



Uncovering the Latest Ontario Traveller Insights

A survey of Ontario travel consumer perceptions and behaviours

Topline Report

March 25, 2024

Skift.
ADVISORY

CONFIDENTIALITY STATEMENT

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INTRODUCTION

A background photograph of three people cycling on a paved path. In the foreground, a woman on the left wears a red helmet and a grey t-shirt, smiling. A man in the center wears a red helmet and a black t-shirt. A woman on the right wears a blue helmet and a floral tank top, adjusting her sunglasses. They are all on bicycles. The background is filled with green trees under a clear sky.

INTRODUCTION

The following report presents the topline results of a quantitative market research survey of Ontario traveller perceptions and behaviours, conducted by Skift on behalf of Regional Tourism Organization 9 (RTO9). These results are the third wave of annual research conducted for RTO9 and their DMO and operator partners assessing current and future travel perceptions and behaviours and impact on South Eastern Ontario's travel and tourism industry and economy.

The results highlight the changing perceptions and behaviours of Ontario travel consumers post COVID-19 and the ongoing evolution of the Ontario travel and tourism market.



METHODOLOGY

METHODOLOGY

Skift, in partnership with RTO9, conducted a custom market research study of a representative sample of n=1,000 identified travel consumers in Ontario. Fieldwork was conducted online in December 2023, using an online consumer research panel. A representative sample of the online population in Ontario 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 overnight holiday/vacation trip in the past two years (i.e., since November 2021); and/or
- Are likely to take a domestic overnight holiday/vacation trip in the next year (i.e., by November 2024)

A questionnaire was developed by Skift Advisory and was fielded in English and French.

Results are representative of the online adult traveller population in Ontario and are considered accurate within +/- 2 to 3 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 is provided in the bottom of select pages.





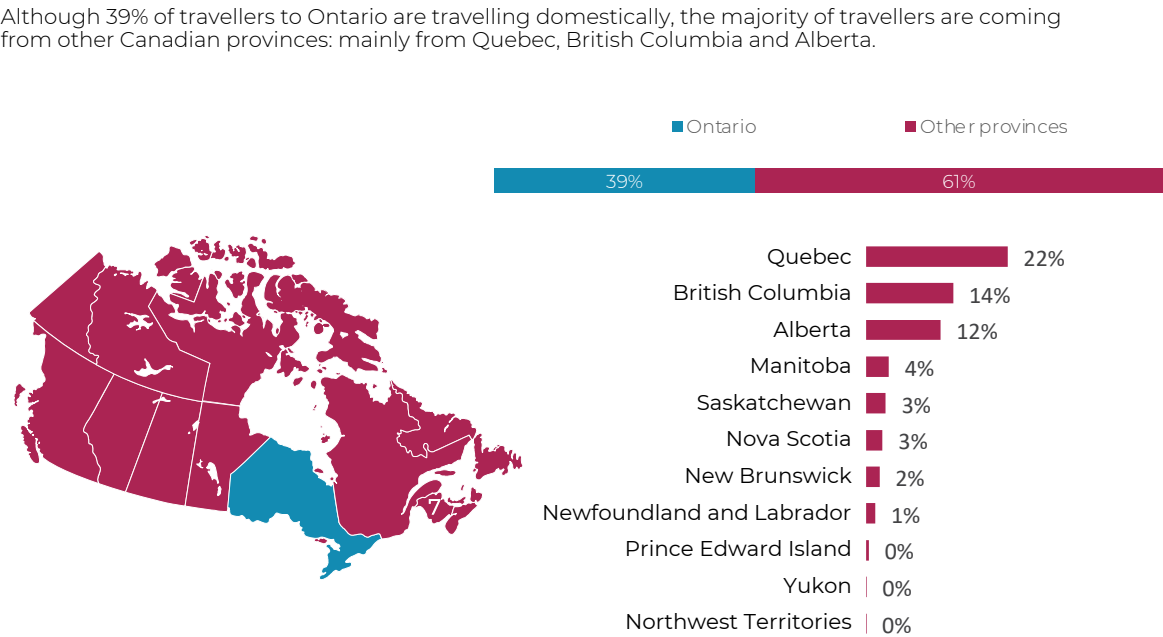
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ONTARIO TRAVEL CONSUMER INSIGHTS

DEMOGRAPHIC BREAKDOWN

61% of travellers are coming from provinces outside of Ontario with the interest in the province remaining very high: more than 90% of travellers have taken a vacation in Ontario in the last 2 years and more than 80% are planning one soon.

Province of Residence



Past and Future Travel

Interest in travelling to Ontario remains consistent for both segments, with more than 90% having recently enjoyed a holiday in Ontario and more than 80% intending to visit it soon.



93% of Ontarians have recently taken a holiday in Ontario



83% Ontarians plan to take it soon



91% of residents of other provinces have recently taken a holiday in Ontario



88% residents of other provinces plan to take it soon

Annual Household Income*

Ontario-based travellers with incomes under \$39,999 are more prevalent, while Canadian travellers from other provinces mostly fall into medium and higher income level ranges of \$40,000 - \$59,999 and \$80,000 - \$124,999.

	Ontario residents	Other provinces**
Under \$39,999	34%	22%
\$40,000 - \$59,999	14%	24%
\$60,000 - \$79,999	14%	17%
\$80,000 - \$124,999	22%	23%
\$125,000 - \$199,999	14%	13%
\$200,000 or more	3%	1%

**Prefer not to answer' has been excluded from the above table. Percentages within age brackets that are significantly higher than the average have been highlighted in bold (95% confidence level)*
***Other Provinces contain respondents from all Canadian provinces except Ontario*

Education

Nearly half of all travellers have higher education. Ontario travellers, being mostly 25 – 34 years old, are younger than travellers from other provinces (being 55 – 64).

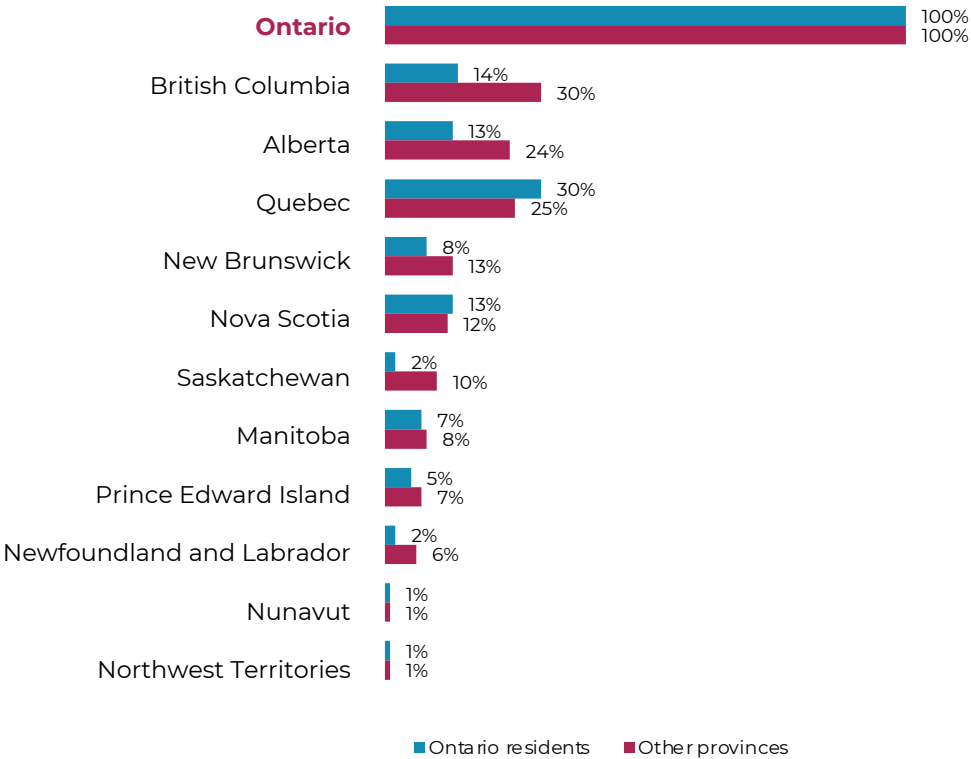


RECENT TRAVELS TO ONTARIO

Quebec and British Columbia are the next most popular provinces for the travellers who have visited Ontario in the last two years. When travelling within Ontario, they consider Toronto, Ottawa, Niagara Region and London as the main tourist landmarks.

