RTO 9 Consumer Insights Survey

Spring/Summer Survey 2024

RTO 9

South Eastern ONTARIO

Key Objectives

To understand our consumer database and their travel motivations

- Measure interest in vacationing within South Eastern Ontario
- Measure how they plan trips and activities
- Measure travel behaviour among target segments (other report)
- Determine what types of activities these segments are interested in

Methodology

Type of survey: Online using Survey Monkey

Sample location: Our consumer database (39,000 subscribers) and across Ontario

Sample size: 703 survey responses

Completion: 74%

Time spent: 6m 12 seconds

In-market dates: June 10th - 21st, 2024

Respondent Locations

Chesterville Campbellford Harrowsmith
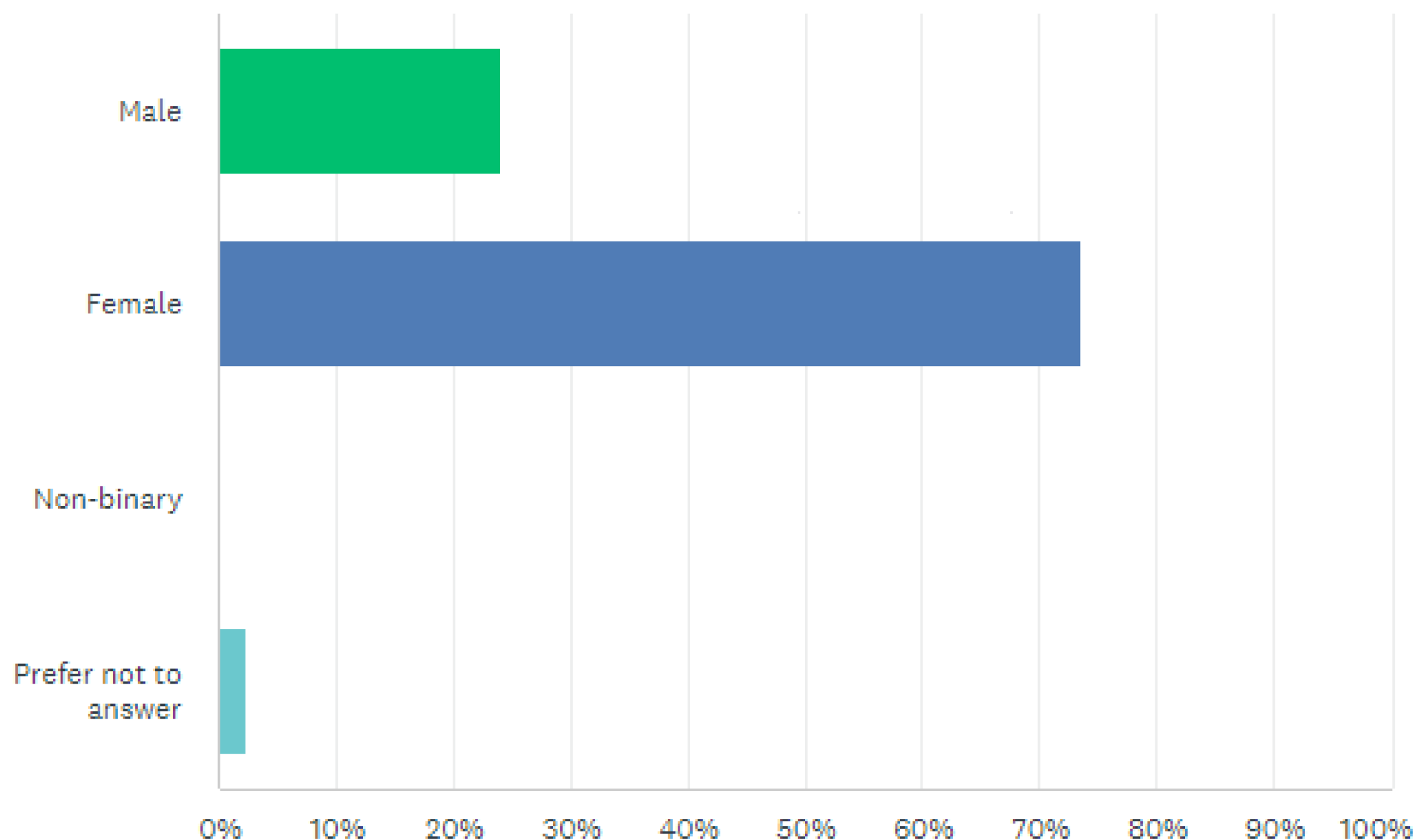Iroquois Morrisburg Stoney Creek
Ingleside Kanata Trenton Orleans Stirling
Orangeville Gananoque Mississauga Napanee Picton
Kemptville Ontario ont Cornwall
Peterborough St City Long Sault Bath Whitby
Athens Town Brockville Ottawa Belleville
Burlington Rockland
Russell Toronto Kingston Oshawa Guelph
Montreal Hamilton
Windsor Cobourg North
Sydenham Maitland St Catharines London
Milton Markham
Cardinal Pickering Alexandria
Kitchener
Prince Edward County North Lancaster Westport

Profile of Survey Responses

73% Female

24% Male

0.5% Non-binary

2.5 % Prefer not to answer
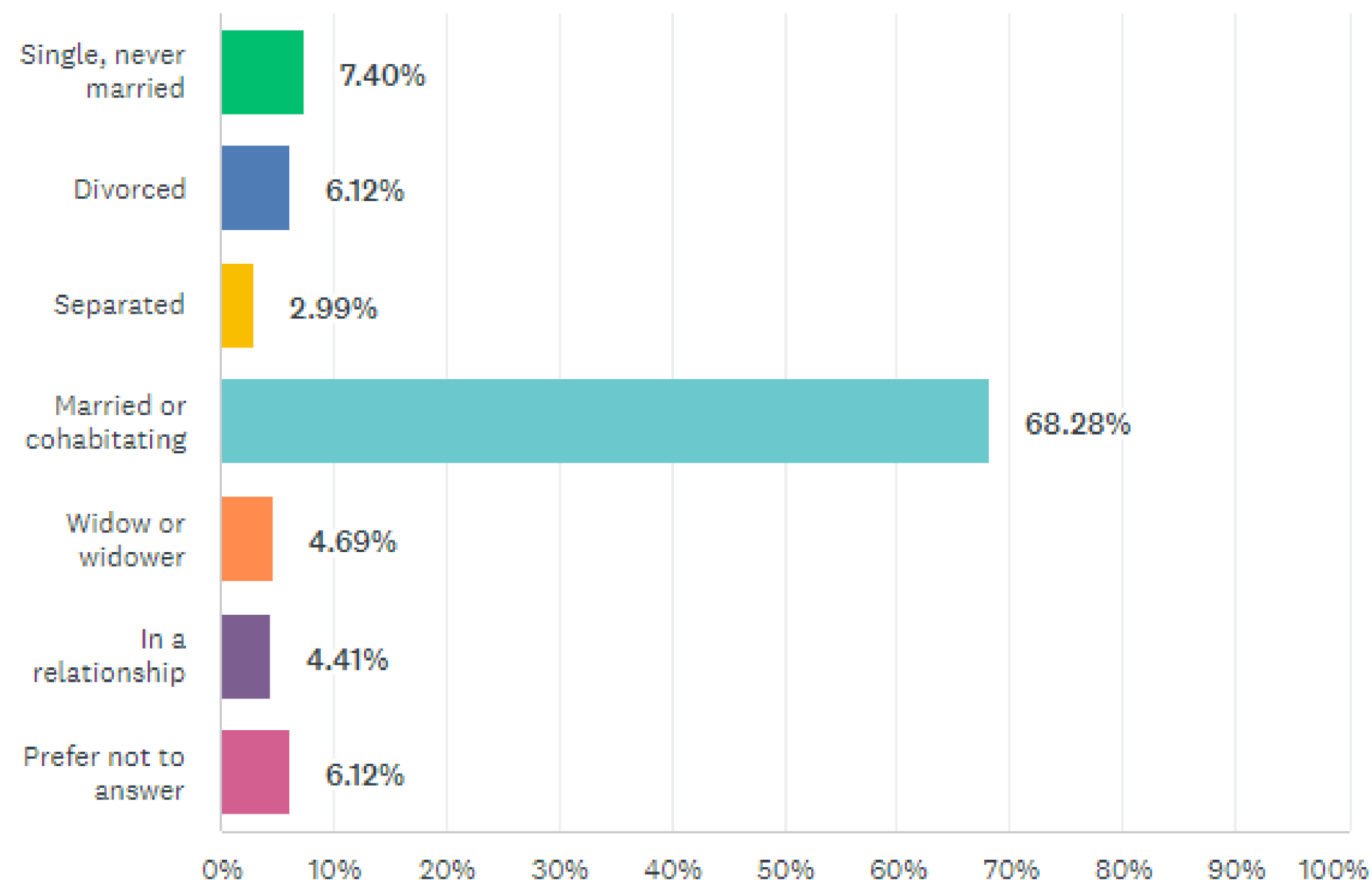
Profile of Survey Responses
Age Ranges

Prefer not to answer 3.27% (23)

