

The background of the slide is a photograph of a dramatic landscape. In the foreground, there are dark, jagged rock formations. Beyond the rocks, a vast, calm body of water stretches to the horizon. The water has a light blue-green hue. In the distance, a small island or headland is visible. Two people are standing on a rocky outcrop on the right side of the image, looking out over the water. The sky is a pale, clear blue.

# Destination Ontario

**Travel Intentions and Motivations Study**

**Ontario**

**Prepared by Forum Research  
June 16, 2022**

Background

# Key Objectives

To understand Ontarians' anticipated travel patterns in the next 12 months

- Measure interest in and the incidence of vacationing within Ontario versus outside Ontario in the next 12 months
- Assess the opportunities for targeting those planning to travel within Ontario and outside Ontario
  - travel motivations
  - attitudes to travel and to Ontario
  - planned trip types and activities
  - and travel behaviour among both segments
- Determine what types of activities these segments are interested in so that Ontario products can be matched to the segments



# Methodology



**Type of survey:** Online panel survey

**Location:** Across Ontario

**Sample size:** 1,520 surveys

**Survey length:** 15 minutes

**Fieldwork dates:** March 18 to April 8, 2022

**Maximum margin of error:** On 1,520 respondents is +/-2.51%, at the 95% confidence level (or 19 times out of 20, if the study were to be repeated)

The study is a random sample of Ontario travellers. Qualified respondents:

- Reside in Ontario
- Are 21-70 years of age
- Have made an overnight pleasure trip in the past 3 years or plan to make one in the next 2 years

Quotas and weights were implemented to ensure the sample represents the Ontario population by:


- age
- gender
- region of Ontario
- multi-cultural background

# Key Findings and Recommendations


# Four Key Numbers to Know

Travel plans **within and outside Ontario** during the next 12 months have increased since 2021


## 88%

- of **all respondents** are planning to make **any trip within Ontario** (overnight and/or day) in the next 12 months
- 75% of **all respondents** will make both **overnight and day** trips within Ontario during this time
-  from 30% in 2021


## 81%

- of **all respondents** are planning to make **overnight trips within Ontario** in the next 12 months
-  from 69% in 2021
- 25% of **all respondents** are planning **multiple overnight trips** (3 or more trips) within Ontario during this time
- Of this 81%...
  - 54% = 2-3 day trip
  - 38% = 4-7 day trip
  - 9% = 8+ days

## 82%

- 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 (4.1 vs. 2.3 trips)
-  from 73% in 2021

## 76%

- of **all respondents** are planning to make **out-of-province trips** in the next 12 months
-  from 51% in 2021
- 73% will make overnight trips
- 48% will make day trips

# FIVE Key Take-aways – Ontario Travel Plans and Perceptions

ALL ONTARIO TRAVELLERS				TRAVELLING WITHIN ONTARIO
Ontario tourism is in the recovery phase	Main types of pleasure trips planned also the highest revenue-generating vacations	Opportunity to showcase equally or more attractive options of popular activities to “Outside Ontario” travellers to increase visit and spend	Upward swing in perceptions of Ontario	Ontarians take short get-away trips in Ontario
Travellers are <b>more willing to travel</b> and to participate in tourism activities than they were in 2021.	<p>Activities in the next 12 months both <b>within and outside Ontario</b> are:</p> <ul style="list-style-type: none"> <li>• Trips to experience nature/natural wonders</li> <li>• Family vacations with lots of children’s activities</li> <li>• Camping (within Ontario only)</li> <li>• Romantic get-aways</li> <li>• Sightseeing trips to experience famous or historical sites</li> <li>• Beach vacations/beaches</li> <li>• Trips to enjoy city life – urban entertainment and nightlife</li> </ul> <p>along with other high revenue generating activities such as</p> <ul style="list-style-type: none"> <li>• Touring vacations (by car, RV, motorcycle)</li> <li>• Shopping trips.</li> </ul>	<p><b>Within Ontario:</b> Winery tours, Canoeing/kayaking/paddleboarding, Outdoor Adrenaline, and Cycling/mountain biking activities, are relatively unique to trips within Ontario.</p> <p><b>Outside Ontario:</b></p> <ul style="list-style-type: none"> <li>• Many activities and trips are equally popular among those planning trips <b>outside Ontario</b>.</li> <li>• Beach trips and Resorts are more prevalent outside Ontario. <b>Ontario’s equally or more attractive options (Port Stanley Beach, Ste. Anne’s Spa)</b> in these product areas should be showcased to “Outside Ontario” travellers.</li> </ul>	Ratings have <b>increased</b> slightly in several areas, and substantially in terms of <b>“great for fun and being constantly entertained”</b> (from 53% to 62%) and <b>“is popular/trendy”</b> (from 45% to 57%).	There continues to be an <b>opportunity to extend the duration of trips</b> and increase revenues by encouraging tourism operators to offer <b>packages on accommodations for extended stays, joint promotions</b> (e.g., offers on dinner for attending an activity) or <b>packages</b> for extended trips.

