



**Skift.**

ADVISORY

**BUILDING A DATA-DRIVEN  
DECISION-MAKING  
CULTURE WITHIN  
ONTARIO'S  
TOURISM INDUSTRY**

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RTO Multi-Year Research Program

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Ontario Annual Insights Report

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January 2025



## Disclaimer

The findings reported herein are provided to the Regional Tourism Organizations of Ontario and the Tourism Industry Association of Ontario, collectively referred to as "the Clients." The Clients are free to use these findings at their discretion, including sharing them with their travel and tourism industry stakeholders, partners, and/or the media.

The data and insights in this report originate from Destination Canada's Data Collective (<https://www.tourismdatacollective.ca/>) and Skift Inc. Please note that the data is current as of the date of publication. However, it is subject to change due to market dynamics, updated research, or new information becoming available.

Skift Advisory adheres to the standards set by the World Association of Opinion and Marketing Research Professionals (ESOMAR), which establishes minimum disclosure standards for primary research studies released to the public or media. This ensures the integrity of market research analysis by preventing misleading interpretations.

If you are considering disseminating the findings, we request that you consult with us regarding the form and content of publication. ESOMAR standards require us to address and correct any potential misinterpretation or misrepresentation of the findings.





# Purpose of this Document

The ambition of the Multi-Year RTO Research Program is to cultivate a strong, data-driven decision-making culture across Ontario's Regional Tourism Organizations, which will be achieved through the design and implementation of this comprehensive data and research insights program.

Our program features a series of quarterly insights reports and briefings alongside annual reports, providing comprehensive and ongoing analysis and strategic insights. These reports provide a snapshot of the latest trends and complement the access to the dynamic Destination Canada Data Collective Dashboard.

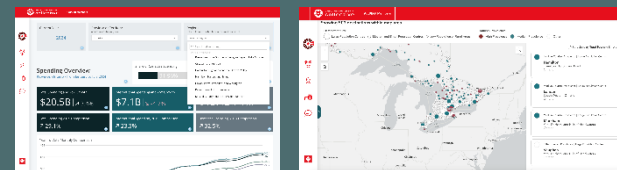
Additionally, targeted training sessions are offered to enhance research capacity, ensuring that you can effectively leverage data to drive informed decision-making and foster long-term growth within your respective regions.

This document is the second of six quarterly insights reports that the RTOs will receive throughout the program.



# Backed by Sound Data...

24/7 Destination Canada Data Collective Dashboard



Destination Canada Data Collective LASR CSV files  
through monthly updated SFTP accounts

| Location | Date       | Metric 1 | Metric 2 | Metric 3 |
|----------|------------|----------|----------|----------|
| 1.1.1.1  | 2023-01-01 | 100      | 200      | 300      |
| 1.1.1.2  | 2023-01-02 | 150      | 250      | 350      |
| 1.1.1.3  | 2023-01-03 | 200      | 300      | 400      |
| 1.1.1.4  | 2023-01-04 | 250      | 350      | 450      |
| 1.1.1.5  | 2023-01-05 | 300      | 400      | 500      |

Annual Environics Analytics  
membership CSV files

| Name          | Email                     | Phone        |
|---------------|---------------------------|--------------|
| John Doe      | john.doe@example.com      | 555-123-4567 |
| Jane Smith    | jane.smith@example.com    | 555-987-6543 |
| Bob Johnson   | bob.johnson@example.com   | 555-234-5678 |
| Alice Brown   | alice.brown@example.com   | 555-345-6789 |
| Charlie Davis | charlie.davis@example.com | 555-456-7890 |

**Meet Rocco,  
the Research Raccoon!**

Rocco LOVES to dig into data and is here  
to guide you through key insights. Keep  
an eye out for his key take-aways!



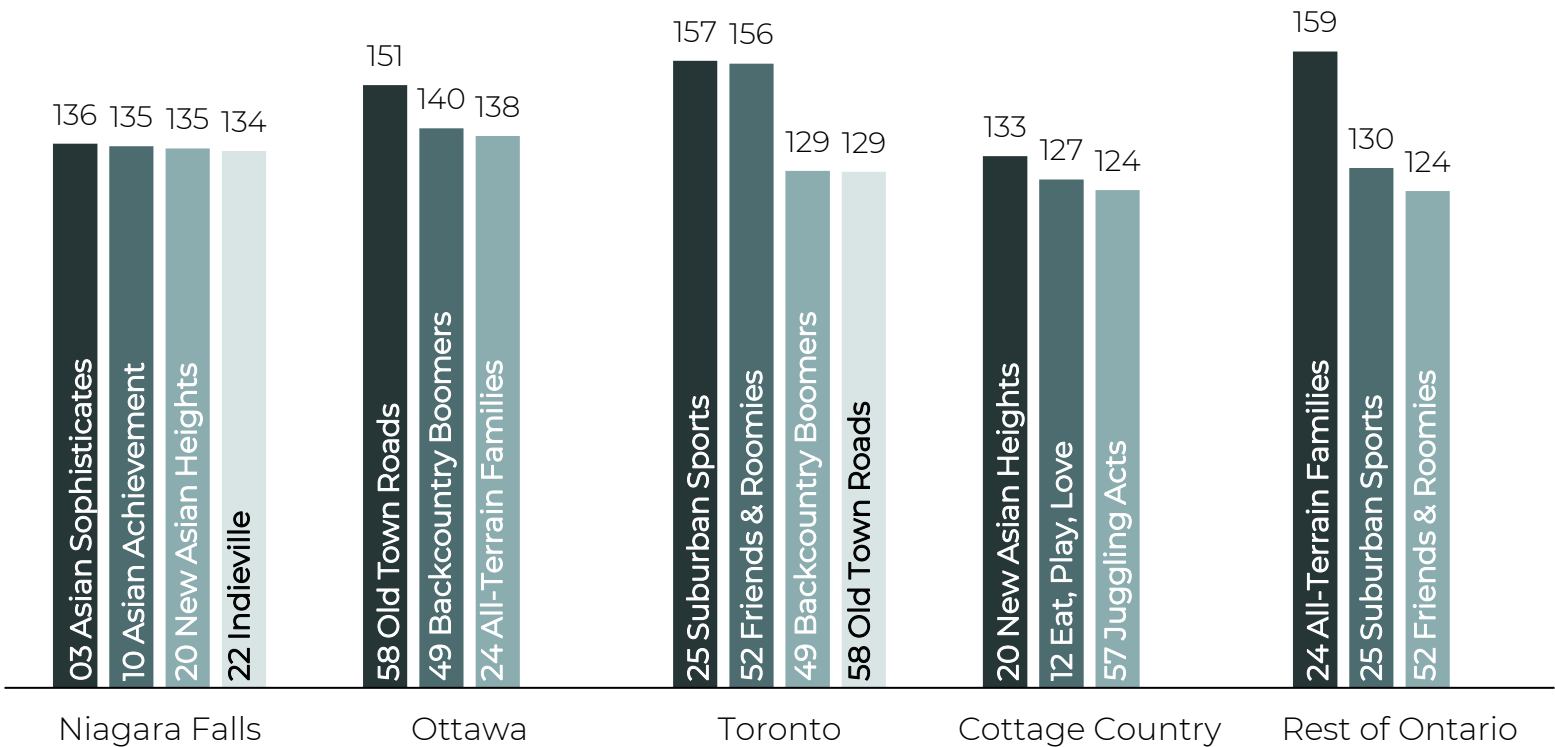
**...Brought to Life  
Through Insights**



# METHODOLOGY

The following PRIZM segments were determined to be more likely to visit Ontario, and have been profiled in this document. Segments were selected based on actual size (more than 100,000 present in Ontario) as well as index (highest three indexed segments compared to the average Ontario distribution). In cases of ties, four segments were selected.