25-34 4.69% (33)

35-44 8.68% (61)

45-54 11.66% (82)

65+ 43.67% (307)

55-64 28.02% (197)

Profile of Survey Responses

Marital Status

Marital Status	Percentage
Single, never married	7.40%
Divorced	6.12%
Separated	2.99%
Married or cohabitating	68.28%
Widow or widower	4.69%
In a relationship	4.41%
Prefer not to answer	6.12%
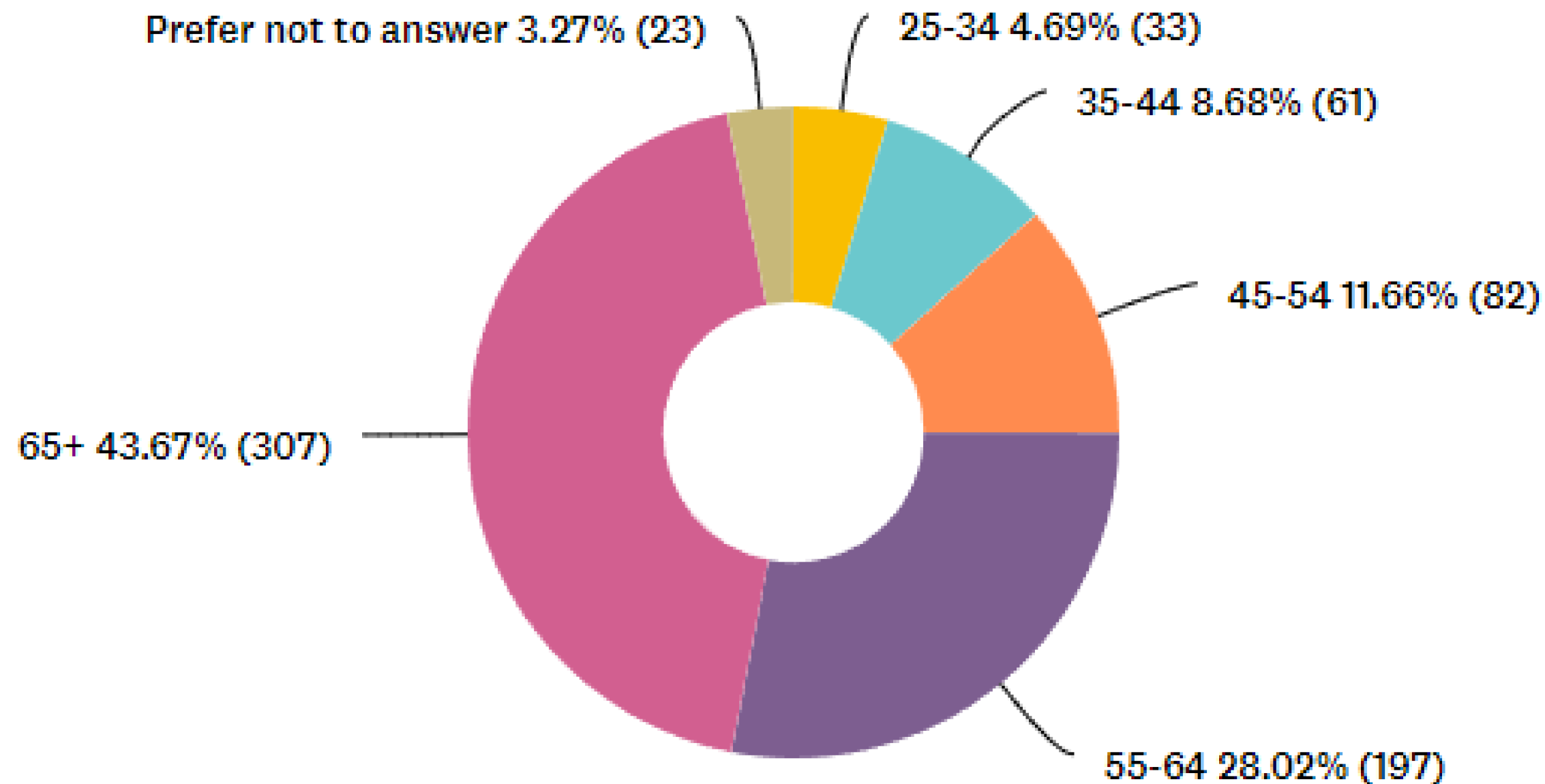
Children in household

Yes 21.19%

No 78.81%
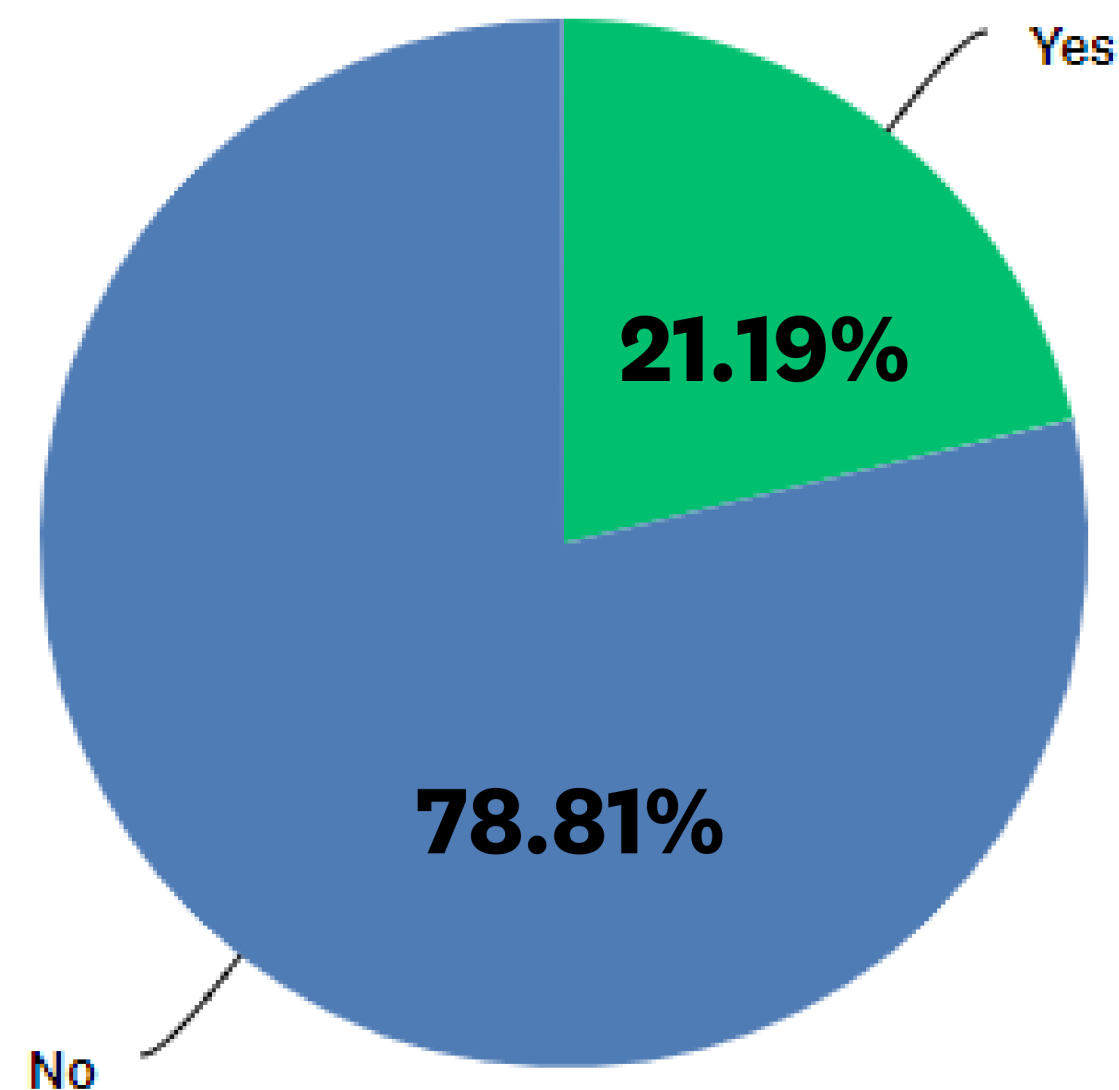
Profile of Survey Responses
Level of annual household income

Income Level	Percentage
Less than $25,000	3.70%
$25,000 - $50,000	11.24%
$50,000 - $100,000	26.60%
$100,000 - $200,000	20.63%
More than $200,000	4.55%
I prefer not to say	33.29%