# FOUR Key Take-aways – Ontario Recovery

## COVID Recovery – ALL ONTARIO TRAVELLERS

Increase in travel intention within Ontario	Increase in travel confidence	More than just outdoor activity interest in 2022	Travel activities planned for 2022
<p><b>More people are willing to travel in the next 12 months, than in 2021</b> when the COVID pandemic travel restrictions were imposed on Ontario</p> <ul style="list-style-type: none"> <li>81% are planning to make <b>overnight trips</b> within Ontario (versus 69% in 2021)</li> <li>82% are planning to make <b>day trips</b> within Ontario (versus 73% in 2021)</li> <li>However, travellers are <b>still limiting their travel</b>. In both cases, the increase in travel since 2021 is among those planning 1 or 2 trips. The proportion planning lots of trips (3+) is unchanged.</li> </ul>	<p>COVID-related reasons (safer, travel restrictions) have <b>dropped dramatically</b> since 2021, as <b>motivations</b> for travelling within Ontario</p> <ul style="list-style-type: none"> <li>From 23% to 7% as a reason for planning an overnight trip in Ontario, unaided</li> <li>From 41% to 17% as a reason for planning a trip within Ontario, aided</li> </ul>	<p><b>Other motivations</b> for travelling within Ontario have <b>risen to the top</b> in 2022:</p> <ul style="list-style-type: none"> <li><b>The desire to see specific places or events</b> (e.g., Niagara Falls, Blue Mountain, casinos, festivals)</li> <li><b>Affordability</b> – it is less expensive</li> <li><b>Proximity</b> – being close remains a top reason for staying in the province (easy to reach, can travel by car, less hassle, no time for a longer vacation, don't want to travel far with children)</li> </ul>	<p>The COVID recovery seems to have had a <b>slight impact on trips and activities planned</b> for 2022:</p> <ul style="list-style-type: none"> <li>There has been a <b>slight increase in family vacations</b> in Ontario (from 6% to 11%), and beach vacations outside Ontario (from 15% to 21%)</li> <li><b>Walking/hiking</b> is still the main activity planned in Ontario, but there has been a <b>decline</b> since last year (from 49% to 41%) in favour of visiting attractions (increased from 30% to 35%)</li> <li>There has also been a decline in walking/hiking among those planning trips outside Ontario (from 34% to 26%)</li> </ul>

**Overall, the research suggests that travellers are more willing to travel and participate in tourism activities than they were in 2021**



# Key Findings

## Motivations for Planning Trips

### Motivations for wanting a trip in general

#### Within Ontario:

- **New experience/change of scene** (25%)
- **Relax/"de-stress"** (17%) / **care for mental health** (11%)
- **Trip tradition** (8%)

#### Outside Ontario:

- **New experience** (21%)
- **Relax/"de-stress"** (16%) / **care for mental health** (10%)
- **Trip tradition** (11%)
- **Visits to family/friends** (10%) – greater motivation than for "within Ontario" travellers (2%)

# Key Findings








## Motivations for Planning Trips

### Motivations for planning trips within and outside Ontario

	Within Ontario	Outside Ontario
Main Motivations	To visit specific places/events	To visit a certain destination
	Close to home/less hassle – easy to reach, can travel by car, no planes, good for a short trip when have limited vacation time	Want to experience something new, different, unfamiliar/seen Ontario  Ontario’s attractions seem less interesting/desirable (possibly due to over-familiarity with them)
		Friend/family visits or events (weddings, reunions, bachelor parties, birthdays, etc.)
Secondary Motivations	Affordable	Want a sun destination/warmer weather/to see the ocean or beaches
	Less planning: with lower cost, close to home = a more relaxing, leisurely trip	

# Key Findings

## Main Types of Pleasure Trips Planned Next 12 Months

		Within Ontario	Outside Ontario
	A trip to experience nature/natural wonders	15%	11%
	Camping (mostly unique to travel within Ontario)	12%▲	2%
	A family vacation with lots of children’s activities	11%	8%
	A romantic get-away	11%	9%
	A sightseeing trip to experience famous or historical sites	8%▼	14%
	A trip to enjoy sitting/playing on the beach	5%▼	21%
	A trip to enjoy city life (urban entertainment, nightlife)	4%	5%

All other trip types are planned by 4% or fewer respondents  
Question: Overall, which **one** of the following statements best describes the type of pleasure trip that you are planning to take **next** within/outside Ontario?  
▲ ▼ shows how Within Ontario differs from Outside Ontario

# Key Findings

## TOTAL SPEND ON 9 TOP TRIP TYPES

These will also be the highest revenue-generating vacations in Ontario in the next 12 months, along with Touring vacations and Shopping trips

### Total Estimated Spend Per Trip Type – Ontario 2022\*

	Total Estimated Spend	Average Spend Per Travelling Group
 1. Trip to experience nature/natural wonders (n=199)	\$477,737,687	\$1,011
 2. Family vacation with lots of children's activities (n=159)	\$423,112,092	\$1,221
 3. Camping (n=159)	\$328,887,666	\$870
 4. Romantic get-away (n=152)	\$286,579,607	\$827
 5. Sightseeing trip to experience famous or historical sites (n=107)	\$265,126,302	\$1,052
 6. Trip to enjoy city life – urban entertainment and nightlife (n=62)	\$134,201,289	\$1065
 7. Beach trip (n=74)	\$122,545,308	\$778
 8. Touring Ontario vacation in car, RV or motorcycle (n=39)	\$120,970,176	\$1,280
 9. Shopping trip (n=49)	\$119,584,059	\$949
* Extrapolated to total households in Ontario – 2021 Census Caution: Many of these are calculated on small bases sizes and are subject to a high degree of variability		These estimates for spending over the next 12 months are approximate and based on “next trip” only. They do not account for multiple trips.

Overall, which one of the following statements best describes the type of pleasure trip that you are planning to take next within Ontario?

Please think about your next pleasure trip within Ontario, and all the expenditures of all of the people in your immediate travelling group. What is the total amount that you are expecting to spend on this trip? (Your best estimate is fine).

# Key Findings

## TOTAL SPEND ON 9 REMAINING TRIP TYPES

### Total Estimated Spend Per Trip Type – Ontario 2022\*

	Total Estimated Spend	Average Spend Per Travelling Group
 10. Winery, brewery, or distillery tour (n=41)	\$102,352,110	\$1083
 11. Arts and Culture trip (e.g., theatre, art galleries, opera) (n=34)	\$94,885,982	\$1,004
 12. Outdoor adventure trip (e.g., rock climbing, skydiving, zip-lining, scuba diving) (n=34)	\$80,772,795	\$1,282
 13. A trip to enjoy concerts or festivals (n=38)	\$79,008,646	\$836
 14. Spa or retreat trip (n=25)*	\$77,118,487	\$1,224
 15. Sport-oriented trip (e.g., golfing, fishing, hunting) (n=21)*	\$68,171,735	\$1,082
 16. Fitness-oriented trip (e.g., hiking, skiing, cycling) (n=23)*	\$63,635,353	\$1010
 17. “Foodie” focussed trip (n=30)	\$42,780,599	\$679
 18. Water adventure trip (e.g., houseboating, rafting, sailing) (n=17)*	\$37,110,122	\$1,178
* Caution: small bases ** Extrapolated to total households in Ontario – 2021 Census		These estimates for spending over the next 12 months are approximate and based on “next trip” only. They do not account for multiple trips.