PRIMARY PRIZM SEGMENTS BY ONTARIO REGION (INDEXED TO AVERAGE SEGMENT CONTRIBUTION IN ONTARIO)

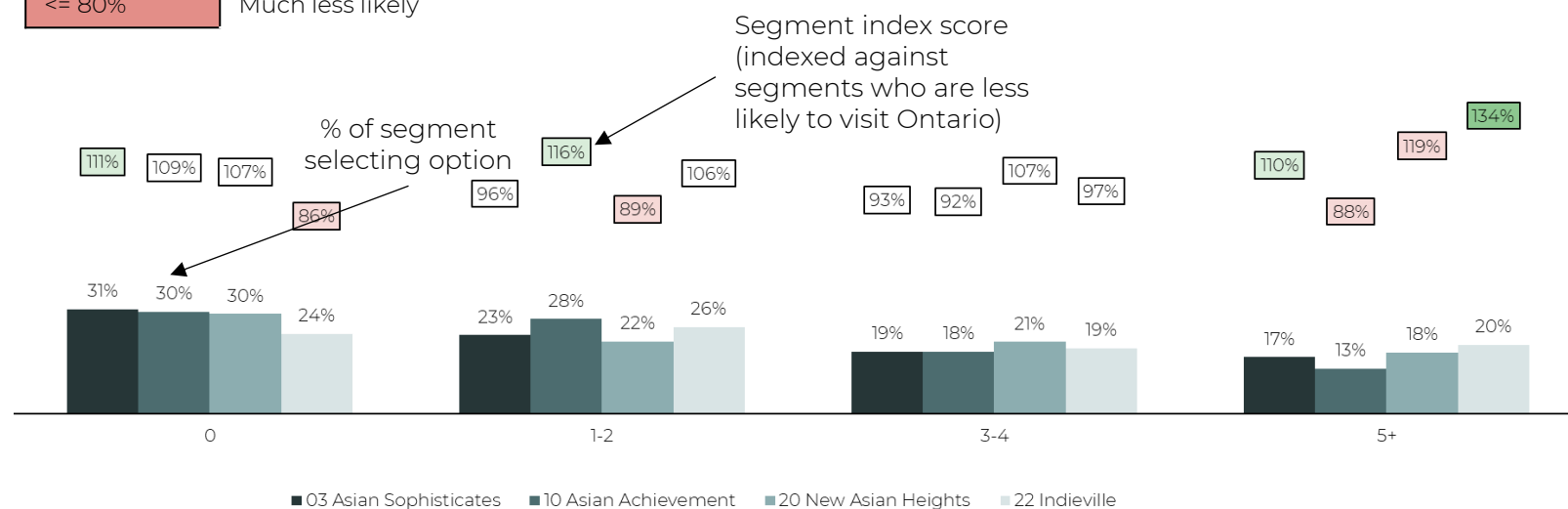


# HOW TO READ THIS REPORT

Data from the Numeris 2024 dataset was linked with data from the PRIZM 2024 Segmentation data, to determine the PRIZM segments who are most likely to visit Ontario. Each segment has then been profiled and indexed against less likely to visit segments to determine visitor preferences. While the profiles are based on the behaviour of the segment as a whole, throughout the report segments are referred to as regional visitors to simplify the readability of the report.

Index scores are an indication of how much more likely a segment is to exhibit a certain behaviour / hold a certain preference compared to less likely to visit segments, and have been colour-coded as follows:

|             |                  |
|-------------|------------------|
| >= 120%     | Much more likely |
| 110% - 119% | More likely      |
| 91%-109%    | Equally likely   |
| 81% - 90%   | Less likely      |
| <= 80%      | Much less likely |





# Interpretation of Ontario Regional Travel Data

**Definition of “Ontario Cottage Country”:** The Numeris does not provide a formal definition for "Ontario cottage country" beyond referencing Muskoka as an example. As a result, respondents self-identify whether they have vacationed in an Ontario cottage destination within the past three years. It is assumed that travellers are aware of their vacation locations, particularly if they stayed in cottage-style accommodations.

**Definition of "Other Ontario":** For the purposes of this analysis, “Other Ontario” refers to all areas of the province outside the key vacation destinations identified in the survey: Niagara Falls, Ottawa, Toronto, and Ontario cottage country.

**Key Considerations for This Report:** The five regions analyzed in this report were selected because they are the only travel-related Ontario regions available in the Numeris dataset. No additional geographic indicators were provided. Since Ottawa, Niagara Falls, and Toronto are not part of the Ontario consortium, the data for these regions can be leveraged in two ways: 1) Exclude these regions and focus exclusively on Cottage Country and Other Ontario; 2) Use these regions as indicators of travellers who are already visiting Ontario, providing insights into how these visitor flows can be influenced. This could help identify opportunities to attract these travellers to other regions or support collaborative strategies with these destinations to increase travel across the province.

Due to the lack of a precise definition for Cottage Country in the survey, some assumptions must be made when interpreting this data. In broad terms, any location in Ontario where cottages are a common form of accommodation could be considered part of this category, excluding Ottawa, Niagara Falls, and Toronto. The data should therefore be viewed as a conceptual tool to understand the profile of travellers who choose cottage-style accommodations in Ontario, rather than as a reflection of travel to a specific geographic region. Similarly, “Other Ontario” can be used to analyze the behaviour of visitors travelling within the province but not to Niagara, Ottawa, or Toronto, and who are choosing accommodations other than cottages.

**Analytical Approach:** The insights from this dataset require a more conceptual and interpretive approach compared to the more structured quarterly reports. Given the limitations in geographic specificity, a degree of lateral interpretation is necessary to extract meaningful insights that can support regional tourism strategies.

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# EXECUTIVE SUMMARY

# Executive Summary | Niagara Falls

## Highlights

- ✈️ **Higher vacation Frequency**: Niagara Falls visitors take more out-of-town vacations than non-visitors.
- 🇨🇦 **Top Canadian Destinations**: Key vacation spots include Whistler, Hawaii, and various locations in Asia and Europe.
- 💰 **Higher Vacation Spending**: Visitors exhibit a trend towards higher vacation spending, with varying trends among different sub-segments.
- 🏠 **Preferred Accommodation Options**: All-inclusive resorts and vacation rentals are the top choices for visitors.
- 🌐 **Digital Engagement**: Niagara Falls visitors are heavier users of social media and online travel services.
- 🍽️ **Dining Preferences**: A preference for international cuisine, especially Mexican and Italian, is noted among these visitors.
- 📺 **Consumerism Trends**: Visitors display consumerist tendencies, influenced by advertising.

## Key Insights

- ✈️ **Frequent Travelers**: Niagara Falls visitors travel more for leisure, making them a prime market for travel services.
- 🇨🇦 **Canadian Vacation Preferences**: Visitors are drawn to nature-focused destinations like Whistler, Calgary, and Banff, which highlights a preference for outdoor experiences. Tourism boards can use this to target marketing efforts and partnerships with these locations.
- 🌐 **Business Travel Trends**: While business travel is generally low, those who do travel tend to prefer efficiency, presenting an opportunity for airlines and business travel services to cater to this group.
- 📅 **Evolving Travel Planning**: The use of OTAs and direct bookings shows that Niagara Falls visitors are tech-savvy. Travel companies should focus on optimizing their online platforms for a smooth booking experience.

