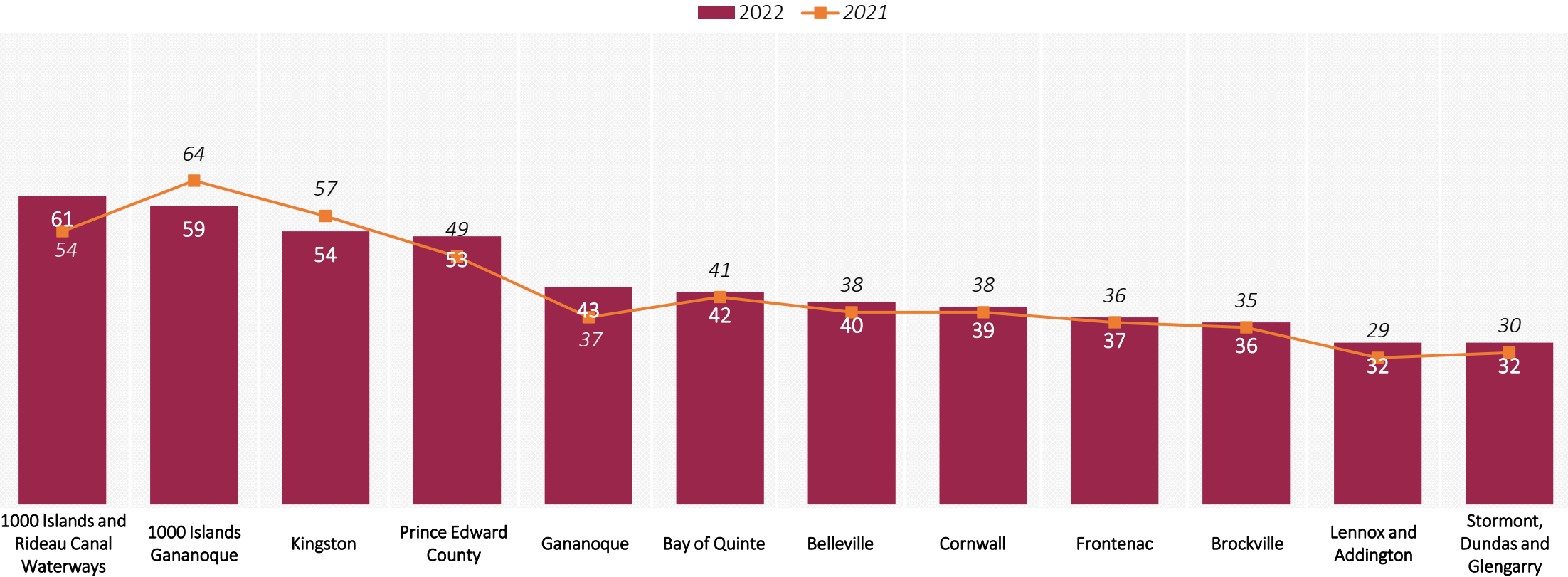
% familiar with each destination



# LIKELIHOOD OF CONSIDERATION OF DESTINATIONS WITHIN SOUTH EASTERN ONTARIO

Few major shifts in consideration of South Eastern Ontario areas, with 1000 Islands/Rideau Canal, Kingston and Prince Edward County the only areas to be considered by a majority