Overall, which one of the following statements best describes the type of pleasure trip that you are planning to take next within Ontario?  
 Please think about your next pleasure trip within Ontario, and all the expenditures of all of the people in your immediate travelling group.  
 What is the total amount that you are expecting to spend on this trip? (Your best estimate is fine).



# Key Findings

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

	Within Ontario	Outside Ontario
	Build Traffic & Spend	Promote
Walking/hiking (especially within Ontario)	41%▲	26%
Visiting attractions	35%▲	21%
Nature/natural wonders (especially within Ontario)	31%▲	25%
Beaches	30%	32%
Shopping	24%	25%
Famous/historical sites	22%	21%
Also, more unique to trips within Ontario	22%▲	6%
Camping	22%▲	7%
Farmer’s markets		

These activities are equally popular/likely to be considered by those planning overnight and day trips  
Question: Which of the following activities are you planning on participating in during your next pleasure trip within/outside Ontario (or wish you could participate in if they were available)?

▲▼ shows how Within Ontario differs from Outside Ontario





# Key Findings

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

	Within Ontario	Outside Ontario
	Unique to Ontario Build Traffic & Spend	Promote
Wine tours/regions	13% ▲	3%
Canoeing, kayaking, paddleboarding	12% ▲	5%
Outdoor Adrenaline (rock-climbing, scuba, etc.)	12% ▲	5%
Cycling/mountain biking	8% ▲	2%

	Within Ontario	Outside Ontario
		Showcase Ontario's attractive options
Resorts	10% ▼	17%

▲▼ shows how Within Ontario differs from Outside Ontario

Question: Which of the following activities are you planning on participating in during your next pleasure trip within/outside Ontario (or wish you could participate in if they were available)?

# Key Findings

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

Natural Wonders Trip	Family Vacation	Camping Trip	Romantic Get-away	Sightseeing Trip – Famous/ Historical Sites	City Life Trip	Beach Trip	Touring Ontario (road trip)	Shopping Trip
Walking/hiking	Visiting attractions	Camping	Shopping	Famous/historical sites	Shopping	Beaches	Nature/natural wonders	Shopping
Nature/natural wonders	Theme parks	Canoeing, kayaking, paddleboarding	Spas	Visiting attractions	Bars, clubs, nightlife	Canoeing, kayaking, paddleboarding	Visiting attractions	
	Science/ education activities	Fishing	Resorts	Museums/ heritage sites	Other entertain – e.g., live music, gaming, comedy		Wine tours	
		Cycling/ mountain biking	Retreats				Farmer’s markets	
			Wine Tours				Other “foodie” destinations	
							Motorcycling	
							Indigenous experiences	

Question: Which of the following activities are you planning on participating in during your next pleasure trip within/outside Ontario (or wish you could participate in if they were available)?





# Travel Behaviour

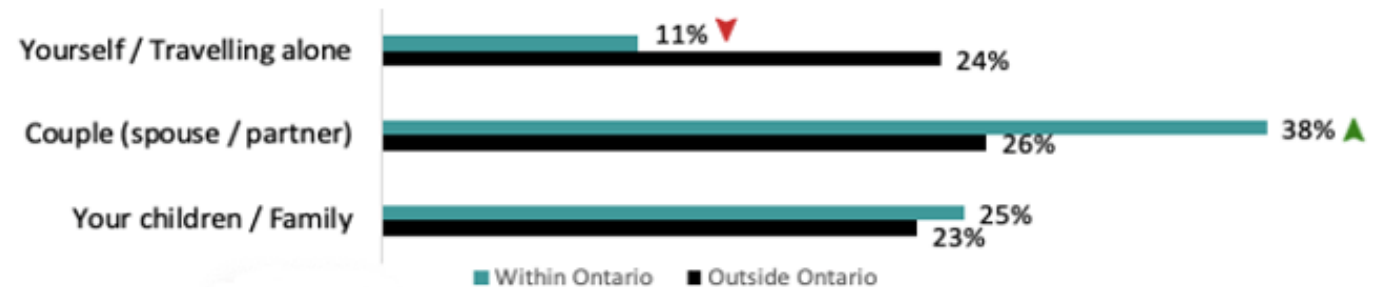
Ontario is mostly recognized as a destination for **short get-aways**

Number and length of overnight trips planned – next 12 months		
	Within Ontario	Outside Ontario
Net: Long weekend trips	69%▲	39%
Net: Brief get-aways during the week	29%▲	10%
Net: One-week trips	36%	40%
Net: Trips of 2+ weeks	14%	32%▲
shows how Within Ontario differs from Outside Ontario		

92% Next Ontario trip = **one week or less**

54% Next Ontario trip = **brief get-away of 1-3 days**

Average distance travelled (Ontario) ~ **340 km**



Other characteristics of those making overnight trips in Ontario in the next 12 months: Representative regionally of Ontario (43% from Toronto GTA); fairly equally spread across ages (21 to 34 years – 30%; 35 to 54 years – 40%; 55 to 70 years – 29%); 68% household income of \$50,000+; 69% Caucasian background; 62% university or technical college



# Key Findings

Strengths	Weaknesses/Opportunities
Good for short get-aways (1 to 3 days) (83% agree)	Good for a longer trip of at least 10 days (46% agree)
Charming small towns (78%)	Is popular/trendy (but image improved since 2021) (57% agree from 45% in 2021)
Lots of interesting “out-of-the-way” places (69%)	Has unique features (55%)
Easy to vacation in/travel around (76%) Welcoming, where you can be yourself (76%) → A more relaxing leisurely trip (66%)	
Lots of family friendly experiences (75%)	
Has a surprising number of destinations/attractions (72%)	
A wide range of places, cultures, experiences (70%)	
Is a safer place to travel right now (70%)	

\* 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.  
Question: How much do you agree or disagree with the following statements about **Ontario** as a travel destination?

