



# Destination Ontario

Travel Segmentation Study

Background

## Key Objectives

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- Measure interest in and the incidence of vacationing within Ontario vs. outside Ontario in the next 12 months
- Assess the opportunities for targeting those planning to travel within Ontario and outside Ontario
- Further drill down to understand the consumer segments that are planning to travel within Ontario and are willing to spend on revenue-generating activities
- Determine what types of vacations and activities these segments are interested in, so that Destination Ontario can match its products to the segments
- Better understand who the low priority targets are and how to overcome barriers to Ontario travel



## Methodology



**Type of survey:** Online panel survey

**Location:** Across Ontario

**Sample size:** 3,242 surveys

GTA – 1,695

Other Ontario – 1,547

**Survey length:** 15 minutes

**Fieldwork dates:** March 7- 18, 2021

**Maximum margin of error:** On 3,242 respondents is +/-1.72%, at the 95% confidence level

- The study is a random sample of Ontario residents. Qualified respondents:
  - Reside in Ontario
  - Are 18-70 years of age
- Quotas and weights were implemented to ensure the sample represents the Ontario population by:
  - age
  - gender
  - region of Ontario
  - multi-cultural background

# Key Findings

# Four Key Numbers to Know

Travel plans **within Ontario** during the next 12 months are **healthy** compared to past 3-year behaviour



## 80%

- of **all respondents** are planning to make **any trip within Ontario** (overnight and/or day) in the next 12 months
- 30% of **all respondents** will make **overnight and day** trips within Ontario during this time



## 69%

- of **all respondents** are planning to make **overnight trips within Ontario** in the next 12 months
- 27% of **all respondents** are planning **multiple overnight trips** (3 or more trips) within Ontario during this time
- Of this 69%...
  - 24% = 2 day trip
  - 32% = 3 day trip
  - 36% = 4-7 day trip
  - 7% = 8+ days



## 73%

- of **all respondents** are planning to make **day trips within Ontario** in the next 12 months – twice as many day trips than overnight trips, on average (4.4 vs. 2.3 trips)



## 45%

- of respondents **might be convinced** to make overnight or day trips if the trip/location was interesting and safe (among those **not currently planning any trips** in the next 12 months)
- 80% of those **who might be convinced**, would make trips within Ontario

Travel **outside Ontario** during the next 12 months will not be as prevalent as travel within Ontario: only 51% are planning any out-of-province trips (49% and 26% **overnight and day trips** respectively)

# Key Findings

## Motivations for Planning Trips

### Motivations for wanting a trip in general

#### Within Ontario:

- **New experience (34%)** – specifically, **tired of being cooped up at home and need a change of scene (27%)**

#### Outside Ontario:

- **New experience (22%)**
- **Visits to family/friends (14%)** – greater motivation than for “within Ontario” travellers (4%).

### Motivations for planning trips within and outside Ontario

	Within Ontario	Outside Ontario
<b>Main Motivations</b>	COVID – safer, easier to travel given restrictions	Visit a specific location Have a favourite spot I like to return to
	Close to home/less travel time	Change of scene/something new/interesting After being in lockdown, just want to go far away Travelled through Ontario – want to see something else
	Explore Ontario	Like to visit places that have different cultures
	Visit family/friends	Visit family/friends
<b>Secondary Motivations</b>	Less expensive – better fits budget	Want warmer weather
	Requires less planning	Ontario is too close to home to feel like a real vacation
	Less planning, lower cost, close to home = a more relaxing, leisurely trip	Ontario’s attractions seem a little boring/outdated/not unique

## Key Findings

### Main Types of Pleasure Trip Planned Next 12 Months

	Within Ontario	Outside Ontario
 A trip to experience nature/natural wonders (especially within Ontario)	17% ▲	10%
 Camping (mostly unique to travel within Ontario)	14% ▲	3%
 A romantic get-away	11%	7%
 A sightseeing trip to experience famous or historical sites	7%	10%
 A family vacation with lots of children's activities	6%	8%
 A trip to enjoy sitting/playing on the beach	6% ▼	15%



# Key Findings

## TOTAL SPEND ON 7 TOP TRIP TYPES

These will also be the highest revenue-generating vacations in Ontario in the next 12 months, followed by Touring vacations

### Total Estimated Spend Per Trip Type – Ontario\*



1. Trip to experience nature/natural wonders

Total Estimated Spend

\$621,892,411

Average Spend Per Travelling Group

\$910



2. Romantic get-away

\$387,589,954

\$842



3. Camping

\$366,989,003

\$616



4. Family vacation with lots of children's activities

\$253,749,085

\$1,052



5. Sightseeing trip to experience famous or historical sites

\$224,495,814

\$778



6. Beach trip

\$198,911,347

\$862



7. Touring Ontario vacation in car, RV or motorcycle

\$174,947,258

\$1,076

\* Extrapolated to total households in Ontario – 2016 Census

These estimates for spending over the next 12 months are approximate and based on "next trip" only (not multiple trips)