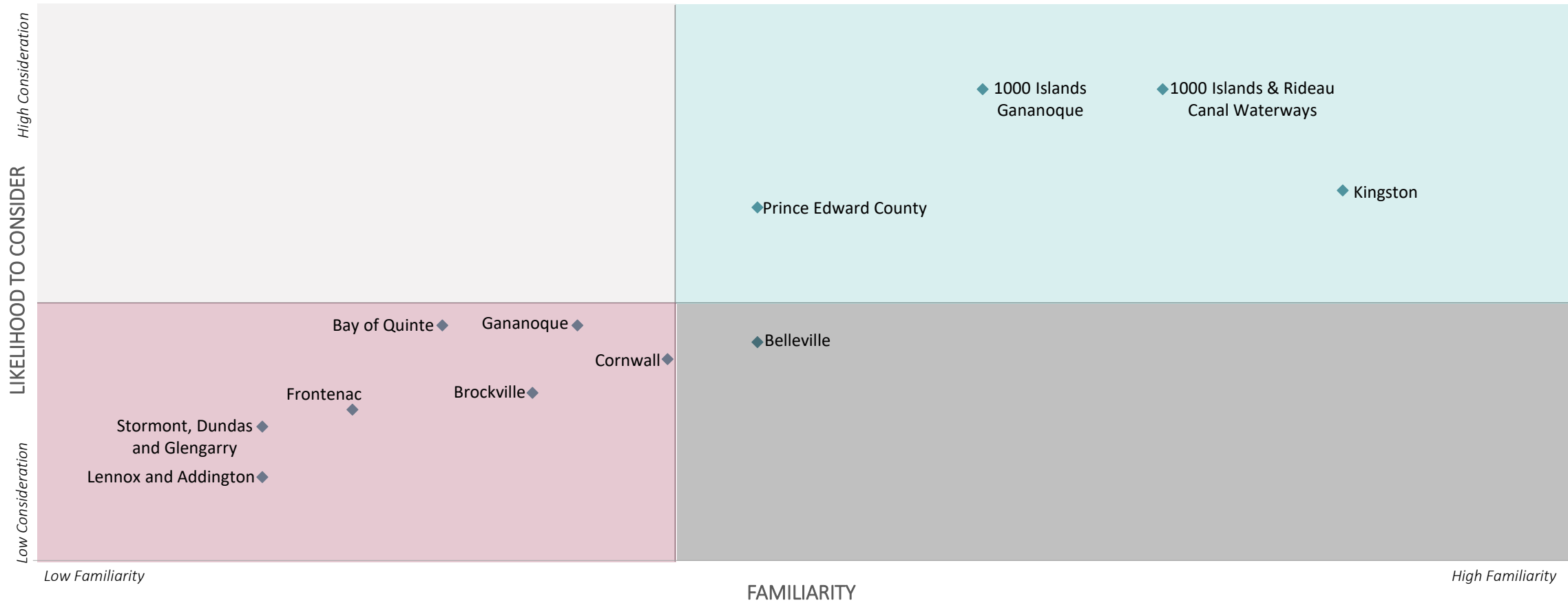
% likely to consider each for vacation within Canada in 2022



Base: Total n=1011  
Sample: All Respondents  
Q15. And for each, please indicate how likely you would be to consider that destination for a vacation within Canada in spring/summer 2022. Please use a scale of 1 to 5, where 1 means you are not at all likely to consider it, and 5 means you are very likely to consider it.  
NB Scale was changed from 4 point to 5 point between 2021 and 2022 so tracking is indicative. 2022 data shows % rating 3,4,5 on scale, while 2021 shows % rating 3 and 4.

# FAMILIARITY AND CONSIDERATION OF SOUTH EASTERN ONTARIO DESTINATIONS

In almost all cases, consideration of destinations within South Eastern Ontario increases the better a destination is known, with 1000 Islands, Kingston and Prince Edward County the destinations standing out for most



Base: Total n=1011  
Sample: All Respondents  
Q14. Here is a list of some destinations within South Eastern Ontario. For each, please indicate how familiar you feel with what that destination has to offer for holidays/vacations leisure travel. Please use a scale from 1 to 5, where 1 means you know very little about that destination, and 5 means you know a great deal about it.  
Q15. And for each, please indicate how likely you would be to consider that destination for a vacation within Canada in spring/summer 2022. Please use a scale of 1 to 5, where 1 means you are not at all likely to consider it, and 5 means you are very likely to consider it.



# ASSOCIATIONS WITH SOUTH EASTERN ONTARIO DESTINATIONS

Accessibility, natural beauty and relaxation are the defining features of most South Eastern Ontario destinations, with Prince Edward County also associated with good food and wine

*Table shows % feeling that each quality ‘strongly applies’ to each destination*

Prince Edward County	Kingston	Gananoque	Cornwall	Belleville	Bay of Quinte
Naturally beautiful (40%)	Easy for me to get to (31%)	Naturally beautiful (38%)	Easy for me to get to (27%)	Easy for me to get to (30%)	Naturally beautiful (36%)
Relaxing (35%)	Good for families (24%)	Relaxing (29%)	Relaxing (26%)	Good for families (27%)	Relaxing (35%)
Has excellent food and wine (28%)	Naturally beautiful (23%)	Good for families (25%)	Good value for money (24%)	Relaxing (24%)	Good for families (23%)
Good for families (23%)	Relaxing (21%)	Easy for me to get to (25%)	Good for families (22%)	Naturally beautiful (21%)	Easy for me to get to (20%)
Easy for me to get to (20%)	Has interesting culture (19%)	Good value for money (17%)	Naturally beautiful (18%)	Good value for money (21%)	Good value for money (16%)
Has interesting culture (14%)	Good value for money (19%)	Has interesting culture (15%)	Has interesting culture (14%)	Has interesting culture (12%)	Has excellent food and wine (12%)
Good value for money (13%)	Has excellent food and wine (16%)	Exciting (13%)	Diverse (14%)	Exciting (12%)	Has interesting culture (12%)
Exciting (10%)	Diverse (13%)	A good place to meet new people (13%)	Has excellent shopping (12%)	Has excellent shopping (11%)	Vibrant (10%)
Has excellent shopping (9%)	Has excellent shopping (12%)	Has excellent food and wine (11%)	A good place to meet new people (10%)	A good place to meet new people (11%)	Diverse (9%)
A good place to meet new people (9%)	Vibrant (12%)	Vibrant (8%)	Has excellent food and wine (9%)	Diverse (10%)	Has adrenaline activities (9%)
Diverse (8%)	Exciting (11%)	Has good nightlife (8%)	Exciting (9%)	Has excellent food and wine (8%)	Exciting (8%)
Vibrant (8%)	A good place to meet new people (11%)	Has excellent shopping (7%)	Has good nightlife (9%)	Vibrant (8%)	Has excellent shopping (8%)
Has good nightlife (7%)	Has good nightlife (11%)	Diverse (6%)	Vibrant (6%)	Has good nightlife (7%)	A good place to meet new people (8%)
Has adrenaline activities (6%)	Has adrenaline activities (4%)	Has adrenaline activities (6%)	Has adrenaline activities (6%)	Has adrenaline activities (6%)	Has good nightlife (8%)