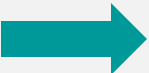
Most Ontarians prefer to travel to **less crowded destinations** (73%), to take their time exploring **one or two destinations** (71%) and have **limited vacation budgets** (66%)  
= Ontario’s strengths of having **charming small towns** and **“out-of-the-way” places**, and that it **accommodates all travel budgets**

# Insights and Opportunities

# INSIGHTS AND OPPORTUNITIES – WITHIN & OUTSIDE ONTARIO

## INSIGHT

COVID-related concerns – no longer a main motivation for travelling within Ontario



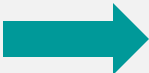
## OPPORTUNITY

Travellers are confident in travelling and no longer require the Travel Safe, Travel Local messaging

A main motivation for wanting a trip:

Need for a **a new experience/change of scene**

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



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

- Continue promoting Ontario as a destination where travellers can **experience a change of scene/a new experience close to home**
- Communicate Ontario's perceived strengths of having **charming small towns and interesting "out-of-the-way" places**
  - Feature its small towns and out-of-the-way places in ads, **perhaps creating a series of ads** that each focuses on the charm of one or two towns/places
  - **Link the ads to "Regions, Cities and Towns"** sections of the website
  - **Package together a couple of these destinations** that are close to each other
    - **Add a "What else is close-by?" feature**, so users can build their own trips
    - Encourage **tourism operators to offer packages** as well



# INSIGHTS AND OPPORTUNITIES – WITHIN & OUTSIDE ONTARIO

## INSIGHT

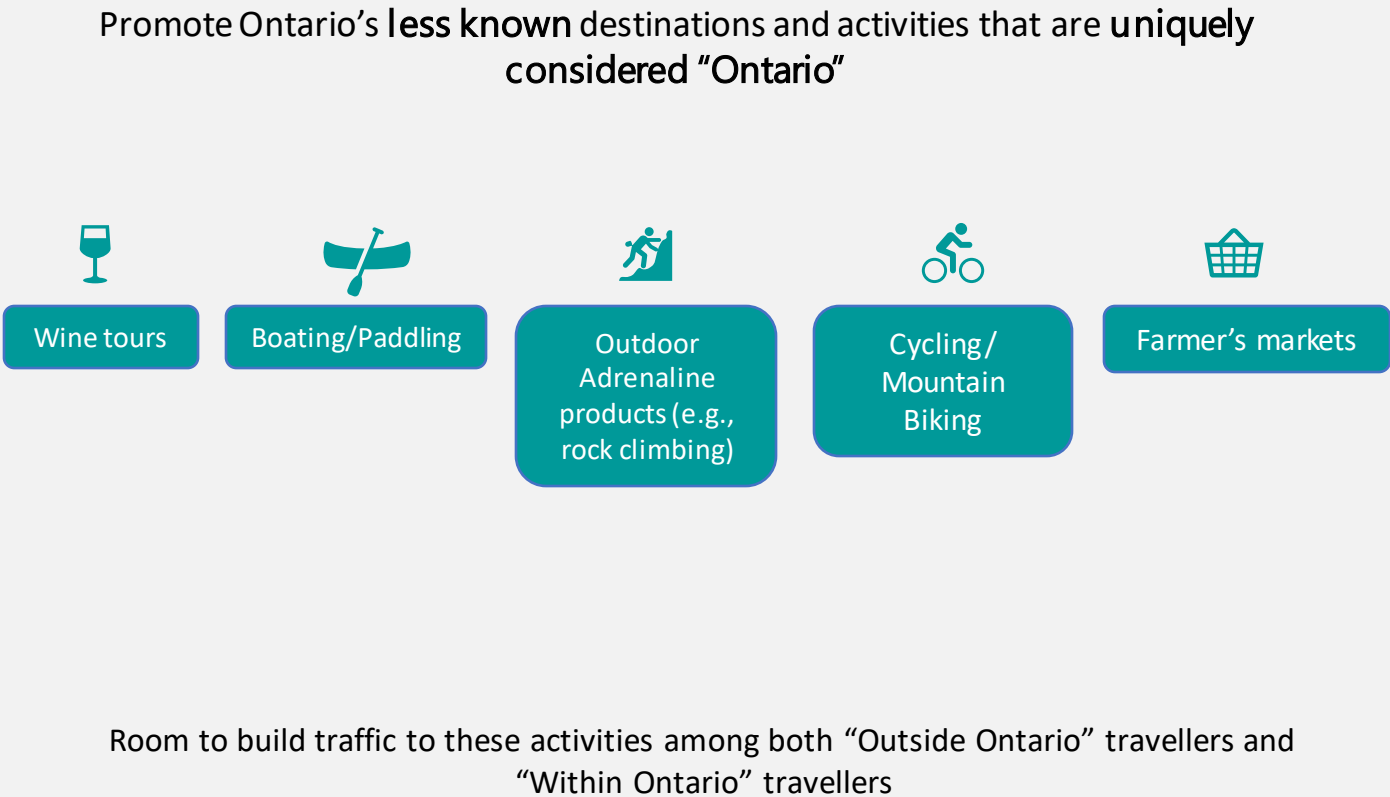
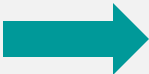
## OPPORTUNITY

A main motivation for wanting a trip:

Need for a **a new experience/change of scene**

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

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



INSIGHT

OPPORTUNITY

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

- Trips to experience nature/natural wonders
- Family vacations with lots of children’s activities  
Camping (within Ontario only)
- Romantic get-aways
- Sightseeing trips to experience famous or historical sites
- Beach vacations/beaches
- Trips to enjoy city life – urban entertainment and nightlife