- 💰 **Spending Patterns**: The trend of higher spending on vacations signals a desire for premium experiences, which businesses can capitalize on by offering upscale accommodations and exclusive activities.
- 🌐 **Psychographic Profile**: The younger demographic at Niagara Falls, often going through life changes, is a key target for brands that focus on transitional stages. Tailoring marketing to this lifestyle can be highly effective.
- 📺 **Media Consumption**: The shift away from traditional media like radio and TV towards digital platforms indicates that marketing should focus on social media and digital ads to effectively engage this audience.

In summary, The travel behavior and preferences of Niagara Falls visitors paint a comprehensive picture of a dynamic and engaged demographic. Their frequent travel habits, preference for digital booking, and willingness to spend on experiences present unique opportunities for RTOs. Understanding their psychographics and media consumption habits can further enhance targeted marketing efforts, making it possible to cater effectively to this significant market segment



# Executive Summary | Ottawa

## Highlights

- ✈️ **Frequent Business Travel:** Ottawa visitors engage in more business trips than non-visitors, primarily by air.
- 🇨🇦 **Top Canadian Destinations:** Popular vacation spots for Ottawa travelers include Cape Breton Island and Prince Edward Island.
- 🌐 **Global Travel Choices:** Cuba and France rank high among the global destinations preferred by Ottawa visitors.
- 📱 **Direct Booking Preferences:** Ottawa travelers show a preference for booking directly through airlines and hotels rather than using online travel agencies.
- 💰 **Higher Vacation Spending:** Ottawa visitors tend to spend more on vacations compared to their non-visiting counterparts.
- 🏠 **Diverse Accommodation Options:** Ottawa visitors favor a variety of accommodations, including cruise ships and motels.
- 🍽️ **Restaurant Spending Trends:** Ottawa visitors spend significantly more on business dining occasions than on personal outings.

## Key Insights

- ✈️ **Business Travel Dynamics:** The frequency of business trips among Ottawa visitors indicates a thriving professional environment. The preference for short-stay trips could suggest that these travelers prioritize efficiency and productivity, likely traveling for conferences, meetings, or client engagements..
- 🇨🇦 **Canadian Vacation Preferences:** The inclination of Ottawa visitors to vacation within Canada emphasizes the appeal of domestic tourism. Destinations like Cape Breton Island and Newfoundland and Labrador are not only celebrated for their natural beauty but also for their cultural experiences. This trend could be influenced by a growing awareness of the importance of supporting local economies in the wake of global uncertainties.
- 🌐 **International Travel Trends:** The choice of Cuba and France as popular international vacation spots for Ottawa visitors reveals a penchant for both relaxation and cultural exploration. Cuba's allure may stem from its affordability

and vibrant culture, while France represents a desire for rich historical experiences and gastronomy. This duality in destination preferences highlights a sophisticated traveler profile that seeks both leisure and cultural enrichment.

- 📱 **Evolving Travel Planning:** The preference for direct booking through airline and hotel websites suggests that Ottawa visitors value control over their travel arrangements. This trend may also indicate a growing trust in brand websites for secure transactions and personalized services, contrasting with the more impersonal nature of online travel agencies.
- 💰 **Spending Patterns:** The higher spending of Ottawa visitors on vacations compared to non-visitors may reflect a greater disposable income or a willingness to invest in experiences. This trend could be indicative of a demographic that prioritizes travel as a significant aspect of their lifestyle, aiming for enriching experiences over merely cost-effective options.
- 🏠 **Accommodation Preferences:** The diversity in accommodation choices among Ottawa visitors indicates an openness to different types of travel experiences. From the unique experience of cruise ships to the familiarity of motels and the comfort of staying with friends, these preferences reveal a willingness to adapt their lodging choices based on the nature of their trips, whether for leisure or business.
- 🍽️ **Dining Out Trends:** The tendency for Ottawa visitors to spend more on business dining compared to personal meals suggests a distinction in dining behavior based on context. This could reflect the importance of professional networking and entertaining clients, where higher spending is often justified. Conversely, their preference for drive-throughs and eat-in restaurants indicates a desire for convenience and casual dining experiences during personal outings.

In summary, the travel behaviors and preferences of Ottawa visitors provide valuable insights into their lifestyle, spending habits, and the influences shaping their choices. By understanding these patterns, RTOs can tailor their communications to better address the needs of this unique traveler demographic, ultimately fostering stronger connections and enhancing the overall travel experience.

# Executive Summary | Toronto

## Highlights

- ✈️ **Preference for Car Travel:** Toronto visitors frequently prefer car travel for business over air travel.
- 🇨🇦 **Top Canadian Destinations:** Top Canadian vacation spots include Cape Breton Island and PEI.
- 🌍 **Global Travel Preferences:** Global destinations favored by Toronto visitors include Africa and Australia/New Zealand.
- 📅 **Booking preferences:** Travelocity is the leading online travel agency for vacation bookings among Toronto visitors.
- 🏠 **Accommodation preferences:** Toronto visitors have diverse accommodation preferences, including vacation rentals and cruise ships.
- 🏪 **Engagement:** Loyalty programs such as SCENE and Tim Horton's are popular among Toronto visitors.
- 🍷 **Dining Preferences:** Seafood restaurants are a favored choice across all segments of Toronto visitors.

## Key Insights

- ✈️ **Preference for Car Travel:** Toronto visitors show a distinct preference for car travel over air travel for business trips. This trend may reflect a desire for flexibility and the ability to travel shorter distances without the time constraints associated with flying. The implications for businesses in the travel sector could be significant, as they may need to focus more on services that cater to road travelers, including car rentals and highway accommodations.
- 🇨🇦 **Canadian Vacation Destinations:** The popularity of destinations like Cape Breton Island and Newfoundland highlights a strong domestic travel trend among Toronto visitors. This could indicate a growing appreciation for local culture and nature, potentially fueled by a desire for unique experiences and a sense of community. Travel agencies and local tourism boards might leverage this trend by promoting curated experiences in these regions.
- 🌍 **Global Travel Preferences:** The inclination of Toronto visitors to travel to

global destinations, particularly Africa and Australia/New Zealand, suggests a curiosity for diverse cultures and environments. Travel companies should consider tailoring their marketing strategies to highlight unique attractions and experiences these destinations offer, appealing to the adventurous spirit of these travelers.

- 📅 **Online Booking Trends:** The finding that Toronto visitors predominantly book vacations through airline and hotel websites, with a notable reliance on Travelocity, underscores the importance of having a robust online presence. Travel service providers must ensure that their websites are user-friendly and optimized for searches to capture the attention of this demographic effectively.
- 🏠 **Diverse Accommodation Preferences:** The varied accommodation choices, including vacation rentals and cruise ships, reflect a shift towards personalized travel experiences. This trend opens opportunities for Airbnb-style companies and cruise lines to market their offerings more aggressively to Toronto visitors, who may seek out unique or luxurious lodging options.
- 🍷 **Dining Out Preferences:** The preference for dining out at seafood restaurants indicates a discerning taste among Toronto visitors. Restaurants targeting this demographic should consider incorporating high-quality seafood options into their menus and promoting these dishes to attract customers. Additionally, understanding the dining habits of various age groups could lead to more tailored marketing strategies.
- 📺 **Media Consumption Habits:** The average consumption of TV, radio, and internet among Toronto visitors suggests that traditional media still plays a vital role in their lives. Advertising strategies should encompass a mix of digital and traditional media to maximize reach and engagement with this audience, especially since older visitors tend to gravitate towards TV.

Overall, the travel behaviors and preferences of Toronto visitors paint a detailed picture of their vacationing habits, business travel choices, and leisure activities. By understanding these patterns, RTOs can better cater to the needs and desires of this demographic, leading to more successful marketing strategies and enhanced customer experiences.