# ASSOCIATIONS WITH SOUTH EASTERN ONTARIO DESTINATIONS, CONT'D

1000 Islands and Rideau Canal brands are particularly strongly associated with natural beauty. Many destinations within South Eastern Ontario are also felt by many to be good for families

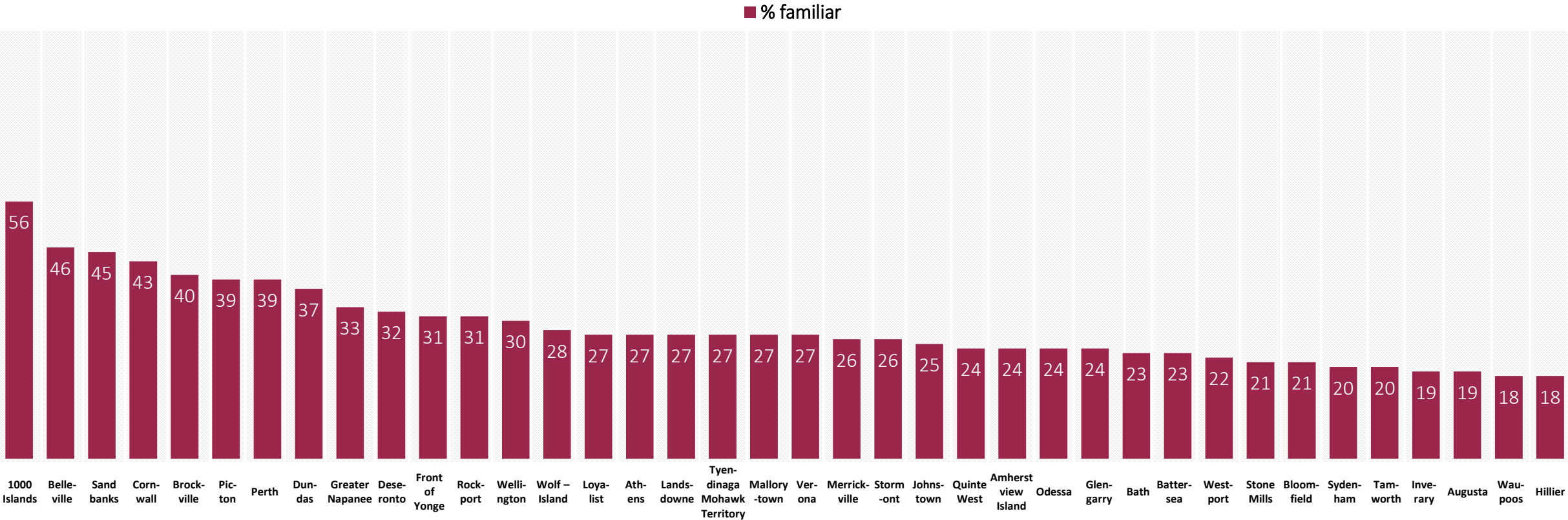
Table shows % feeling that each quality ‘strongly applies’ to each destination