Travel Priorities for Leisure Travel in the Next 12 Months

South Eastern ONTARIO

PRIORITIES

89%
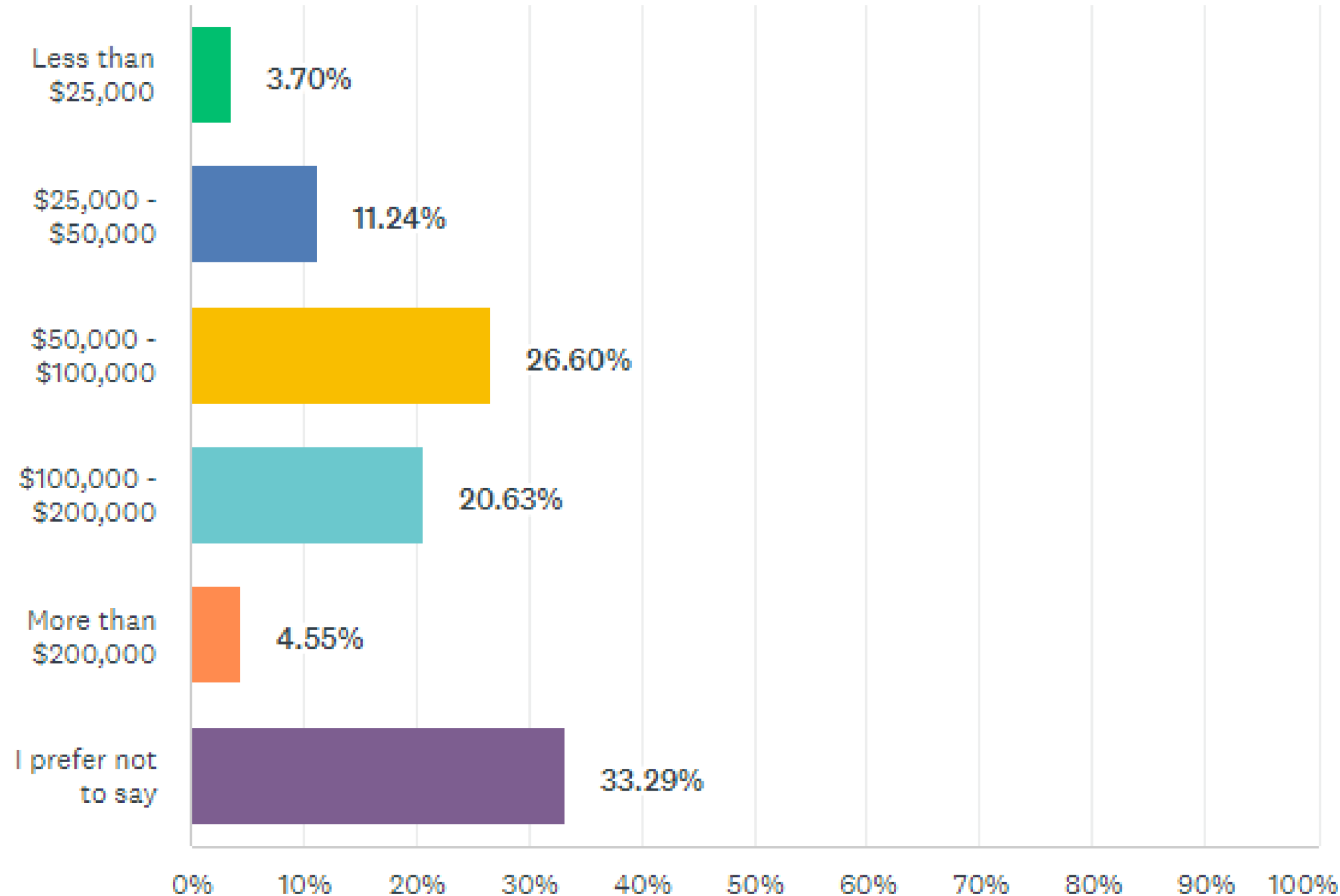
Very Likely to take an overnight leisure trip in/to Ontario in the next 12 months

36%

Would make it a 3-nights + trip

49%

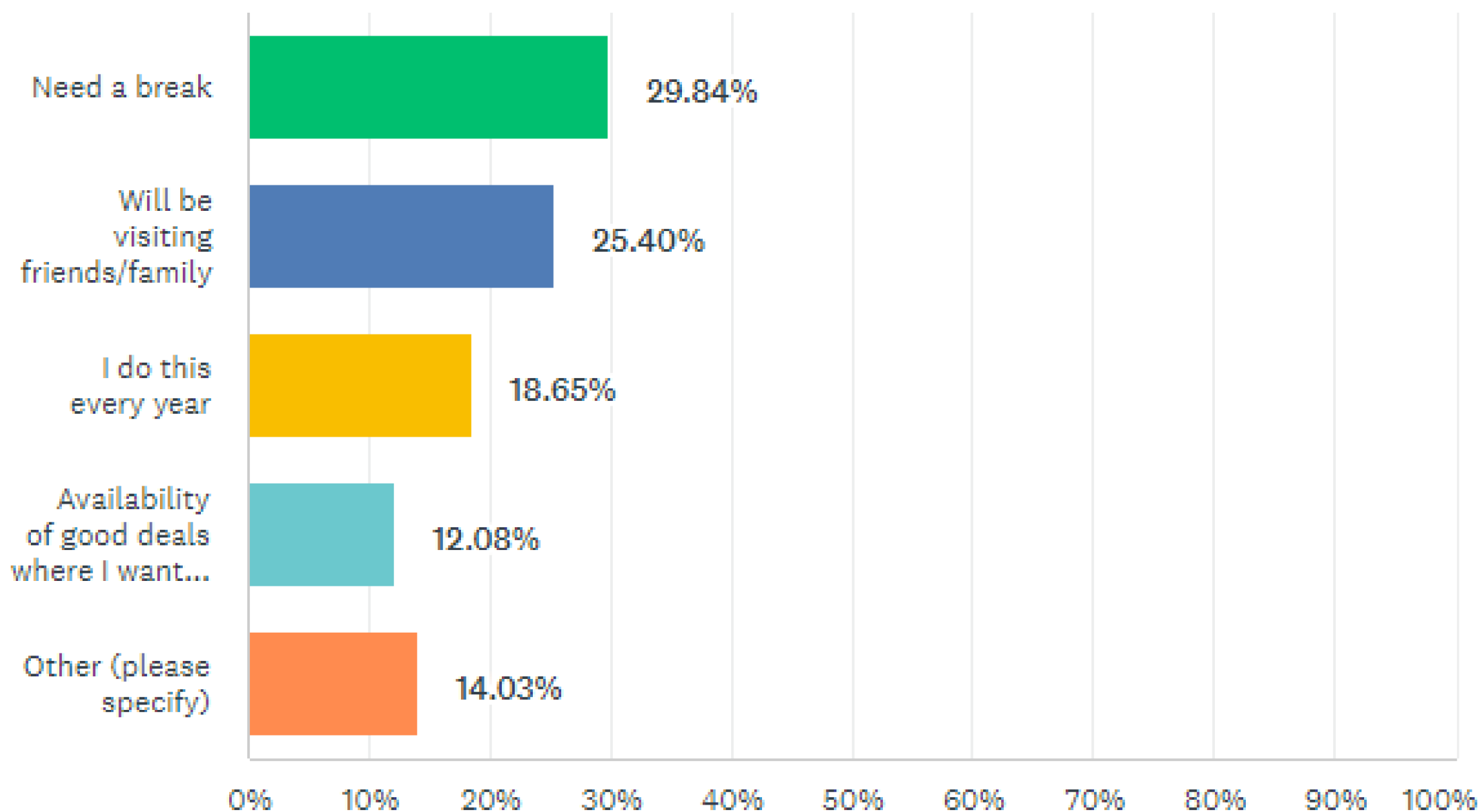Would make it a 2-night trip

13%

Would make it a 1-night

Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES

30%

*Stated the reason for a trip would be "Need a Break"

Category	Percentage
Need a break	29.84%
Will be visiting friends/family	25.40%
I do this every year	18.65%
Availability of good deals where I want...	12.08%
Other (please specify)	14.03%

Travel Priorities for Leisure Travel in the Next 12 Months

South Eastern
ONTARIO

Barriers to Travel

31%

of those not able to take an overnight leisure trip to/in Ontario in the next 12 months stated because they can't afford it

Can't afford it	31%
Nowhere I want to visit at the moment	16%
Too busy	4%
Household/family commitments	18%
Prefer to travel in Canada, but outside Ontario	4%
Prefer to travel outside of Canada	8%
Unable to take a vacation	5%
Other	14%

Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES
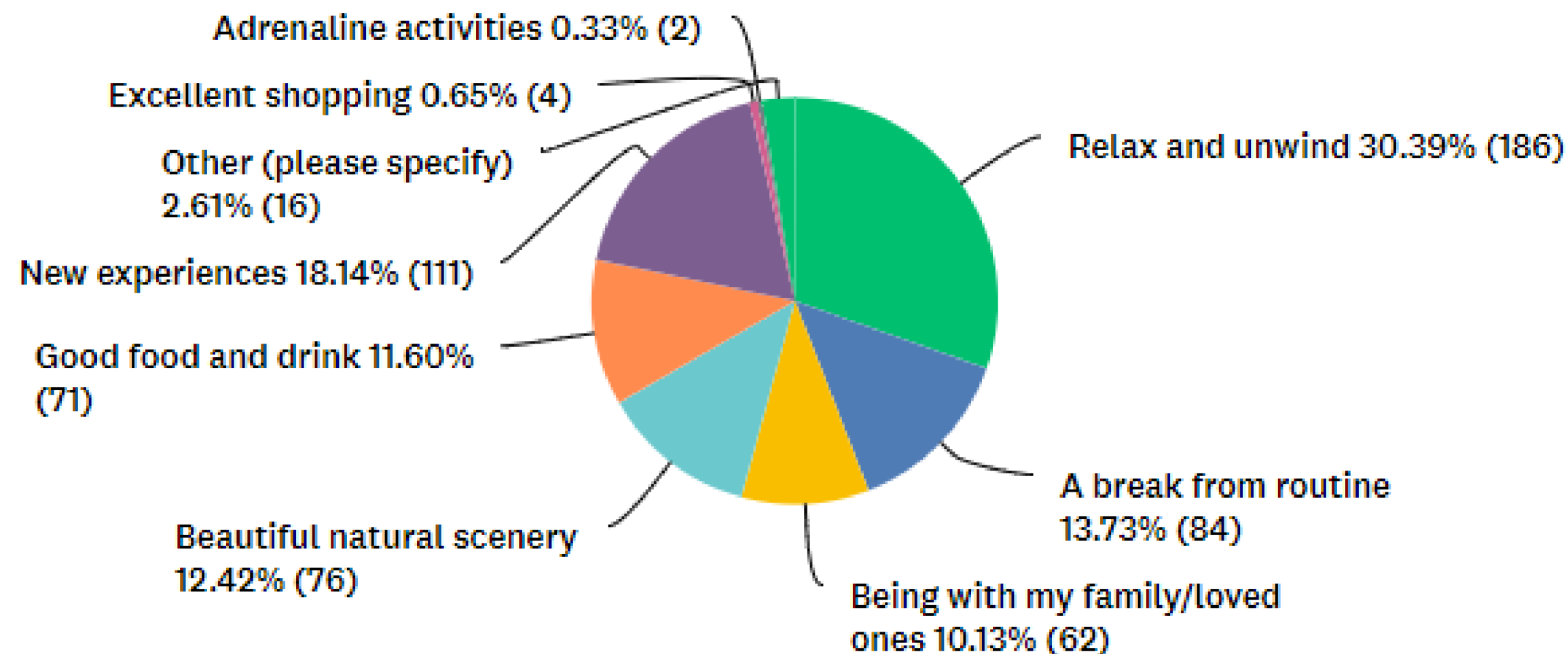
Other main reasons specified as barriers to travel

- Health reasons
- Can't leave pet
- Own a Cottage elsewhere

Primary Motivation For Planned Leisure Trips

MOTIVATION

Primary motivation remains to "Relax and unwind".

- Adrenaline activities 0.33% (2)
- Excellent shopping 0.65% (4)
- Other (please specify) 2.61% (16)
- New experiences 18.14% (111)
- Good food and drink 11.60% (71)
- Beautiful natural scenery 12.42% (76)
- Relax and unwind 30.39% (186)
- A break from routine 13.73% (84)
- Being with my family/loved ones 10.13% (62)

Perspectives On Planning & Booking For Leisure Travel

South Eastern
ONTARIO

"Which of the following are most likely to **inspire** you to visit a destination within Ontario for an overnight leisure trip?"

INSPIRATION

Stated WoM from friends and family (does not include the use of Social Media)

32%
VERY LIKLEY

56%
SOMEWHAT LIKLEY

Stated WoM from your friends and family (including posts sent to you from friends and family)

13%
VERY LIKLEY

54%
SOMEWHAT LIKLEY

Online travel sites with packages and discounts - Expedia, Landsby

22%
VERY LIKLEY

44%
SOMEWHAT LIKLEY

Perspectives On Planning & Booking For Leisure Travel

South Eastern
ONTARIO

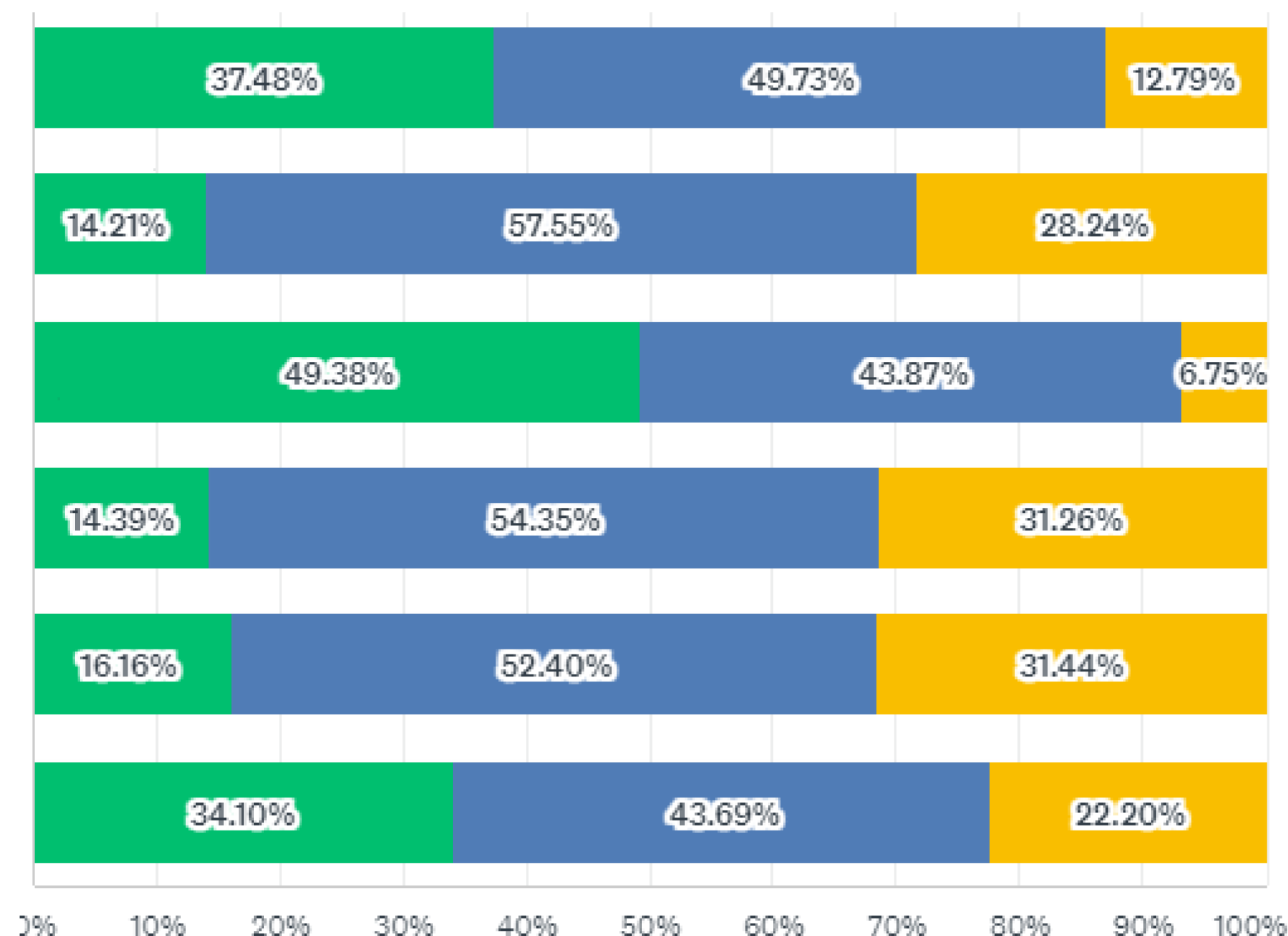| Category	Unlikely	Somewhat	Very Likely
What your friends and family post on their Social Media accounts (includes posts sent to you from friends and family)	37.48%	49.73%	12.79%
Word of Mouth from your friends and family (this does not include the use of Social Media)	14.21%	57.55%	28.24%
What other brands and creators post on Social Media	49.38%	43.87%	6.75%
Google and other search engines (includes Google Reviews)	14.39%	54.35%	31.26%
Destination websites & blogs	16.16%	52.40%	31.44%
Online travel sites with packages and discounts - Expedia, Landsby	34.10%	43.69%	22.20%

Legend: Unlikely | Somewhat … | Very Likely

Perspectives On Leisure Travel To South Eastern Ontario

South Eastern
ONTARIO

What type of accommodations do you typically book?
Select all that apply.