## Key Findings

### TOTAL SPEND ON 11 REMAINING TRIP TYPES

#### Total Estimated Spend Per Trip Type – Ontario\*



8. Trip to enjoy city life – urban entertainment and nightlife

\$147,632,319

Average Spend Per Travelling Group

\$999



9. Winery, brewery, or distillery tour

\$144,915,566

\$822



10. Sport-oriented trip (e.g., golfing, fishing, hunting)

\$131,536,620

\$1,311



11. Shopping trip

\$105,130,480

\$741



12. Spa or retreat trip

\$ 94,993,034

\$1,108



13. “Foodie” focussed trip

\$ 84,943,338

\$937



14. Outdoor adventure trip  
(e.g., rock climbing, skydiving, Zip-lining, scuba diving)

\$ 73,357,834

\$1,072



15. Arts and Culture trip (e.g., theatre, art galleries, opera)

\$ 70,710,472

\$742



16. Fitness-oriented trip (e.g., hiking, skiing, cycling)

\$ 67,002,449

\$571



17. Water adventure trip (e.g., houseboating, rafting, sailing)

\$ 55,793,100

\$1,068



18. A trip to enjoy concerts or festivals

\$ 2,659,848\*\*

\$334\*\*

\*\* Caution: very small base (N=5)



## Specific Activities Planned (39 Products) – Most Popular

	Within Ontario	Outside Ontario
	Build Traffic & Spend	Promote
Walking/hiking (especially within Ontario)	49% ▲	34%
Nature/natural wonders (especially within Ontario)	34% ▲	24%
Beaches	32%	33%
Visiting attractions	30%	32%
Shopping	23% ▼	30%
Famous/historical sites	20%	24%
Also, more unique to trips within Ontario		
Camping	22% ▲	8%
Farmer's markets	24% ▲	10%
Possible emerging opportunity: Food trails/festivals, Other "foodie" focused destinations		



## Specific Activities Planned (39 Products) – Secondary in Popularity



	Within Ontario	Outside Ontario
	Unique to Ontario Build Traffic & Spend	Promote
Boating/paddling (canoe, kayak, paddleboard)	14% ▲	5%
Wine tours/regions	14% ▲	5%
Breweries/cideries/distilleries	12% ▲	6%
Cycling/mountain biking	10% ▲	4%



	Within Ontario	Outside Ontario
		Showcase Ontario's attractive options
Shopping (a main activity)	23% ▼	30%
Resorts	9% ▼	16%
Bars, clubs, nightlife	8% ▼	14%

## Key Findings

### Specific Activities Planned (39 Products) – Among Top Travel Segments/Trip Type



Natural Wonders Trip	Romantic Get-away	Camping Trip	Family Vacation	Sightseeing Trip – Famous/Historical Sites	Beach Trip	Touring Ontario (road trip)
Walking/hiking	Shopping	Camping	Visiting attractions	Famous/historical sites	Beaches	Farmer's markets
Nature/natural wonders	Wine Tours	Walking/hiking	Theme parks	Visiting attractions	Farmer's markets	Museums/heritage sites
Other boating/paddling (not houseboat)	Spas	Beaches	Science/education activities	Museums/heritage sites		Motorcycling
	Resorts	Fishing	(Less likely Walking/Hiking, Nature)			
	Breweries, cideries, distilleries	Other boating/paddling (not houseboat)				
	"Other" entertain. (music, gaming, comedy)	Cycling/mountain biking				
	Bars, clubs, nightlife					



## Travel Behaviour

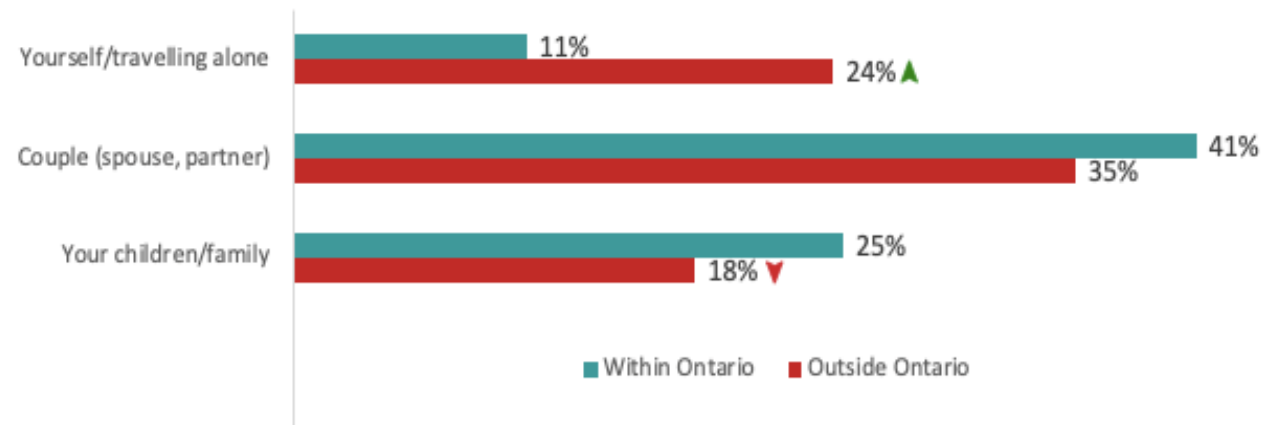
Ontario is mostly recognized as a destination for **short get-aways**