# Executive Summary | Cottage Country

## Highlights

- ✈️ **Increased Vacation Frequency:** Cottage Country visitors take more out-of-town vacations than non-visitors.
- 📍 **Diverse Travel Destinations:** Popular Canadian destinations include Victoria and Banff, while international trips often lead to Asia and the UK.
- 💰 **Higher Vacation Spending:** These visitors can often spend over \$2,000 on vacations, indicating a willingness to invest in travel experiences.
- 🏠 **Varied Accommodation Preferences:** Options include package tours, vacation rentals, and cruise ships, showcasing a taste for unique experiences.
- 📱 **Digital Media Engagement:** They prefer online travel services, with heavy usage of OTAs like Travelocity for planning vacations.
- 🍽️ **Restaurant Spending Trends:** Higher spending at restaurants for pleasure compared to business indicates a focus on enjoyment during their travels.
- 🎁 **Loyalty Program Engagement:** Popular loyalty programs highlight their commitment to maximizing travel and dining experiences.

## Key Insights

- 🌐 **Travel Behavior Insights:** Cottage Country visitors showcase a distinct pattern in their travel behavior, taking more out-of-town vacations compared to non-visitors. This trend indicates a strong inclination towards leisure travel, revealing possible motivations such as the pursuit of adventure, relaxation, and exploration of new locales.
- ✈️ **Business Travel Patterns:** Interestingly, while these visitors frequently engage in leisure travel, they exhibit less frequency in business trips. This could suggest that their work-life balance leans towards prioritizing personal travel experiences over business commitments, indicative of a lifestyle that values personal enrichment.
- 🇨🇦 **Canadian Destinations Domination:** Among the top five Canadian vacation destinations, cities like Victoria and Banff

stand out, catering to the visitors' desire for nature and outdoor activities. This preference reflects a broader trend of urban dwellers seeking natural retreats and scenic landscapes for their vacations.

- 🇺🇸 **U.S. Vacation Preferences:**

The inclination towards U.S. destinations like Hawaii and Las Vegas demonstrates a blend of adventure and relaxation in their travel choices. This indicates a demographic that enjoys both beach vacations and vibrant city life, suggesting a diverse range of interests.

- 🌐 **International Travel Trends:**

The propensity to travel to global destinations such as Asia and Europe reveals an adventurous spirit among Cottage Country visitors. This suggests that they are not only interested in domestic travel but also eager to immerse themselves in different cultures and experiences.

- 📅 **Vacation Planning Channels:**

The reliance on online travel agencies (OTAs) like Travelocity for vacation planning indicates a tech-savvy demographic that values convenience and accessibility in booking their travel. The preference for discount or last-minute agencies suggests a budget-conscious mindset, reflecting a desire for value in their travel experiences.








- 🍽️ **Dining Preferences:**

The higher spending patterns at restaurants for leisure highlight a willingness to indulge in culinary experiences while traveling. This trend suggests that Cottage Country visitors appreciate quality dining as an integral part of their vacation experience, often seeking out unique and enjoyable food options.




The insights derived from the travel behavior of Cottage Country visitors paint a comprehensive picture of a demographic that is adventurous, sophisticated, and digitally engaged. Their travel choices are influenced by a desire for unique experiences, whether in the form of destination selections or dining preferences. The data suggests that as this group continues to prioritize leisure travel, their engagement with technology and preference for diverse experiences will shape the future of travel and tourism in the regions they frequent. Understanding these trends can help RTOs tailor their industry support to meet the evolving preferences of this dynamic group.

# Executive Summary | Rest of Ontario





## Highlights

-  **Frequent Travelers:** Rest of Ontario visitors are more likely to take three or more out-of-town vacations within three years.
-  **Business Travel:** This demographic shows a higher frequency of business trips, often spending more than 22 nights away from home.
-  **Domestic Destinations:** Popular vacation spots include Jasper, Banff, and Manitoba, showcasing a preference for scenic Canadian locales.
-  **U.S. Getaways:** Top U.S. travel destinations for these visitors include Hawaii and San Francisco, reflecting diverse international interests.
-  **Online Planning:** The use of online travel agencies (OTAs) and airline/hotel websites is predominant for vacation planning, with minimal use of travel agents.
-  **Spending Patterns:** Rest of Ontario visitors generally spend less on vacations, rarely exceeding \$2,000 per trip.
-  **Dining Preferences:** They favor casual dining options and are more likely to choose Starbucks over other coffee shops.

## Key Insights

-  **Travel Frequency:** The inclination of Rest of Ontario visitors to take multiple vacations over three years suggests a strong travel culture. This behavior can be attributed to a growing interest in exploration and leisure, which is essential for businesses in the tourism sector to capitalize on.
-  **Business Travel Trends:** The higher likelihood of spending significant nights away for business indicates a professional demographic that values travel. Businesses catering to this segment should focus on comfort and convenience, especially in accommodation and transportation services.
-  **Domestic Tourism:** The popularity of destinations like Jasper and Banff

highlights a trend toward appreciating natural beauty within Canada. This insight is valuable for RTOs to attract more visitors to nature focused attractions.

-  **International Travel Preferences:** The interest in U.S. destinations such as Hawaii and California signifies a penchant for both relaxation and adventure. RTOs could develop tailored packages focusing on these elements of travel to enhance user engagement and sales.
-  **Digital-First Approach:** The preference for online booking platforms suggests that businesses must enhance their digital presence. Investing in user-friendly websites and mobile applications could significantly improve customer experience and boost bookings.
-  **Cost-Conscious Travelers:** The lower spending level per trip indicates a budget-conscious segment. Travel agencies and businesses should consider offering value-for-money packages and discounts to attract these visitors without compromising on quality.
-  **Casual Dining Preference:** The inclination towards casual dining establishments such as Earls and Boston Pizza reflects a desire for comfort and familiarity. Restaurants targeting this demographic should focus on community engagement and loyalty programs to maintain customer interest.

In conclusion, these insights into the travel behaviors and preferences of Rest of Ontario visitors are crucial for RTOs. Understanding the unique characteristics of this demographic allows for strategic marketing, tailored offerings, and improved customer engagement. By aligning services with the preferences of these visitors, destinations can drive growth in an increasingly competitive market.





# NIAGARA FALLS

## Key Segments:

- **Asian Sophisticates:** Upper-middle-income, middle-aged families primarily of Asian descent
- **Asian Achievement:** Financially secure, middle-aged and older families of primarily Asian descent
- **New Asian Heights:** Younger singles and couples with high levels of university degrees, primarily of Asian descent
- **Indieville:** Younger and middle-aged urban singles and couples