Frontenac	Lennox and Addington	Rideau Canal	Stormont, Dundas and Glengarry	Brockville	1000 Islands
Relaxing (35%)	Relaxing (27%)	Naturally beautiful (48%)	Easy for me to get to (29%)	Easy for me to get to (28%)	Naturally beautiful (53%)
Naturally beautiful (28%)	Naturally beautiful (26%)	Relaxing (30%)	Relaxing (25%)	Good for families (26%)	Relaxing (35%)
Good for families (22%)	Easy for me to get to (23%)	Good for families (27%)	Good for families (22%)	Relaxing (25%)	Good for families (26%)
Easy for me to get to (20%)	Good for families (22%)	Easy for me to get to (23%)	Naturally beautiful (21%)	Naturally beautiful (22%)	Easy for me to get to (21%)
Has interesting culture (15%)	Has interesting culture (18%)	Exciting (18%)	Exciting (14%)	Good value for money (21%)	Good value for money (16%)
Exciting (15%)	Good value for money (18%)	Good value for money (16%)	Has interesting culture (13%)	Has interesting culture (13%)	Exciting (15%)
Good value for money (14%)	Diverse (12%)	Has interesting culture (12%)	Good value for money (13%)	A good place to meet new people (12%)	Has interesting culture (12%)
Has excellent food and wine (12%)	Exciting (11%)	Has excellent food and wine (12%)	Diverse (13%)	Diverse (12%)	Has excellent food and wine (12%)
A good place to meet new people (12%)	Has excellent food and wine (11%)	Vibrant (10%)	Has excellent food and wine (12%)	Exciting (9%)	Has adrenaline activities (9%)
Diverse (9%)	Has good nightlife (11%)	A good place to meet new people (9%)	Vibrant (11%)	Has excellent food and wine (9%)	Vibrant (8%)
Has good nightlife (9%)	Has excellent shopping (11%)	Diverse (8%)	Has good nightlife (9%)	Has good nightlife (8%)	A good place to meet new people (7%)
Vibrant (8%)	A good place to meet new people (10%)	Has adrenaline activities (7%)	Has adrenaline activities (9%)	Vibrant (8%)	Diverse (7%)
Has excellent shopping (7%)	Vibrant (8%)	Has good nightlife (6%)	A good place to meet new people (6%)	Has excellent shopping (8%)	Has excellent shopping (6%)
Has adrenaline activities (6%)	Has adrenaline activities (8%)	Has excellent shopping (6%)	Has excellent shopping (5%)	Has adrenaline activities (7%)	Has good nightlife (5%)

# PROFILE OF SPECIFIC DESTINATIONS WITHIN SOUTH EASTERN ONTARIO

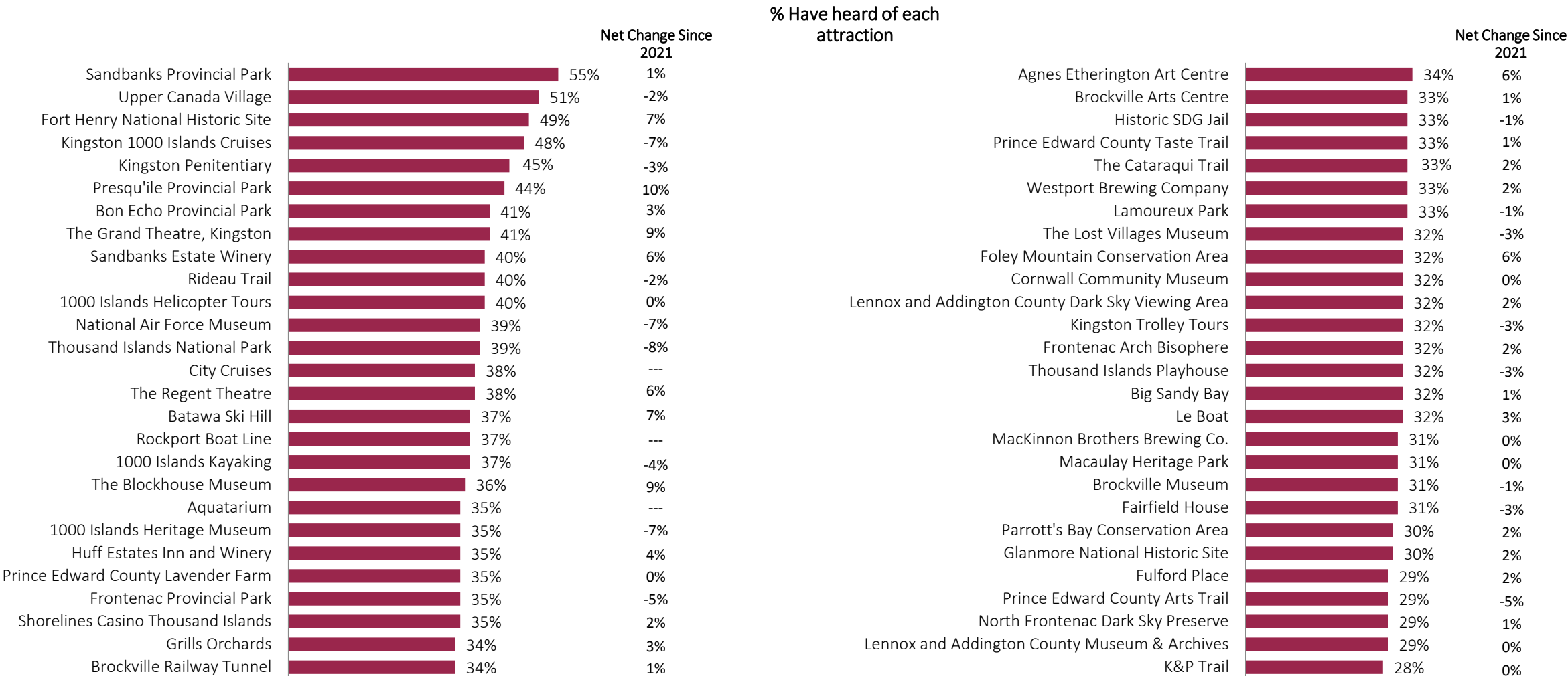
1000 Islands is the only specific destination known to a majority, with many familiar to fewer than one in four