Also, highest revenue-generating vacations

- Touring vacations (by car, RV, motorcycle)
- Shopping trips

Additional individual products

- Walking/hiking
- Visiting attractions



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

# INSIGHTS AND OPPORTUNITIES – WITHIN & OUTSIDE ONTARIO

## INSIGHT

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



**Internet surfing**



**Social media/social media influencers**  
(particularly Facebook and Instagram)



**Video streaming services**  
(particularly Netflix, Amazon Prime)



**Regular, cable television channels online or on television**



## OPPORTUNITY

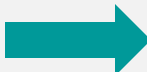
Consider these platforms for promoting Ontario travel to both those planning trips within and outside Ontario

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

**Close to home/less hassle/easy to vacation** – a main motivation for travel within Ontario

Also motivations and strengths of Ontario:

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



Create messaging and tone accordingly

These may work together in one message: Close to home, less planning, and accommodates all travel budgets  
= a more relaxed leisurely break

# INSIGHTS AND OPPORTUNITIES – WITHIN ONTARIO

## INSIGHT

**Affordability** is a **greater motivator** for travelling within Ontario since COVID, likely to become even more dominant as gas prices increase

When planning vacations, “Within Ontario” travellers use websites mainly to look for **discounts or package deals**



## OPPORTUNITY

Promote Ontario as an **affordable get-away**  
(compared to driving to the U.S., for example)

Encourage the tourism trade to **offer packages** on meals, accommodations and/or attractions to make trips more affordable

Promote these on the website or through links to operators

The main types of pleasure trips planned for travel within Ontario include **camping trips** and trips to **experience nature/natural wonders**

They are among the **highest revenue-generating trips** in the next 12 months

Trips to **experience nature** are popular among all travellers, especially “Within Ontario” travellers

**Camping** is much more **uniquely considered** for trips **within Ontario** than outside Ontario



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



# 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 ~ 340 kilometres



## OPPORTUNITY

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

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

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

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



Given that 1-in-4 "Outside Ontario" travellers are alone, 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

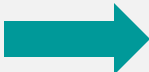
# INSIGHTS AND OPPORTUNITIES – OUTSIDE ONTARIO

## INSIGHT

## OPPORTUNITY

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

Just under half of those planning trips “Outside Ontario” travellers are intending to travel to relatively **close and familiar destinations** on their next trips, i.e., other Canadian provinces and the United States

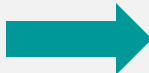


Most “Outside Ontario” travellers are seeking fairly familiar experiences outside of the province, rather than wildly exotic ones, making it **relatively easier to target** Ontario products to them

Motivations for travelling out-of-province include :

Wanting to experience **something new, different, unfamiliar** – not the “same old, same old”

Ontario’s attractions seem a little **boring, outdated, not unique**, not the products they are seeking (possibly due to over-familiarity)



Messaging and tone of promotions should continue to convey the idea that Ontario offers travellers a real **escape from the ordinary** and all the experiences that they would have elsewhere

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**– wine tours, canoeing/ kayaking/paddleboarding, outdoor adrenaline (e.g., rock climbing, ziplining, scuba diving) cycling/mountain biking products, Farmer’s markets

# INSIGHTS AND OPPORTUNITIES – OUTSIDE ONTARIO

## INSIGHT

## OPPORTUNITY

A main motivation for wanting a trip that is more prevalent among “Outside Ontario” travellers”:

- Visiting places that have **different cultures and customs** from ours

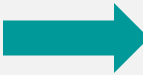


Promote Ontario’s Indigenous and Francophone experiences

“Outside Ontario” travellers are:

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

as “Within Ontario” travellers



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, Port Stanley beaches

Consider promoting Ontario’s beaches as being **affordable family fun beach vacations “in your own backyard”** – there’s no need to pay large airfares and travel long distances with children (a barrier to travelling far) to have family fun on the beach

Several Ontario products that are popular among “Within Ontario” travellers are also popular among “Outside Ontario” travellers ...

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

... or are more likely to be planned by “Outside Ontario” travellers

- Resorts



**Promote Ontario’s equally or more attractive products** to those planning trips outside the province

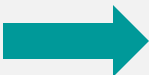
# INSIGHTS AND OPPORTUNITIES – OUTSIDE ONTARIO

## INSIGHT

Products not planned for the next trip outside Ontario, but that generate considerable interest include:

- Food trails/festivals
- Farmer’s markets
- Other “foodie” focused destinations, and
- Resorts and spas

(given survey timing constraints, interest among those not planning each activity was only asked of “Outside Ontario” travellers)



## OPPORTUNITY

The latent interest in “food” and the popularity of farmer’s markets within Ontario travel suggests that **food products may be an emerging opportunity** outside and within Ontario

There also may be a **latent interest in resorts and spas** that can propel them from being secondary products (in terms of interest) to more popular ones








**Resorts and spas** may be emerging product opportunities, yet resorts is one that travellers are more likely to go **out-of-province** for

A secondary motivation for taking a trip is a need to **relax/“de-stress”/care for mental health**



Promote Ontario’s **equally or more attractive resorts** to those planning trips outside the province, as well as its **spas and retreats** as places to de-stress and care for mental health

A unique angle on Ontario’ resorts may be the **Canadiana aspect** – e.g., Ontario has world-class resorts and spas in a truly Canadian setting (in the wilderness/cottage country, on lakes, at Niagara Falls, Great Wolf Lodge, Nordic spas in Ottawa/Whitby)

SEGMENT/PRODUCT		OPPORTUNITY
<div>Camping</div> <div></div>		<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 (yurts, cabins, backcountry cabins)</li></ul></li></ul>
		<ul style="list-style-type: none"><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, fishing equipment (items that are of particular interest to this segment)</li><li>backcountry guides and outfitters (e.g., air, water or road shuttle services, equipment delivery/pick-up)</li></ul></li></ul>
		<ul style="list-style-type: none"><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></ul>
		<ul style="list-style-type: none"><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></ul>
		<ul style="list-style-type: none"><li>Ensure that car and day campers know where they can <b>buy emergency supplies locally</b> (e.g., diapers, food, matches, etc.)</li></ul>
		<ul style="list-style-type: none"><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 (i.e., “add a day trip to your camping trip”)</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>