Number and length of overnight trips planned – next 12 months		
	Within Ontario	Outside Ontario
Net: Long weekend trips	70% ▲	40%
Net: Brief get-aways during the week	29% ▲	11%
Net: One-week trips	32%	39%
Net: Trips of 2+ weeks	11%	39% ▲

94% Next Ontario trip = **one week or less**

61% Next Ontario trip = **brief get-away of 1-3 days**

Average distance travelled (Ontario) ~ **300 km**





## Perceptions of Ontario as a Travel Destination

Strengths	Weaknesses/Opportunities
Good for short get-aways	Good for a longer trip of at least 10 days
Charming small towns	Is popular/trendy
Lots of interesting “out-of-the-way” places	Has unique features
Easy to vacation in/travel around Welcoming, where you can be yourself —> A more relaxing leisurely trip	Great for fun and being constantly entertained
Lots of family friendly experiences	
Has a surprising number of destinations/attractions	
Is a safer place to travel right now	
* There is a high degree of overlap among those planning trips within and outside Ontario. Therefore, perceptions of Ontario are very similar among “within and outside Ontario” travellers	

Most Ontarians prefer to travel to **less crowded destinations (73%)**, to take their time exploring **one or two destinations (71%)** and have **limited vacation budgets (66%)**

= Ontario’s strengths of having **charming small towns** and **“out-of-the-way” places**, and that it **accommodates all travel budgets**

# INSIGHTS AND OPPORTUNITIES – WITHIN & OUTSIDE ONTARIO

## INSIGHT

A main motivation for wanting a trip:  
Need for a **change of scene/a new experience**

Most Ontarians prefer to travel to **less crowded destinations** and to take their time **exploring one or two destinations**

**Having unique features** and being **popular/trendy** are among Ontario's perceived weaknesses



## OPPORTUNITY

- Promote Ontario as a destination where travellers can **experience a change of scene/a new experience close to home**
  - Promote Ontario's **less known** destinations and activities that are **uniquely considered "Ontario"**



Boating/Paddling



Wine tours



Brewery/Distillery



Cycling/  
Mountain Biking



Farmer's markets

- Communicate Ontario's perceived strengths of having **charming small towns** and **interesting "out-of-the-way" places**
  - Create a **portal on the website** listing and detailing these places
  - **Package together a couple of these destinations** that are close to each other
    - in Destination Ontario communications
    - by encouraging the tourism operators to offer package deals



# INSIGHTS AND OPPORTUNITIES – WITHIN & OUTSIDE ONTARIO

## Insights

## Opportunities

The **main types of pleasure trips/products planned** in the next 12 month – and the **highest revenue-generating vacations:**



- Trips to experience nature/natural wonders



- Romantic get-aways



- Camping (within Ontario only)



- Family vacations with lots of children's activities



- Sightseeing trips to experience famous or historical sites



- Beach vacations/beaches



- Touring vacations (by car, RV, motorcycle) – high revenue generator



Focus resources on building and promoting these types of trips for maximum return

Additional specific products



- Walking/hiking



- Visiting attractions



- Shopping

# INSIGHTS AND OPPORTUNITIES – WITHIN & OUTSIDE ONTARIO

## INSIGHT

The **media** that are **most used** for information about attractions are:



**A general internet search** (59% use for travel information)



**Specialty travel/review websites** – e.g., Expedia, Travelocity, Trivago, CAA, Trip Advisor (16% -19% travel information)



**Social media/social media influencers** (12% travel information) – particularly Facebook and Instagram



**Video streaming services** (81% consume) – particularly Netflix, Amazon Prime



**Regular, cable television channels online or on television** (75% consume, 10 hours/week ave.)



## OPPORTUNITY

Consider these platforms for promoting Ontario travel to both those planning trips within and outside Ontario

Ensure that search engine optimization is in place to find Ontario products

# INSIGHTS AND OPPORTUNITIES – WITHIN ONTARIO

## INSIGHT

## OPPORTUNITY

**COVID-related concerns** – a main motivation for travelling within Ontario

**“Ontario is a safer place to travel right now”**  
– among its strengths



Continue to **promote Travel Safe, Travel Local type** messaging

Provide information in Destination Ontario communications/website that would most **assure travellers that overnight travel is safe**

