



IDENTIFYING THE DRIVERS OF SOUTHEASTERN ONTARIO'S DESTINATION BRAND

A 2023 Market Research Study with Ontario,
Quebec & US Travel Consumers for RTO9

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For more information, please contact:

Oliver Martin

Partner

+1 416 721 3544

oliverm@twenty31.org

Michelle Gouden

Partner

+27 73 085 7641

michelleg@twenty31

Sam Mountford

Research Director

+44 7970 039530

samm@twenty31.org

Twenty31 Consulting Inc.

2178 W. 15th Avenue

Vancouver, British Columbia

V6K 2Y5

Canada

tourism by design

www.twenty31.org

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17 April 2023

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EXECUTIVE SUMMARY

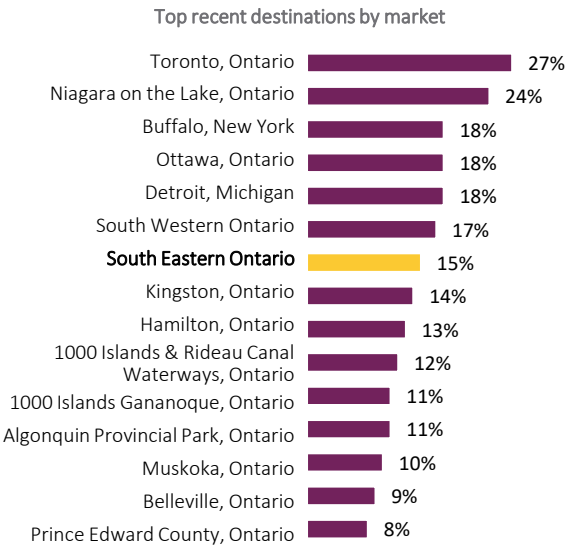
- Past Visitation & Future Consideration
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EXECUTIVE SUMMARY (1 OF 2)

South Eastern Ontario’s brand health is moderate compared to other nearby destinations; food and drink and soft adventure while enjoying the outdoors are the top preferences in terms of activity on a potential holiday to the region.

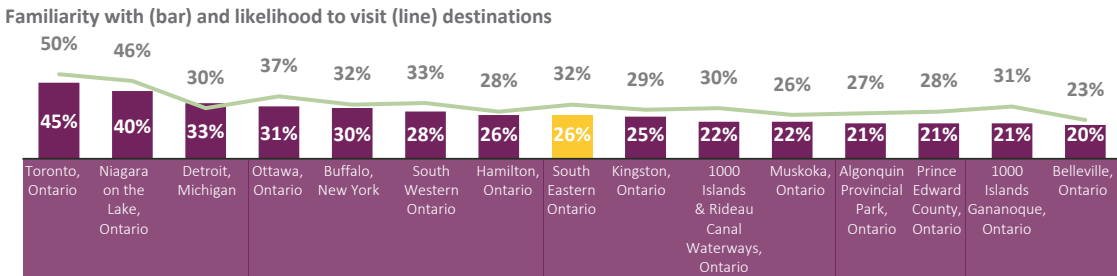
PAST VISITATION & FUTURE CONSIDERATION

- 1 These findings reveal that a relatively small proportion of travellers surveyed – 15% in total – say they have visited South Eastern Ontario. This is some way behind the most-visited nearby destinations, Toronto (visited by 27%) and Niagara-on-the-Lake (visited by 24%) – but ahead of competitor destinations like Muskoka (10%) or Algonquin Park (11%).
- 2 Encouragingly, almost two in five (39%) travellers across these markets say they will consider South Eastern Ontario as a future leisure travel destination (39%), including 19% who say they will definitely consider it.
- 3 When travellers are asked what would make them more likely to consider the region in future, relatively low awareness is apparent, with many mentioning more information. Others cite offers and discounts on accommodation or food and drink, or easier transportation.



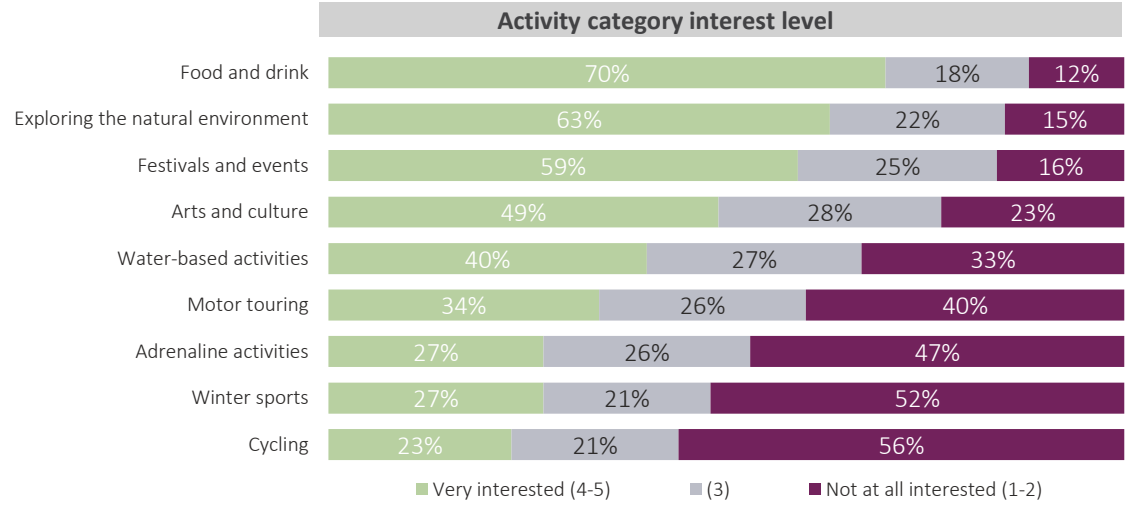
SOUTH EASTERN ONTARIO’S BRAND HEALTH

- 1 South Eastern Ontario’s brand health is moderate compared to other nearby destinations. At 26%, familiarity with the region as a whole is significantly higher than with the destinations within the region except for Kingston, which is almost as well known at 25%. However, it is less well known than major urban centres such as Ottawa (31%), Detroit (33%) or Buffalo (30%) and much less well known than marquee destinations Toronto (45%) and Niagara on the Lake (40%).
- 2 Likelihood to visit South Eastern Ontario is in line with this overall picture – just under a third (32%) say they are likely to visit in future. Many have clear associations with it on being asked, and often mention its natural beauty – beaches, lakes, rivers , countryside and small towns.



INTEREST IN TYPES OF ACTIVITY ON HOLIDAY

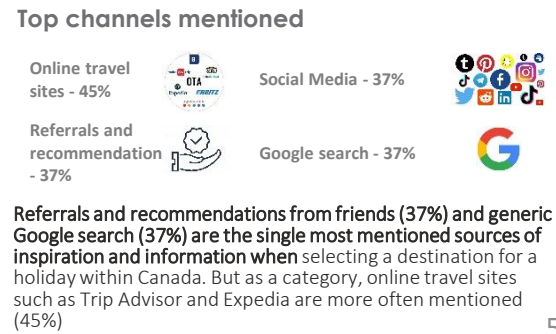
- 1 Relaxation and enjoying the outdoors are also clearly top of mind when travellers think about their preferred activities on a holiday to the region. Asked what type of activities they would be interested in undertaking on a potential holiday to South Eastern Ontario, the only categories that a majority are interested in are food and drink (70%), exploring the natural environment (63%) and festivals (59%). More active or energetic activity types tend to be the least popular, with only 27% mentioning adrenaline activities or winter sports, and 23% mentioning cycling.



INTEREST IN SPECIFIC ACTIVITIES



INSPIRATION SOURCE FOR PAST VISITS



EXECUTIVE SUMMARY (2 OF 2)

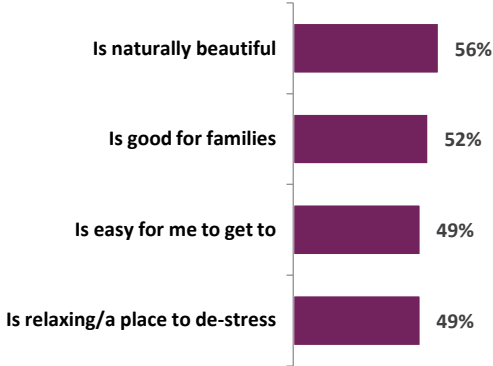
South Eastern Ontario’s natural beauty is actively driving visitation. Adrenaline activities and nightlife are seen as weaker areas for the region – but this does not appear to be a major factor holding people back from visiting.

KEY ELEMENTS OF SOUTH EASTERN ONTARIO’S IMAGE

- 1 Travellers across these markets were asked to say which of a range of descriptions they felt applied to South Eastern Ontario. The results confirm that **it has a number of important attributes that make it appealing** and that potentially differentiate it.
- 2 **Natural beauty is the top attribute associated with South Eastern Ontario**, cited by over half (56%). This meshes well with travellers’ preference for soft adventure activities in the outdoors. A majority (52%) also feel that it is a good destination for families, highlighting the success of RTO9’s current positioning.
- 3 **Its weaker areas are to some degree the flipside of these strengths.** If it valued for its relaxing environment, the peace and quiet of its natural beauty, its easy accessibility and its suitability for families, travellers in these target markets are more likely to doubt that it offers adrenaline activities (35%), has good nightlife (36%), or is a good place to meet new people (41%).
- 4 It is striking that **sustainability is also one of the weaker associations with South Eastern Ontario.** It is not clear why travellers perceive the region in this way – this may be a reflection of low awareness of initiatives to promote sustainability, or of the relative lack of public transportation options in the region. Further research is advisable to understand this perception better.

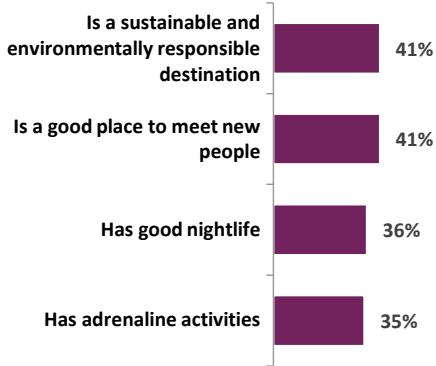
% who feel each applies to South Eastern Ontario

Highest rated attributes



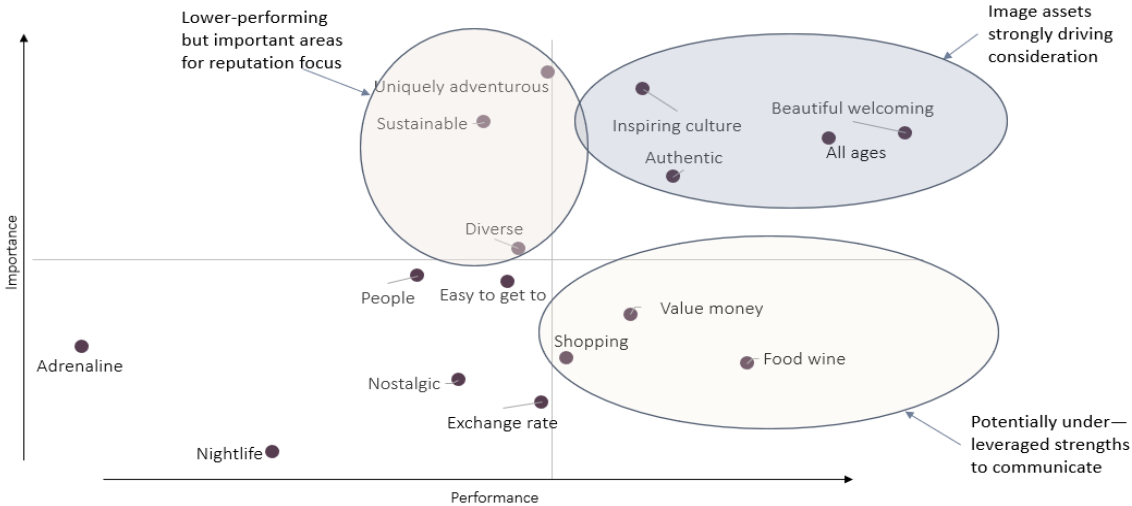
% who feel each applies to South Eastern Ontario

Lowest rated attributes



INTEREST IN TYPES OF ACTIVITY ON HOLIDAY

- 1 Not all perceptions about South Eastern Ontario are equally important in driving visitation to the region. By conducting a Key Drivers analysis, **it is possible to uncover which are the beliefs that are doing most to encourage people in these markets to visit – and which are most important in holding them back.**
- 2 South Eastern Ontario has a wide array of key reputation assets – positive perceptions that actively drive visitation. Most notable among these are its reputation as a **beautiful and welcoming place**, that is **appealing to all ages**, that it is **authentic** and has **inspiring culture**. These themes should be reinforced in brand communications. Conversely, there is the potential to do more to strongly link South Eastern Ontario’s food and beverages with its brand, as the positive perceptions in this area are not currently strongly driving visitation.
- 3 While South Eastern Ontario is seen as having a weaker offering in terms of adrenaline activities or nightlife, these are not ‘deal-breakers’ for potential visitors. More significant may be the perception that South Eastern Ontario is not a **unique or adventurous** place, that it could do more to be **sustainable** and that other destinations may potentially be more **diverse**. Perceptions around diversity appear to be a particular problem in some American markets.





METHODOLOGY

- Why Destination Brand Health Research Matters
- Methodology
- Source Markets

UNDERSTANDING THE REGIONAL MARKET FOR TOURISM TO SOUTH EASTERN ONTARIO

It is vital for South Eastern Ontario to track how their destination brand is perceived in the market in order to implement and evolve an evidence-based marketing strategy to drive higher-value, sustainable tourism.

To support Southwest Ontario’s future sustainable growth, the RTO9 commissioned Twenty31 Consulting Inc., to develop an insights report drawing on a custom quantitative research survey of representative samples of identified travel consumers in major outbound travel markets. The overarching objective was to provide current insights on travel consumer perceptions of South Eastern Ontario’s destination brand and identify segments of opportunity.

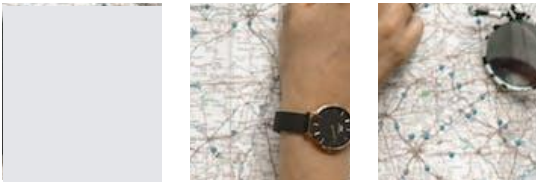


Why Destination Brand Health Research Matters

RTO9’s current statistics provide factual information on total visitor arrivals and traveller origin. In tourism research circles these metrics are the basic data points needed to understand macro growth and performance. However, this data provides limited understanding of consumer issues, market dynamics and travel consumer insights. Best-practice in international destination management and marketing outlines the need to benchmark brand standing and travel consumer perceptions, and then over time track performance.



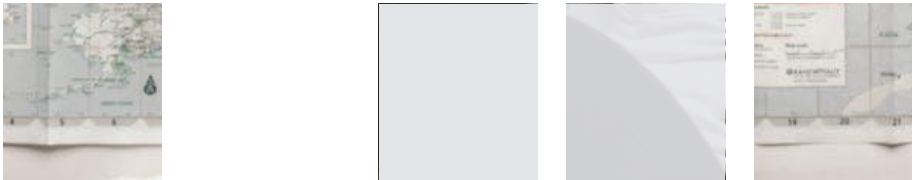
The following report provides a snapshot of how identified travel consumers perceive Southwest Ontario’s destination relative to a ‘normative benchmark’ competitive destination. These market research insights are invaluable to design products and experiences that will resonate with travel consumers; understand ideal markets and determine how best to connect with them; and design PR, travel trade and marketing strategies and tactics that will move consumers down the Path to Purchase.



Destination BC, Discover Halifax, Tourism Kingston, Travel Alberta and other select Destination Marketing Organizations are becoming increasingly successful in driving higher-value tourism to their destinations because they invest in conducting, analyzing and utilizing market research, specifically focused on brand health and consumer insights.



This report draws on an analysis of a custom market research study focused on South Eastern Ontario, launched by Twenty31 in February 2023.



UNDERSTANDING THE REGIONAL MARKET FOR TOURISM TO SOUTH EASTERN ONTARIO

In partnership with RTO9's team, we defined destination brand attributes describing South Eastern Ontario's visitor experience and personality. Through advanced statistical modeling, we derived the importance of these attributes to travel consumers.

Methodology

This topline report is based on a custom market research study of a representative sample of n=4,250 identified travel consumers in travel markets across southern Ontario, Quebec and selected US states neighbouring Canada, carried out for the RTO9 team by Twenty31 Consulting.

Fieldwork was conducted online in February 2023, using online consumer research panels. A representative sample of the online population in each market was drawn, stratified by age, gender and region. This sample was then sent a survey invitation by email, and respondents screened to identify leisure travellers. These were defined as those who either:

- Had taken a domestic (international for US respondents) overnight holiday/vacation trip in the past three years (i.e., since January 2020); and/or
- Are likely to take a domestic (international for US respondents) overnight holiday/vacation trip in the next year (i.e., by January 2024)

A questionnaire was developed by Twenty31 Consulting in collaboration with RTO9, and was fielded in English (and French, in Quebec).

In partnership with RTO9's team, we identified a total of 25 destination brand attributes – criteria likely to define a destination's visitor experience and personality.

Traveller respondents were then asked to rate the association of these attributes with South Eastern Ontario and a competitive destination to determine how well the destination performed in delivering on the attribute, or how well the destination's visitor experience aligned to the attribute. The 'performance' scores of South Eastern Ontario and the competitive destination are presented in the following section.

As part of the analysis of these destination brand attributes, a series of advanced statistical modeling steps were conducted to determine the 'derived' importance of these attributes – namely how important these attributes were to travel consumers in driving brand awareness, brand interest or brand loyalty (i.e., outcomes of destination brand positioning and marketing activities).

Note:

- Results are representative of the online adult traveller population in each market and are considered accurate within +/- 4 to 5 percentage points, 19 times out of 20.
- All figures in the charts 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.
- The final deliverable includes a detailed SPSS file and a set of data tables as the source data for this report.

This report presents the results from a quantitative market research study surveying statistically representative samples of travel consumers in southern Ontario, Quebec and the US Midwest in early 2023.