Familiarity with select destinations within South Eastern Ontario



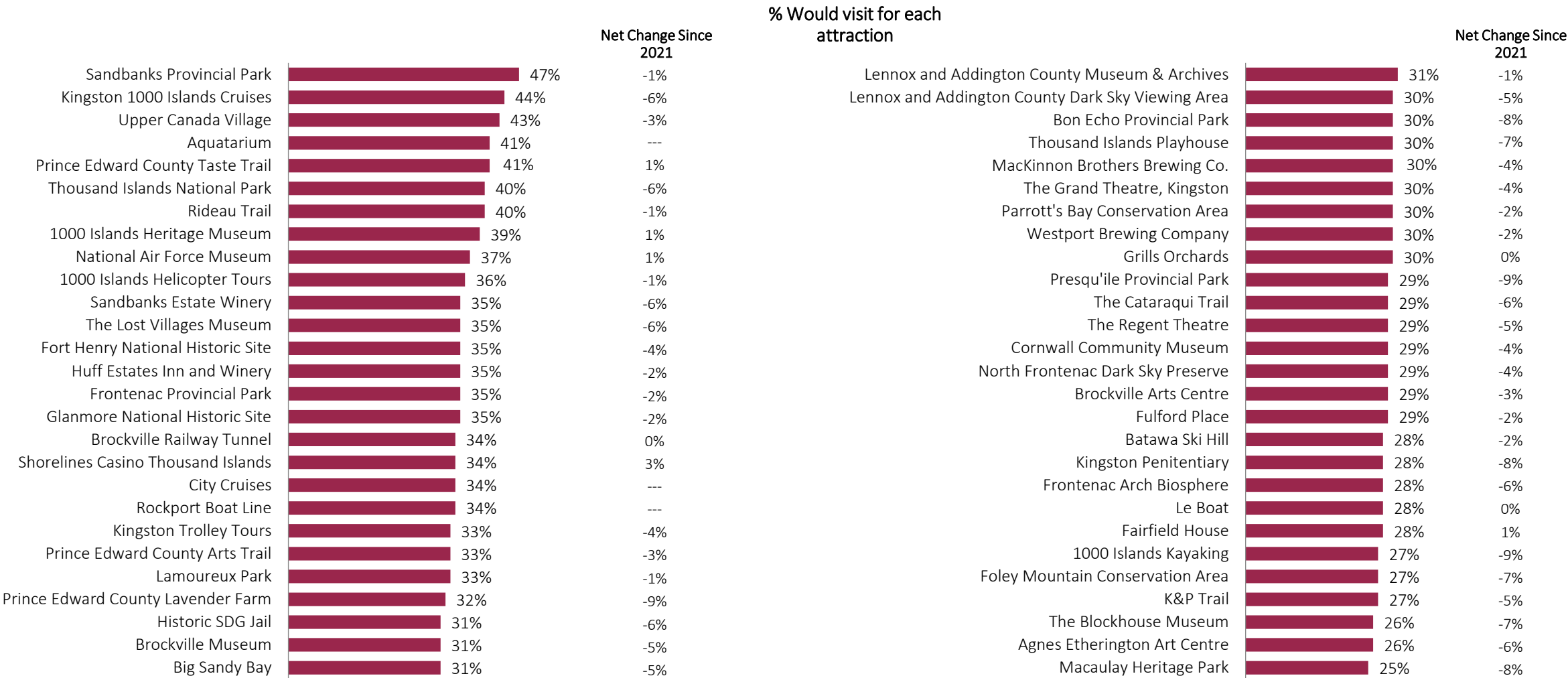
# PROFILE OF ATTRACTIONS ACROSS SOUTH EASTERN ONTARIO

Sandbanks, Upper Canada Village, Fort Henry and Kingston 1000 Islands Cruises remain the most familiar attractions across the region. Profile of Presqu’ile Provincial Park and Grand Theatre in Kingston has risen