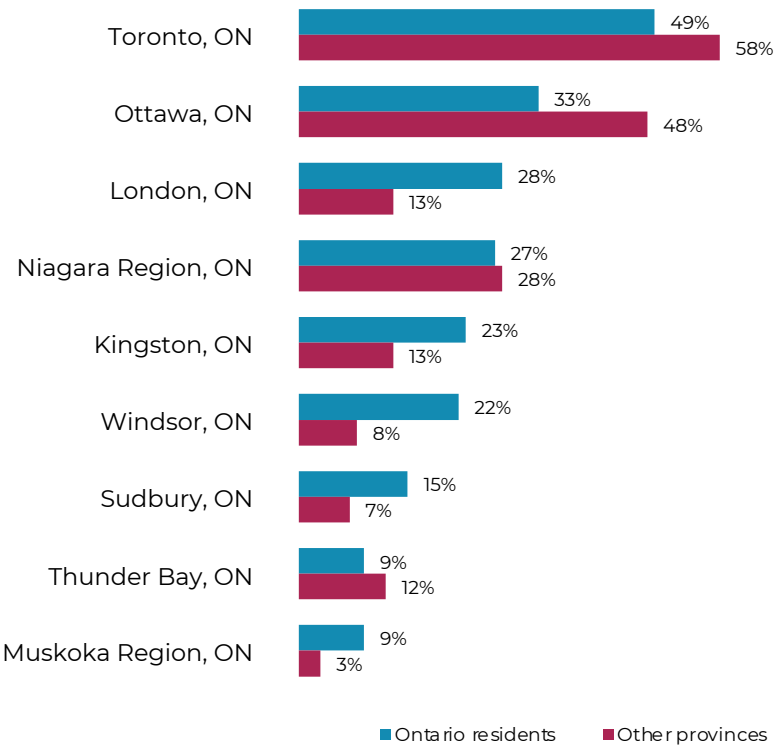
Recent Travels to Ontario and other provinces

Of those travelling within Ontario, the most popular provinces for travel outside of Ontario in the last two years are Quebec and British Columbia.



Recent Travels to Ontario destinations

In Ontario province, around half of the travellers have preferred Toronto as a travel destination, followed by Ottawa and Niagara Region. London has also been one of the favourite destinations for Ontarian residents.

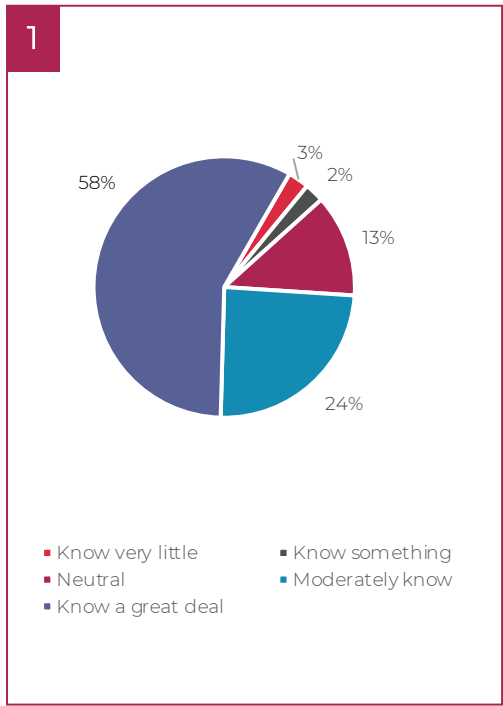


REGION'S BRAND APPEAL FOR ONTARIO RESIDENTS

Ontario-based travellers know very well their province, the vast majority of them consider it an excellent travel destination and would likely recommend it as a holiday experience. Three quarters of Ontarians are likely to take a holiday trip within their province soon.

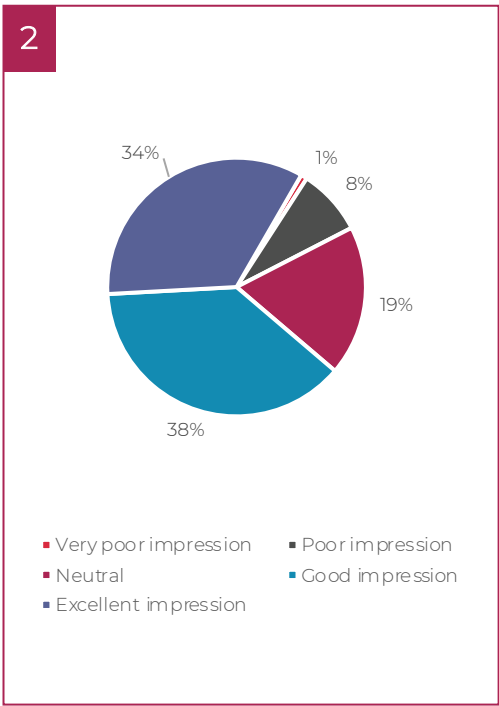
Familiarity

82% of Ontario-based travellers are very familiar with what Ontario has to offer as holiday travel experiences.



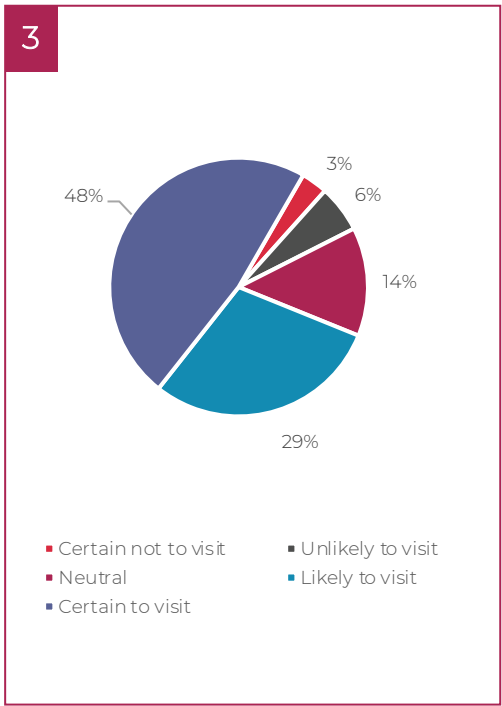
Overall impression

Almost three quarters have an overall good impression of their province's travel offering with only 9% consider it less appealing.



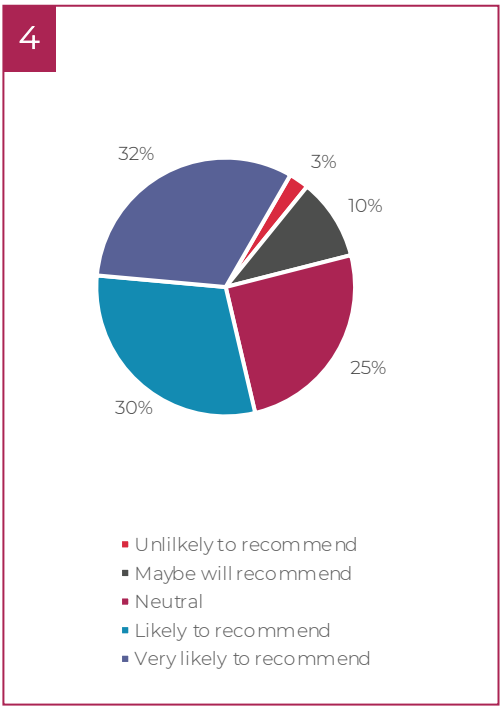
Likelihood to visit in the next 2 years

77% of Ontarians are likely to take a holiday trip within their province in the next two years.