# Travel Behaviour

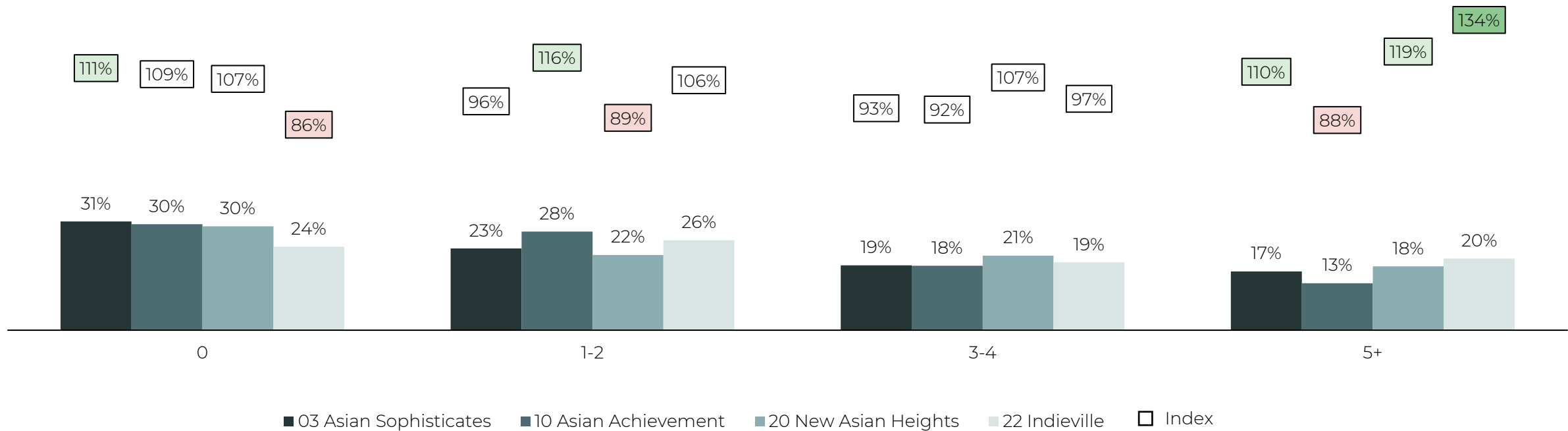
- There is some evidence that Niagara Falls visitors are more likely to go on out-of-town vacations more frequently than non-visitors.
- Overall incidence of business travel is low for Niagara Falls visitors, but specifically their air travel for business purposes over-indexes compared to non-visitors.
- Key vacation destinations in Canada for Niagara Falls visitors include Whistler, Victoria, British Columbia, Calgary, and Banff.
- US vacation destinations among Niagara Falls travelers include Western states, Hawaii, San Francisco, New York, and Las Vegas,
- Global vacation destinations for Niagara Falls visitors include Asia, UK and Ireland, Rest of Europe, Australia/New Zealand, and other (lesser-known) global destinations.
- Niagara Falls visitors are significantly more likely to book through an airline directly and through OTAs. Key OTAs relevant to them include Trivago, Sunwing.ca, and airline websites.
- Top accommodations used by Niagara Falls visitors when traveling for vacation include all-inclusive resorts, vacation rentals, bed and breakfasts, staying with friends and relatives, and cottages.
- Niagara Falls visitors are more likely to fly with Air Canada and West Jet. Other airlines who have lower incidence but over-index for Niagara Falls visitors include United, Delta, and other European airlines.



# Travel Behaviour: Overall Frequency of Trips

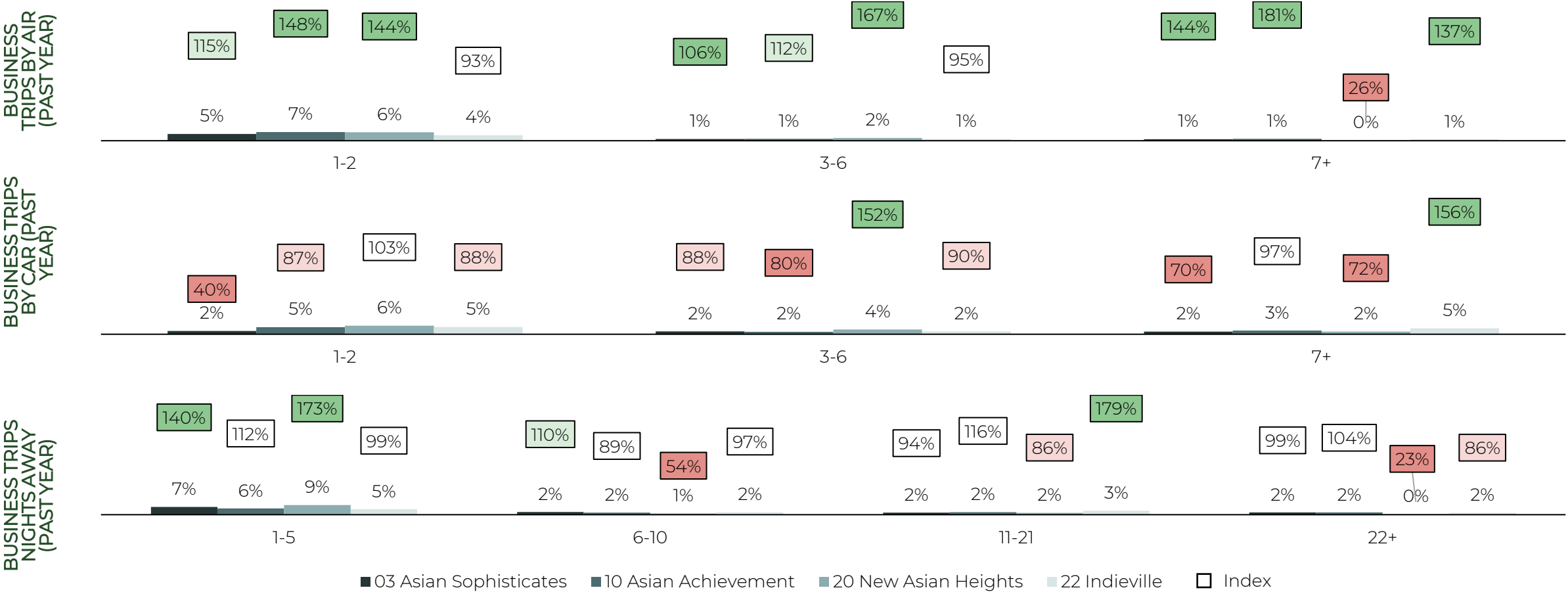
There is some evidence that Niagara Falls visitors are more likely to go on out-of-town vacations more frequently than non-visitors.

## OUT-OF-TOWN VACATIONS (PAST 3 YEARS)



# Travel Behaviour: Frequency of Business Trips

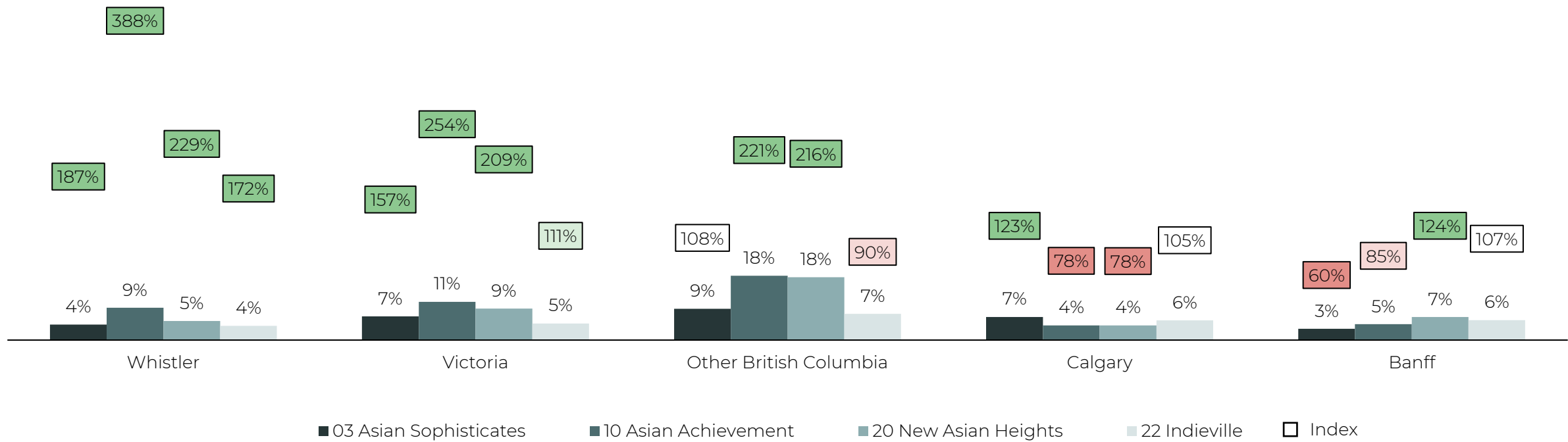
Overall incidence of business travel is low for Niagara Falls visitors, but specifically their air travel for business purposes over-indexes compared to non-visitors, indicating a higher propensity for business travel by air.