Independently owned hotels	45.42%
Chain hotels	68.46%
Bed & Breakfast/Guest House	38.73%
Vacation rental-Cottage/Airbn...	46.41%
Campground	19.12%
Motel	34.97%
Resort	31.54%
Farm Stay	5.72%

Perspectives On Planning & Booking For Leisure Travel

South Eastern
O N T A R I O
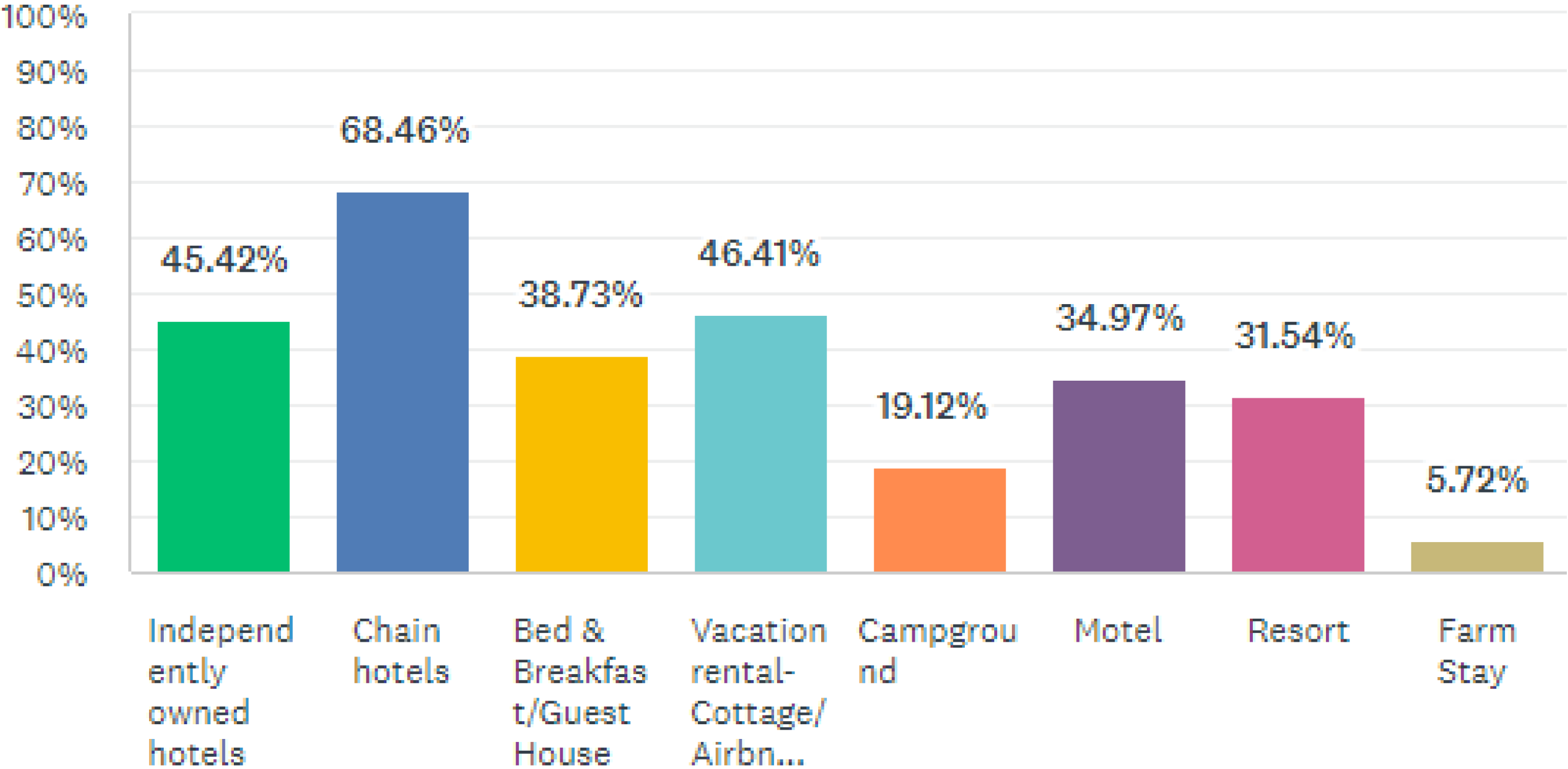
PLANNING

"When planning your itinerary for an overnight leisure trip within Ontario, which of the following would you likely tend to use?"

Stated they would use WoM from friends and family (does not include the use of Social Media) to plan

Stated they would use Destination websites & blogs to plan

Stated other brands or Creators/ Influence planning

28%
VERY LIKLEY

32%
VERY LIKLEY

7%
VERY LIKLEY

58%
SOMEWHAT LIKLEY

52%
SOMEWHAT LIKLEY

44%
SOMEWHAT LIKLEY

Perspectives On Planning & Booking For Leisure Travel

South Eastern ONTARIO

PLANNING

|	Green	Blue	Yellow
What your friends and family post on their Social Media accounts (includes posts sent to you from friends and family)	37.48%	49.73%	12.79%
Word of Mouth from your friends and family (this does not include the use of Social Media)	14.21%	57.55%	28.24%
What other brands and creators post on Social Media	49.38%	43.87%	6.75%
Google and other search engines (includes Google Reviews)	14.39%	54.35%	31.26%
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Online travel sites with packages and discounts - Expedia, Landsby	34.10%	43.69%	22.20%
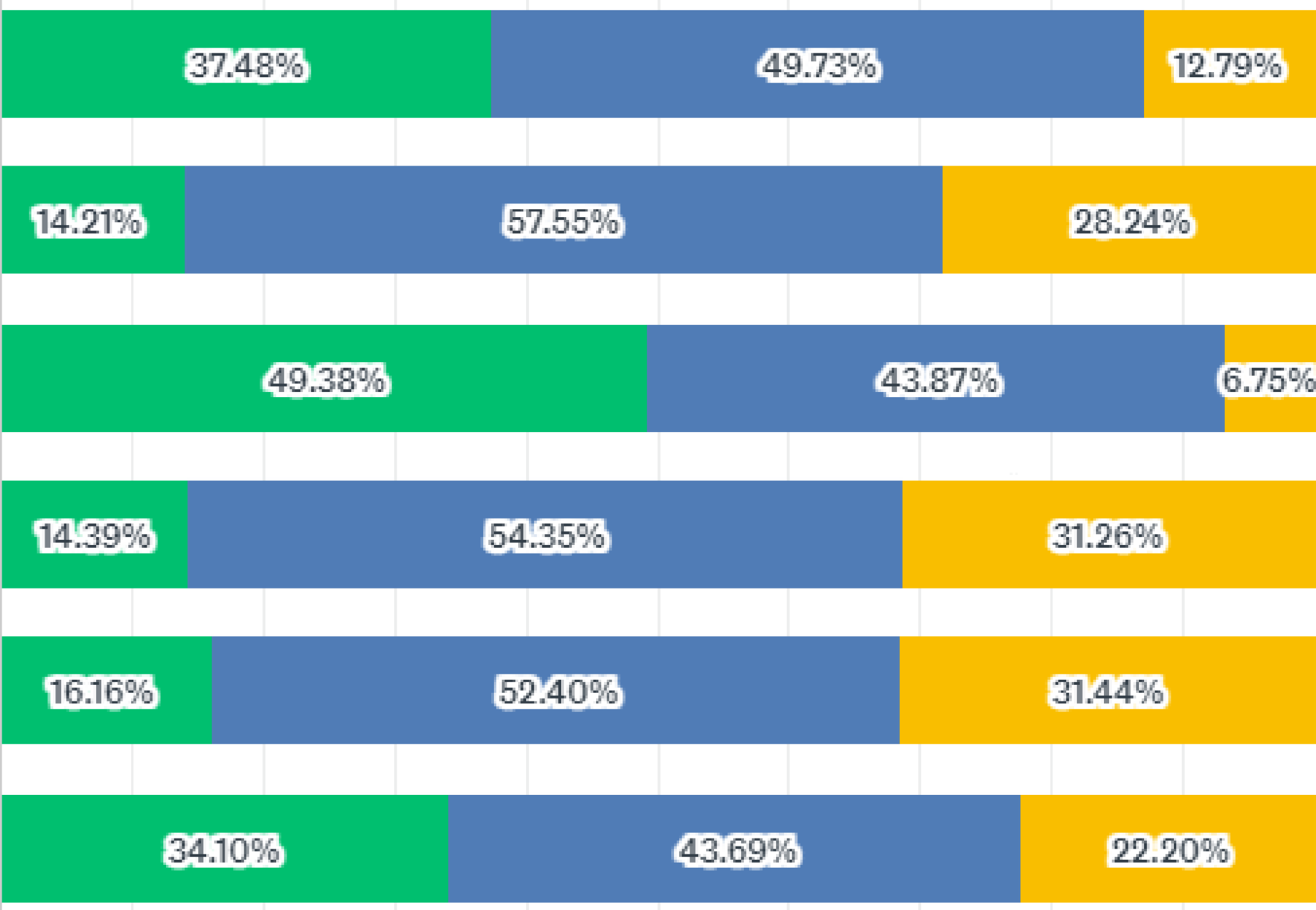
Perspectives On Planning & Booking For Leisure Travel

BOOKING

"For booking (e.g. travel, accommodation, dining, visits to attractions) an overnight leisure trip within Ontario, which of the following would you likely tend to use?"