- ways that the tourism operators are following COVID safety protocols (especially accommodations)
- possibly, a list of accommodations that are actively practicing protocols
- attractions/products where social distancing is made possible

**Close to home/less travel time** – a main motivation for travel within Ontario

Other motivations/strengths of Ontario:

- **requires less planning**
- **provides a more relaxing leisurely trip**
- **being lower cost**



Create messaging and tone accordingly

Possibly, combine: Close to home, less planning, and accommodates all travel budgets = a more relaxed leisurely break

Main types of trips planned for travel within Ontario are:

- **camping trips** (uniquely for trips in Ontario)
- **nature/natural wonders experience** (universally popular, esp. for trip in Ontario)



Focus communications for Camping on **building spend and traffic** among those planning trips within Ontario

Among the **highest revenue-generating trips** in the next 12 months

# INSIGHTS AND OPPORTUNITIES – WITHIN ONTARIO

## INSIGHT

Ontario is mostly recognized as a destination for **short get-aways, close to home**

- Long weekend trips
- Short get-aways during the week
- Average trip ~ 300 kilometres



## OPPORTUNITY

Consider ways of **extending the duration** of Ontario trips by **a day or two**

- Encourage the tourism operators to offer
  - **discounts on accommodations for extended stays**
  - **joint promotions** (e.g., discount on dinner for attending an activity)
  - **package deals** for 4 or 5 day trips
- **Develop package deals** by **combining activities/products** that each travel segment (e.g., Family Vacation) is predisposed to
- Focus on **segments that plan longer trips** (e.g., the Beach and Touring Trip segments)
- In DO communications/travel trade packages, **promote charming towns, "out-of-the-way" places** and **unique activities** in more remote locations

Those planning a trip within Ontario are much less likely to travel alone (11%)



The "lone traveller" market outside Ontario is sizeable (24%)

It may be worth considering the value of **targeting lone travellers** and how to give them reasons to stay in the province

- access to a hostel or B&B system
- developing products geared towards them

# INSIGHTS AND OPPORTUNITIES – OUTSIDE ONTARIO

## INSIGHT

## OPPORTUNITY

“Outside Ontario” travellers share many of the same product preferences as “within Ontario” travellers

55% of “Outside Ontario” travellers are planning travel to relatively **close and familiar destinations** on their next trip i.e., other Canadian provinces and the United States



Most “outside Ontario” travellers are seeking fairly familiar experiences, rather than wildly exotic ones, making it **relatively easier to target** Ontario products to them

Motivations for travelling out-of-province include:

- Ontario is **too close** to home to feel like a real vacation
- Ontario’s attractions seem a little **boring/outdated/ not unique**



DO’s messaging and tone should convey the idea that Ontario offers travellers a real **escape from the ordinary**

Again, promote Ontario’s **less known** destinations and activities, specifically its:

- **charming small towns** and **interesting “out-of-the-way” places**
- **products that are interesting and unique to Ontario** – boating/paddling products, wine tours, brewery/cidery/distillery tours, cycling/mountain biking products, farmer’s markets

A main motivation for wanting a trip among “outside Ontario” travellers – visiting places that have **different cultures and customs** from ours



Promote Ontario’s **Indigenous and Francophone experiences**

# INSIGHTS AND OPPORTUNITIES – OUTSIDE ONTARIO

## INSIGHT

“Outside Ontario” travellers are:

- more likely planning **beach trips**
- as likely to be planning **romantic get-aways, family vacations, sightseeing trips** and **urban trips**

as “Within Ontario” travellers



## OPPORTUNITY

Communicate to “Outside Ontario” travellers that Ontario offers

**options that are equally or more attractive than those they are seeking out-of-province**

– e.g., Bay of Quinte beaches

Several Ontario products are popular among “outside Ontario” travellers ...

- Walking/hiking
- Experiencing nature/natural wonders
- Beaches
- Visiting attractions
- Famous/historical sites