The survey markets were as follows:

The United States of America (New Jersey, New York, Pennsylvania, Ohio and Michigan)

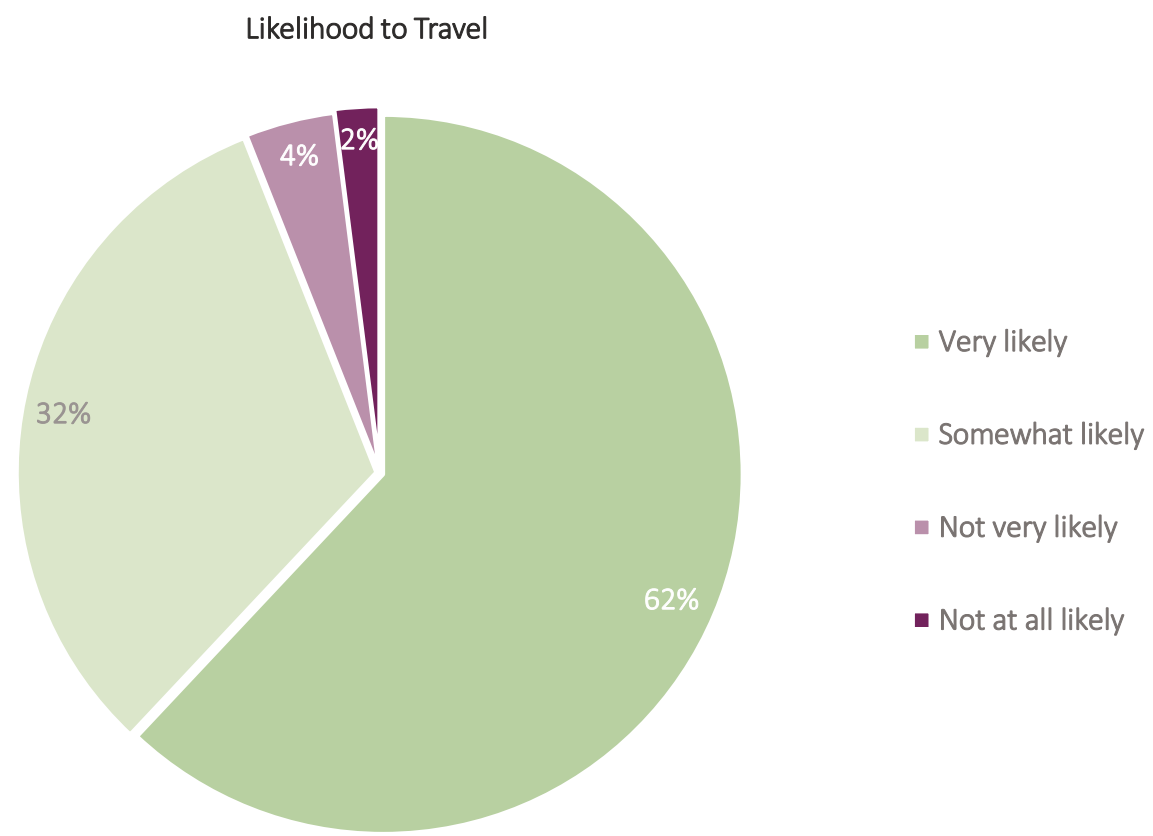


FUTURE TRAVEL PLANNING AND KEY CONSIDERATIONS

- Likelihood to Take Overnight Trip within Canada
- Economic and Financial Optimism among Travellers
- Top Inspiration Sources when Choosing Destination For Domestic Vacation
- Key Considerations when Selecting Destination, Accommodation or Attractions in Ontario
- Willingness to Pay Premium to Address Key Considerations

LIKELIHOOD TO TAKE OVERNIGHT TRIP WITHIN CANADA IN NEXT YEAR

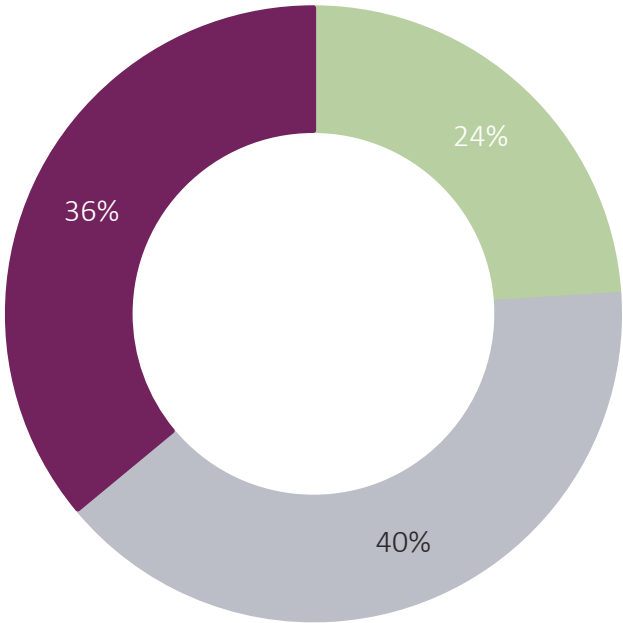
Nearly two-thirds say they are very likely to take an overnight leisure trip in their own country over the next year.



ECONOMIC AND FINANCIAL OPTIMISM AMONG TRAVELLERS

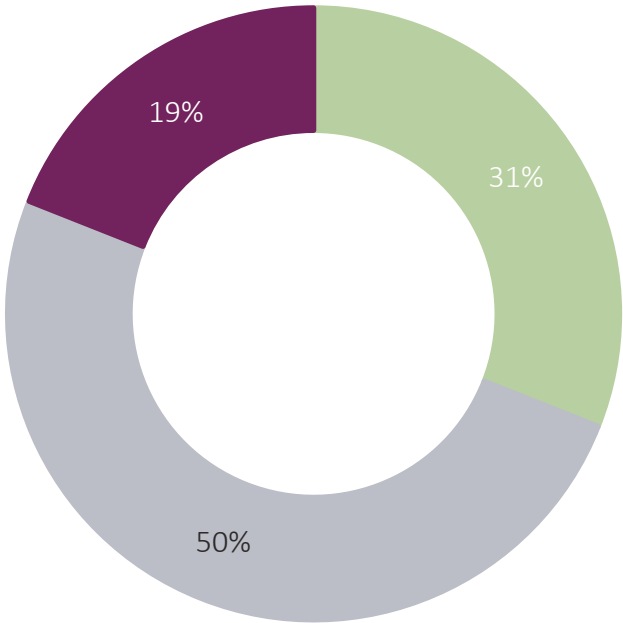
Optimism is significantly higher about people’s own financial situation than about the economy, but most commonly, people expect no change over the next year.

Optimism/Pessimism About Economy



Get better Stay the same Get worse

Own Financial Situation

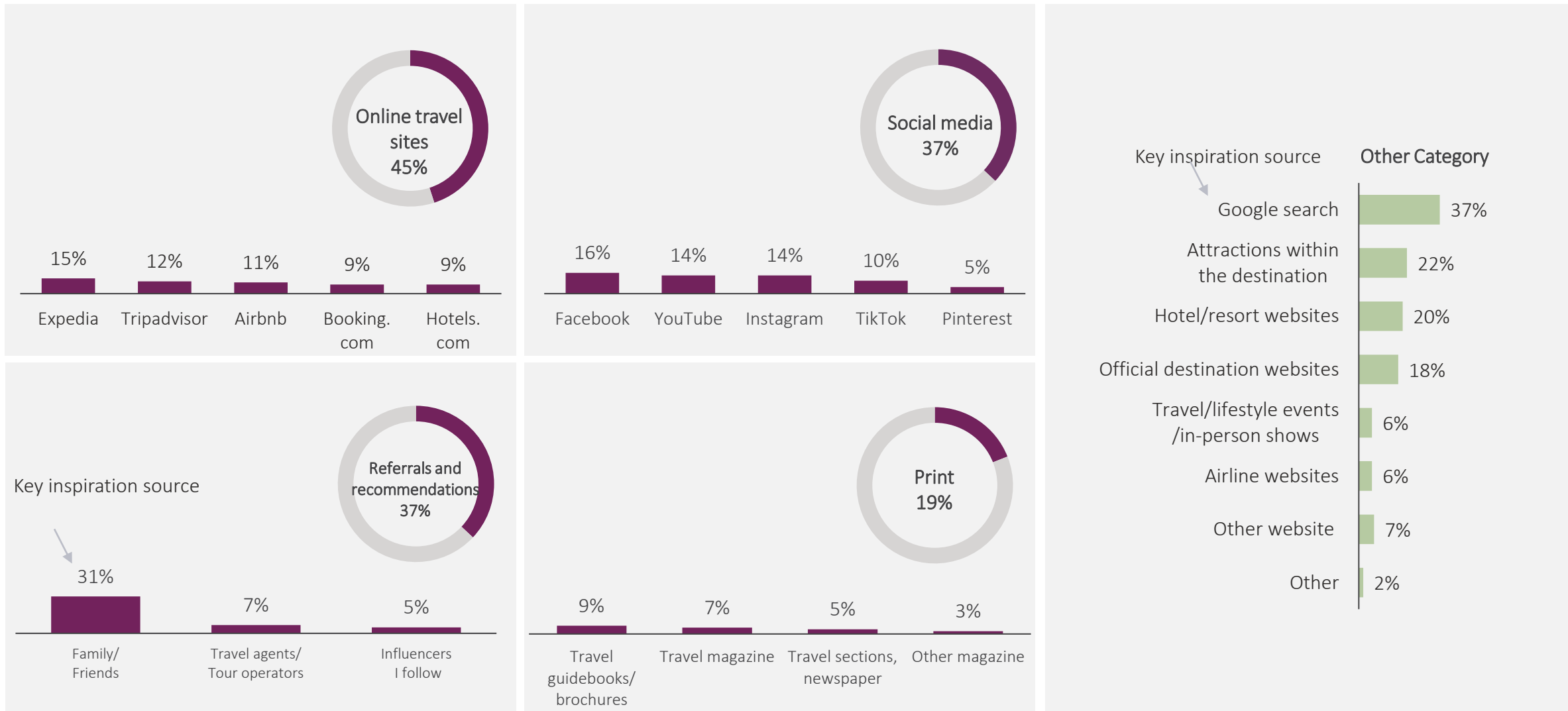


Get better Stay the same Get worse

Base: All Respondents (4250)
Q45. Thinking about the general economic situation in Canada [in USA: 'in America'] over the next year, do you expect it to get better, stay the same or get worse?
Q46. And thinking about your own household's financial situation over the next year, do you expect it to get better, stay the same or get worse?

TOP INSPIRATION SOURCES WHEN CHOOSING DESTINATION FOR DOMESTIC VACATION

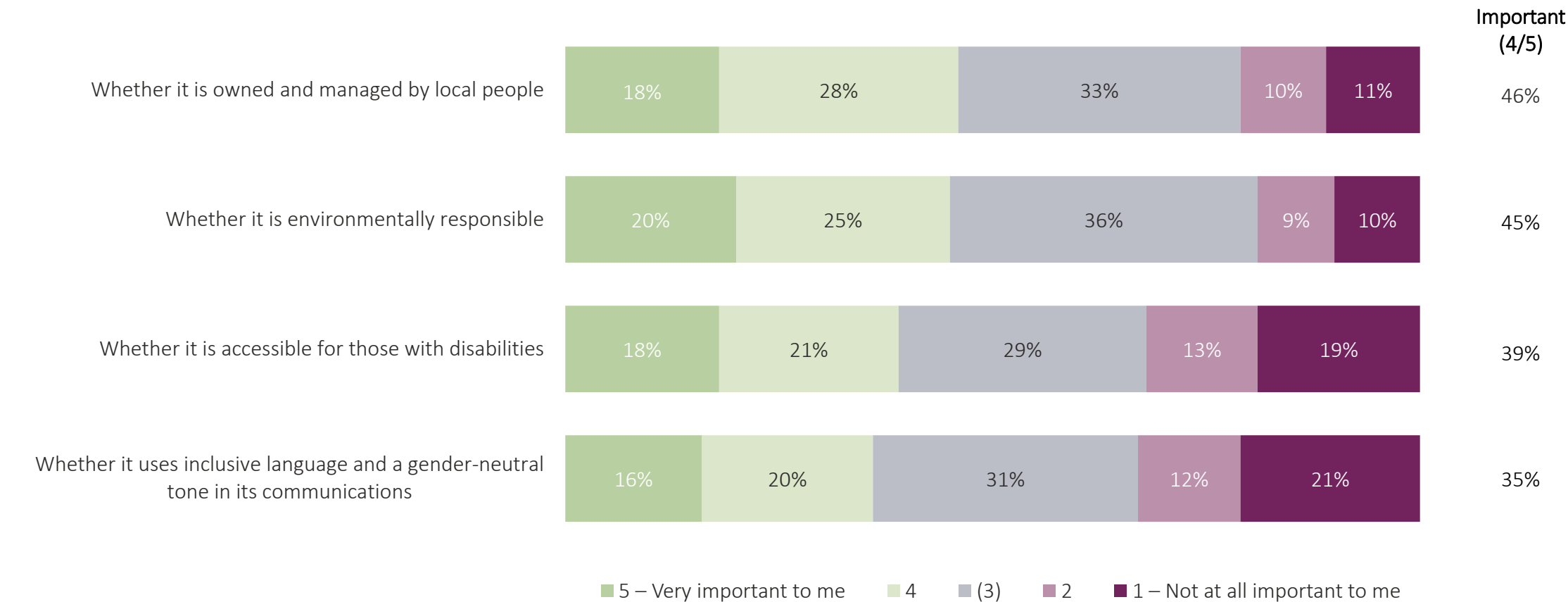
Google search and recommendations from friends and family are most common sources of inspiration, but as a category, online travel sites are more often used.



Base: All Respondents (4250)
Q39. When you choose a potential destination within Canada [IN USA: "within the USA"] for an overnight holiday/vacation, which of the following sources are usually most important in inspiring you?

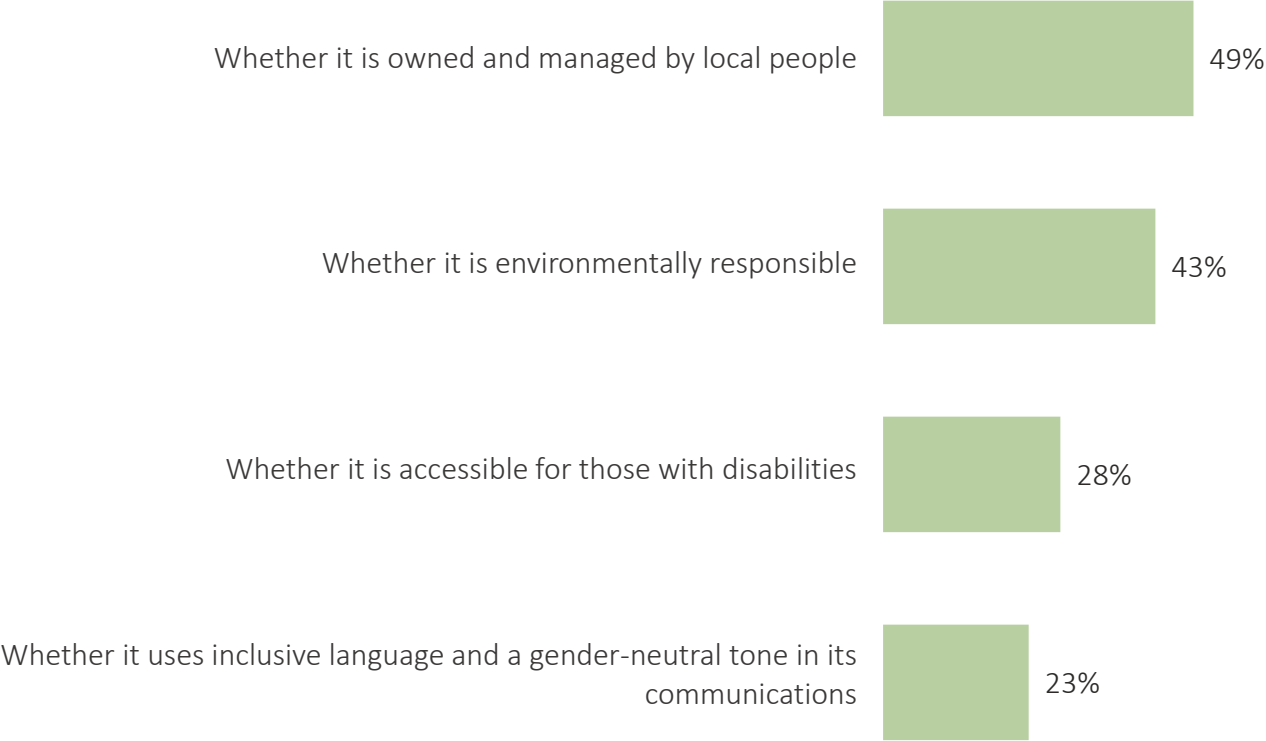
KEY CONSIDERATIONS WHEN SELECTING DESTINATION, ACCOMMODATION OR ATTRACTIONS IN ONTARIO

Local ownership and environmental responsibility are seen as more important factors than disability accessibility or inclusivity in communications, but none are viewed as critical by more than half.



WILLINGNESS TO PAY PREMIUM TO ADDRESS KEY CONSIDERATIONS

Travellers say they are significantly more willing to pay extra for local ownership or environmental responsibility – but less than a majority in all cases.