SEGMENT/PRODUCT

OPPORTUNITY

Nature/Natural  
Wonders



Near popular or appropriate locations, provide lists of/promote:



- **Recreational equipment outfitters** (especially canoes, kayaks, paddle-boards, hiking equipment, binoculars)



- **Local eateries, farmer’s markets and accommodations** for self-directed trips
  - encourage eateries to offer sit-down meals and take-out “lunch-boxes” and snacks for midday meals for travellers visiting the natural sites









- Encourage tourism operators to provide paid **guided tours** and paid **shuttle services**



- **Extend trip duration and revenues** by **encouraging tourism operators to offer packages** that would combine activities particularly liked by this segment – i.e., natural wonders, hiking, boating










For example:

- Day 1:
  - A shuttle to a hike-in sit
  - Breakfast and take-out lunch at a local restaurant or farmer’s market
  - Walk/hike to a natural wonder
  - Shuttle service to dinner and a motel
  - B&B for an overnight stay
- Day 2: A trip to a boating-related site the next day with shuttles and meals








SEGMENT/PRODUCT	OPPORTUNITY
<p>Walking/hiking Cycling</p>  	<div><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></div> <div><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></ul></div> <div><ul style="list-style-type: none"><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></ul></div> <div><ul style="list-style-type: none"><li>• <b>Extend trip duration and revenues</b> by encouraging tourism operators to offer packages, 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></div>

INSIGHTS AND OPPORTUNITIES

UPSELLING POPULAR, BUT LOWER-REVENUE TRIP TYPES/PRODUCTS

SEGMENT/PRODUCT		OPPORTUNITY
<div>Beach Trips</div> <div></div>	<div>➔</div>	<div><ul 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></div>
		<div><ul style="list-style-type: none"><li>Encourage <b>trucks/facilities</b> at beaches selling <b>essential “emergency” items</b> such as as sunscreen, sunglasses, hats, printed/souvenir t-shirts, beach toys</li></ul></div>
		<div><ul 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></div>
		<div><ul 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></div>
		<div><ul style="list-style-type: none"><li>Provide lists of/promote nearby <b>eateries and accommodations</b></li></ul></div>
<div></div>		
<div>Touring Ontario Trips</div> <div></div>	<div>➔</div>	<div><ul style="list-style-type: none"><li>Potential opportunity to 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 interesting <b>“out-of-the-way” places</b></li></ul></div>
		<div><ul 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></div>
		<div><ul 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></div>



SEGMENT/PRODUCT		OPPORTUNITY
Shopping Trips		 <ul style="list-style-type: none"><li>“Shopping” could be for clothing/household goods or for artisan products</li></ul>
		 <ul style="list-style-type: none"><li>Ensure that travellers <b>know about unique shopping areas</b> in the province (e.g., Yorkville, Kensington Market in Toronto), including towns with charming shopping areas (e.g., Port Perry)</li></ul>
		 <ul style="list-style-type: none"><li>Encourage tourism operators to <b>organize shuttles</b> to interesting shopping locations</li></ul>
		 <ul style="list-style-type: none"><li>Offer <b>packages or added-value</b> (e.g., hotel room upgrades) to <b>groups of friends</b> who are on a shopping excursion together</li></ul>
		 <ul style="list-style-type: none"><li>Encourage groups of friends to extend their trip by a day by offering <b>packages on other services</b> (e.g., 15% off a mani-pedi or spa treatment)</li></ul>
		 <ul style="list-style-type: none"><li><b>Attach</b> shopping excursions to <b>other products</b> (e.g., shuttles to shopping areas for those staying at a resort)</li></ul>

SEGMENT/PRODUCT

OPPORTUNITY

Resorts/  
Spa Trips



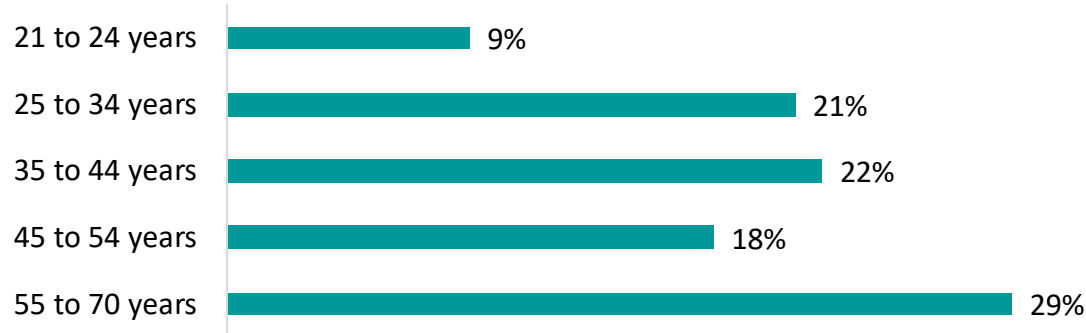
- Ensure that travellers **know where Ontario's resorts** are, how they are different from each other, and who they target (if any group in particular)
- For resorts with spas, **offer romantic spa get-aways** including couples massages etc. (those on romantic get-away trips are more likely than others to want to use resorts, spas and retreats)
- For spas, target women in the mid-income (\$50K to \$99K) to higher-income ranges
- Offer **packages or added-value** (e.g., hotel room upgrades) to **couples or groups of friends** who are visiting a spa together
- Encourage couples and groups of friends to extend their trip by a day by offering **packages on other services** (e.g., a wine tour for couples)