**Promote Ontario’s equally or more attractive products**

to those planning trips outside the province

... or are more likely planned by “outside Ontario” travellers

- Shopping
- Resorts
- Bars, clubs, nightlife

**Farmer’s Markets** are popular among “Within Ontario” travellers

**Food trails/festivals** and other “**foodie**” focused destinations generate considerable “latent” interest



**Food-related products** may be an **emerging opportunity**

outside and within Ontario

# INSIGHTS AND OPPORTUNITIES


## UPSELLING POPULAR, BUT LOWER-REVENUE TRIP TYPES/PRODUCTS

SEGMENT/PRODUCT	OPPORTUNITY
Camping →	<ul style="list-style-type: none"><li>• Collaborate with Ontario Parks and tourism operators to <b>promote camping products</b> and services that <b>generate higher revenue</b> and may <b>attract new audiences</b><ul style="list-style-type: none"><li>• e.g., glamping, roofed accommodation rentals</li></ul></li><li>• Provide lists of/promote <b>camping equipment rentals/outfitters</b> and <b>recreational equipment outfitters</b> near each park/campground<ul style="list-style-type: none"><li>• especially canoes, kayaks, paddle-boards, bikes, hiking, fishing equipment</li><li>• backcountry guides and outfitters (e.g., air, water or road shuttle services, equipment delivery/pick-up)</li></ul></li><li>• Collaborate with partners to promote <b>winter use</b> of campgrounds, and revenue-generating winter activities<ul style="list-style-type: none"><li>• e.g., fat biking, snowshoeing, cross-country skiing, ice skating, ice fishing rentals, yurt/cabin rentals</li></ul></li><li>• Provide lists of/promote <b>accommodations</b> (motels, B&amp;Bs, etc.) <b>and take-out/sit-down eateries</b> near parks/campgrounds, especially near access points to backcountry camping</li><li>• Ensure that car and day campers know where they can <b>buy emergency supplies locally</b> (e.g., diapers, food, matches, etc.)</li><li>• <b>Extend trip duration and revenues</b> by collaborating with partners to develop and/or promote:<ul style="list-style-type: none"><li>• the <b>more comfortable accommodations</b> available (e.g., yurts, cabins), possibly with minimum (4 day) stays</li><li>• the <b>day trips to local attractions/visits to natural features</b> that some parks offer</li><li>• <b>guided wilderness camping or canoe (4-5 day) trips</b></li><li>• <b>hike- or cycle-in sites</b> as “extra-day” activities, or that could be part of a network for multi-day trips</li></ul></li></ul>



# INSIGHTS AND OPPORTUNITIES

## UPSELLING POPULAR, BUT LOWER-REVENUE TRIP TYPES/PRODUCTS

SEGMENT/PRODUCT	OPPORTUNITY
<p>Nature/Natural Wonders</p> 	<p>Near popular or appropriate locations, Destination Ontario can provide lists of/promote:</p> <ul style="list-style-type: none"><li data-bbox="1057 435 2407 521">• <b>Recreational equipment outfitters</b> (especially canoes, kayaks, paddle-boards, hiking equipment, binoculars)</li><li data-bbox="1057 606 2458 778">• <b>Local eateries, farmer’s markets and accommodations</b> for self-directed trips<ul style="list-style-type: none"><li data-bbox="1146 692 2458 778">• encourage eateries to offer sit-down meals and take-out “lunch-boxes” and snacks for travellers while visiting the natural sites</li></ul></li><li data-bbox="1057 892 2407 935">• Encourage tourism operators to provide paid <b>guided tours</b> and paid <b>shuttle services</b></li><li data-bbox="1057 1063 2356 1185">• <b>Extend trip duration and revenues</b> by <b>encouraging tourism operators to offer package deals</b> that would combine activities particularly liked by this segment – i.e., natural wonders, hiking, boating</li></ul>





# INSIGHTS AND OPPORTUNITIES













## UPSELLING POPULAR, BUT LOWER-REVENUE TRIP TYPES/PRODUCTS

SEGMENT/PRODUCT	OPPORTUNITY
Walking/hiking Cycling	<ul style="list-style-type: none"><li>• Provide <b>lists and maps</b> of trail systems in each Ontario region, indicating Beginners, Intermediate and Experienced trails of different lengths and difficulty – and <b>eateries and accommodations</b> along the trails that would allow overnight stays and multi-day trips</li></ul> <p>Specifically eateries that would offer:</p> <ul style="list-style-type: none"><li>• Sit-down meals and take-out “lunch-boxes” and snacks for midday meals</li><li>• Licensed establishments for end-of-day refreshments</li><li>• Bike-friendly facilities for cyclists</li><li>• Could include food trucks at road-crossings</li></ul> <ul style="list-style-type: none"><li>• Encourage tourism operators to provide <b>guided hikes/cycling tours</b> and <b>shuttle services</b> if and where available</li><li>• For cyclists:<ul style="list-style-type: none"><li>• Provide information on <b>local bike repair shops/facilities</b></li><li>• For casual/beginner cyclists: Encourage tourism operators to provide a <b>bike rental/drop-off network</b> similar to the ones provided in cities and other countries</li></ul></li><li>• <b>Extend trip duration and revenues</b> by <b>encouraging tourism operators to offer package deals</b>, e.g.,<ul style="list-style-type: none"><li>• A shuttle to an access point</li><li>• Breakfast and take-out lunch at a local restaurant or farmer’s market</li><li>• Shuttle service (for hikers) to dinner</li><li>• A motel/B&amp;B for an overnight stay, etc.</li></ul></li></ul>