# Travel Behaviour: Canadian Destinations

Key vacation destinations in Canada for Niagara Falls visitors include Whistler, Victoria, British Columbia, Calgary, and Banff.

TOP 5 CANADIAN VACATION DESTINATIONS VISITED (PAST 3 YEARS)





# Travel Behaviour: U.S. Destinations

US vacation destinations among Niagara Falls travelers include Western states, Hawaii, San Francisco, New York, and Las Vegas,

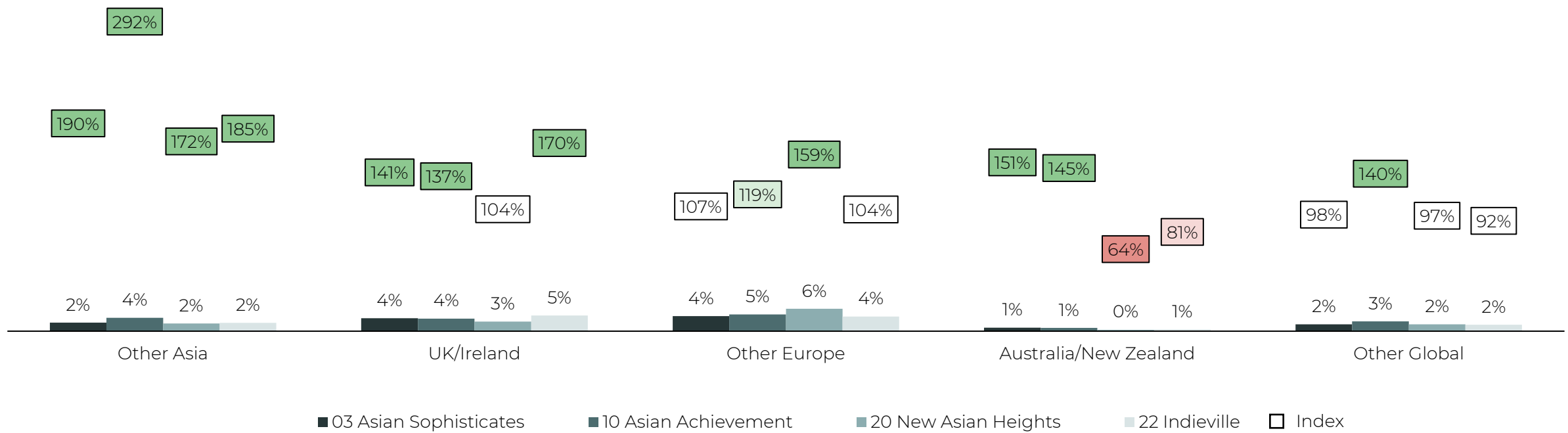
TOP 5 USA VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: Global Destinations

Global vacation destinations for Niagara Falls visitors include Asia, UK and Ireland, Rest of Europe, Australia/New Zealand, and other (lesser-known) global destinations.

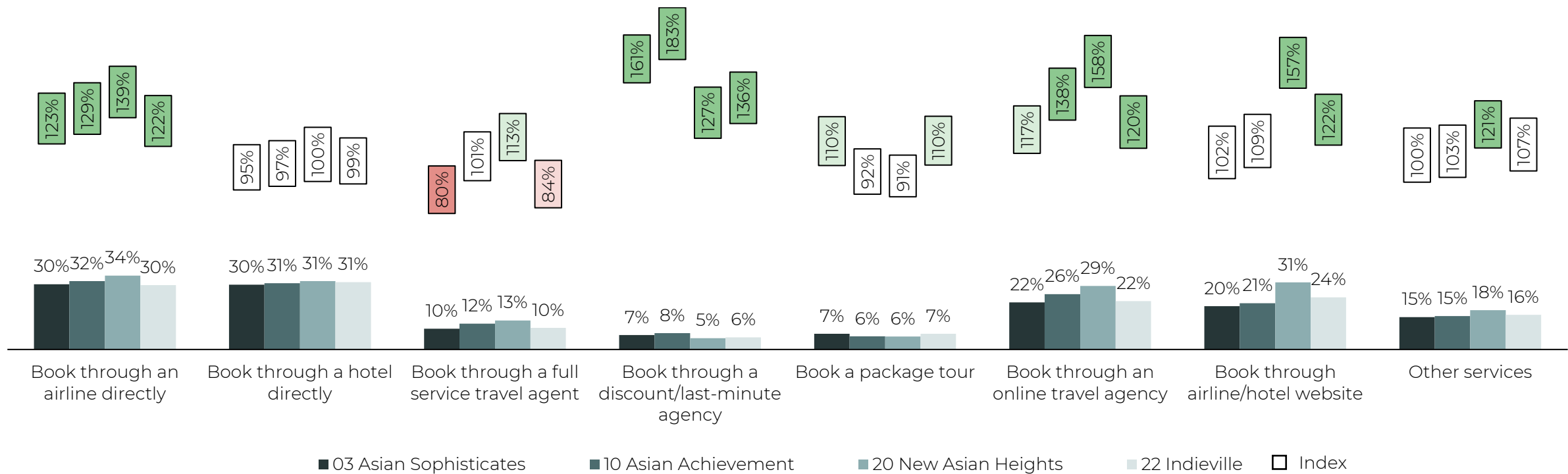
TOP 5 GLOBAL VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: Booking Channels

Niagara Falls visitors are significantly more likely to book through an airline directly and through OTAs. They also have a higher prevalence (although incidence is low) of making use of discount or last-minute agencies.

VACATION PLANNING USED (PAST 3 YEARS)