Likelihood to recommend

62% of Ontarians are likely to recommend it as a holiday travel destination.

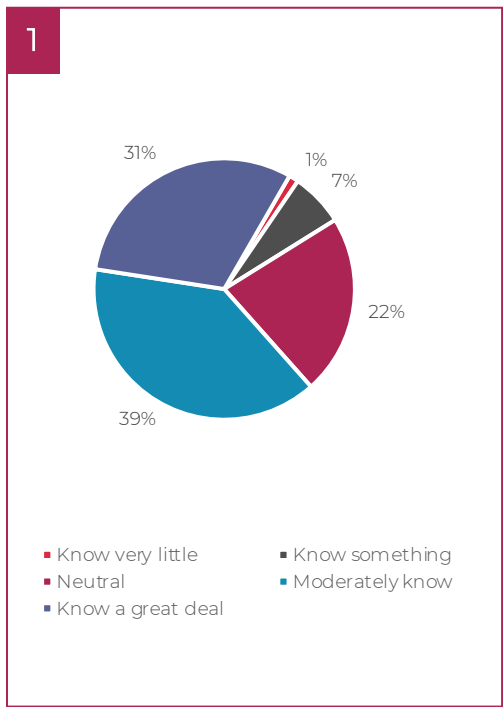


REGION'S BRAND APPEAL FOR OTHER PROVINCES

Following Ontario-based travellers pattern, residents from other Canadian provinces are mostly familiar and have even greater impression of Ontario as a tourism destination with three quarters of them likely to visit it in the next two years.

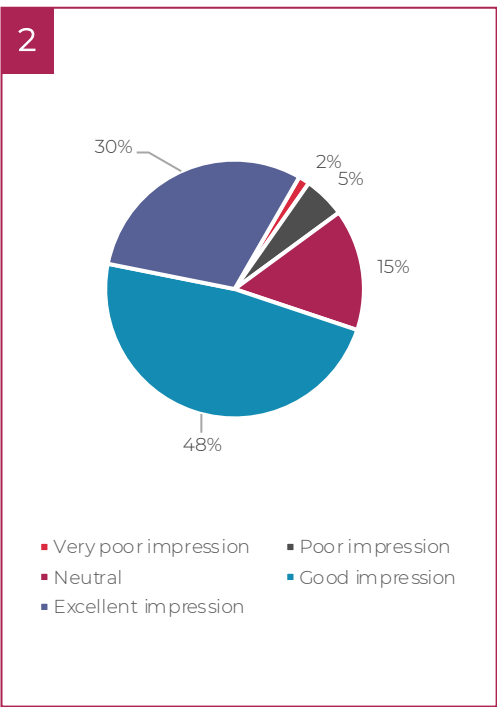
Familiarity

The travellers from other Canadian provinces are very familiar with Ontario, almost three quarters of them stating that they know Ontario's travel offering quite well.



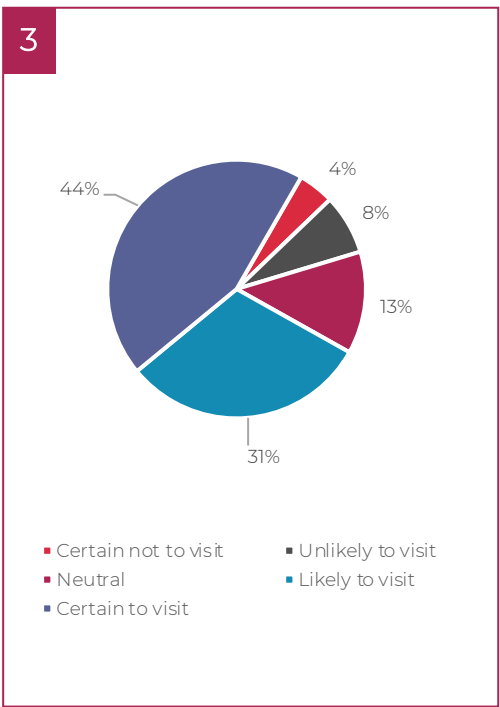
Overall impression

Almost 80% of Canadian travellers have a great impression of Ontario and its travel scene.



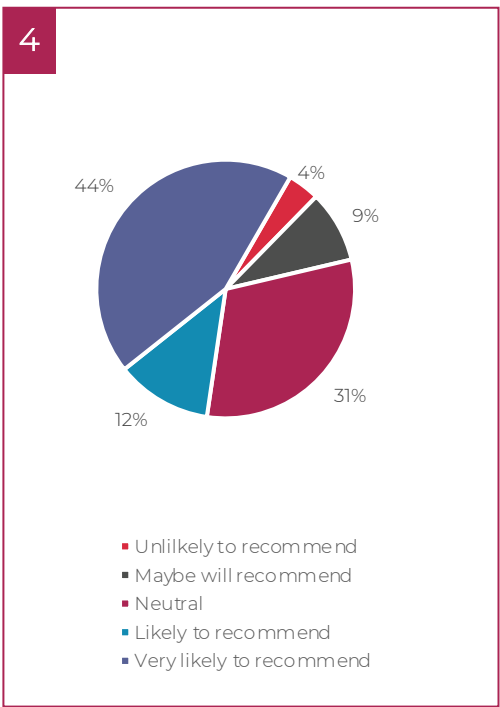
Likelihood to visit in the next 2 years

Three quarters of Canadian travellers are likely to make a visit to Ontario during their holiday in the next two years.