# INSIGHTS AND OPPORTUNITIES

## UPSELLING POPULAR, BUT LOWER-REVENUE TRIP TYPES/PRODUCTS

SEGMENT/PRODUCT	OPPORTUNITY
<p data-bbox="38 471 254 556"><b>Beach Trips</b> (4.4 days ave.)</p>  	 <ul data-bbox="586 321 2484 364" style="list-style-type: none"><li>• Encourage tourism operators to provide <b>food trucks</b> at beaches, providing ice cream, cold drinks and other foods/snacks</li></ul>  <ul data-bbox="586 406 2484 492" style="list-style-type: none"><li>• Encourage <b>trucks/facilities</b> at beaches selling <b>essential “emergency” items</b> such as sunscreen, sunglasses, hats, printed/souvenir t-shirts, beach toys)</li></ul>  <ul data-bbox="586 549 2484 592" style="list-style-type: none"><li>• Encourage tourism operators to provide paid <b>excursions</b> (e.g., 1-hour sailboat, motorboat, pontoon rides)</li></ul>  <ul data-bbox="586 642 2484 728" style="list-style-type: none"><li>• Encourage <b>local outfitters</b> to offer <b>beach-related products and services</b> (e.g., life jackets, lounge chairs, beach umbrellas, stand-up paddleboard rentals and lessons) and promote lists of those who do so</li></ul>  <ul data-bbox="586 771 2484 813" style="list-style-type: none"><li>• Provide lists of/promote nearby <b>eateries and accommodations</b></li></ul>
<p data-bbox="38 1078 280 1220"><b>Touring Ontario Trips</b> (~6 days ave.)</p>  	 <ul data-bbox="586 1013 2484 1099" style="list-style-type: none"><li>• Destination Ontario could provide <b>maps</b> of interesting tours in each Ontario region, indicating <b>trips of different lengths</b> (4 day, 1 week, 10 day trips, etc.) and centered around <b>charming towns</b> and <b>interesting “out-of-the-way” places</b></li></ul>  <ul data-bbox="586 1163 2484 1206" style="list-style-type: none"><li>• Highlight <b>museums, heritage sites</b> and other points-of-interest (activities particularly liked by this segment)</li></ul>  <ul data-bbox="586 1256 2484 1335" style="list-style-type: none"><li>• Provide lists of/promote <b>eateries, farmer’s markets</b> and <b>accommodations</b> along each route, as well as <b>service stations/repair shops</b></li></ul>

# Appendix

# Segment Characteristics\*

Natural Wonders Trip	Romantic Get-away	Camping Trip	Family Vacation
<p><b>Demographics</b> ML GTA, LL Eastern Ontario ML Cultural groups: South Asian ML Post Graduate, LL Technical school</p> <p><b>Travel Past 3 Years (QD5a/b)</b> ML travelled within Ontario ML travelled outside Ontario</p> <p><b>Intended Travel – Next 12 Months (Q2/3)</b> ML overnight trips within Ontario LL day trips within Ontario</p> <p><b>Attitudes to Travel (QD1/D2)</b> ML want a “working-holiday” arrangement ML choose different destination each trip ML like less crowded places/fewer tourists ML prefer to find favourite places (not famous) ML want completely new experience LL want to relax/be taken care of</p> <p><b>Perceptions of Ontario (QB12)</b> ML has a surprising number of attractions ML has unique and different features ML offers a more down-to-earth experience</p>	<p><b>Demographics</b> ML married without kids, LL single/no kids Higher H/H income (\$100,000+)</p> <p><b>Travel Past 3 Years (QD5a/b)</b> ML travelled within Ontario ML travelled outside Ontario</p> <p><b>Intended Travel – Next 12 Months (Q2/3)</b> ML overnights trips within Ontario ML overnights trips outside Ontario ML day trips within Ontario/outside Ontario</p> <p><b>Attitudes to Travel (QD1/D2)</b> ML prefer exotic, unusual places/activities ML want to relax/be taken care of ML like travel to be with loved ones ML prefer a faster paced, urban trip LL prefer a vacation alone</p> <p><b>Perceptions of Ontario (QB12)</b> No differences</p> <p><b>Main Motivation for Next (Ont) Trip (QA2)</b> ML want a romantic get-away LL need a change/new experience LL to be with children LL need to get back to nature LL a tradition</p>	<p><b>Demographics</b> LL GTA ML 18-29, 30-44 years, LL 45+ years ML Caucasian, LL Cultural groups ML married with kids (esp. 5-9 yrs), LL married/no kids ML H/H size of 3-4 people</p> <p><b>Travel Past 3 Years (QD5a/b)</b> No differences</p> <p><b>Intended Travel – Next 12 Months (Q2/3)</b> ML overnights trips within Ontario ML day trips within Ontario</p> <p><b>Attitudes to Travel (QD1/D2)</b> ML prefer less crowded places, fewer tourists ML have a limited budget and choose accommodations and activities that fit ML prefer to find favourite places (not famous)</p> <p><b>Perceptions of Ontario (QB12)</b> ML say underrated destination ML is good value for the money</p> <p><b>Main Motivation for Next (Ont) Trip (QA2)</b> ML need to get back to nature ML a tradition LL need a change/new experience</p>	<p><b>Demographics</b> LL Eastern Ontario ML 30-44 years, LL 45+ years ML Cultural groups: South Asian, East/Southeast Asian ML married with kids (all ages), LL married or single/no kids ML H/H size of 3-6 people</p> <p><b>Travel Past 3 Years (QD5a/b)</b> No differences</p> <p><b>Intended Travel – Next 12 Months (Q2/3)</b> No differences</p> <p><b>Attitudes to Travel (QD1/D2)</b> Most like travel to be with loved ones ML prefer faster paced, urban trip ML like to visit as many attractions possible ML find travel very stressful</p> <p><b>Perceptions of Ontario (QB12)</b> ML say great for fun/constantly entertained ML say not enough activities to fill a vacation Lots family friendly experiences–no difference</p>