Stated they would use Google and other search engines to book

Stated they would use Destination websites to book

Stated they use hotel & resort website to book

46%
VERY LIKLEY

37%
VERY LIKLEY

46%
VERY LIKLEY

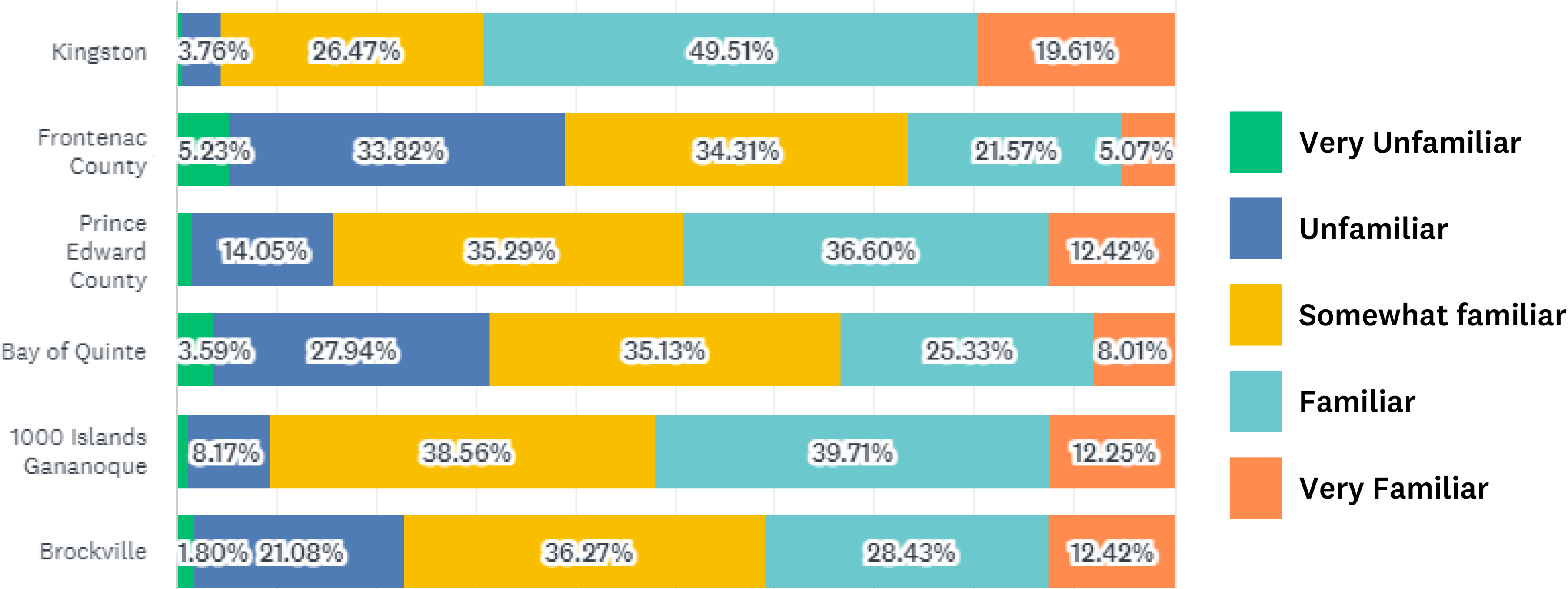## 41%
SOMEWHAT LIKLEY

47%
SOMEWHAT LIKLEY

44%
SOMEWHAT LIKLEY

Perspectives On Leisure Travel To South Eastern Ontario

FAMILIARITY

"For each destination, please indicate how familiar you are with what each destination has to offer for leisure travel."

Destination	Very Unfamiliar	Unfamiliar	Somewhat familiar	Familiar	Very Familiar
Kingston		3.76%	26.47%	49.51%	19.61%
Frontenac County	5.23%	33.82%	34.31%	21.57%	5.07%
Prince Edward County		14.05%	35.29%	36.60%	12.42%
Bay of Quinte	3.59%	27.94%	35.13%	25.33%	8.01%
1000 Islands Gananoque		8.17%	38.56%	39.71%	12.25%
Brockville	1.80%	21.08%	36.27%	28.43%	12.42%

Legend:
- Very Unfamiliar
- Unfamiliar
- Somewhat familiar
- Familiar
- Very Familiar
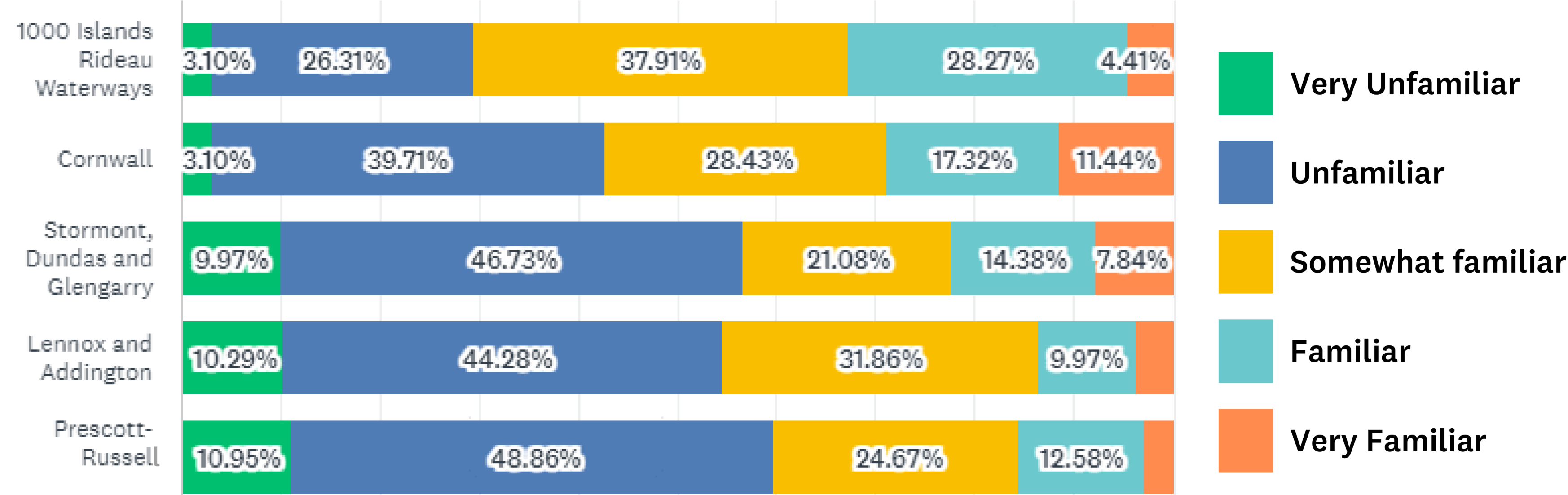
Perspectives On Leisure Travel To South Eastern Ontario

FAMILIARITY

"For each destination, please indicate how familiar you are with what each destination has to offer for leisure travel."

Destination	Very Unfamiliar	Unfamiliar	Somewhat familiar	Familiar	Very Familiar
1000 Islands Rideau Waterways	3.10%	26.31%	37.91%	28.27%	4.41%
Cornwall	3.10%	39.71%	28.43%	17.32%	11.44%
Stormont, Dundas and Glengarry	9.97%	46.73%	21.08%	14.38%	7.84%
Lennox and Addington	10.29%	44.28%	31.86%	9.97%	
Prescott-Russell	10.95%	48.86%	24.67%	12.58%	

Legend:
- Very Unfamiliar
- Unfamiliar
- Somewhat familiar
- Familiar
- Very Familiar

Perspectives On Leisure Travel To South Eastern Ontario

South Eastern ONTARIO

FAMILIARITY

39%
Somewhat Familiar with 1000 Islands Gananoque

35%
Somewhat Familiar with Prince Edward County

36%
Somewhat Familiar with Brockville

34%
Unfamiliar with Frontenac County

28%
Unfamiliar with Bay of Quinte

40%
Unfamiliar with Cornwall

47%
Unfamiliar with SDG Counties

38%
Somewhat Familiar with 1000 Islands & Rideau Waterways

Perspectives On Leisure Travel To South Eastern Ontario

South Eastern
O N T A R I O

"How likely, if at all, are you to consider the following destinations in South Eastern Ontario as a place for an overnight holiday/vacation?"
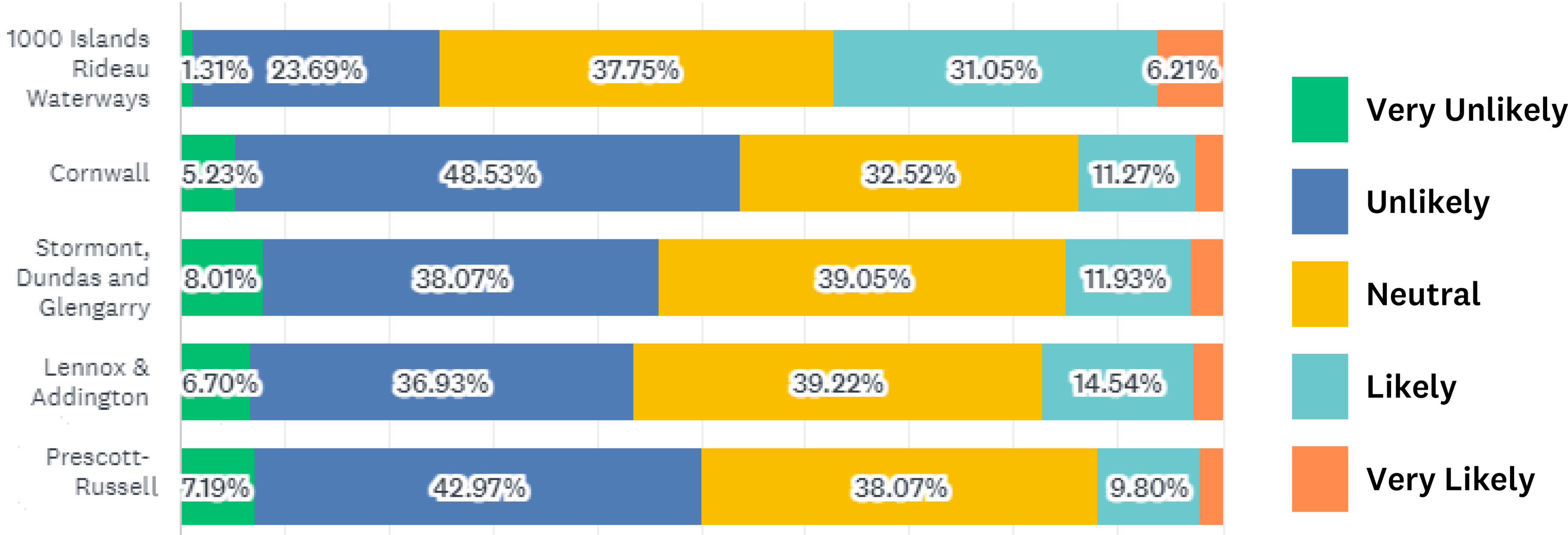
INTEREST