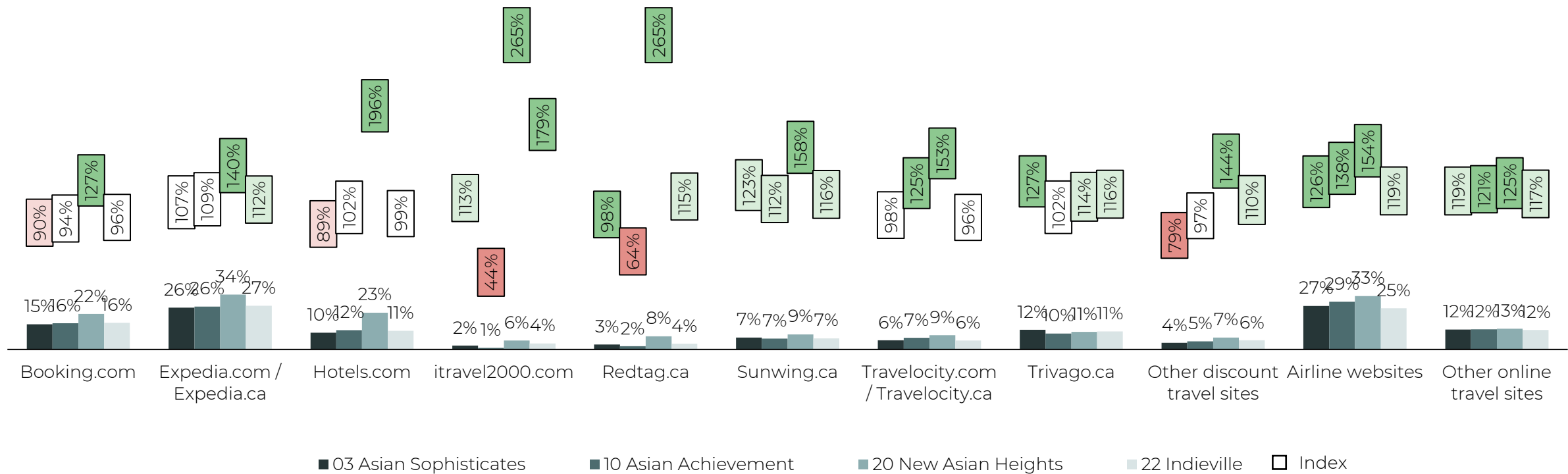




# Travel Behaviour: Online Planning & Booking

Key OTAs relevant to Niagara Falls visitors include Trivago, Sunwing.ca, and airline websites.

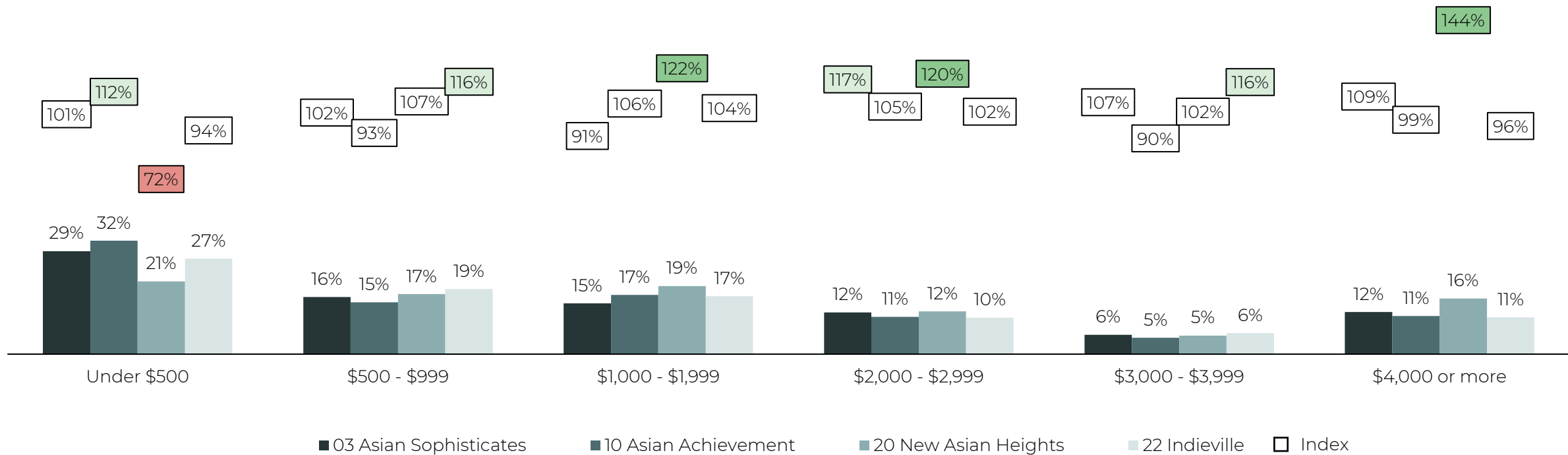
ONLINE TRAVEL SERVICES VISITED (PAST YEAR)



# Travel Behaviour: Spending

There seems to be a trend towards higher vacation spending among Niagara Falls Visitors, although the trend is not absolute, with some sub-segments not over-indexing on any specific spend category.

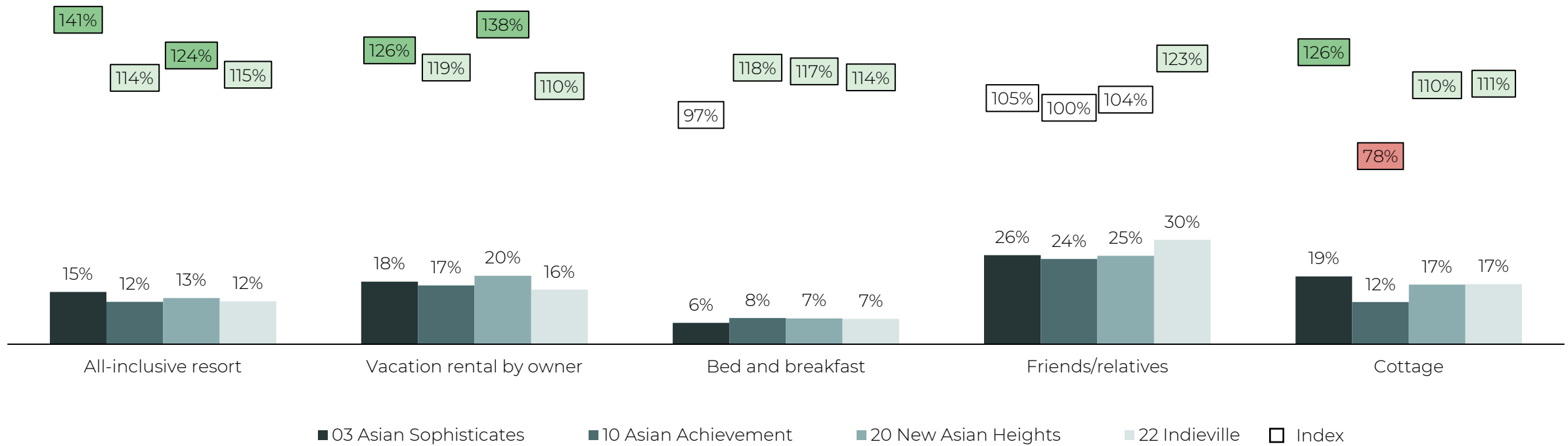
## LAST VACATION SPENDING



# Travel Behaviour: Accommodation

Top accommodations used by Niagara Falls visitors when traveling for vacation include all-inclusive resorts, vacation rentals, bed and breakfasts, staying with friends and relatives, and cottages.

TOP 5 VACATION ACCOMMODATIONS USED (PAST 3 YEARS)