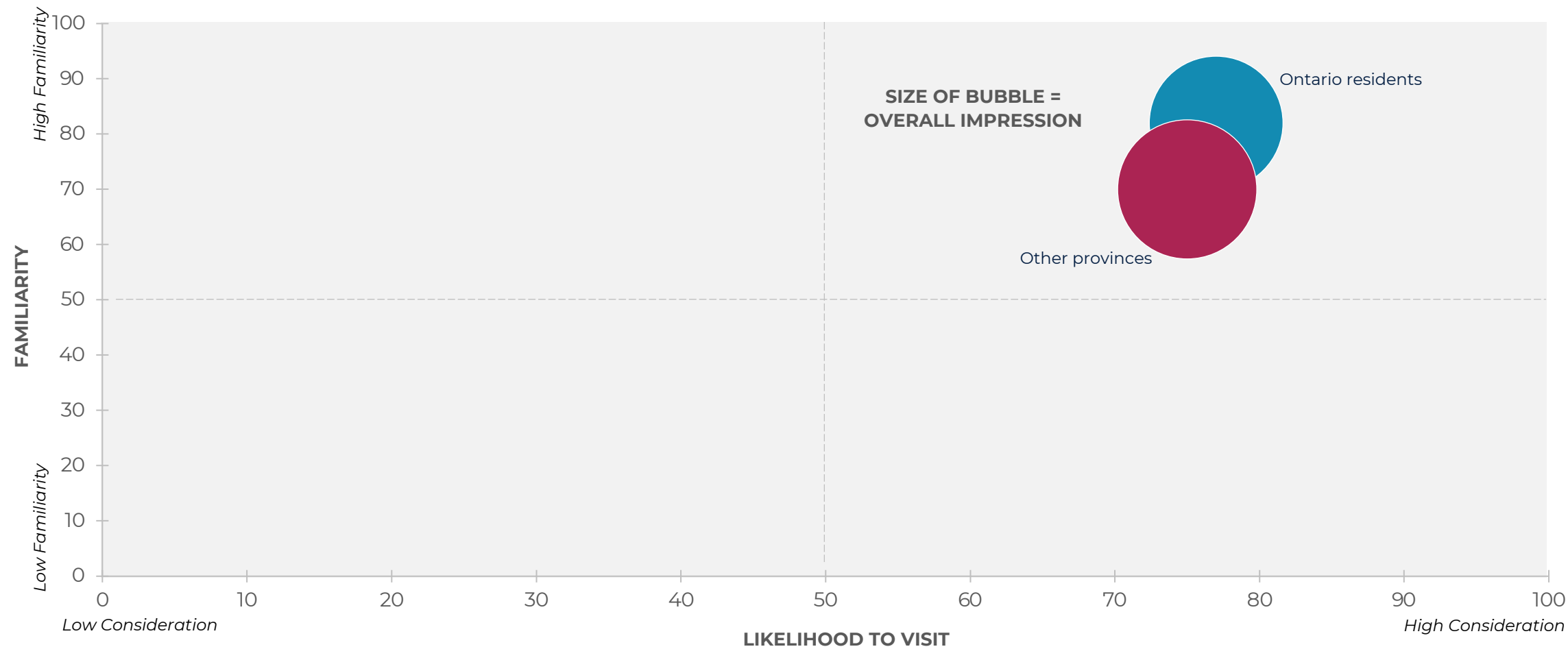
Likelihood to recommend

Half of Canadian travellers are likely to recommend Ontario as a holiday destination within Canada.



ONTARIO BRAND APPEAL

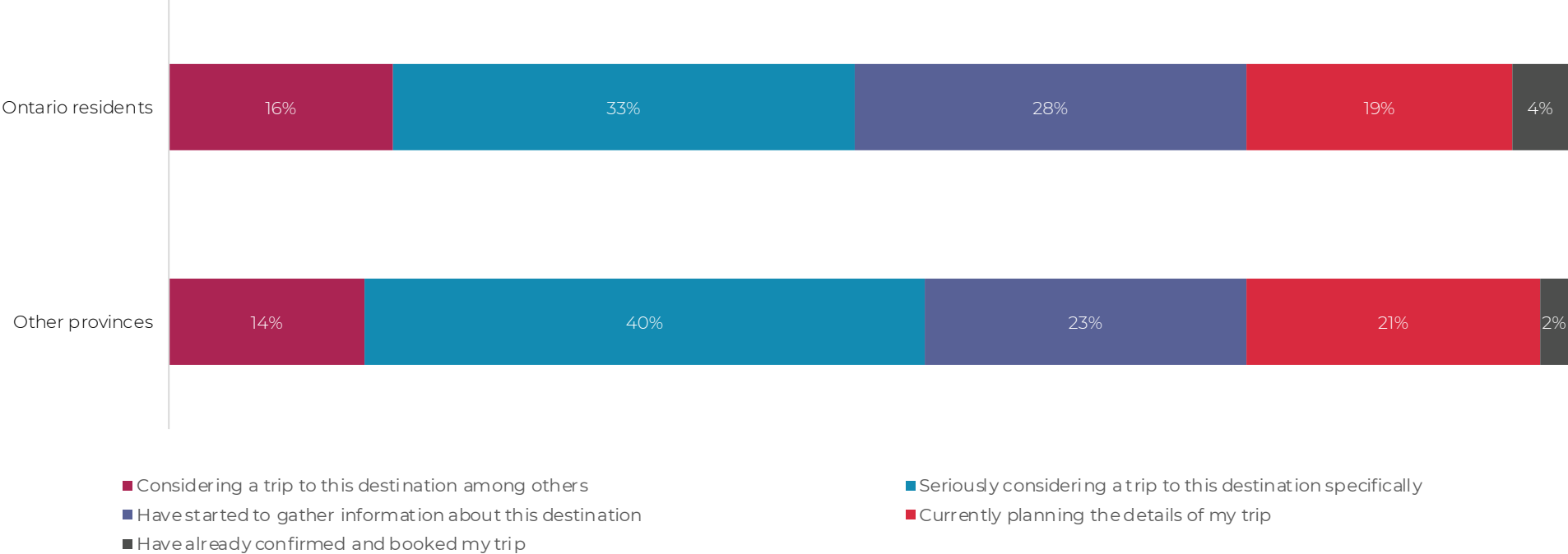
Travellers from other Canadian provinces are almost as familiar with the destination as Ontarian-based travellers expressing similar high likelihood to visit Ontario in the next two years and having an overall excellent impression of the province as a tourist destination.



PATH TO PURCHASE

The majority of Canadian travellers are seriously considering a trip to Ontario with Ontarians being slightly more numerous than travellers from other provinces in having already confirmed their booking.

Although only 4% of Ontarians have already booked their trip, 19% of them are currently planning the details of their vacation within Ontario. 21% of the travellers from other Canadian provinces are planning the vacation to Ontario as well but only 2% of them have confirmed their booking. The majority of both segments is seriously considering a trip specifically to Ontario.

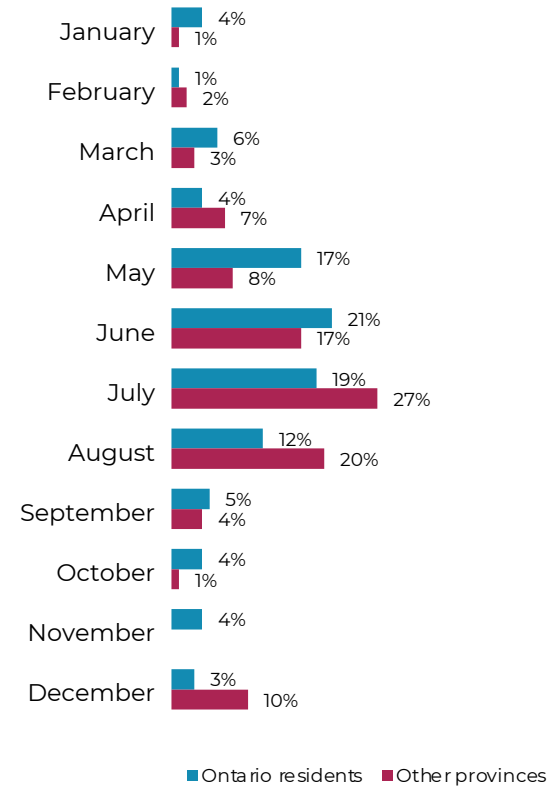


SEASONALITY

Summer has the highest influx of travellers within Ontario, with the majority of them staying 1 – 2 days while on vacation and travelling in a group of two or three.

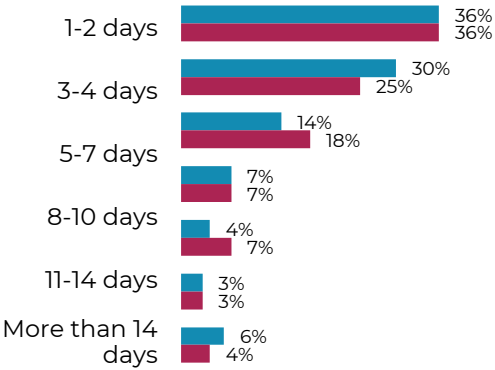
Most popular months to travel in Ontario

The summer months rank as the top months for travel within Ontario with June being the most popular for Ontarians and July for the rest of the Canadian travellers.



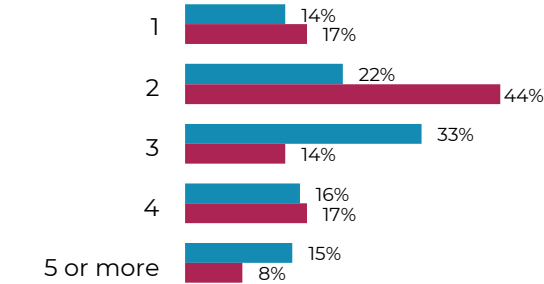
Length of stay

More than third of all travellers to Ontario prefer a short trip of one or two days to the destination.