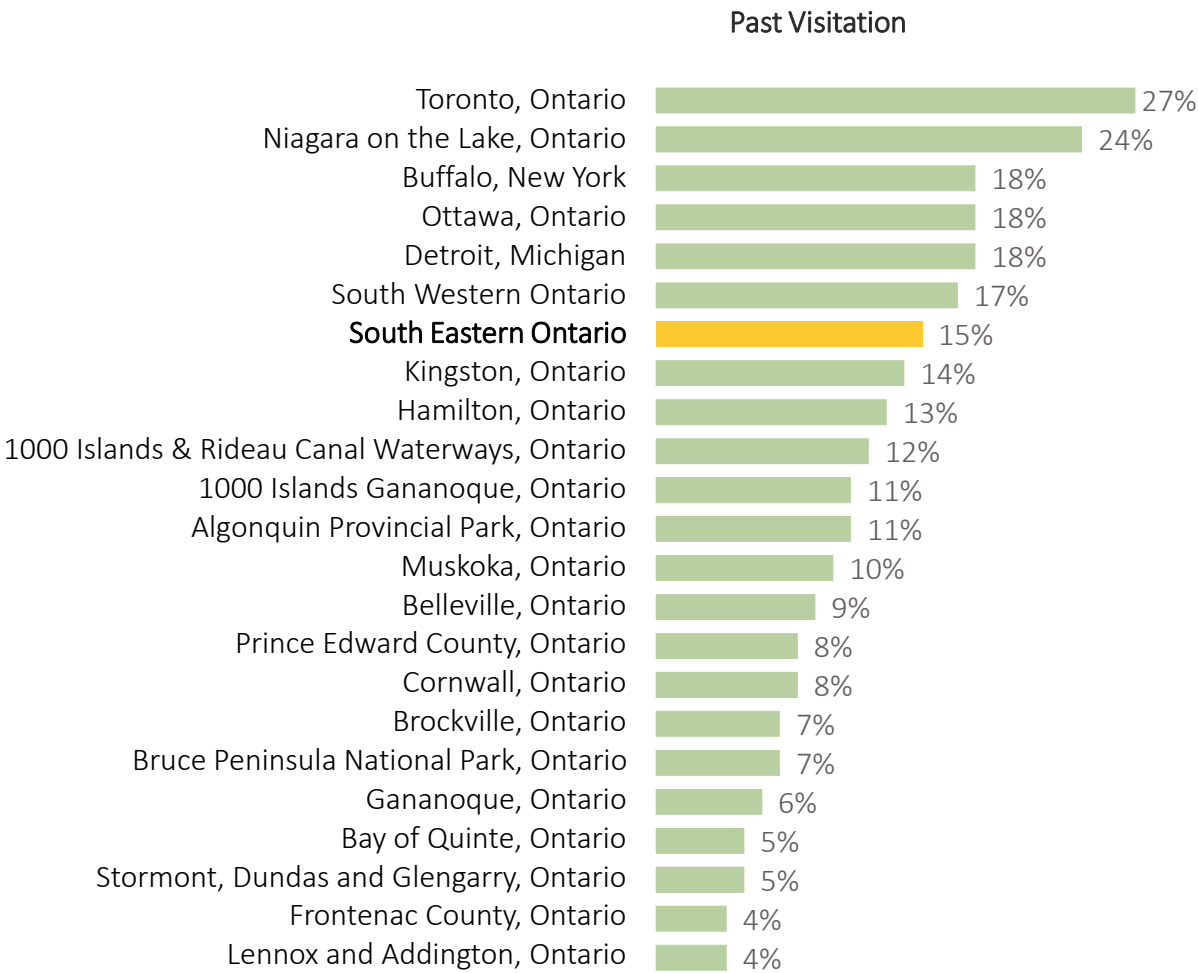


PAST VISITATION

- Previous Visitation of Key Destinations in the Wider Region: Unaided
- Previous Visitation of South Eastern Ontario: Aided

PREVIOUS VISITATION OF KEY DESTINATIONS IN THE WIDER REGION: UNAIDED

Toronto and Niagara are clearly the most-visited destinations in the wider region, but South Eastern Ontario is mentioned as a past destination by nearly one in seven.



PREVIOUS VISITATION OF SOUTH EASTERN ONTARIO: AIDED

When aided and shown a map, however, a more substantial minority say they have taken a leisure trip to South Eastern Ontario in the past, and often associate it with natural beauty, rivers and lakes.

How would you describe South Eastern Ontario?

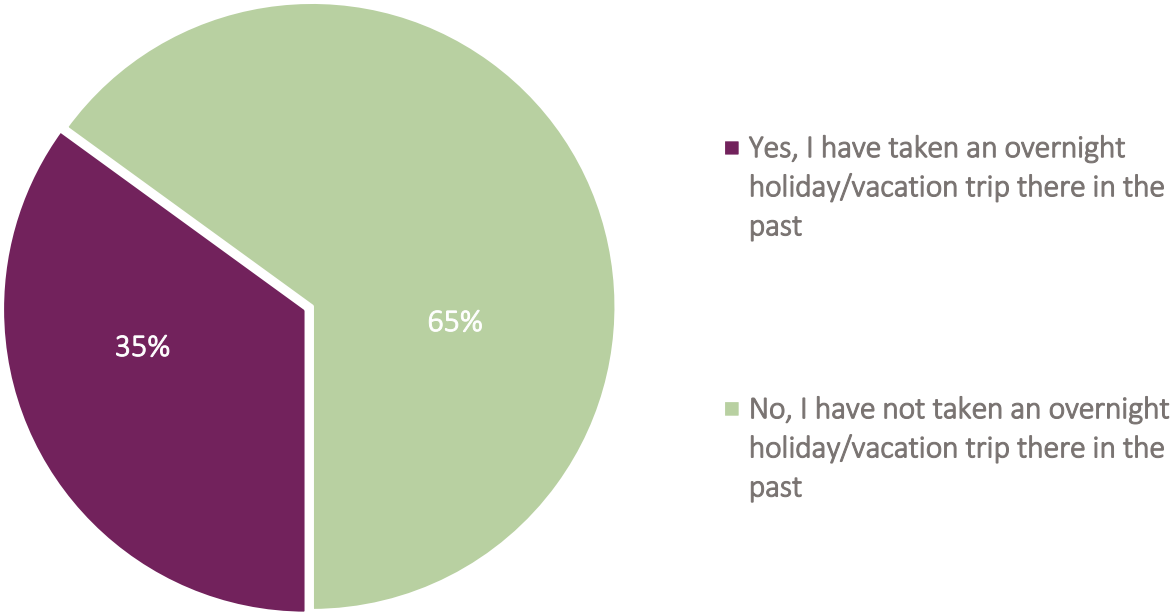
“There are many cute small towns to visit. Apart from Ottawa and Kingston it is quite a rural area.”
– Female, 45-54, South Eastern Ontario

“The country is beautiful because of all the rivers and lakes and beautiful towns.”
- Male, 45-54, Greater Toronto Area

“It’s nice. The county has beautiful beaches. You can drive along the water through Bath and Amherstview”
- Female, 35-54, South Eastern Ontario

“There is a lot to do here. You can go into the city or do outdoorsy activities.”
- Female, 25-34, Pennsylvania

Past Visit to South Eastern Ontario



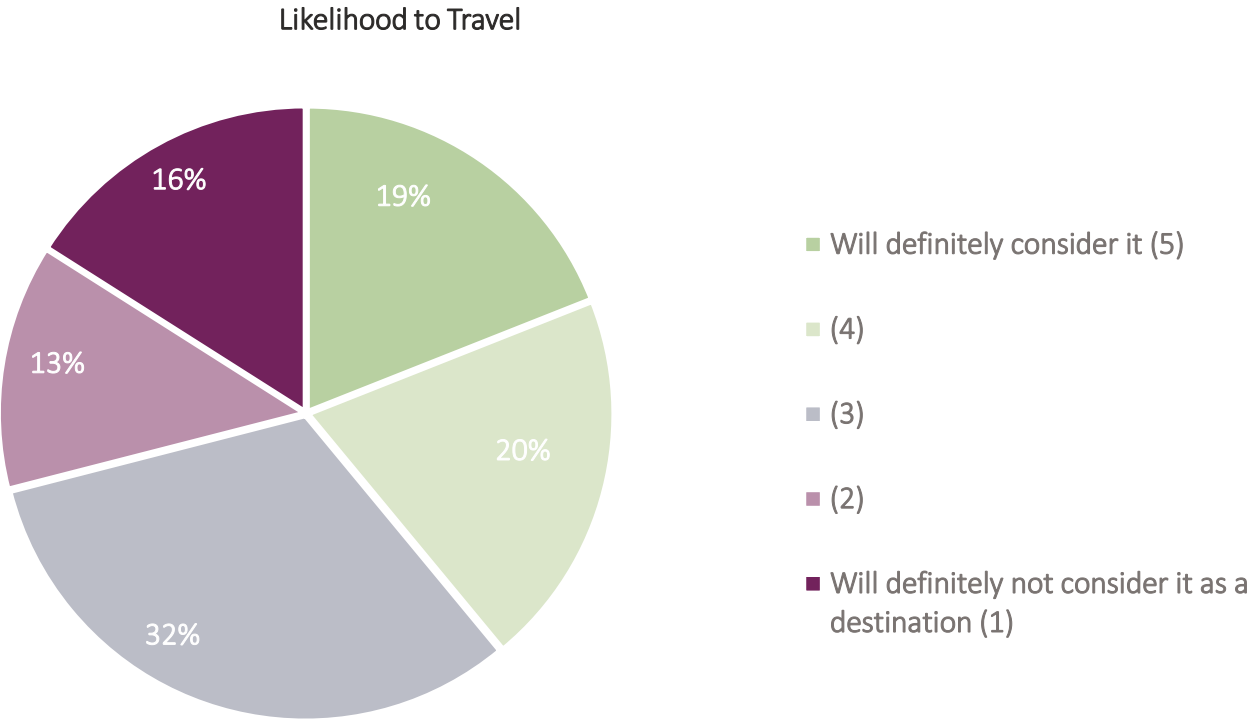


POTENTIAL VISIT TO SOUTHEASTERN ONTARIO

- Likelihood to Consider South Eastern Ontario as Future Destination
- Likely Profile of Potential Future Trip to South Eastern Ontario

LIKELIHOOD TO CONSIDER SOUTH EASTERN ONTARIO AS FUTURE DESTINATION

Nearly two in five say they will consider South Eastern Ontario as future destination, with easier transport, discount vouchers and more information on attractions among potential ideas to boost consideration.



What would make you more likely to consider it?

“Ease of transportation would make me more likely to consider South Eastern Ontario.”
– Female, 65+, New Jersey

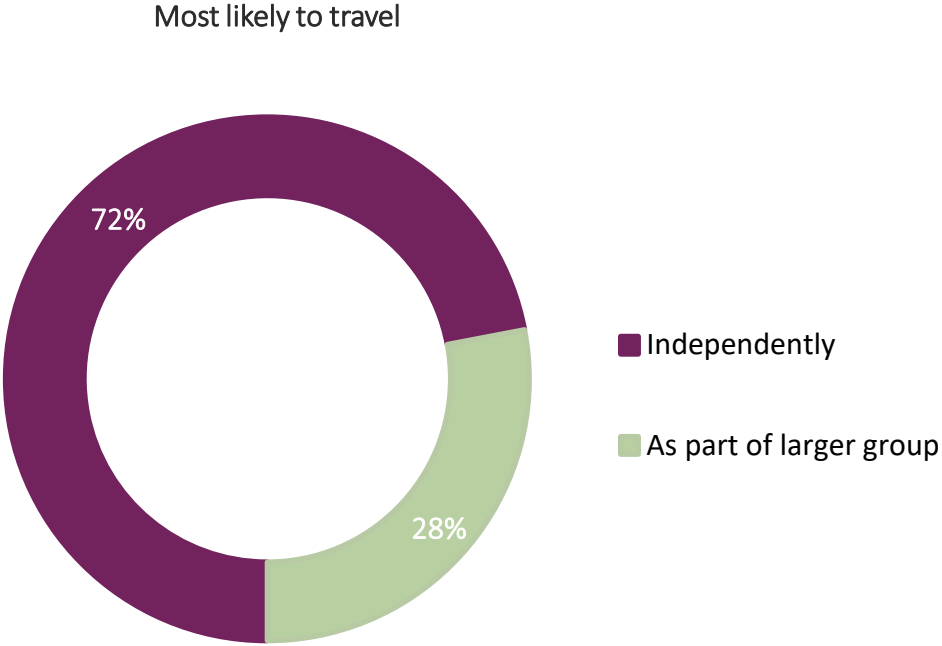
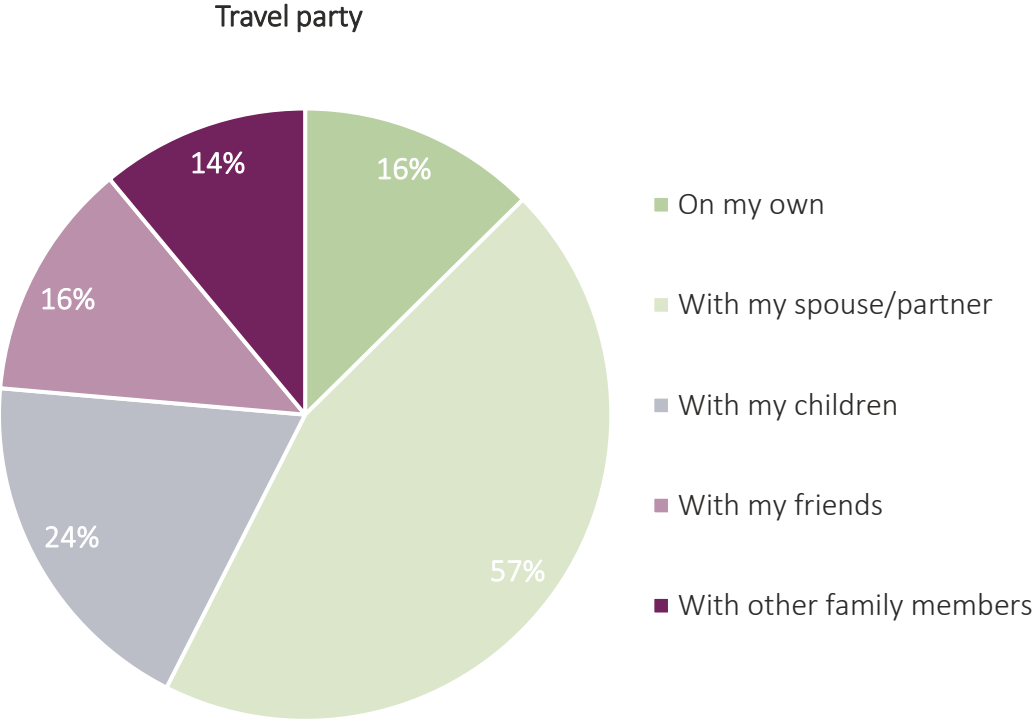
“Having friends who would rather travel north than go to a beach destination in a warm climate.”
– Female, 55-64, Ohio

“A low-cost voucher for a 4 star hotel with at least 1 meal included.”
– Female, 25-34, South Eastern Ontario

“More information on what to do, on things that are not as common as well as information on tourism spots.”
– Male, 25-34, South Western Ontario

LIKELY PROFILE OF POTENTIAL FUTURE TRIP TO SOUTH EASTERN ONTARIO

Independent travel, usually with a spouse or partner, is most likely for a future trip to South Eastern Ontario.



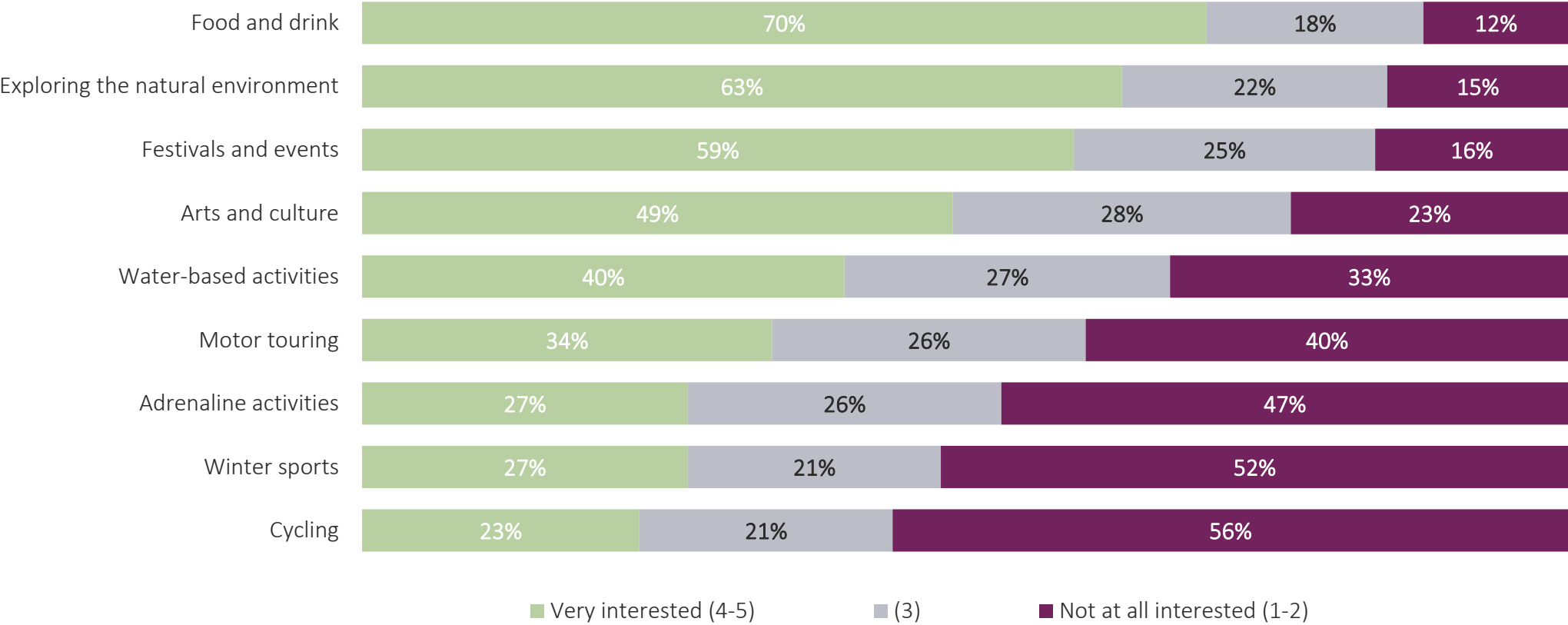


ACTIVITIES ON POTENTIAL TRIP TO SOUTH EASTERN ONTARIO

- Interest in Different Activity Categories on Potential Future Trip to South Eastern Ontario
- Interest in Specific Activities on Potential Future Trip to South Eastern Ontario
- Interest in Specific Activities on Potential Future Trip to South Eastern Ontario