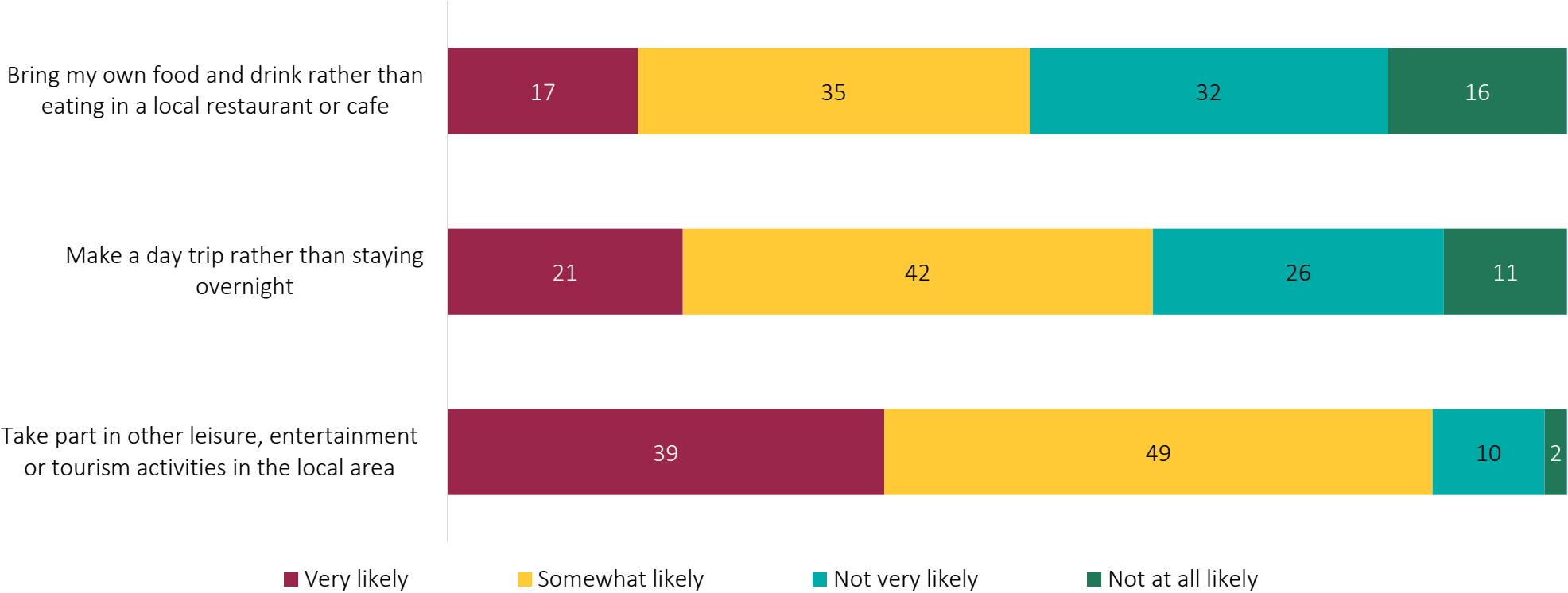
# APPEAL OF ATTRACTIONS ACROSS SOUTH EASTERN ONTARIO

Most high-profile attractions are also the ones with most appeal – though Prince Edward County Taste Trail stands out as a lower-profile but appealing attraction, reflecting high interest in culinary theme



# LIKELY TOURISM BEHAVIOUR WHEN VISITING SANDBANKS

Over half of potential Sandbanks visitors say they are likely to bring their own food and drink while nearly two-thirds will make only a day trip – but nearly nine in ten think they will take part in activities across the local area







## SECTION 5: CONTEXTUAL ISSUES

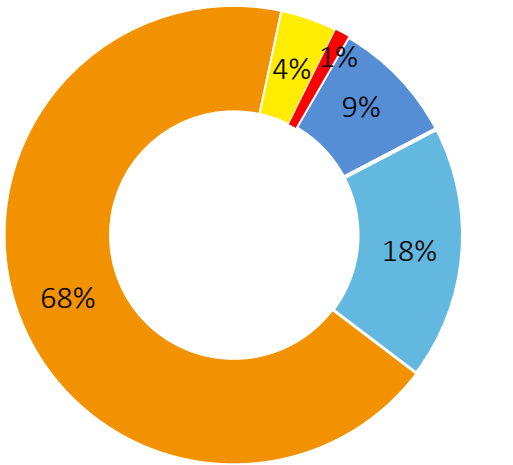
- Perspective on COVID within South Eastern Ontario and destination choice
- COVID risk tolerance and consideration of South Eastern Ontario
- Perspectives on tourism staffing crisis