Likely party size

Nearly half of the Canadians are likely to travel in a group of two, with the Ontarians preferring to travel in a group of three.



Reasons for favoring travel by season

While summer is the best season for catching the good weather during school vacation in Ontario, some travellers prefer spring and fall for less crowd, seasonal celebrations and hockey. Ontarians travel in winter to see their families for Christmas holidays, while other Canadians prefer to visit Banff and Lake Louise.

Ontario residents

- It's warm and beautiful to explore
- School vacation

Other provinces

- Good weather for vacancies
- Start of Canada day

Ontario residents

- Autumn will look nice at that time
- Halloween

Other provinces

- To see family
- Company vacation time

Ontario residents

- My family has holidays
- My family will be over for Christmas

Other provinces

- Water polo tournaments
- To visit Banff and Lake Louise

Ontario residents

- It's not too crowded in airports
- Hockey season

Other provinces

- It doesn't have much rain during that time
- Easter time

TRAVEL PRIORITIES

All Canadian travellers are united in their priorities when choosing a destination: cultural values, political stability and quality of customer service are the most important considerations, while financial aspect is the main barrier.

Travel barriers preventing from taking a trip in the next 12 months

When choosing a destination, the financial aspect, such as the necessity to save money or the cost of airfares, is the main barrier preventing Canadian travellers from taking a trip. However, Ontario-based residents are less price-sensitive than travellers from other provinces.

ONTARIO RESIDENTS


 Save Money
51%

 Cost of airfares
27%


 Time to visit
27%


 Different stage in my life
16%

OTHER PROVINCES

 Save Money
72%

 Cost of airfares
29%


 Time to visit
21%

 Right people to go
12%


Important considerations when choosing a destination


When choosing a destination, cultural values, such as treatment of women, political stability and quality of customer service are the most important factors. However, travellers from outside of Ontario are easier affected by the standards of customer service at the destination.

ONTARIO RESIDENTS

 Cultural values
68%

 Political stability
66%

 Quality of customer service
57%

 Environmental responsibility
55%

OTHER PROVINCES

 Quality of customer service
71%

 Political stability
62%

 Cultural values
55%

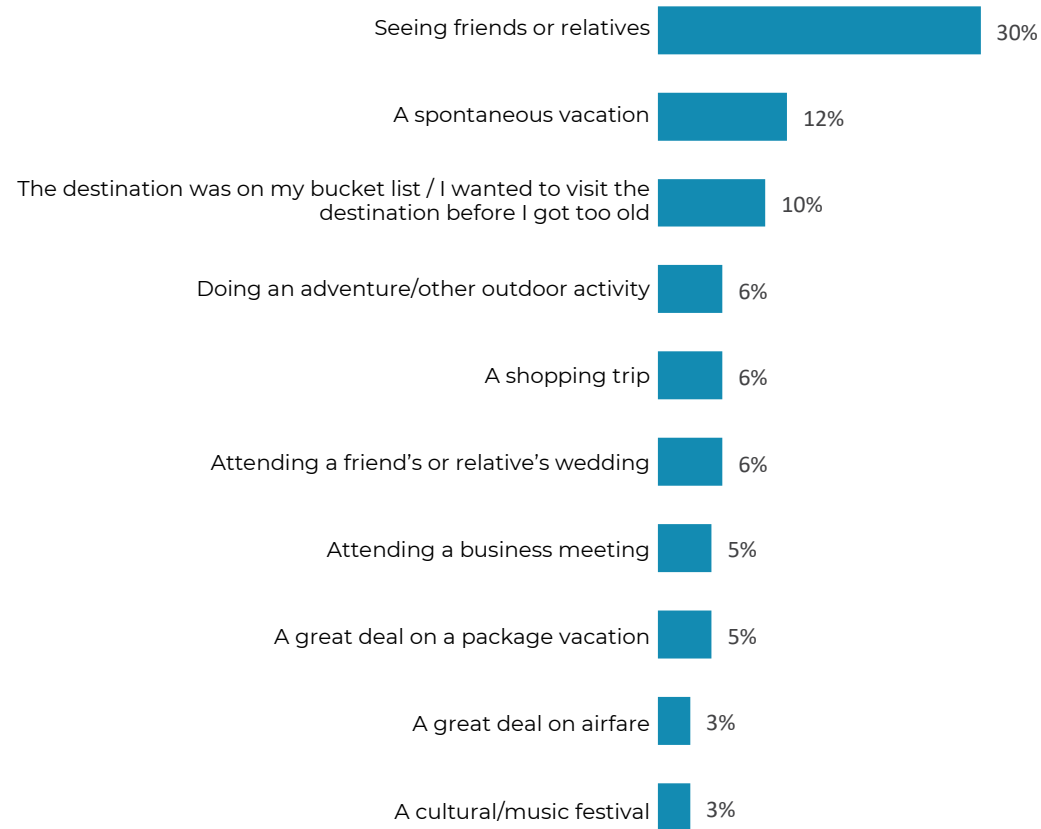
 Health issues
50%

MOTIVATIONS

Seeing friends or relatives is the main reason for overnight leisure trip within Ontario for both Ontario residents and residents of other provinces, followed by desire for a spontaneous vacation.

Top-10 reasons for most recent overnight holiday trip - Ontario residents

Seeing friends or relatives is the top motivation for a third of Ontarians when travelling within their province. They also see these trips as a spontaneous vacation or as their “bucket list” destination.



Top-10 reasons for most recent overnight holiday trip – Other provinces

Following Ontario residents pattern, travellers from other Canadian are travelling even more within Ontario in order to visit their friends or relatives. Additionally, they consider these trips as a spontaneous vacation or attend a friend's or relative's wedding.

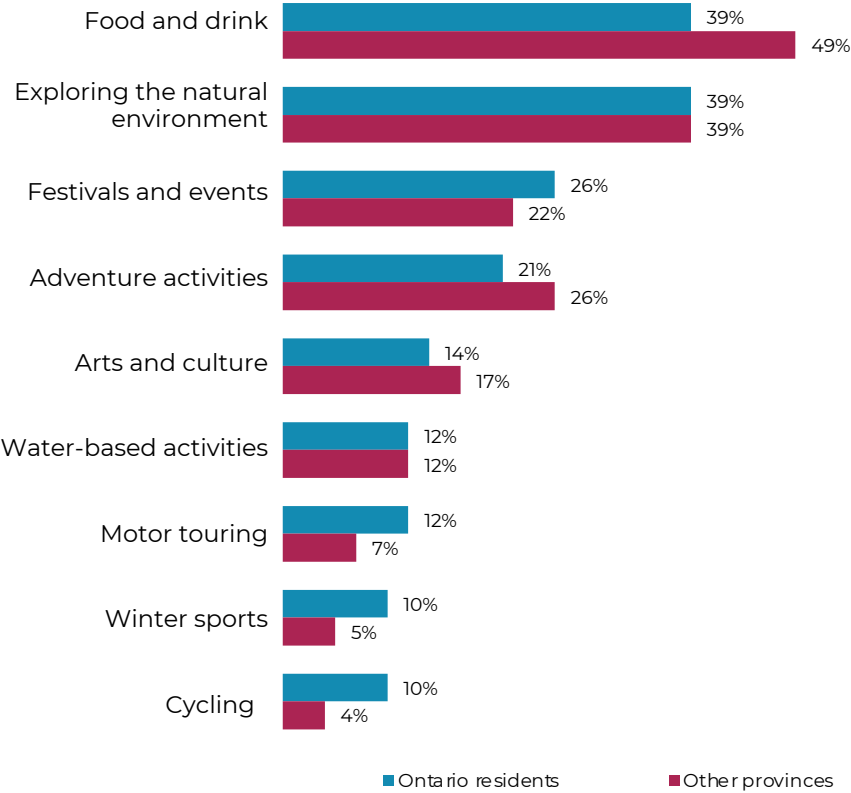


POPULAR ACTIVITIES

Trying local cuisine tends to be the favourite activity of both Ontario residents and other Canadians travelling within Ontario closely followed by nature-related activities.