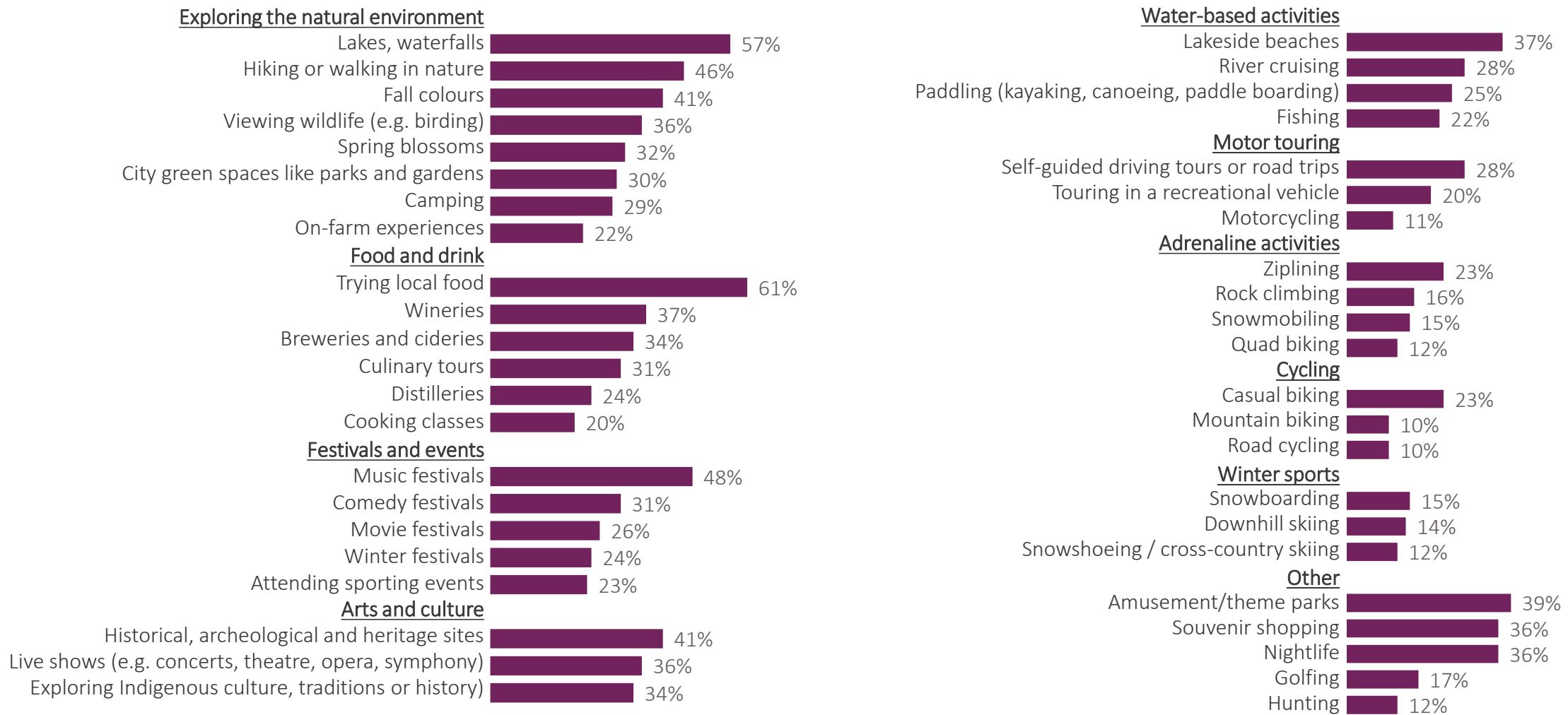
INTEREST IN DIFFERENT ACTIVITY CATEGORIES ON POTENTIAL FUTURE TRIP TO SOUTH EASTERN ONTARIO

Culinary tourism, exploring nature, and festivals are the types of activities that appeal to most travellers on a trip to South Eastern Ontario, with more energetic activities less popular.



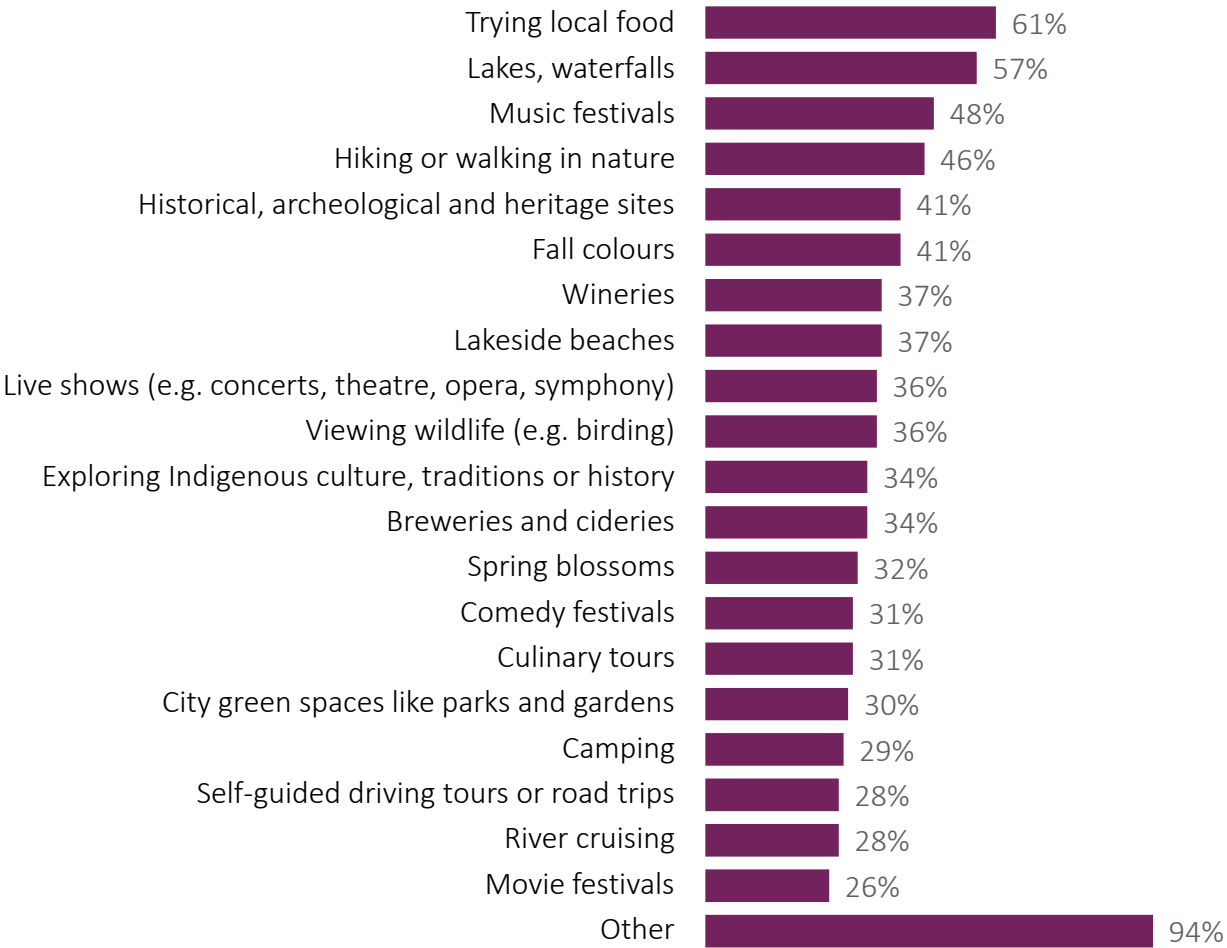
INTEREST IN SPECIFIC ACTIVITIES ON POTENTIAL FUTURE TRIP TO SOUTH EASTERN ONTARIO

Specific activities with high level of interest include trying local food, seeing lakes and waterfalls, music festivals, and visiting historical sites.



INTEREST IN SPECIFIC ACTIVITIES ON POTENTIAL FUTURE TRIP TO SOUTH EASTERN ONTARIO

Many activities are of interest to a third or more of travellers.





SOUTH EASTERN ONTARIO BRAND HEALTH

- Familiarity with South Eastern Ontario & Specific Destinations
- Overall Impression of South Eastern Ontario & Specific Destinations
- Likelihood to Visit South Eastern Ontario & Specific Destinations
- Likelihood to Recommend South Eastern Ontario & Specific Destinations

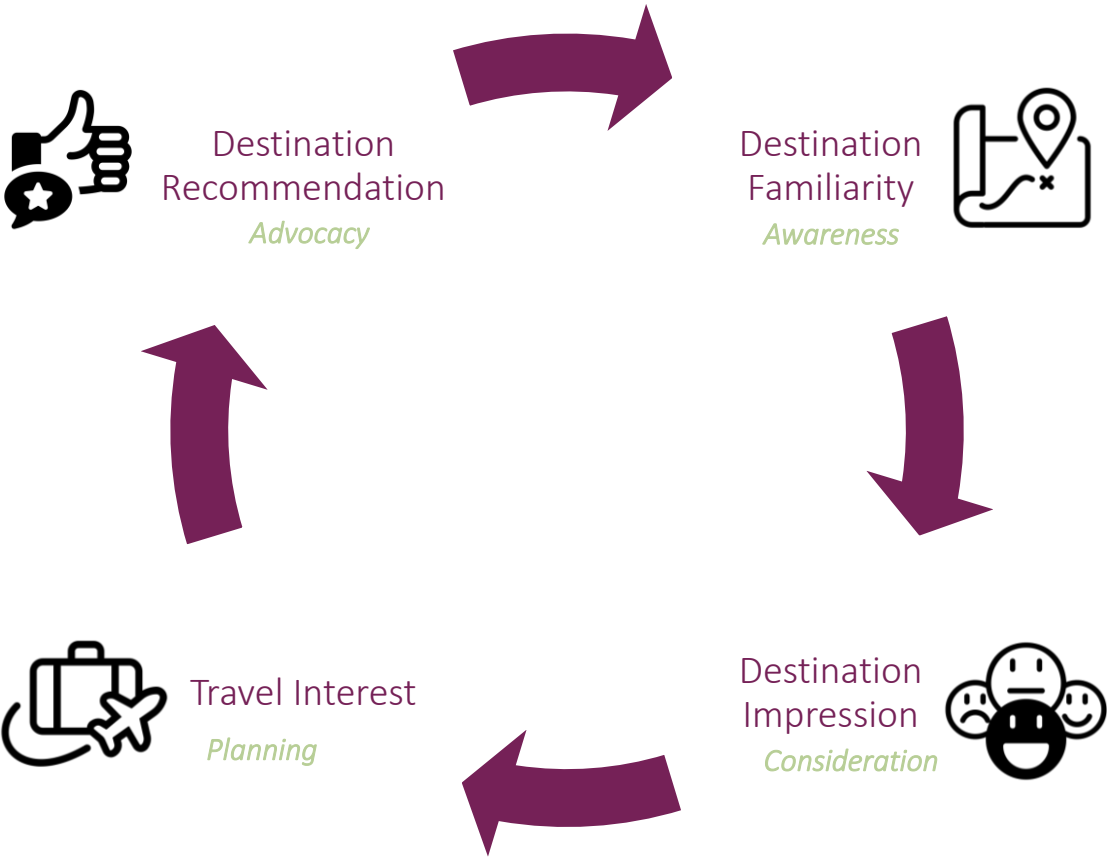
A man with a beard is looking down at a smartphone in his hands. The background is blurred, showing warm, bokeh lights, suggesting an indoor setting like a restaurant or bar. The text is overlaid on the image in a large, bold, white font.

**Almost 60% of the
DECISION TO TRAVEL
to a destination is influenced by the
PERCEPTION of the
TOURISM BRAND**

MEASURING SOUTHWEST ONTARIO'S DESTINATION BRAND HEALTH

Destination brands need to be measured and tracked on a consistent basis in order for DMOs and their industry partners to understand how best to influence and invest in the market to maximize ROI.

MEASURING SOUTHWEST ONTARIO'S DESTINATION BRAND HEALTH ALONG THE TRAVEL ADVOCACY LOOP

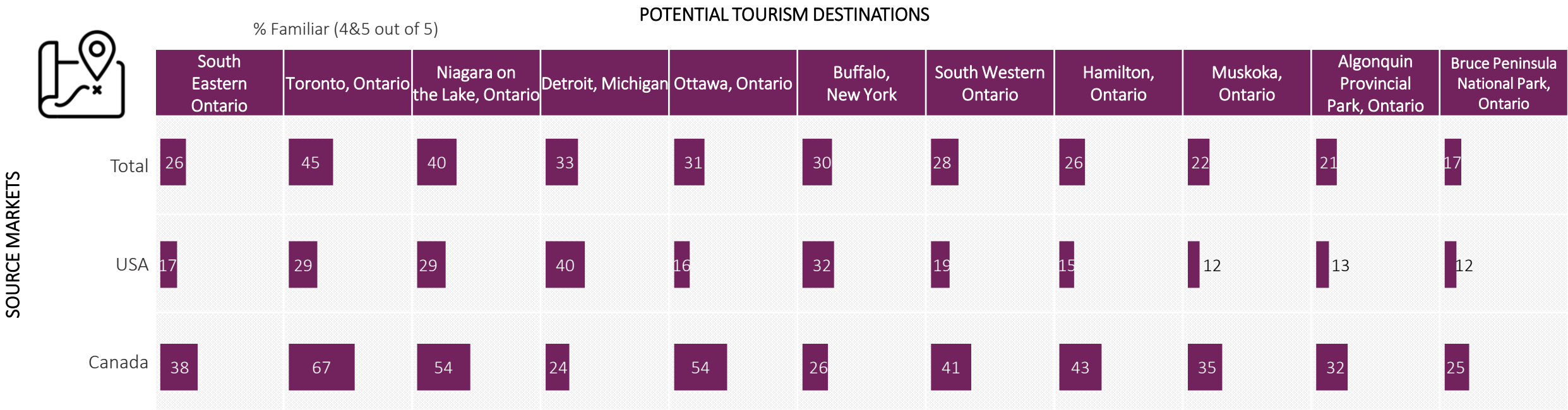


KEY OBSERVATIONS

- The linear Path to Purchase model has transitioned to more of an Advocacy Loop, in part because of how the market has shifted due to the COVID-19 pandemic and impact on travel consumer behaviour.
- One of the key methods of assessing destination brand health is to assess ratings of Southwest Ontario vs. competitive destinations along the Path to Purchase from brand awareness through to brand advocacy.
- For the 2022 benchmark study, Southwest Ontario was compared to: Toronto, Ontario; Niagara on the Lake, Ontario; Detroit, Michigan; Ottawa, Ontario; Buffalo, New York; South Eastern Ontario; Hamilton, Ontario; Muskoka, Ontario; Prince Edward County, Ontario; Algonquin Provincial Park, Ontario; Bruce Peninsula National Park, Ontario

FAMILIARITY WITH SOUTH EASTERN ONTARIO & SPECIFIC DESTINATIONS – DESTINATIONS OUTSIDE OF RTO9

Familiarity with South Eastern Ontario is lower than with Toronto, Niagara and most other major urban centres, but ahead of major national and provincial parks.



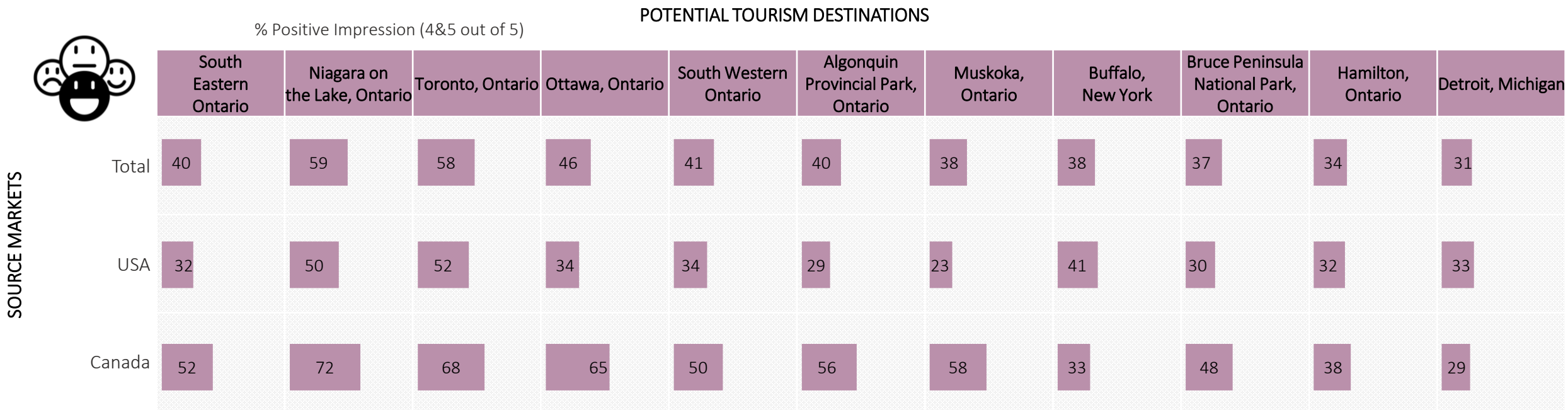
FAMILIARITY WITH SOUTH EASTERN ONTARIO & SPECIFIC DESTINATIONS – DESTINATIONS WITHIN RTO9

Familiarity with South Eastern Ontario itself is clearly higher than with destinations within the region, except Kingston.



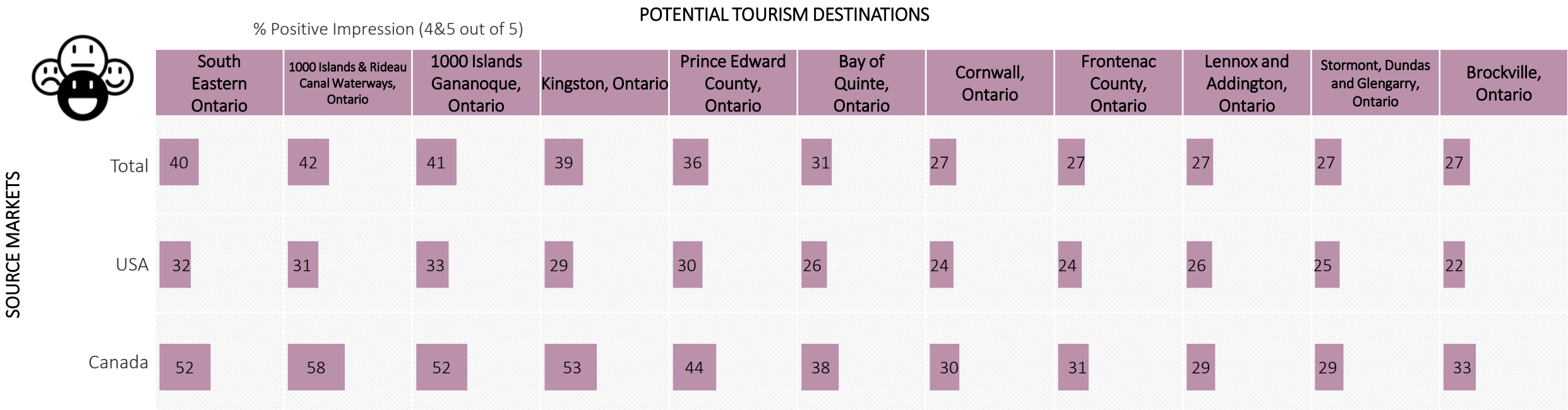
OVERALL IMPRESSION OF SOUTH EASTERN ONTARIO & SPECIFIC DESTINATIONS – DESTINATIONS WITHIN RTO9

Overall impression of South Eastern Ontario is in line with South Western Ontario and Algonquin Park.