1000 Islands Rideau Waterways	1.31% · 23.69% · 37.75% · 31.05% · 6.21%
Cornwall	5.23% · 48.53% · 32.52% · 11.27%
Stormont, Dundas and Glengarry	8.01% · 38.07% · 39.05% · 11.93%
Lennox & Addington	6.70% · 36.93% · 39.22% · 14.54%
Prescott-Russell	7.19% · 42.97% · 38.07% · 9.80%

Legend:
- Very Unlikely
- Unlikely
- Neutral
- Likely
- Very Likely

Perspectives On Leisure Travel To South Eastern Ontario

How interested, if at all, would you be in a vacation focused on the following types of activities in South Eastern Ontario?

INTEREST

38%
Interested in Wineries, breweries, cideries

52%
Interested in River Cruising

44%
Interested in Viewing Wildlife

45%
Interested in Festivals and events
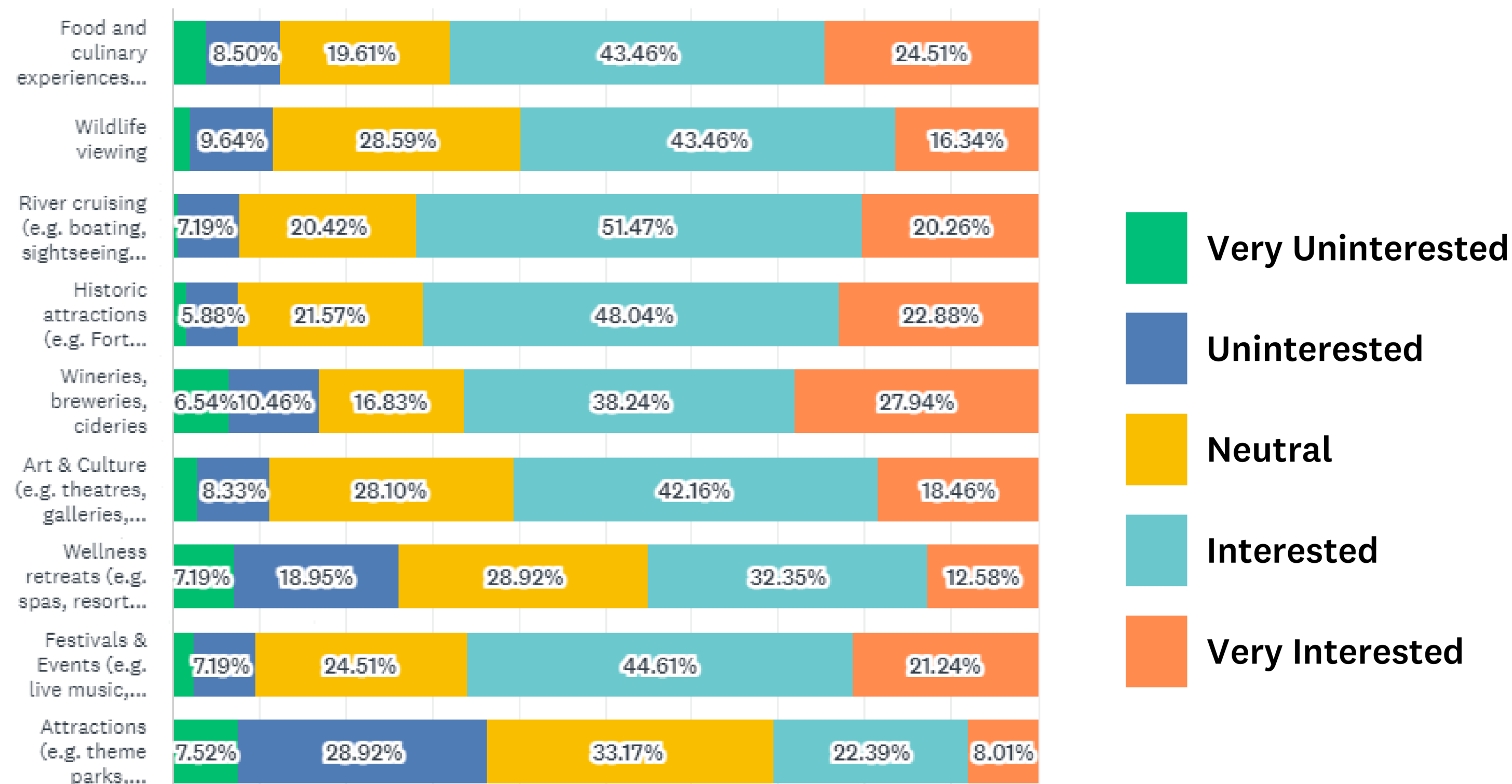
32%
Interested in Indigenous Experiences

48%
Interested in Historic Attractions

Perspectives On Leisure Travel To South Eastern Ontario

South Eastern ONTARIO

"How interested, if at all, would you be in a vacation focused on the following types of activities in South Eastern Ontario?
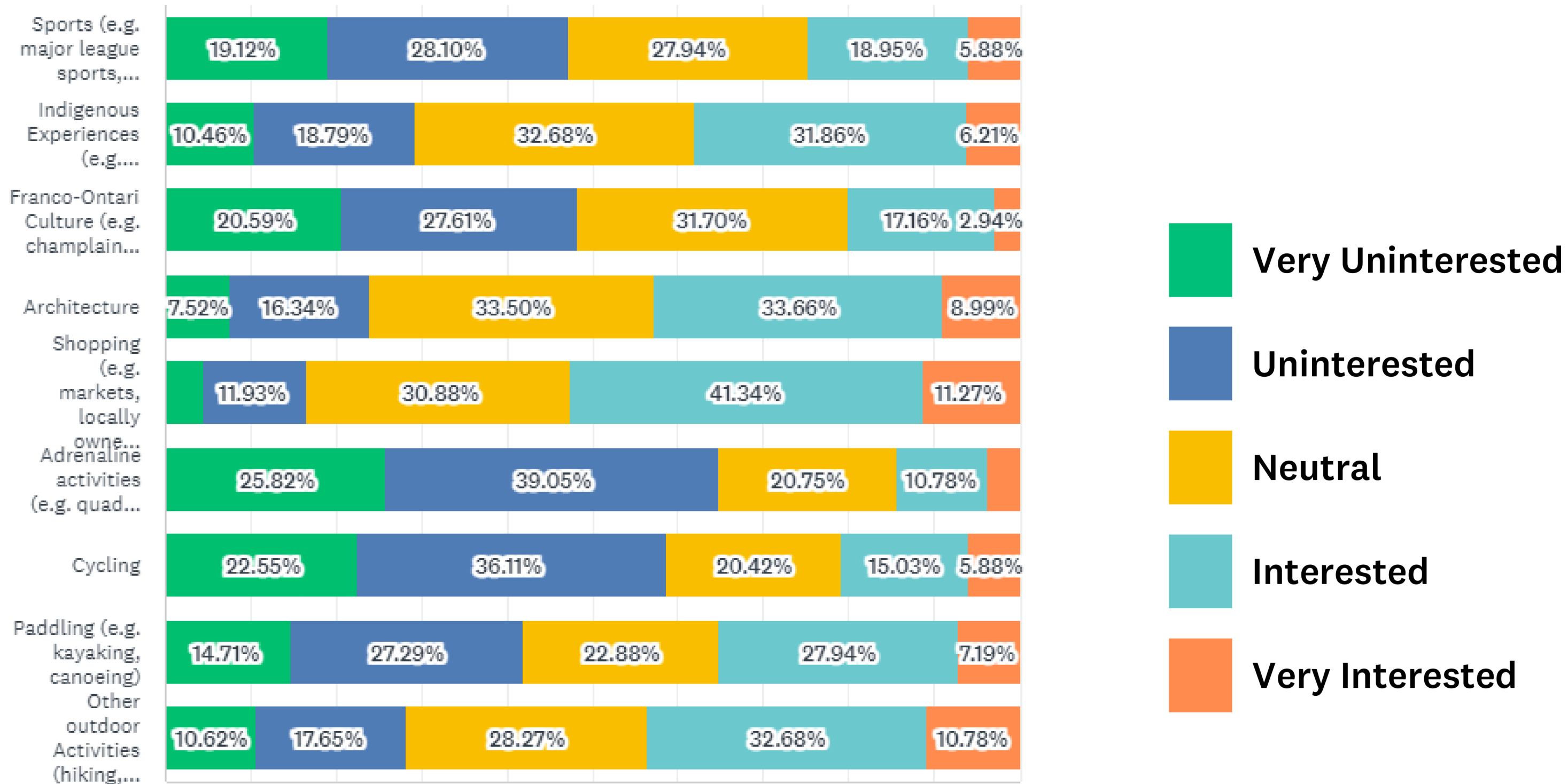
INTEREST