\*Shows segment differences versus the total sample

ML = More likely LL = Less likely

# Segment Characteristics\*

Natural Wonders Trip	Romantic Get-away	Camping Trip	Family Vacation
<p><b>Main Motivation for Next (Ont) Trip (QA2)</b> ML needed to get back to nature</p>	<p><b>Motivations for Travel in Ontario (QA1c)</b> LL can combine it with other activities</p>	<p><b>Motivations for Travel in Ontario (QA1c)</b> LL can combine it with other activities</p>	<p><b>Main Motivation for Next (Ont) Trip (QA2)</b> ML to spend time with children LL need to relax/de-stress from life LL want a romantic get-away LL need to get back to nature</p>
<p><b>Motivations for Travel in Ontario (QA1c)</b> ML fewer tourists LL can combine it with other activities</p>	<p><b>Planned Activities – Next Trip Ontario (QA4)</b> ML "Other" entertainment (music, gaming, comedy) ML Bars, clubs, nightlife ML Shopping ML Wine Tours ML Breweries, cideries, distilleries ML Spas ML Resorts LL Camping LL Walking/hiking LL Cycling/mountain biking LL Other boating/paddling (not houseboat) LL Fishing</p>	<p><b>Planned Activities – Next Trip Ontario (QA4)</b> ML Camping ML Walking/hiking ML Cycling/mountain biking ML Other boating/paddling (not houseboat) ML Beaches ML Fishing LL Visiting attractions LL Visiting famous/historical sites LL Culture – Theatre, Art Galleries/"Other" entertain (e.g., music, gaming), Museums LL Bars, clubs, nightlife LL Shopping LL Wine tours, breweries, distilleries LL Spas, Resorts</p>	<p><b>Motivations for Travel in Ontario (QA1c)</b> No differences</p>
<p><b>Planned Activities – Next Trip Ontario (QA4)</b> ML Walking/hiking ML Other boating/paddling (not houseboat) ML Nature/natural wonders LL Culture - Theatre/"Other" entertainment (music, gaming, comedy) LL Shopping</p>	<p><b>Travel Behaviour – Next Trip in Ontario</b> No differences</p>	<p><b>Travel Behaviour – Next Trip in Ontario</b> ML travel in June-July-August ML travelling with family/children ML travelling group size is 3-4 people ML travel 1-4 hrs from home Lower spending per trip, lower travel budget</p>	<p><b>Planned Activities – Next Trip Ontario (QA4)</b> ML Visiting attractions ML Theme parks ML Science/education activities LL Walking/hiking LL Nature/natural wonders LL Wine tours</p>
<p><b>Travel Behaviour – Next Trip in Ontario</b> No differences</p>	<p><b>Information Sources/Media Consumption</b> ML Internet search ML consume YouTube, music streaming, Spotify</p>	<p><b>Information Sources/Media Consumption</b> ML consume video streaming, music streaming, Disney Plus, Instagram, Snapchat, Pinterest LL consume cable TV</p>	<p><b>Travel Behaviour – Next Trip in Ontario</b> LL travel in June, September ML travelling with family/children ML travelling group size is 3-9 people Higher spending per trip, average travel budget (next 12 months)</p>
<p><b>Information Sources/Media Consumption</b> ML Internet search ML consume YouTube, music streaming, Spotify</p>	<p><b>Travel Behaviour – Next Trip in Ontario</b> LL travel in July-August ML short get-aways (1-3 days) ML travelling as a couple</p>	<p><b>Information Sources/Media Consumption</b> ML consume video streaming, music streaming, Disney Plus, Instagram, Snapchat, Pinterest LL consume cable TV</p>	<p><b>Information Sources/Media Consumption</b> ML consume Disney Plus LL consume Twitter</p>