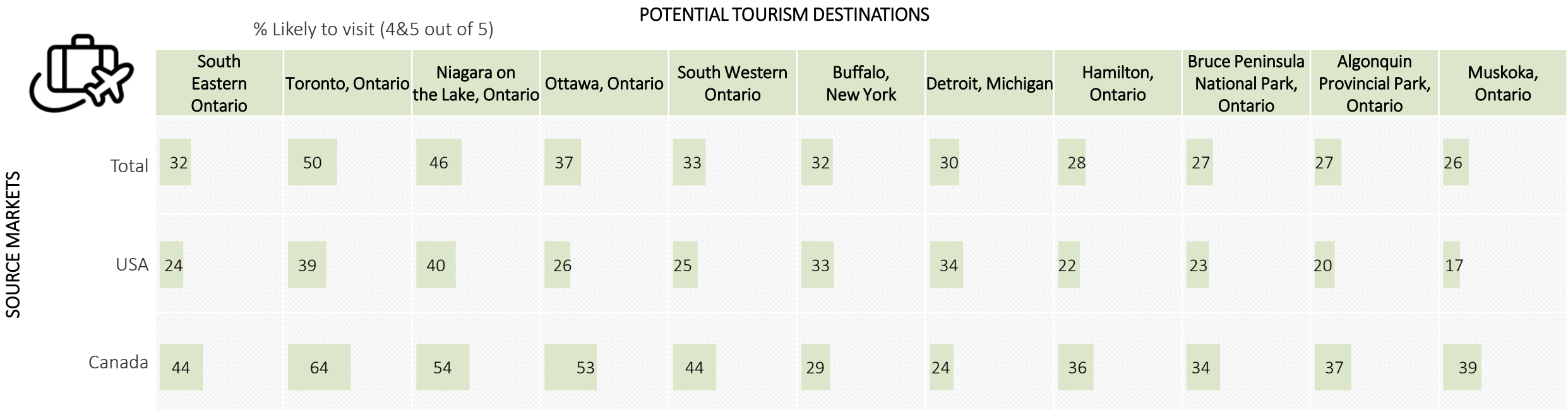
OVERALL IMPRESSION OF SOUTH EASTERN ONTARIO & SPECIFIC DESTINATIONS – DESTINATIONS OUTSIDE OF RTO9

Overall impression of South Eastern Ontario is slightly lower than that of 1000 Islands, but ahead of other destinations within the region.



LIKELIHOOD TO VISIT SOUTH EASTERN ONTARIO & SPECIFIC DESTINATIONS – DESTINATIONS OUTSIDE OF RTO9

Travellers are much more likely to visit Toronto, Niagara, and Ottawa than South Eastern Ontario – but RTO9 rates ahead of national and provincial parks.



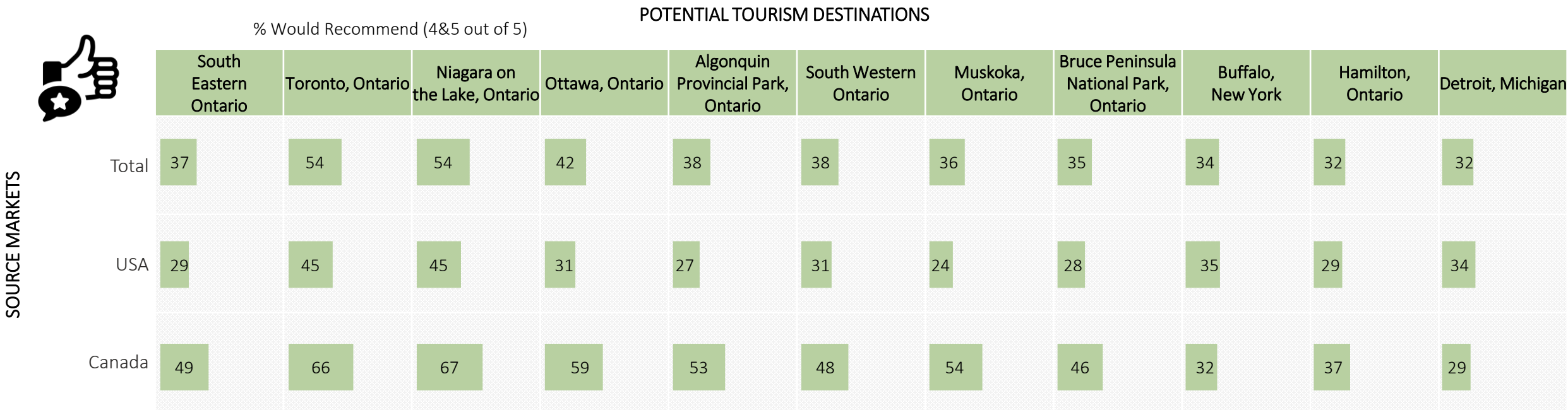
LIKELIHOOD TO VISIT SOUTH EASTERN ONTARIO & SPECIFIC DESTINATIONS – DESTINATIONS WITHIN RTO9

1000 Islands and Kingston have significantly higher likelihood to visit than other destinations within the region.



LIKELIHOOD TO RECOMMEND SOUTH EASTERN ONTARIO & SPECIFIC DESTINATIONS – DESTINATIONS OUTSIDE OF RTO9

South Eastern Ontario is some way behind Toronto and Niagara in terms of advocacy, which more than half would recommend.



LIKELIHOOD TO RECOMMEND SOUTH EASTERN ONTARIO & SPECIFIC DESTINATIONS – DESTINATIONS WITHIN RTO9

1000 Islands/Rideau Canal and Kingston are significantly ahead of other destinations within RTO9 in terms of traveller advocacy.





SOUTH EASTERN ONTARIO BRAND IMAGE

- Brand Image of South Eastern Ontario
- Competitive Brand Analysis of South Eastern Ontario
- Drivers of Consideration for South Eastern Ontario

BRAND IMAGE OF SOUTH EASTERN ONTARIO – AMENITIES & ATMOSPHERE

South Eastern Ontario scores highly for relaxation, authenticity, and gastronomy but less well for nightlife and adrenaline activities.

Top 2 Boxes: 4&5 on a 5-point scale



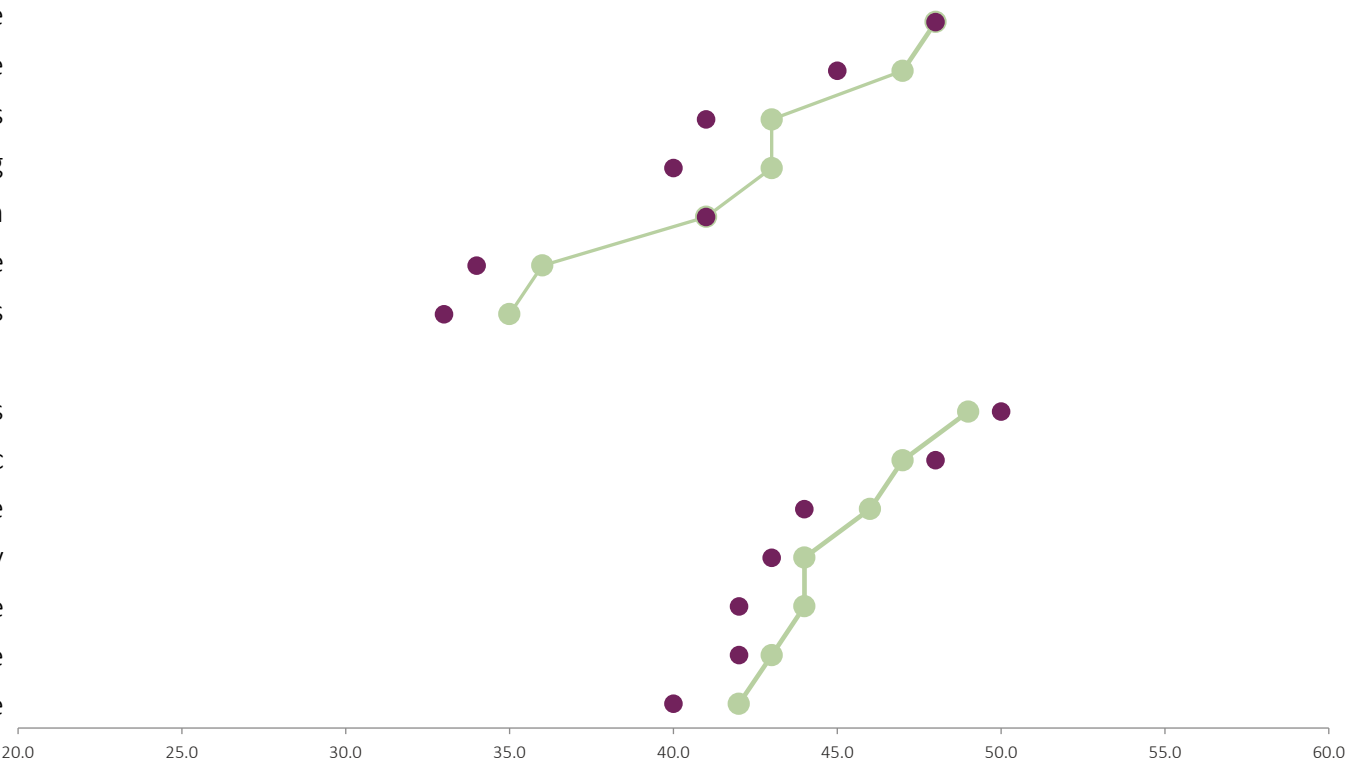
Does not describe



Describes Very Well

—●— South Eastern Ontario ● South Western Ontario

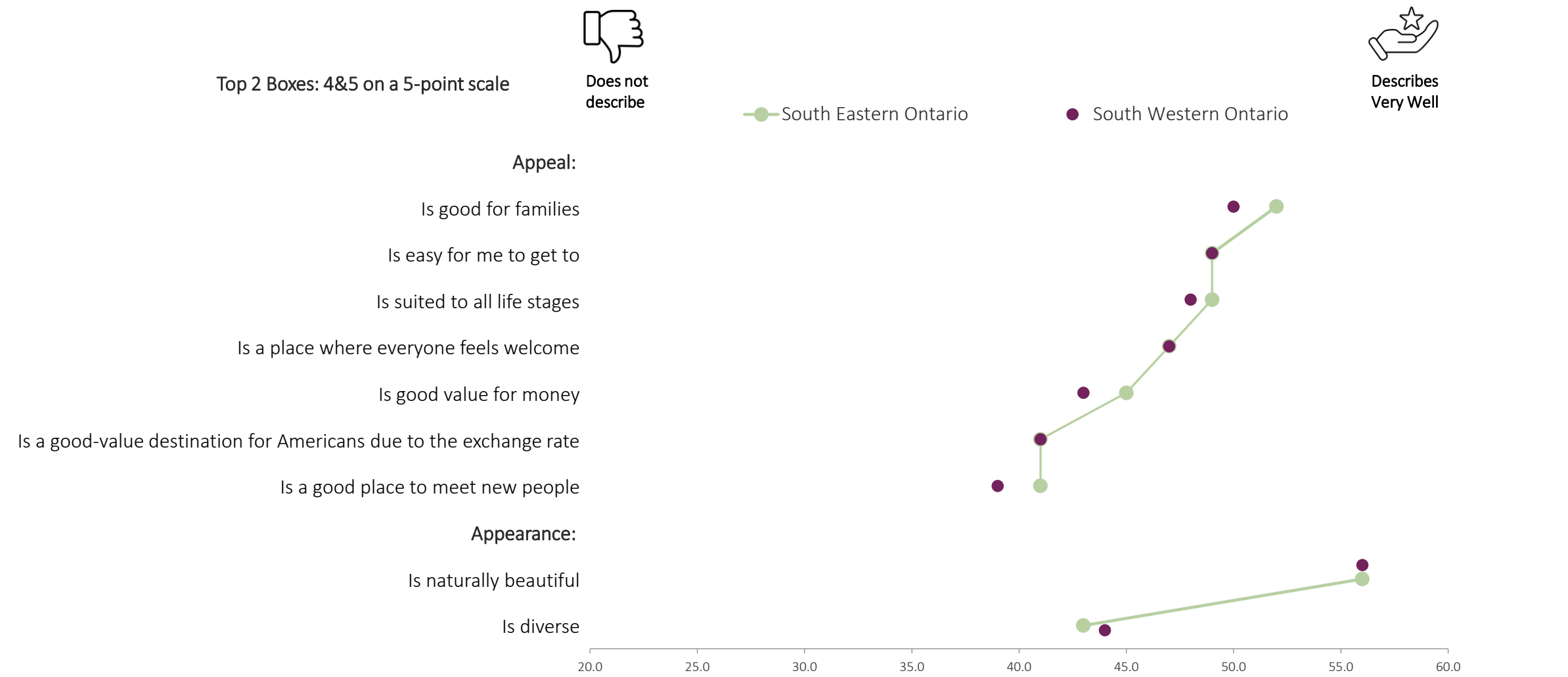
- Amenities:
- Has excellent food and wine
 - Has interesting culture
 - Has exclusive experiences
 - Has excellent shopping
 - Is a sustainable and environmentally responsible destination
 - Has good nightlife
 - Has adrenaline activities
- Atmosphere:
- Is relaxing/a place to de-stress
 - Is authentic
 - Is original and distinctive
 - Has a strong sense of community
 - Is an inspiring place
 - Is an exciting and adventurous place
 - Has an old fashioned/nostalgic atmosphere



Base: All Respondents (4250)
Q41. How strongly does each of the following describe South Western Ontario?

BRAND IMAGE OF SOUTH EASTERN ONTARIO – APPEAL & APPEARANCE

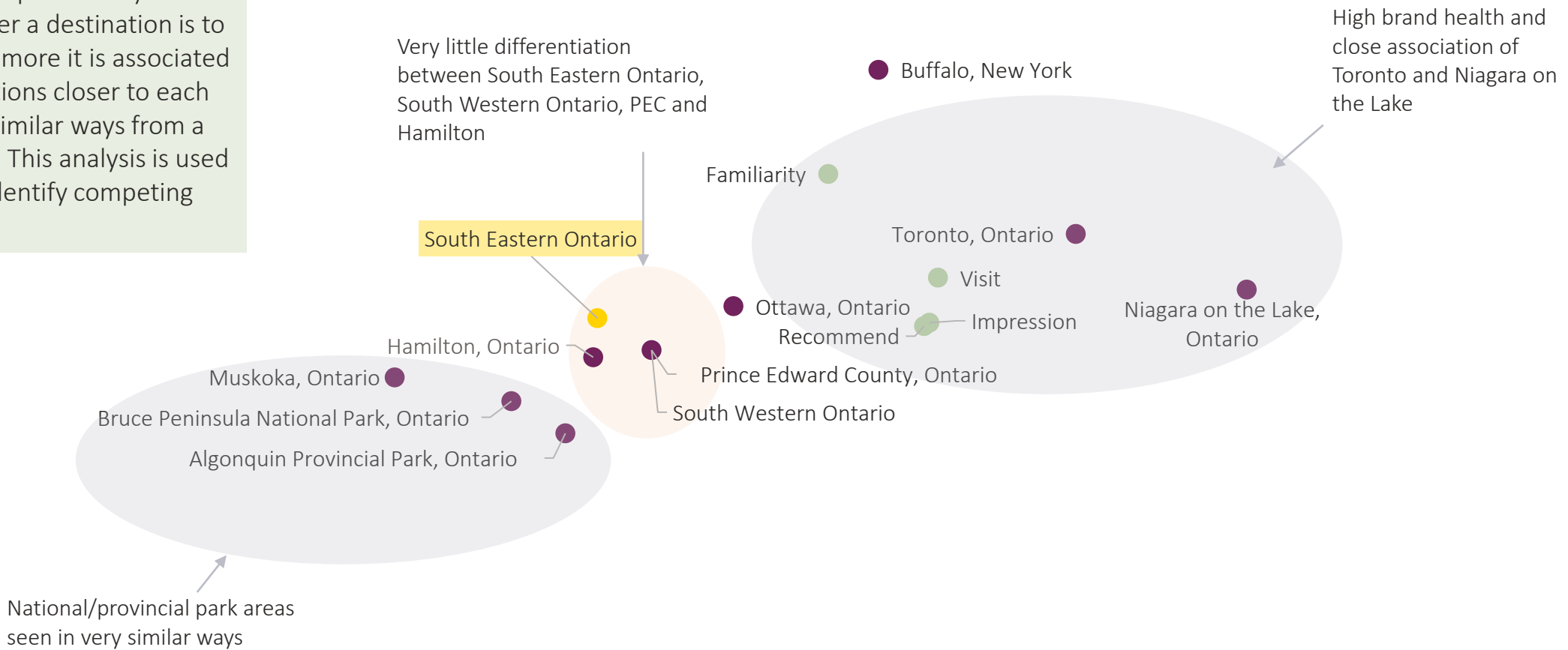
Natural beauty, suitability for families, and ease of access are stronger areas for South Eastern Ontario than suitability for meeting new people, value for money or diversity.



COMPETITIVE BRAND ANALYSIS OF SOUTH EASTERN ONTARIO – PERCEPTION MAP

Analysis of South Eastern Ontario versus competitors reveals how closely associated it is with Southwest Ontario and Hamilton and need for greater differentiation to boost brand health.