# Who is Travelling Within Ontario

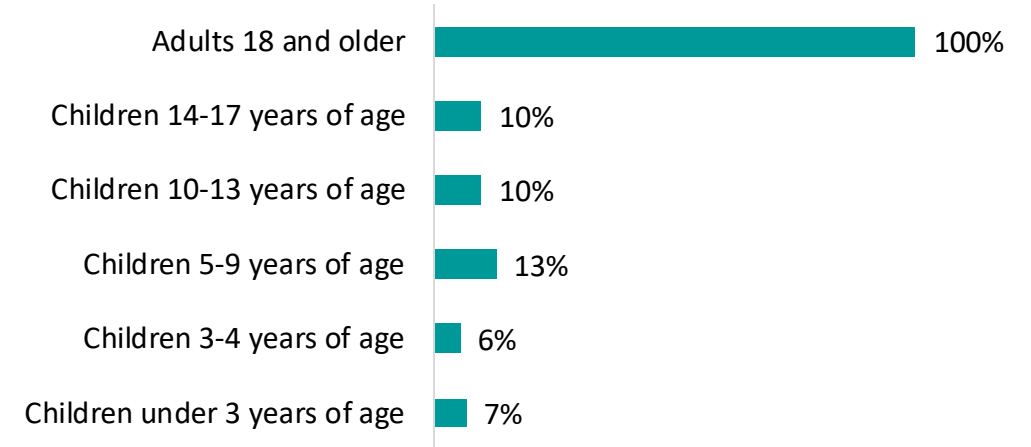
# Overnight Travellers Within Ontario

## (Next 12 Months)

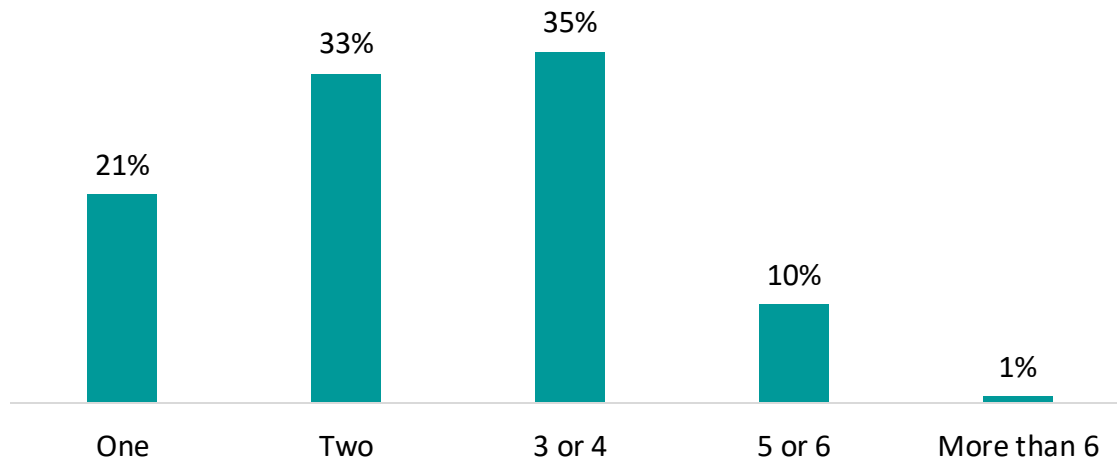
Age\*



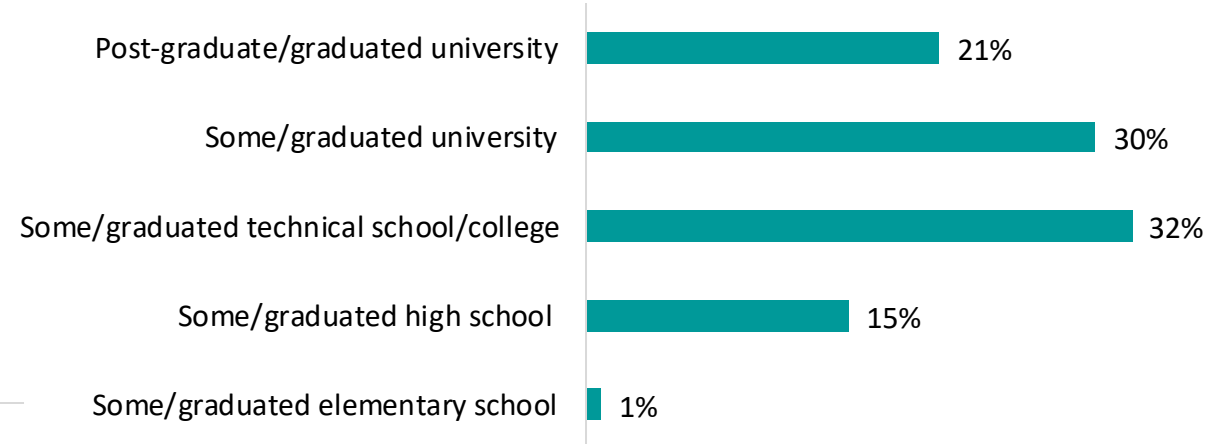
Household Composition



Number Of People In Household



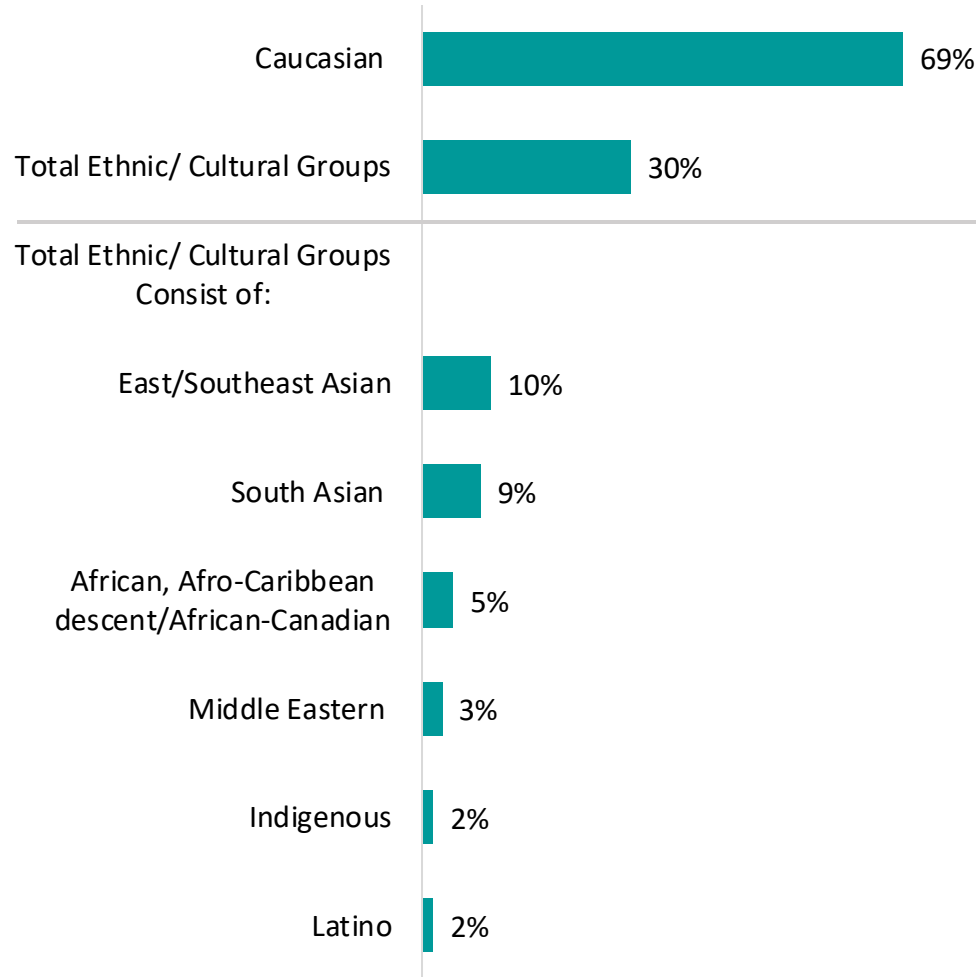