# PERSPECTIVE ON COVID IN SOUTH EASTERN ONTARIO AND DESTINATION CHOICE

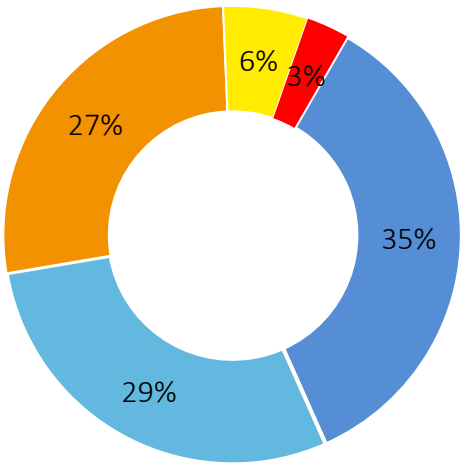
Almost all see the COVID risk as either the same or lower as their usual destination, with nearly two-thirds feeling that COVID will not dissuade them from taking their usual vacation

COVID risk in SE Ontario compared to usual destination



- Risk is much lower in SE Ontario
- Risk is somewhat lower in SE Ontario
- Risk is about the same
- Risk is somewhat higher in SE Ontario
- Risk is much higher in SE Ontario

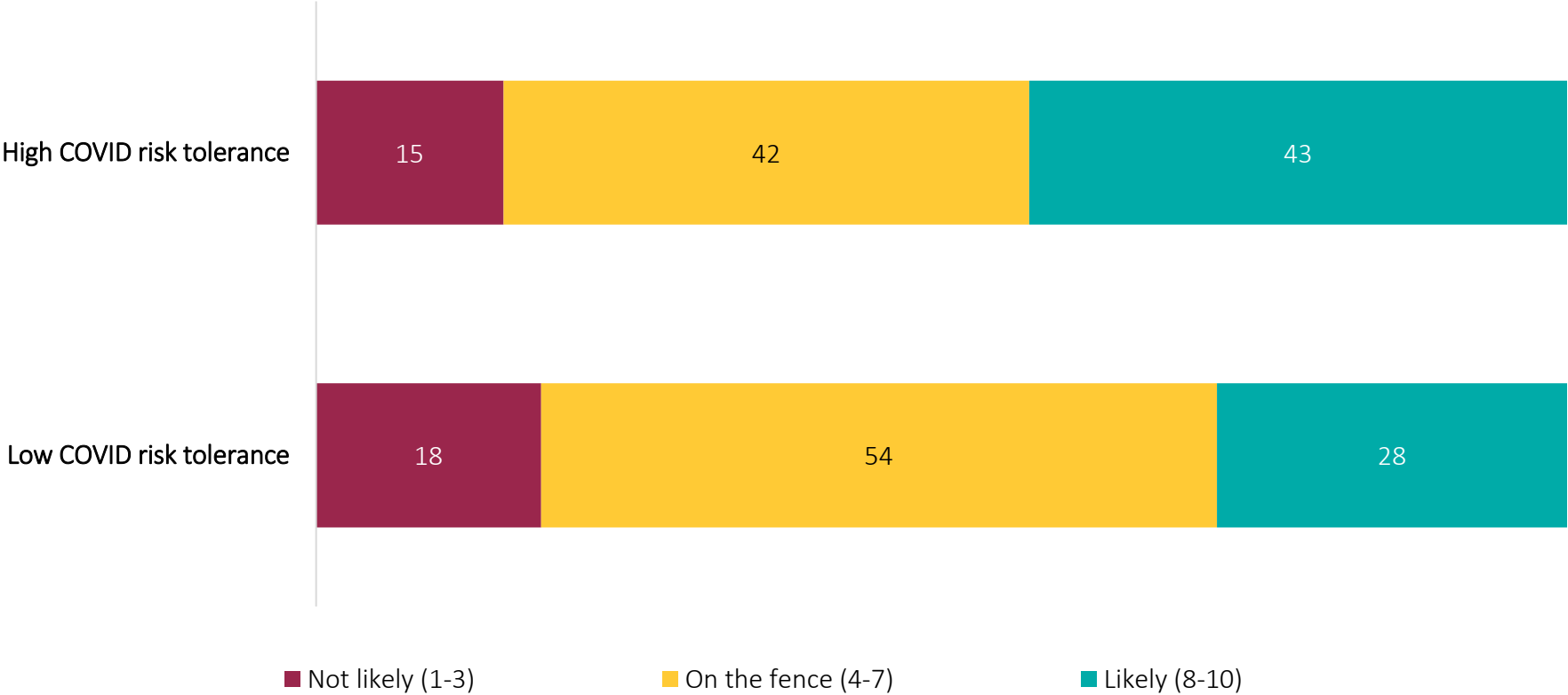
COVID won't prevent taking preferred vacation



- 5 - Strongly agree
- 4
- 3
- 2
- 1 - Strongly disagree

# COVID RISK TOLERANCE AND CONSIDERATION OF SOUTH EASTERN ONTARIO

Those with higher COVID risk tolerance significantly more likely to be considering South Eastern Ontario as a vacation destination