Perception maps plot all destinations tested in the same space as key variables. The closer a destination is to a key variable, the more it is associated with that. Destinations closer to each other are seen in similar ways from a brand perspective. This analysis is used to quantitatively identify competing destinations.



Base: All Respondents (USA + Canada) (4250)

UNDERSTANDING THE DRIVERS OF SOUTH EASTERN ONTARIO'S BRAND

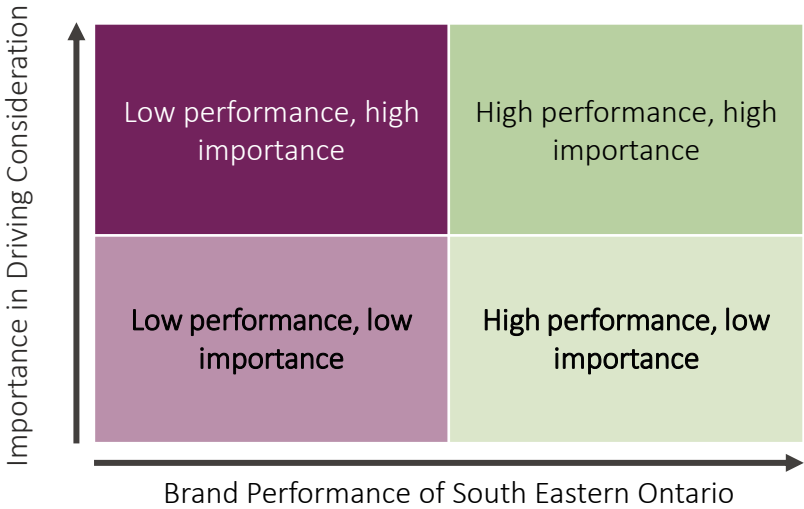
Using a series of statistical analysis techniques, an in-depth assessment of the South Eastern Ontario destination brand was conducted at the total and market level.

Methodology

The following brand maps (i.e., matrices) graphically display the results of the brand drivers assessment. This advanced analysis was based on a series of statistical analysis techniques including correlation analysis, cluster analysis and association analysis.

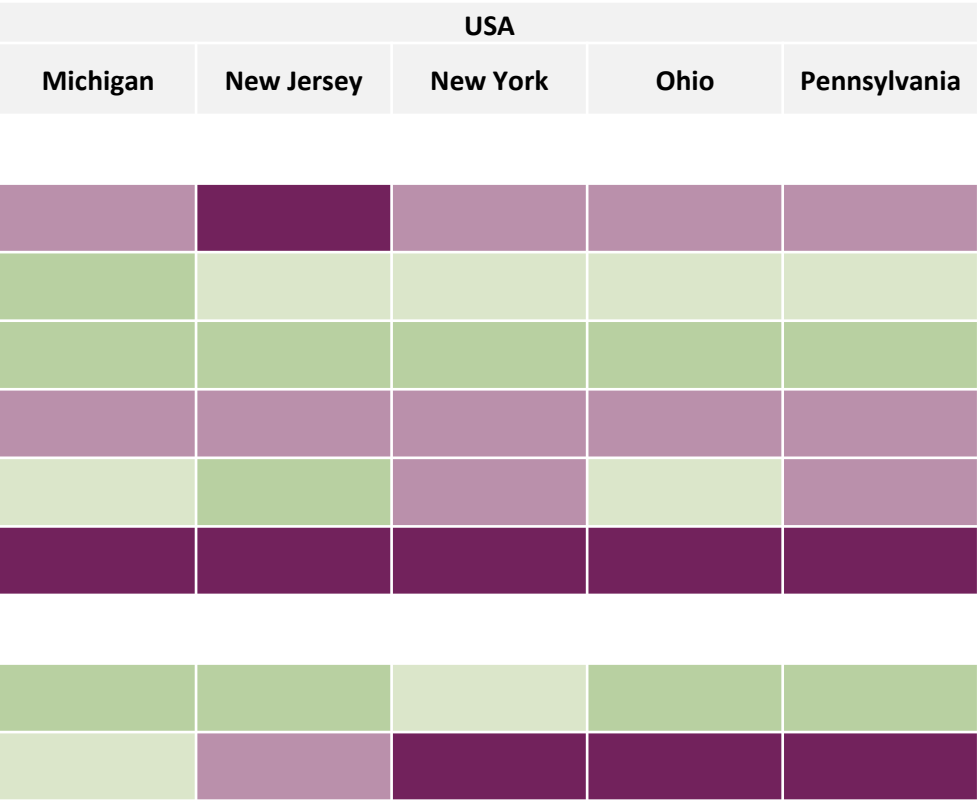
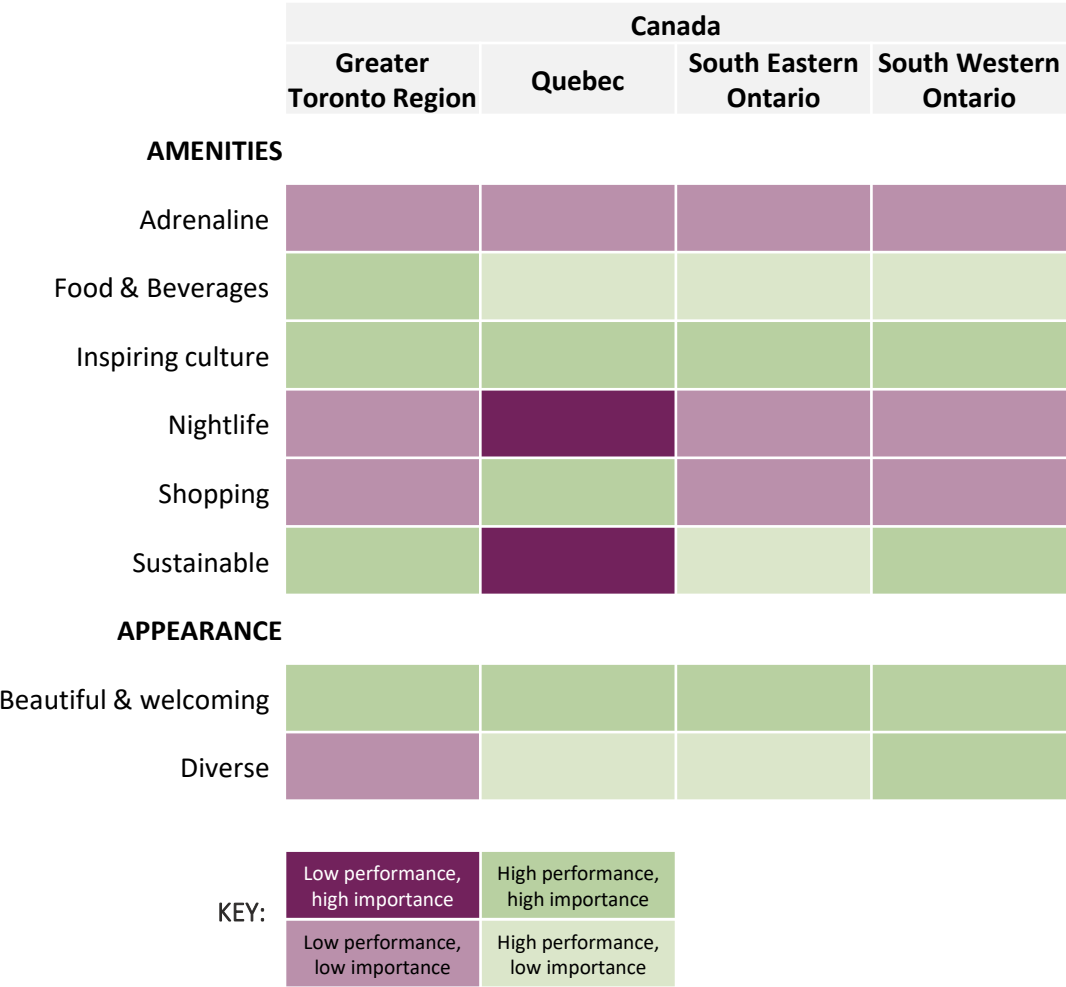
A brand map is provided at the total aggregate level (i.e., all respondents from all markets), and for each of the individual survey markets (i.e., respondents specifically from the selected market). Each brand map outlines:

- The performance of South Eastern Ontario in delivering on the attribute (or how well the destination is associated with the attribute)
- The importance of the attribute in driving consideration to choose South Eastern Ontario as a vacation destination
- Two summary tables are provided listing the importance and performance scores for each of the survey markets for ease of reference.
- This data can be directly used to:
 - Determine how best to position South Eastern Ontario in each source market
 - Determine ideal messaging, visuals and creative to use in each market to drive greater interest in South Eastern Ontario as a vacation destination
 - Determine high-priority products, experiences, itineraries and packages to promote in each source market



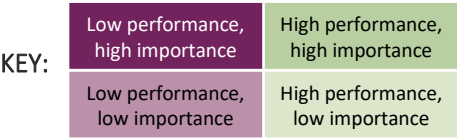
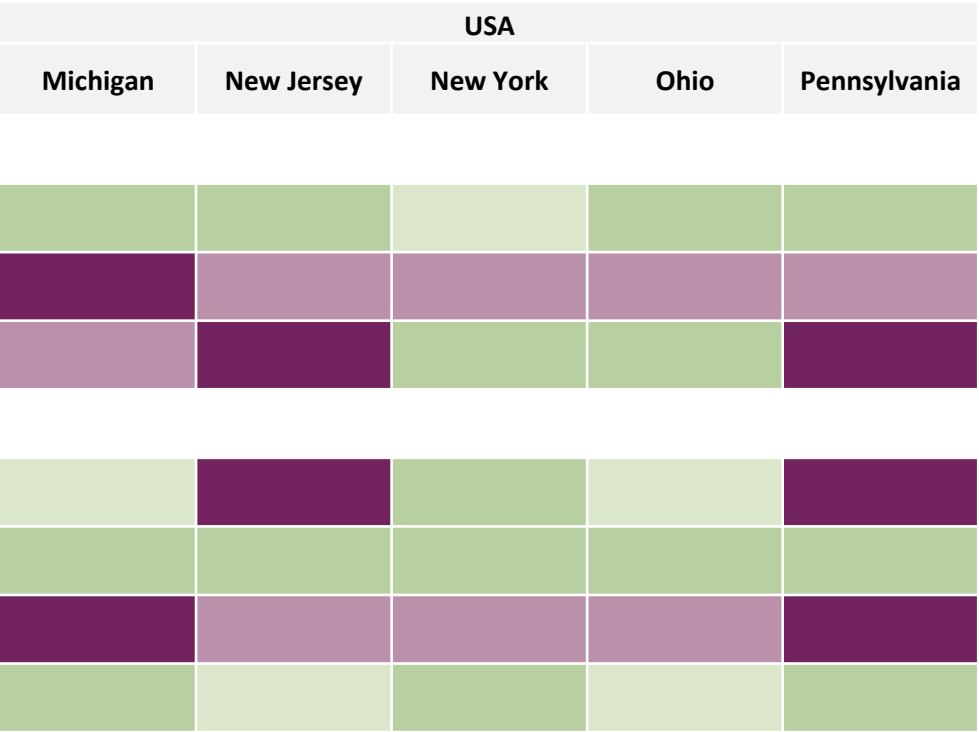
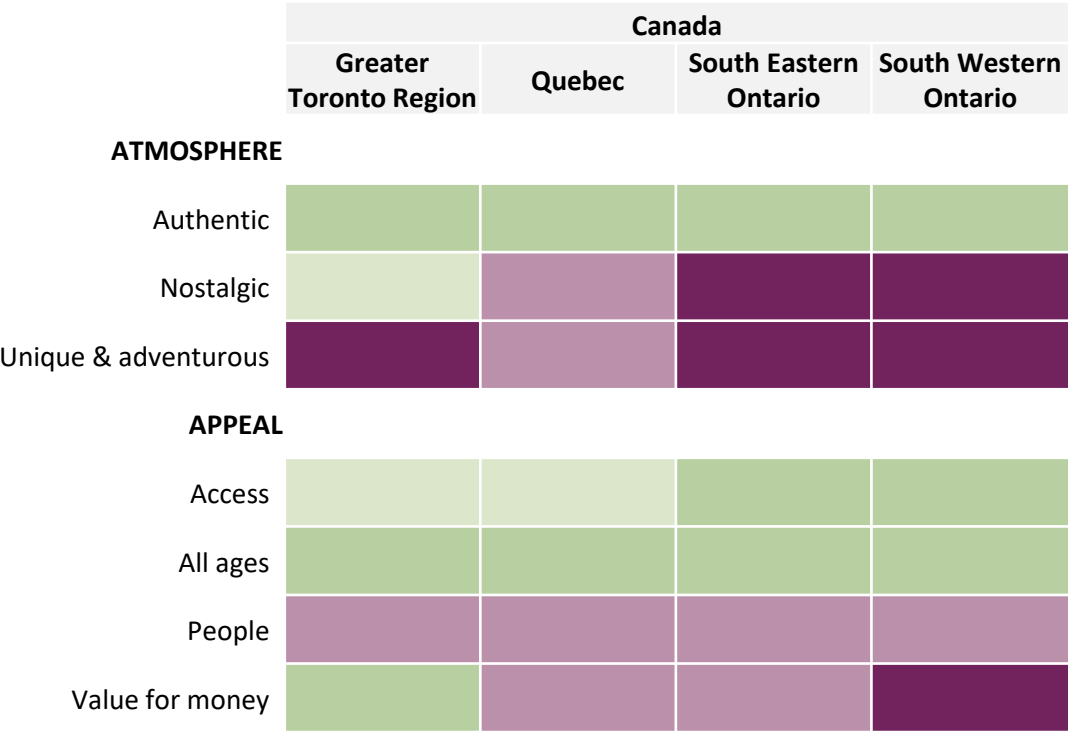
SOUTH EASTERN ONTARIO'S BRAND IMAGE: SUMMARY DASHBOARDS - AMENITIES & APPEARANCE

Culture, beauty, and welcome clearly a major selling point across all regions; sustainability is a reputation challenge in the USA; adrenaline and nightlife are areas of generally weaker performance, but not a major block to visitation.



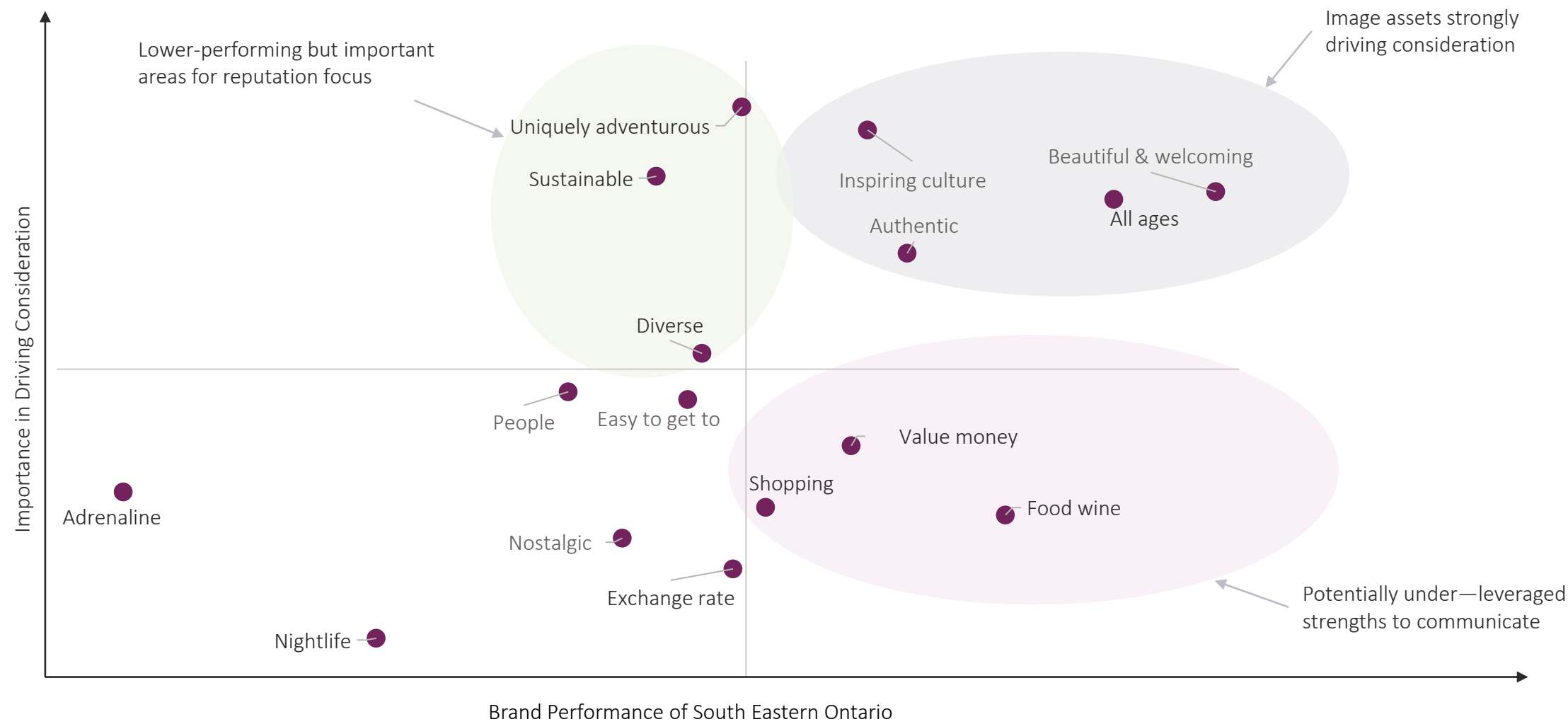
SOUTH EASTERN ONTARIO'S BRAND IMAGE: SUMMARY DASHBOARDS - ATMOSPHERE AND APPEAL

Authenticity and appeal to all ages help drive visitation in all markets; nostalgia and adventurousness are lower-performing and a potential reputation risk among more local travellers; people is another weaker area.



DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - TOTAL RESPONDENTS (ALL MARKETS)

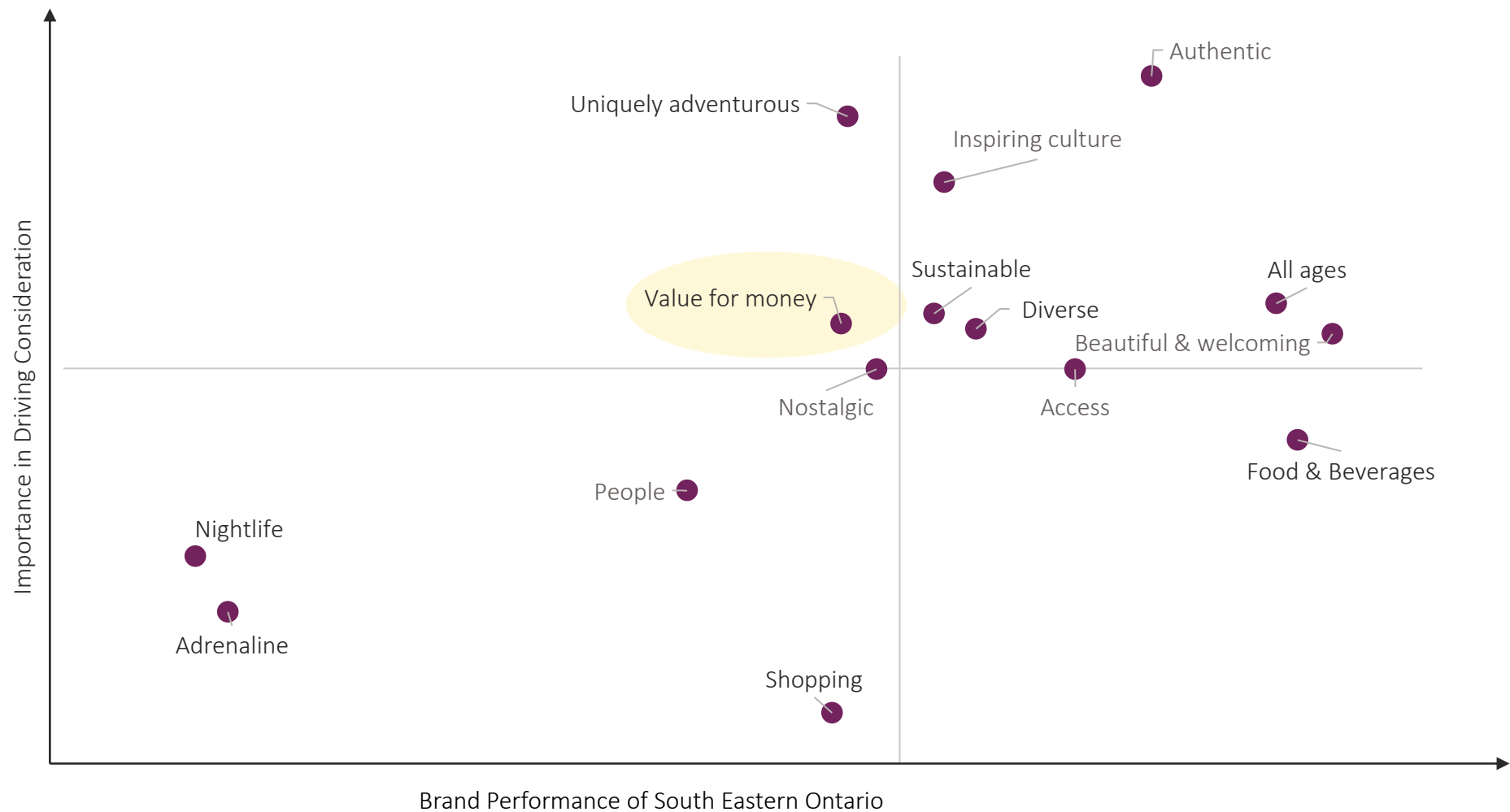
Key image assets strongly driving consideration of South Eastern Ontario are its beauty, appeal to all ages, authenticity, and inspiring culture; lack of adventure, sustainability, and diversity are more problematic.



Base: All Respondents (4250)
Q42. How strongly does each of the following describe South Eastern Ontario?

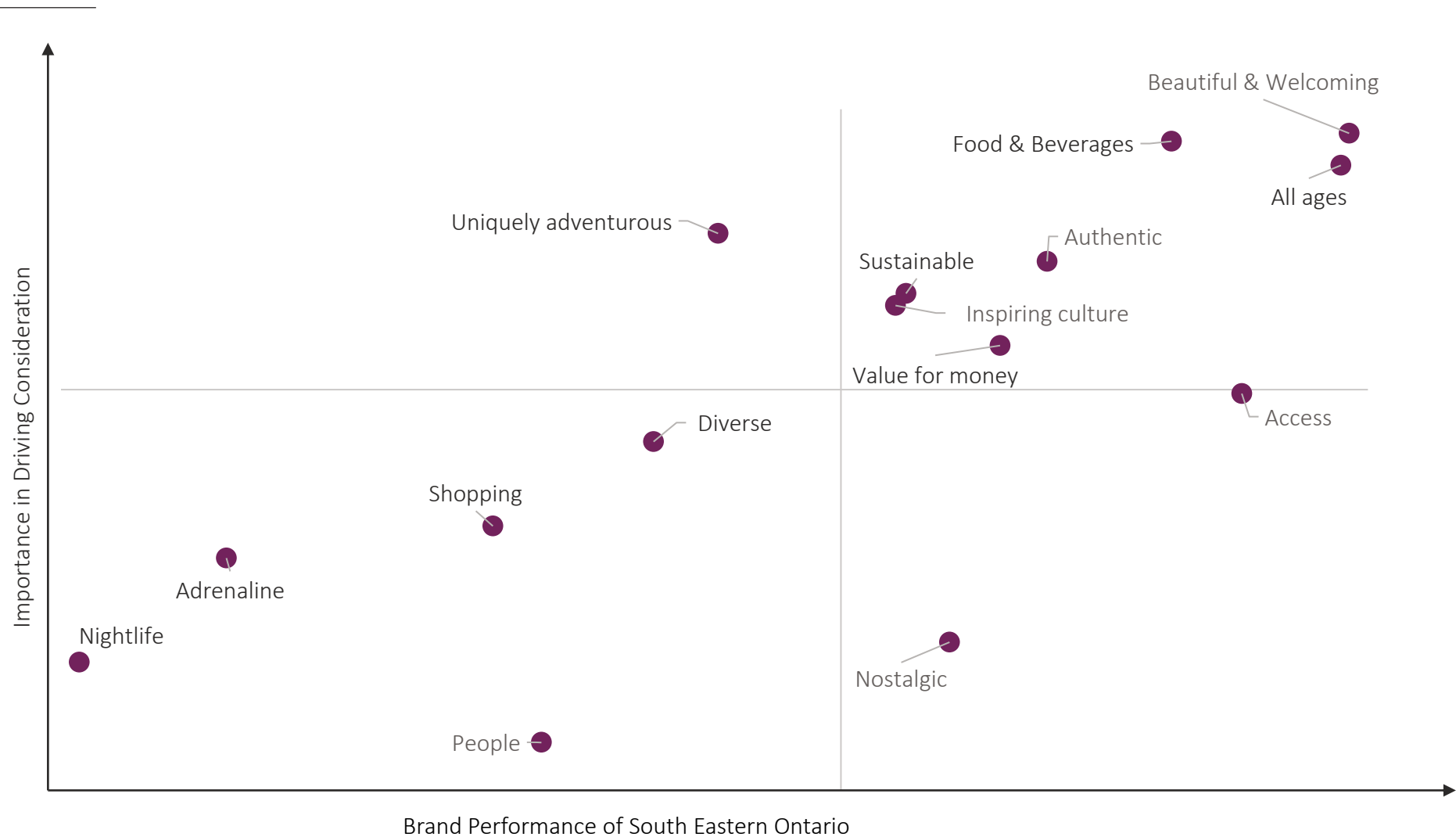
DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - SOUTH WESTERN ONTARIO RESPONDENTS

South Eastern Ontario’s image is very strong in South Western Ontario, but value for money is a potential additional area of concern.



DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - GREATER TORONTO REGION RESPONDENTS

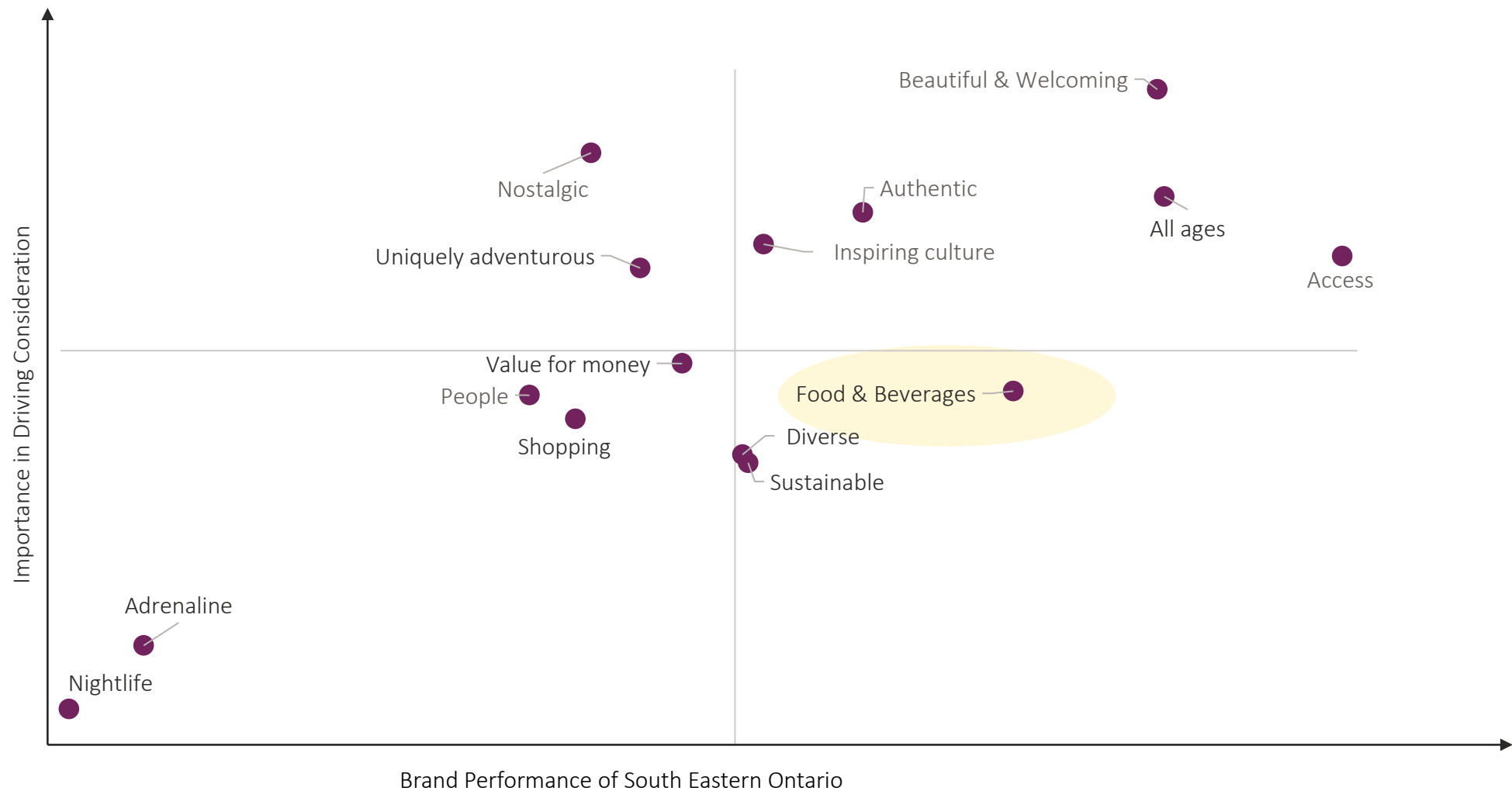
South Eastern Ontario's image has many assets in Greater Toronto, with few obvious red flags.



Base: All Respondents in Greater Toronto Region
Q42. How strongly does each of the following describe South Eastern Ontario?

DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - SOUTH EASTERN ONTARIO RESPONDENTS

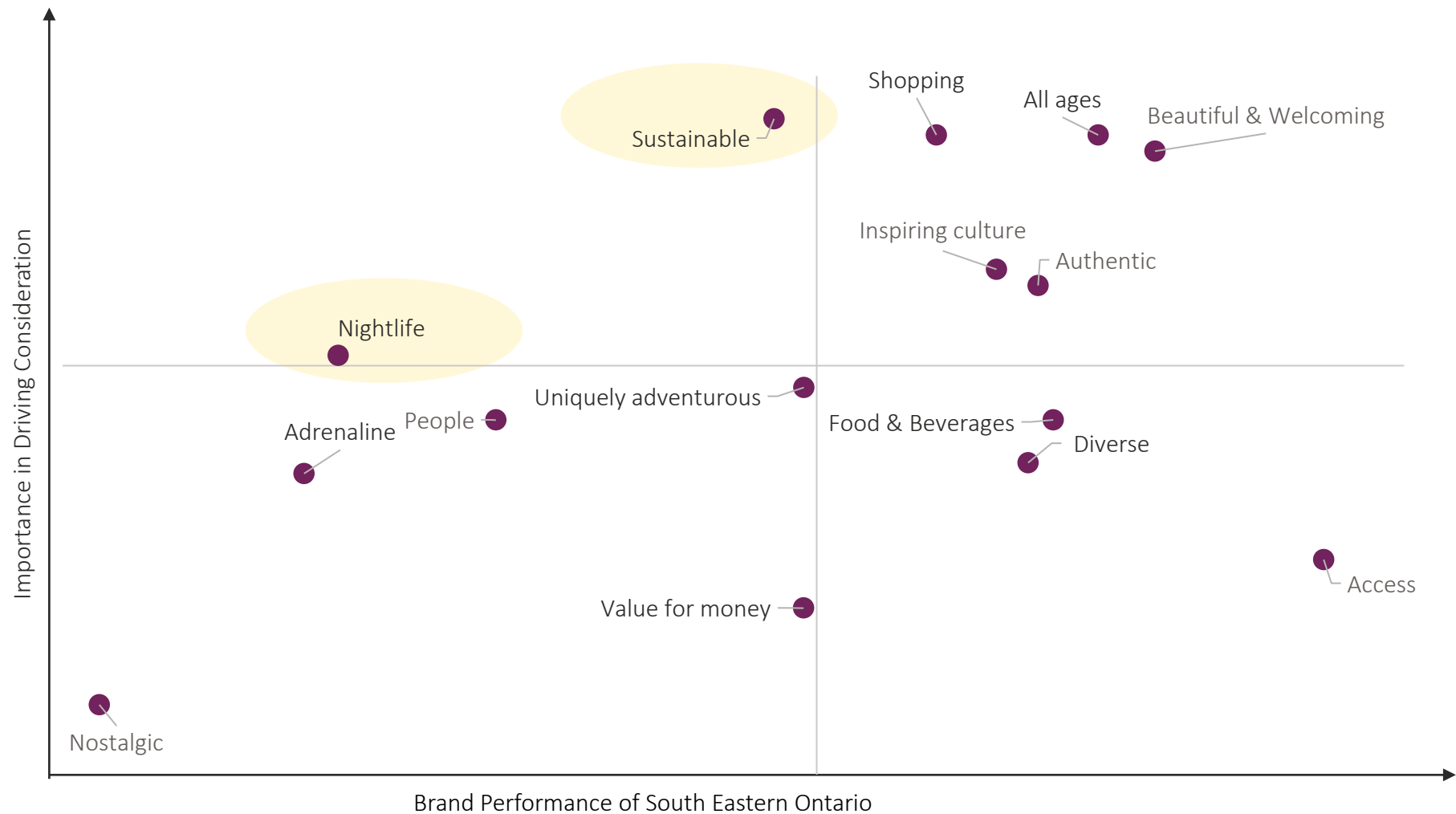
Among residents, South Eastern Ontario’s reputation is very strong, but food and beverage is not currently among the main factors driving consideration, despite positive perceptions.



Base: All Respondents in South Eastern Ontario
Q42. How strongly does each of the following describe South Eastern Ontario?

DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - QUEBEC RESPONDENTS

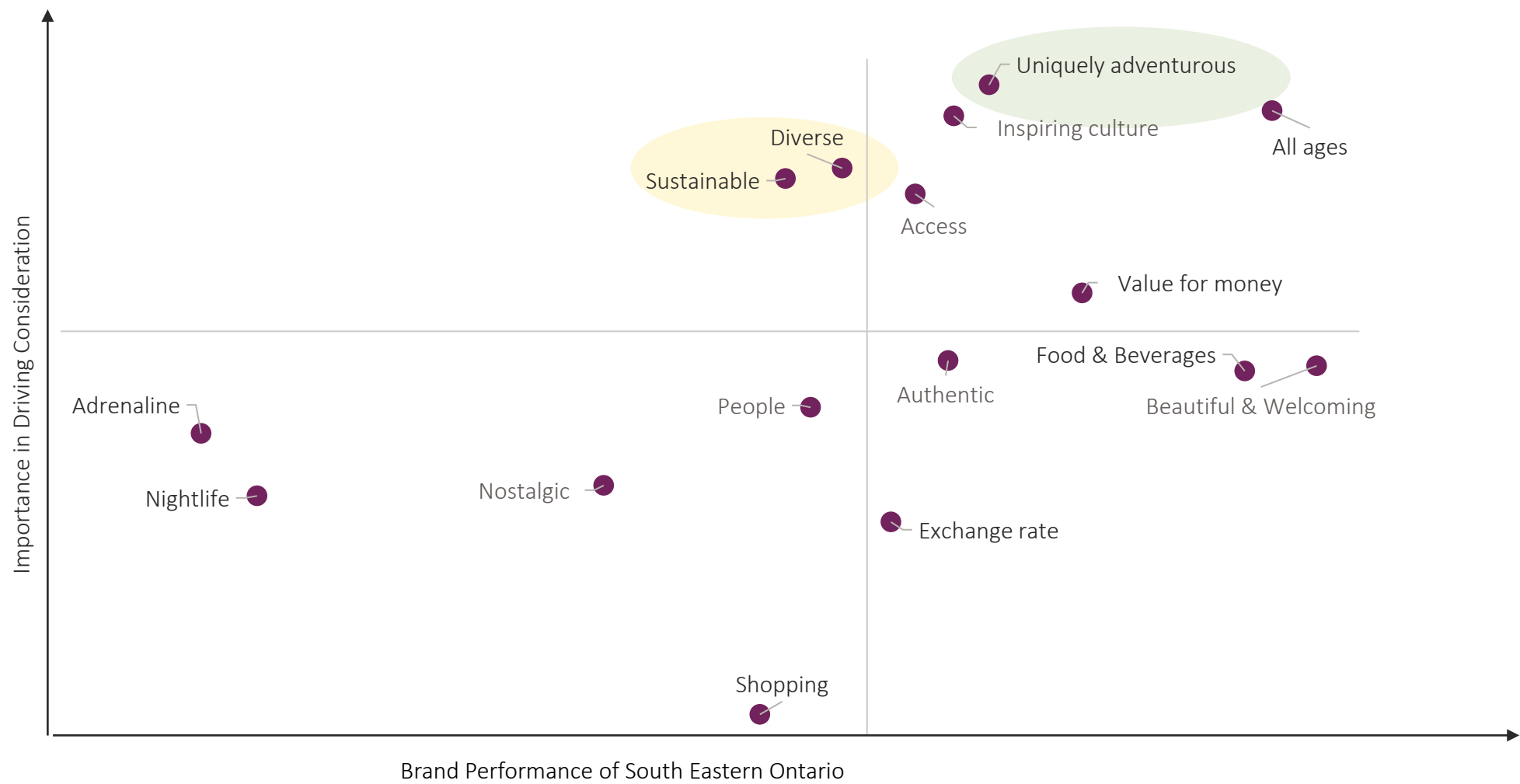
South Eastern Ontario has many factors underpinning its reputation in Quebec, but nightlife and sustainability are two slightly more problematic areas.