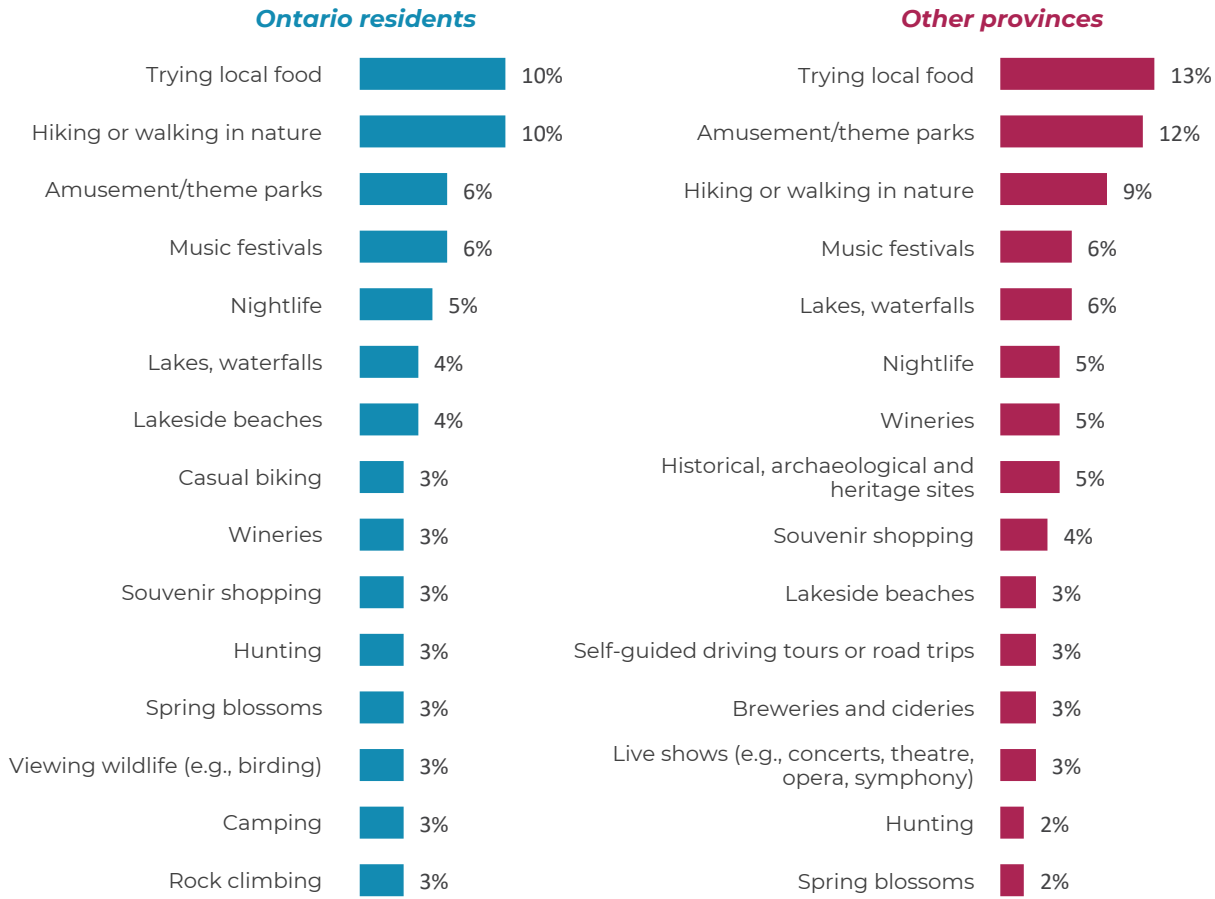
Popular activity categories

Among all Canadian travellers, indulging in food and drink ranks as the preferred activity category closely followed by exploring natural environment. Ontarians also enjoy visiting festivals and events, while other provinces' residents prefer adventure activities.



Popular activities

Ontario residents equally enjoy trying local food and hiking or walking in nature. Residents of other Canadian provinces also enjoy exploring local cuisine, as well as visiting amusement and theme parks.

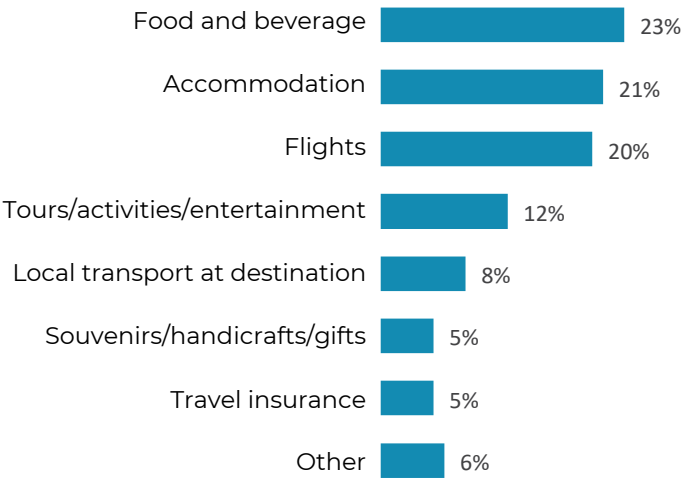


SPENDING HABITS

Although both Ontarians and other Canadians are likely to spend the majority of their trip’s budget on accommodation and food, residents from other provinces tend to allocate a slightly larger portion to these expenses whereas Ontarians prioritize spending on flights and travel insurance.

Spending priorities for Ontario residents

Accommodation and food are the main spending priorities for Ontario residents when travelling within their province. They also tend to spend more significant amount on travel insurance.

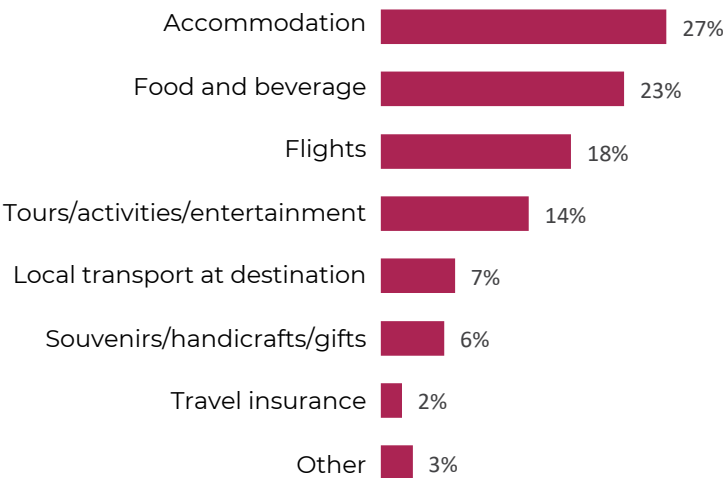


Average spend (\$CAD) in Ontario

2,211

Spending priorities for residents of other provinces

Following Ontario residents pattern, travellers from other Canadian provinces are likely to spend 50% of their trip budget on accommodation and food. They tend to spend slightly less on flights and travel insurance.