Highest Level Of Education



# Overnight Travellers Within Ontario

## (Next 12 Months)

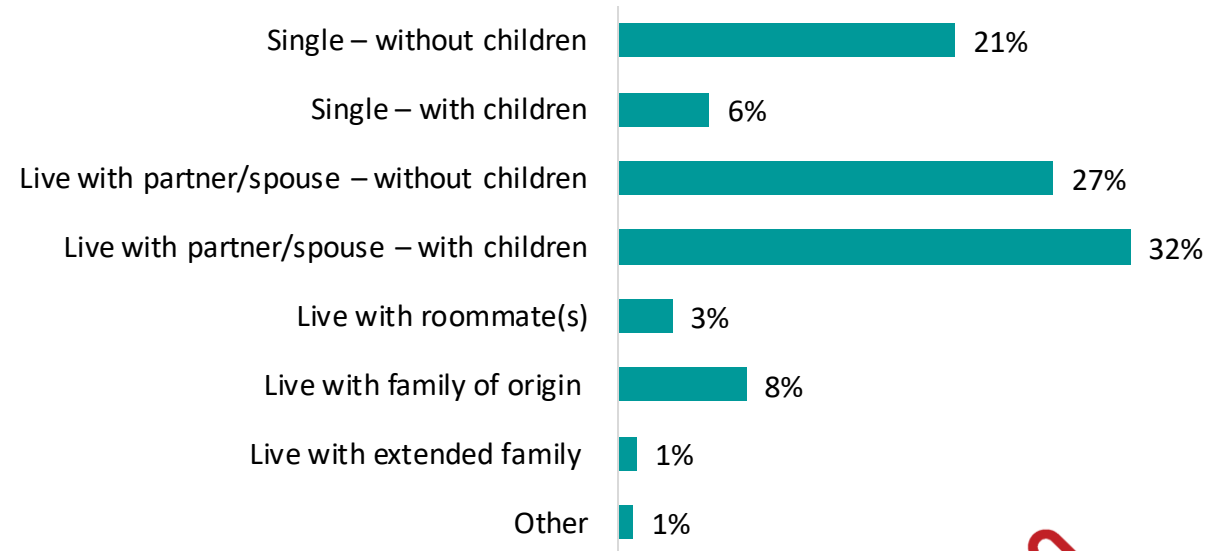
### Ethnicity\*



### Gender\*



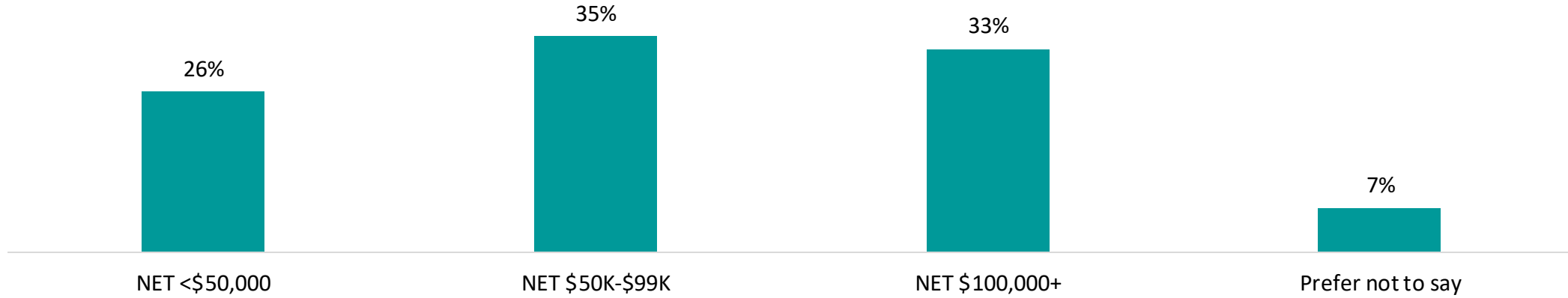
### Household Status



# Overnight Travellers Within Ontario

## (Next 12 Months)

### Total Annual Household Income



### Region\*