\*Shows segment differences versus the total sample

ML = More likely LL = Less likely

# Segment Characteristics\*

Sightseeing Trip – Famous/Historical Sites	Beach Trip	Touring Ontario (road trip)
<p><b>Demographics</b> ML GTA ML Cultural groups: East/Southeast Asian</p> <p><b>Travel Past 3 Years (QD5a/b)</b> LL travelled outside Ontario</p> <p><b>Intended Travel – Next 12 Months (Q2/3)</b> ML overnight trips within Ontario ML overnight trips outside Ontario ML day trips within/outside Ontario</p> <p><b>Attitudes to Travel (QD1/D2)</b> Less like travel to be with loved ones ML choose different destination each trip ML prefer a faster paced, urban trip ML want to see famous sites/attractions</p> <p><b>Perceptions of Ontario (QB12)</b> No differences</p>	<p><b>Demographics</b> ML South West, LL Eastern Ontario ML Female More likely technical school/university, LL post graduate</p> <p><b>Travel Past 3 Years (QD5a/b)</b> No differences</p> <p><b>Intended Travel – Next 12 Months (Q2/3)</b> ML overnight trips outside Ontario</p> <p><b>Attitudes to Travel (QD1/D2)</b> ML want to relax/be taken care of ML prefer less frequent, longer vacations ML want to further explore a favourite destination been to before LL want a "working-holiday" arrangement</p> <p><b>Perceptions of Ontario (QB12)</b> ML feel Ontario is not a real vacation because it's so close</p>	<p><b>Demographics</b> ML 45-59, 60-70 years, LL &lt;45 years ML Caucasian ML married without children ML graduated technical school/college</p> <p><b>Travel Past 3 Years (QD5a/b)</b> ML travelled within Ontario</p> <p><b>Intended Travel – Next 12 Months (Q2/3)</b> ML overnight trips within Ontario ML overnight trips outside Ontario ML day trips within Ontario</p> <p><b>Attitudes to Travel (QD1/D2)</b> ML choose different destination each trip ML like less crowded places/fewer tourists ML prefer to find favourite places (not famous) LL find travelling very stressful</p> <p><b>Perceptions of Ontario (QB12)</b> In general, more positive perceptions of Ontario: ML feel is easy to vacation in/travel around in ML has a surprising number of attractions ML has unique and different features ML offers a more down-to-earth experience ML has lots of family friendly experiences ML has charming small towns ML has lots of interesting "out-of-the-way" places LL feel Ontario is not a real vacation because it's so close LL feel Ontario is not a real vacation because it's too familiar ML feel Ontario is a safer place to travel now</p>

\*Shows segment differences versus the total sample

ML = More likely LL = Less likely



# Segment Characteristics\*

Sightseeing Trip – Famous/Historical Sites	Beach Trip	Touring Ontario (road trip)
<p><b>Main Motivation for Next (Ont) Trip (QA2)</b> ML need a change/new experience</p>	<p><b>Main Motivation for Next (Ont) Trip (QA2)</b> ML need to relax/de-stress from life LL want a romantic get-away</p>	<p><b>Main Motivation for Next (Ont) Trip (QA2)</b> ML need a change/new experience ML for personal growth (gain perspective, challenge self)</p>
<p><b>Motivations for Travel in Ontario (QA1c)</b> No differences</p>	<p><b>Motivations for Travel in Ontario (QA1c)</b> ML provides a relaxing, leisurely trip</p>	<p><b>Motivations for Travel in Ontario (QA1c)</b> No differences</p>
<p><b>Planned Activities – Next Trip Ontario (QA4)</b> ML Visiting attractions ML Visiting famous/historical sites ML Museums/heritage sites LL Camping LL Other boating/paddling (not houseboat) LL Fishing</p>	<p><b>Planned Activities – Next Trip Ontario (QA4)</b> ML Beaches ML Farmer’s markets LL Visiting famous/historical sites LL Camping</p>	<p><b>Planned Activities – Next Trip Ontario (QA4)</b> ML Motorcycling ML Museums and heritage sites ML Farmer’s markets LL Bars, clubs, nightlife LL Spas</p>
<p><b>Travel Behaviour – Next Trip in Ontario</b> ML travel in September ML travelling group size is 3-4 people ML travel 5-8 hrs from home, LL travel 1-4 hrs</p>	<p><b>Travel Behaviour – Next Trip in Ontario</b> ML travel in July-August ML longer vacations (mostly 4-7 days), LL 1-3 days ML travelling with children/family, LL as a couple ML travelling group size is 3-9 people</p>	<p><b>Travel Behaviour – Next Trip in Ontario</b> ML travel in September-October ML longer vacations (mostly 4-7 days), LL 1-3 days ML travelling with spouse/partner Mostly car, ML motorcycle ML travel 5+ hrs from home, LL travel 1-4 hrs</p>
<p><b>Information Sources/Media Consumption</b> ML Internet search ML Tourism/travel sections of newspapers, mags or specialty travel news sites (e.g., Condé Nast) LL consume Netflix, Spotify</p>	<p><b>Information Sources/Media Consumption</b> ML consume social media – no site in particular</p>	<p><b>Information Sources/Media Consumption</b> ML consume cable TV, radio LL consume Disney Plus, Reddit, TikTok</p>

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ML = More likely LL = Less likely