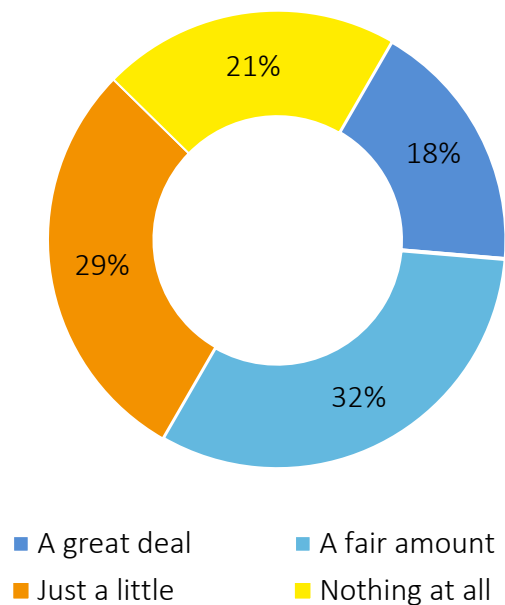


Sample: All Administered  
Q11. And for your next overnight leisure trip, how likely, if at all, are you to consider South Eastern Ontario as a destination? Please use a scale of 1 to 10, where 1 means you will definitely not consider it, and 10 means you will definitely consider it.Q24. And from what you have seen, heard or read, how serious, if at all, would you say this problem is in South Eastern Ontario?  
Q27. To what extent do you agree or disagree with the following statement? Please answer using the scale of 1 to 5, where 1 means you strongly disagree, and 5 means you strongly agree.

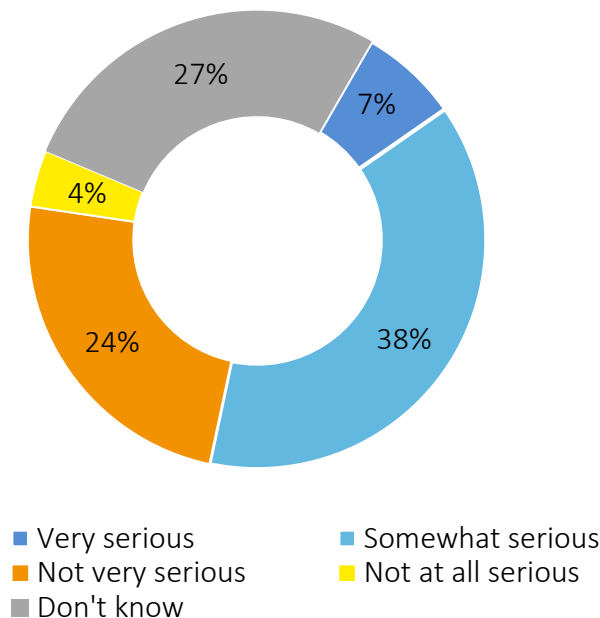
# PERSPECTIVE ON TOURISM STAFFING CRISIS

Around half are aware of the tourism staffing crisis, and view it on balance as a serious problem in South Eastern Ontario – though most say it will not impact their choice of destination significantly

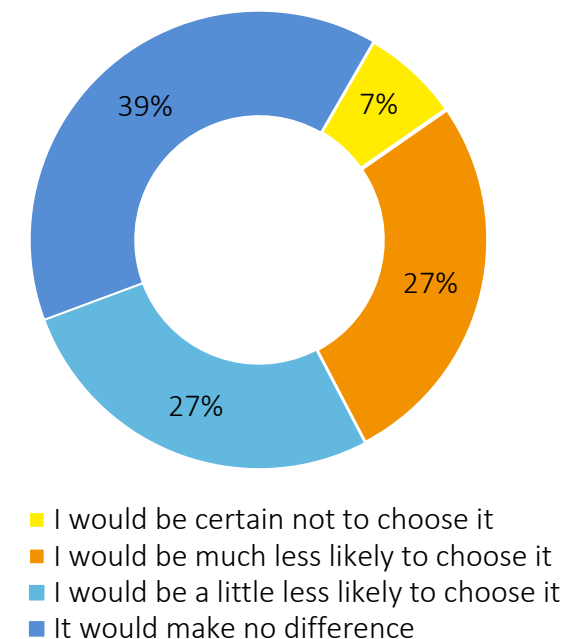
Awareness of staffing crisis



Perceived seriousness of problem in SE Ontario



Potential impact on choice of SE Ontario



Base n=1011

Sample: All Respondents

Q23. As you may be aware, some tourism destinations around the world are currently suffering from a lack of trained staff in tourism businesses like hotels and restaurants, and at tourism attractions, and poorer standards of service as a result. Before this survey, how much, if anything, had you heard about this problem?

Q24. And from what you have seen, heard or read, how serious, if at all, would you say this problem is in South Eastern Ontario?

Q25. If you learnt that South Eastern Ontario was suffering from service disruptions due to a lack of trained staff in tourism businesses, how much less likely would you be to choose it for a vacation?

# TOURISM. BY DESIGN

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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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