Base: All Respondents in Quebec
Q42. How strongly does each of the following describe South Eastern Ontario?

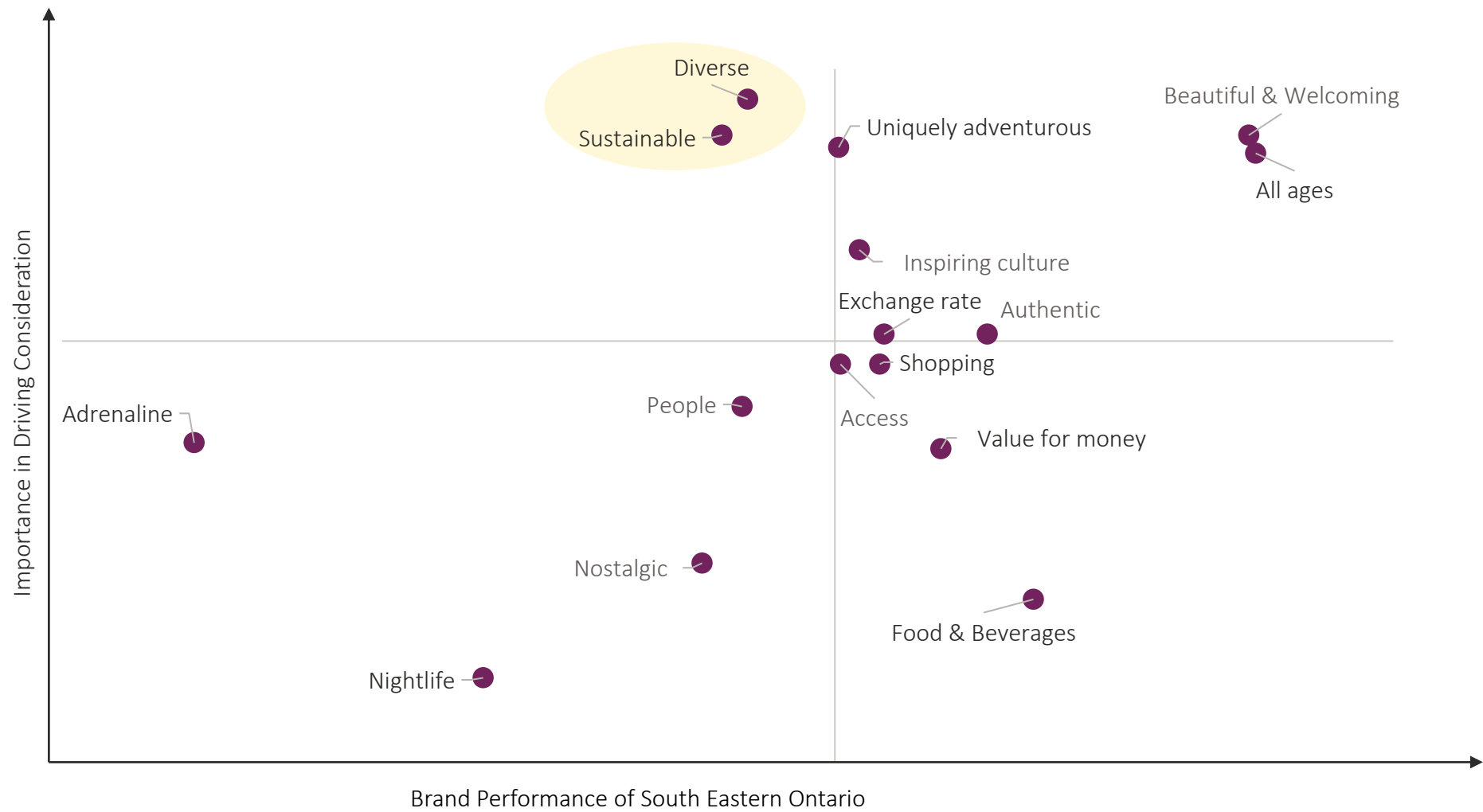
DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - NEW YORK RESPONDENTS

In New York, South Eastern Ontario’s strengths align well with what travellers see as important – with uniqueness and adventurousness also an asset, unlike elsewhere, diversity and sustainability are less positive.



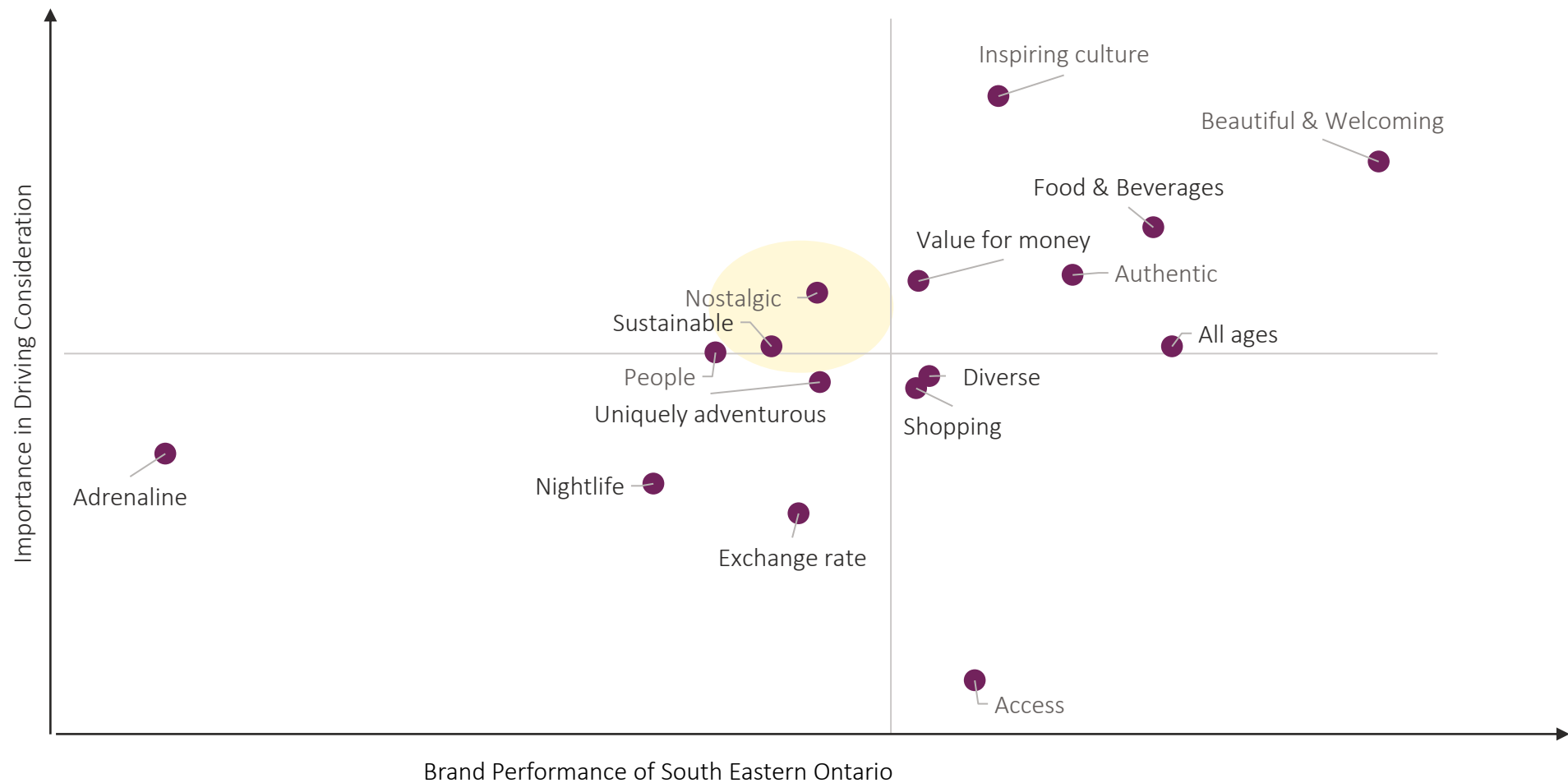
DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - OHIO RESPONDENTS

South Eastern Ontario's reputation as a destination is well aligned with what drives consideration in Ohio, though diversity and sustainability are areas for focus.



DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - MICHIGAN RESPONDENTS

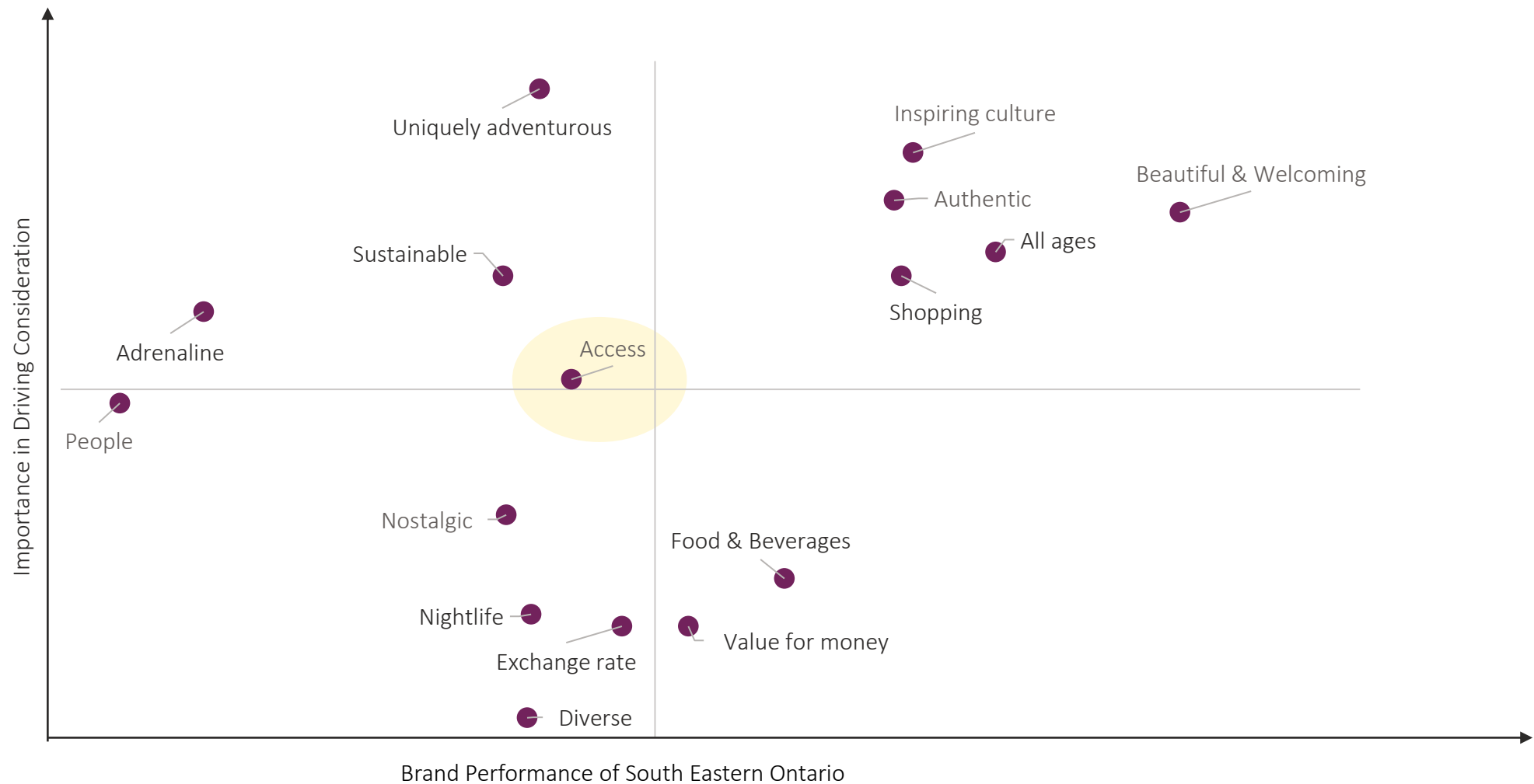
South Eastern Ontario has many reputation assets in Michigan, with only nostalgia and sustainability borderline areas for focus.



Base: All Respondents in Michigan
Q42. How strongly does each of the following describe South Eastern Ontario?

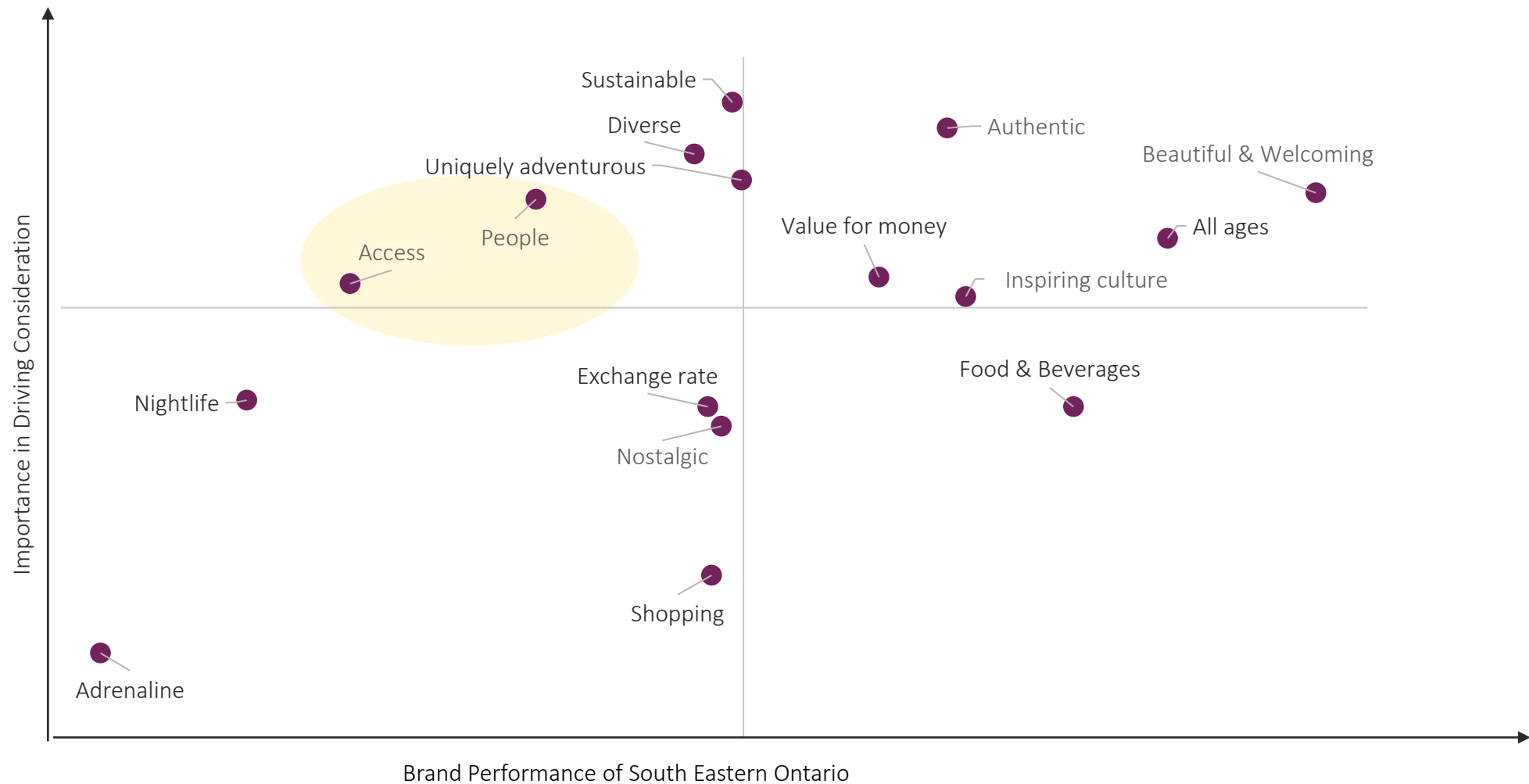
DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - NEW JERSEY RESPONDENTS

South Eastern Ontario has more areas of focus in New Jersey, including access, potentially reflecting longer drive time.



DRIVERS OF CONSIDERATION FOR SOUTH EASTERN ONTARIO - PENNSYLVANIA RESPONDENTS

South Eastern Ontario has several areas of focus in Pennsylvania, with areas like Access and People seen as relatively important, and lower-performing.



Base: All Respondents in Pennsylvania
Q42. How strongly does each of the following describe South Eastern Ontario?

An aerial photograph of a city at sunset. In the foreground, there are several buildings with dark roofs. A prominent building with a large, dark dome and a clock face is on the left. In the background, a harbor is filled with many boats, and a large ship is visible. The sky is filled with orange and yellow clouds, and the sun is setting on the right side of the image.

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