Average spend (\$CAD) in Ontario

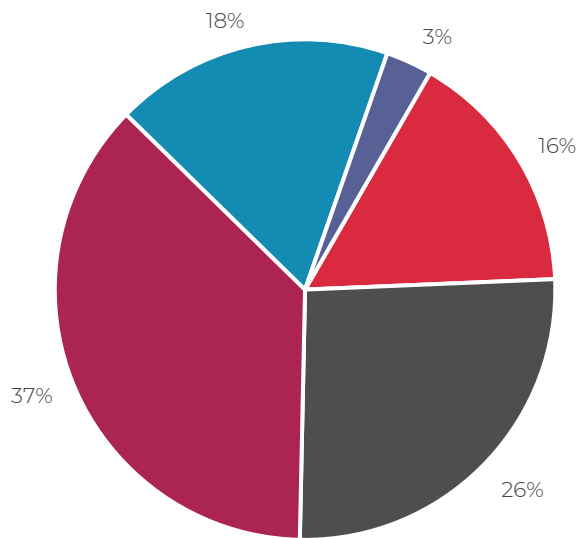
2,177

ECONOMIC IMPACT

The recent increase in consumer prices has decreased the likelihood to travel to Ontario for approximately a third of all Canadian travellers. It has however increased the combined willingness to travel for 41% and 33% of residents from Ontario and other provinces respectively.

Impact of inflation on travel likelihood for Ontario residents

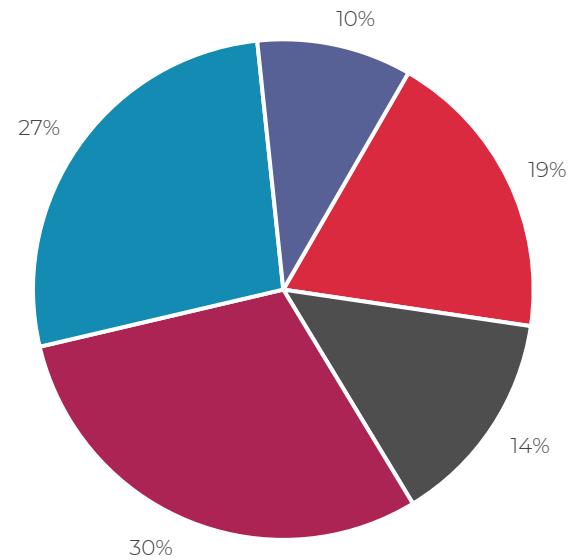
More than third of Ontarians stated that the inflation has had no impact on their likelihood to travel within Ontario. The combined 41% are much more or a little more likely to travel inside their province, while 21% felt that the inflation has negatively impacted their plans to travel within Ontario.



- I am much more likely to travel there
- I am a little more likely to travel there
- It has made no difference to my likelihood to travel there
- I am a little less likely to travel there
- I am much less likely to travel there

Impact of inflation on travel likelihood for Other provinces

The combined 33% of residents from other Canadian provinces are much more or a little more likely to travel to Ontario following the recent increase in consumer prices. However, more than third have stated that the inflation has significantly impacted their plans to travel within Ontario in the next year.



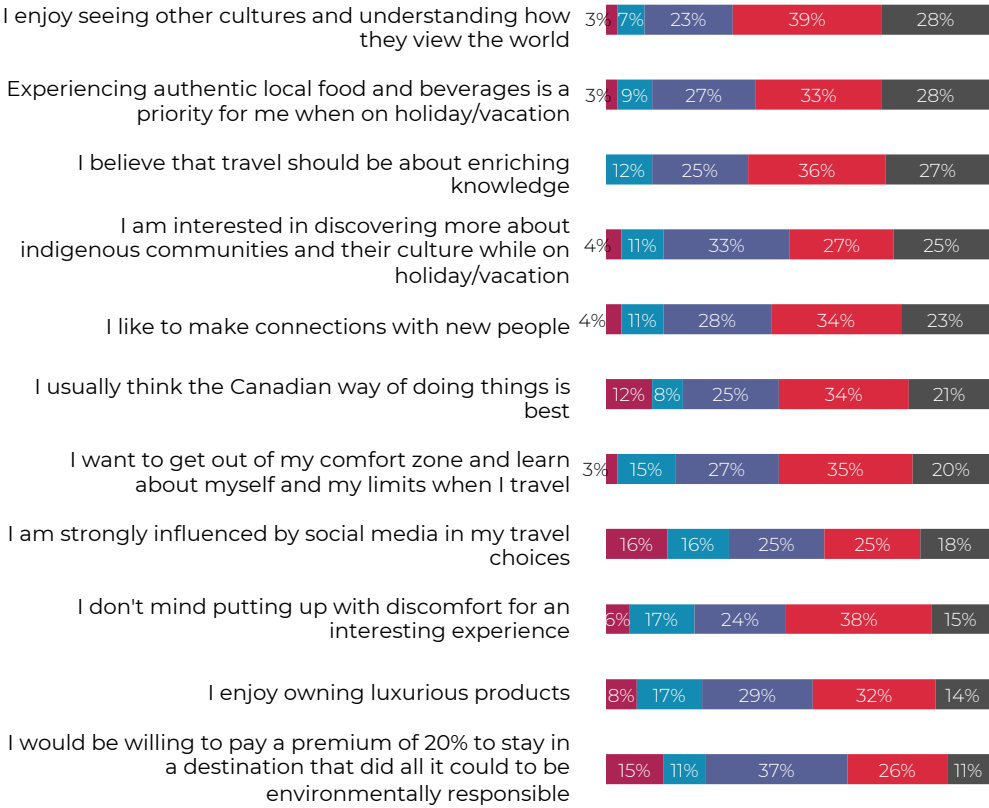
- I am much more likely to travel there
- I am a little more likely to travel there
- It has made no difference to my likelihood to travel there
- I am a little less likely to travel there
- I am much less likely to travel there

TRAVELLER VALUES

All Canadian travellers describe understanding other cultures, enriching their knowledge and trying local cuisine as their top values while travelling. While Ontarians are also interested in discovering more about indigenous communities, other Canadians would like to get out of their comfort zone.

Traveller values – Ontario residents

For the vast majority of Ontario residents travelling is about seeing other cultures, enriching knowledge and understanding how they view the world, but also about experiencing authentic local food and beverage.



■ Does not describe me at all ■ Slightly describes me ■ Neutral
■ Somewhat describes me ■ Describes me very well

Traveller values – Other provinces

The residents of other Canadian provinces value even more seeing and understanding other cultures while travelling with 71% stating is as their main characteristic. Enriching knowledge and experiencing authentic food are extremely valuable for them as well.