Activity	Very Uninterested / Uninterested	Neutral	Interested	Very Interested
Food and culinary experiences...	8.50%	19.61%	43.46%	24.51%
Wildlife viewing	9.64%	28.59%	43.46%	16.34%
River cruising (e.g. boating, sightseeing...	7.19%	20.42%	51.47%	20.26%
Historic attractions (e.g. Fort...	5.88%	21.57%	48.04%	22.88%
Wineries, breweries, cideries	6.54% 10.46%	16.83%	38.24%	27.94%
Art & Culture (e.g. theatres, galleries,...	8.33%	28.10%	42.16%	18.46%
Wellness retreats (e.g. spas, resort...	7.19% 18.95%	28.92%	32.35%	12.58%
Festivals & Events (e.g. live music,...	7.19%	24.51%	44.61%	21.24%
Attractions (e.g. theme parks,...	7.52% 28.92%	33.17%	22.39%	8.01%

Legend:
- Very Uninterested
- Uninterested
- Neutral
- Interested
- Very Interested

Perspectives On Leisure Travel To South Eastern Ontario

"How interested, if at all, would you be in a vacation focused on the following types of activities in South Eastern Ontario?

Activity	Very Uninterested	Uninterested	Neutral	Interested	Very Interested
Sports (e.g. major league sports,...)	19.12%	28.10%	27.94%	18.95%	5.88%
Indigenous Experiences (e.g....)	10.46%	18.79%	32.68%	31.86%	6.21%
Franco-Ontari Culture (e.g. champlain...)	20.59%	27.61%	31.70%	17.16%	2.94%
Architecture	7.52%	16.34%	33.50%	33.66%	8.99%
Shopping (e.g. markets, locally owne...)		11.93%	30.88%	41.34%	11.27%
Adrenaline activities (e.g. quad...)	25.82%	39.05%	20.75%	10.78%	
Cycling	22.55%	36.11%	20.42%	15.03%	5.88%
Paddling (e.g. kayaking, canoeing)	14.71%	27.29%	22.88%	27.94%	7.19%
Other outdoor Activities (hiking,...)	10.62%	17.65%	28.27%	32.68%	10.78%

Insights & Opportunities:

The majority of respondents (44%) are in the 65+ demographic, and therefore, the data may not entirely represent the sentiment of travellers in and to the region but highly represents those who are retired.

Page 3: Survey respondents were higher than those in the Fall 2023 survey. The survey offered no incentive to respond, and we propose to offer an incentive in the future once we are able to offer a giveaway to residents in Quebec.

Page 9: The number of travel nights is increasing. The percentage rate for those planning a trip of 3+ nights increased 6% over the 2023 fall survey.
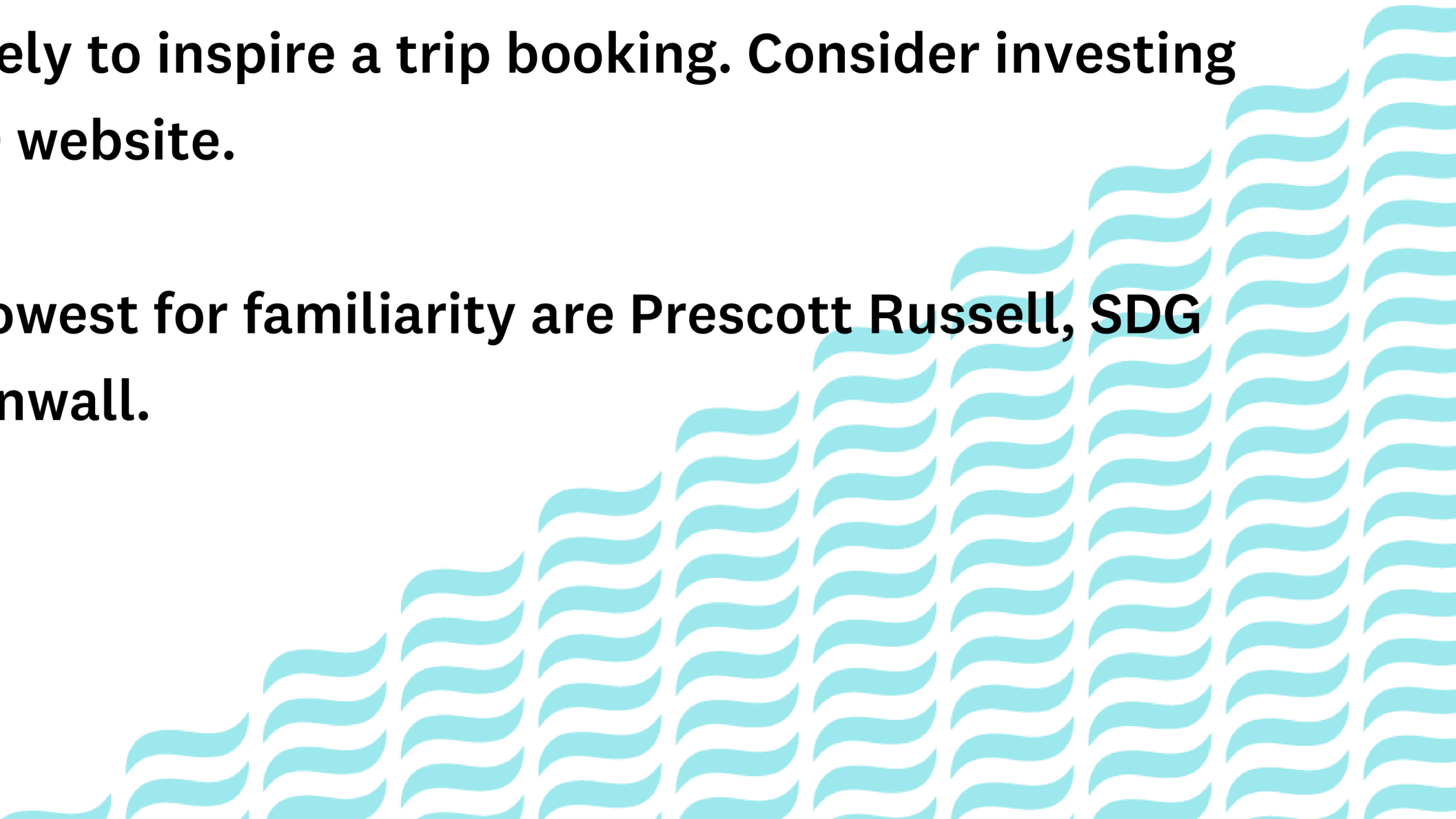
Page 11: Barriers to travel 31% said they are not able to take a leisure trip in the next 12 months due to affordability, up only 2% from the Fall 2023 survey.

Insights & Opportunities:

Page 13: "Relax & Unwind" remains the main motivation for a trip, as has been found in the previous three surveys. We are seeing a rise in those seeking new experiences, and results show that 18% would be motivated by this.

Page 15: Stats remain similar to Fall for perspectives on planning/booking. Google search engines ranked at 54% as somewhat likely to inspire a trip booking. Consider investing more in Google Ads to promote the SEO website.

Page 22: The destinations that scored lowest for familiarity are Prescott Russell, SDG Counties, Lennox & Addington, and Cornwall.

Insights & Opportunities:

Perspectives On Planning & Booking For Leisure Travel: Referrals and recommendations from family and friends are well ahead of other channels when it comes to destination inspiration and trip planning. When it comes to booking travel, accommodation or attractions, Google and other search engines emerge as the top channel.

Opportunity: Ensure that search engine optimization is in place on our new website for users to find SEO products in Google etc.

Continue to create content centred around the most useful lists/itineraries on things to do, what to see, and where to eat.

Insights & Opportunities:

Perspectives On Leisure Travel to South Eastern Ontario: Statsitics looked optimistic for multi-day trips. Continue to encourage tourism operators to offer accommodation packages for 2-3 day trips and joint promotions (e.g., offer on dinner for attending a certain festival/event).

Offer future incentives to complete the survey to attract more Gen X and Gen Z participation for a more accurate outlook.

For Regions that are unfamiliar. Focus on showcasing their best assets and proximity to major cities such as Ottawa, Toronto and Montreal.