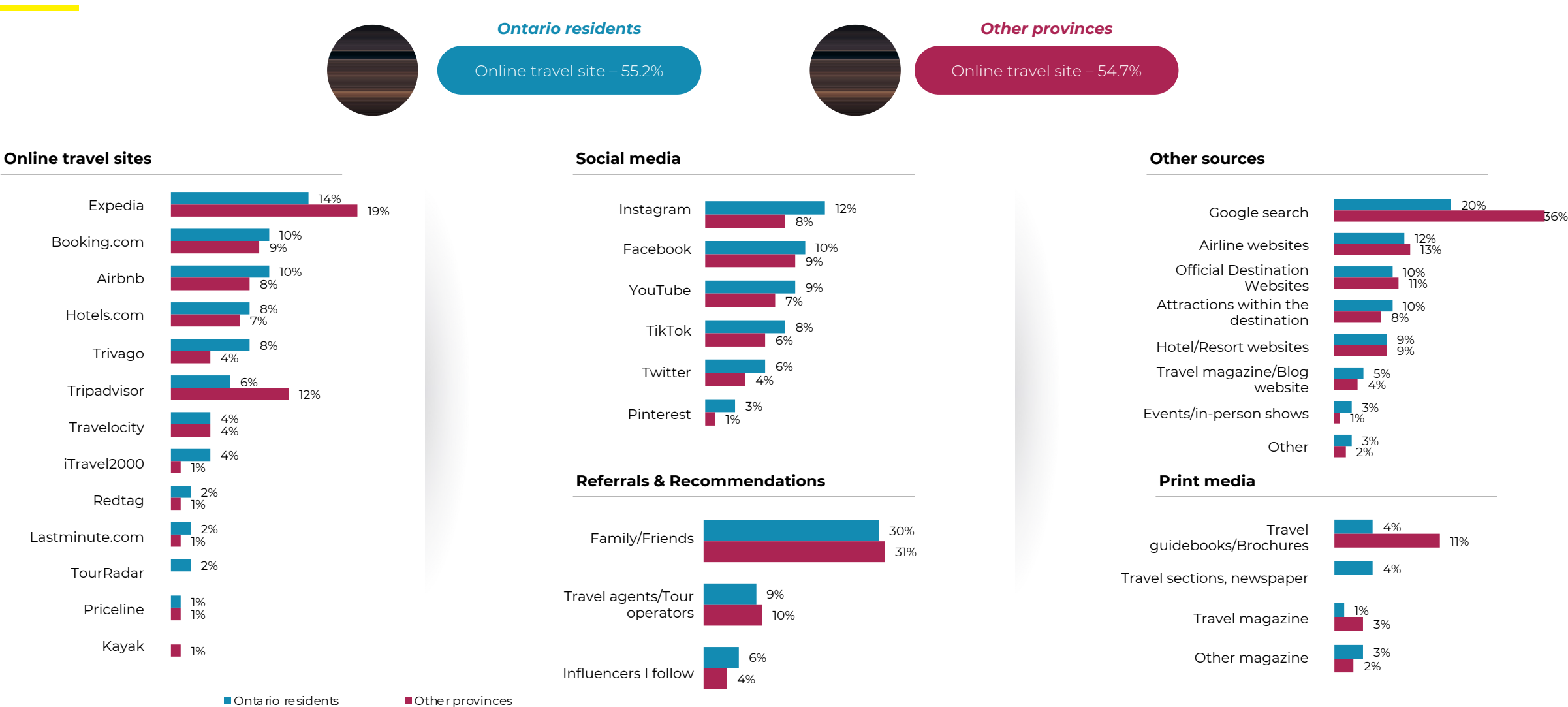


■ Does not describe me at all ■ Slightly describes me ■ Neutral
■ Somewhat describes me ■ Describes me very well

Q25. Please indicate to what extent the following characteristics describe how you perceive yourself in everyday life and when you travel.

INSPIRATION SOURCES

For both segments, online travel sites with Expedia, Booking.com and Airbnb on top are the main influential sources for planning the detailed itinerary for their potential trip, followed by recommendations from their friends and family and social media.

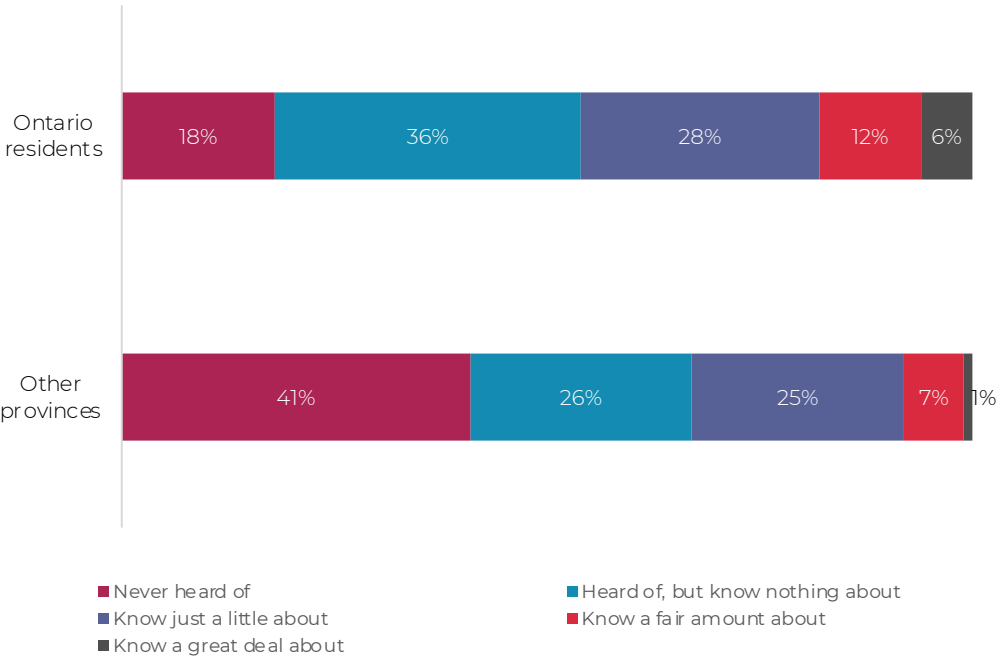


INDIGENOUS TRAVEL

While the vast majority of all Canadian travellers are unfamiliar with or have limited knowledge about indigenous travel options in the region, almost half of them express an interest in exploring indigenous attractions during their next holiday within Ontario.

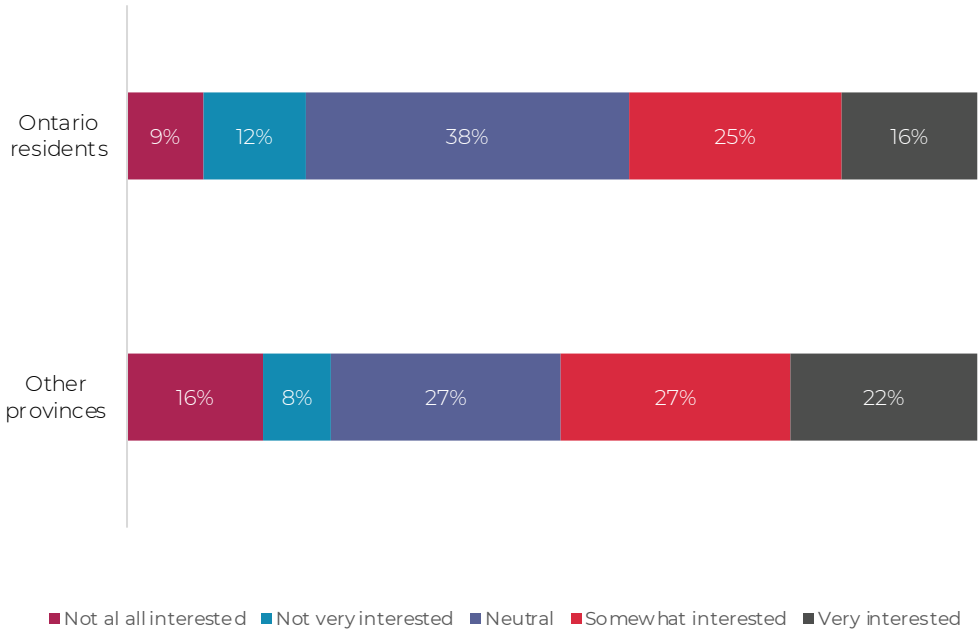
Knowledge of indigenous travel options by province of residence

18% of Ontarians are somewhat acquainted with the indigenous travel options in Ontario, however half of them never heard of or know nothing about them. Even bigger share of Canadian travellers from other provinces – 67% - do not have any knowledge of indigenous travel.



Interest in indigenous travel options by province of residence

Both segments demonstrate a significant interest in visiting or experiencing one of the indigenous tourist attractions in the region. Travellers from other provinces than Ontario show even bigger interest with 49% compared to 41% of Ontario-based travellers.





DEFINING THE FUTURE OF TRAVEL & TOURISM IN SOUTH EAST ONTARIO.

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