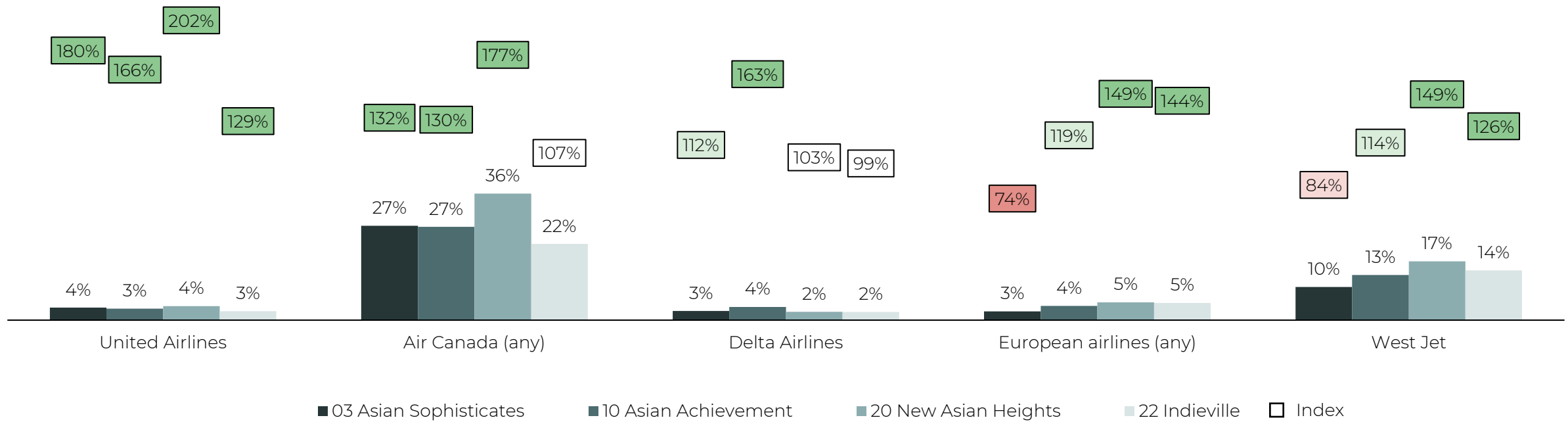




# Travel Behaviour: Airlines

Niagara Falls visitors are more likely to fly with Air Canada and West Jet. Other airlines who have lower incidence but over-index for Niagara Falls visitors include United, Delta, and other European airlines.

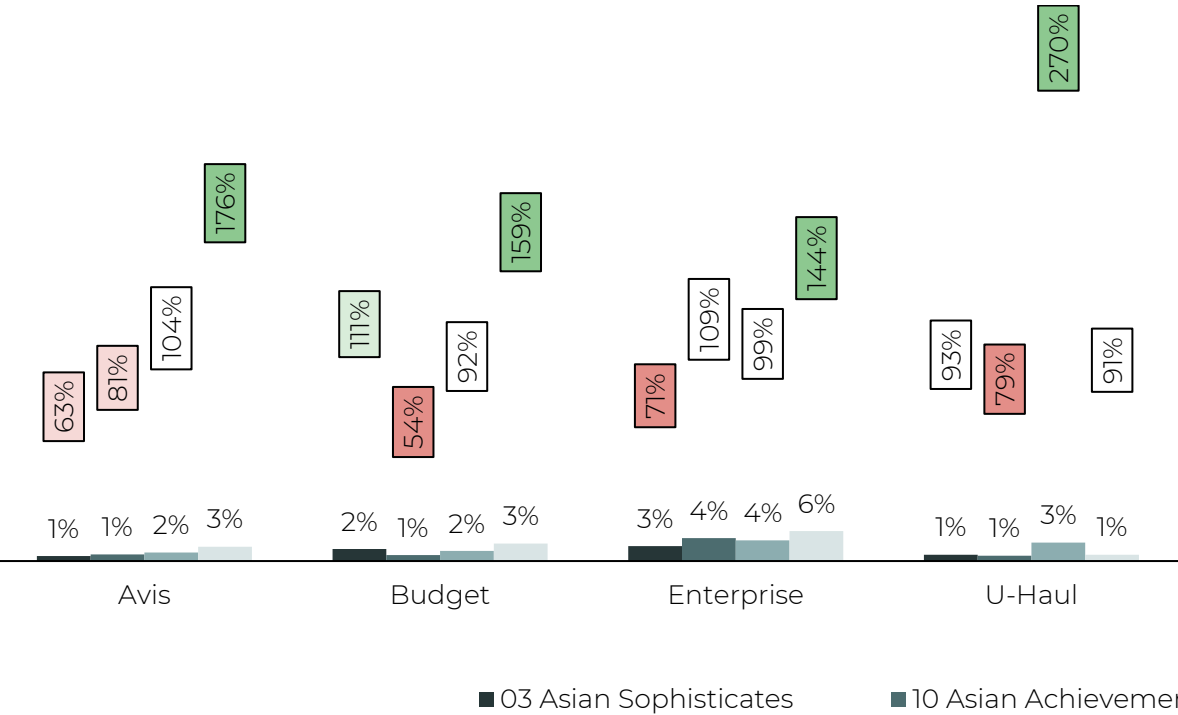
TOP 5 AIRLINES FLOWN (PAST YEAR)



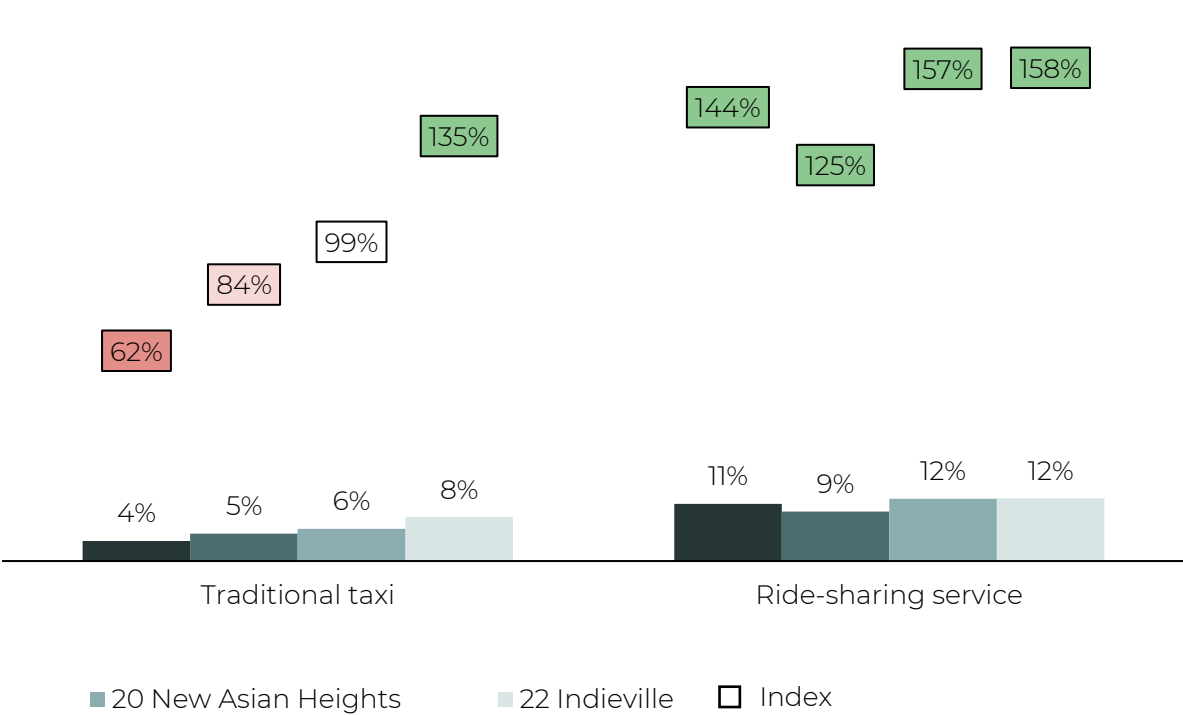
# Travel Behaviour: Car Rental & Taxi Service

Niagara Falls visitors are significantly more likely to make use of ride-sharing services than non-visitors. Indieville visitors as a sub-segment of visitors are also more likely to make use of rental cars.

CAR RENTALS USED (PAST YEAR)



TAXI SERVICES USED (PAST MONTH)



A woman with dark hair, wearing a grey beanie, a colorful striped sweater, blue jeans, and tan boots, is sitting on a large stone wall. She is holding a small orange leaf in her hands. Behind her are trees with vibrant autumn foliage in shades of orange, yellow, and red. The scene is outdoors, likely in a park or a scenic area.

# 2B

# Psychographics

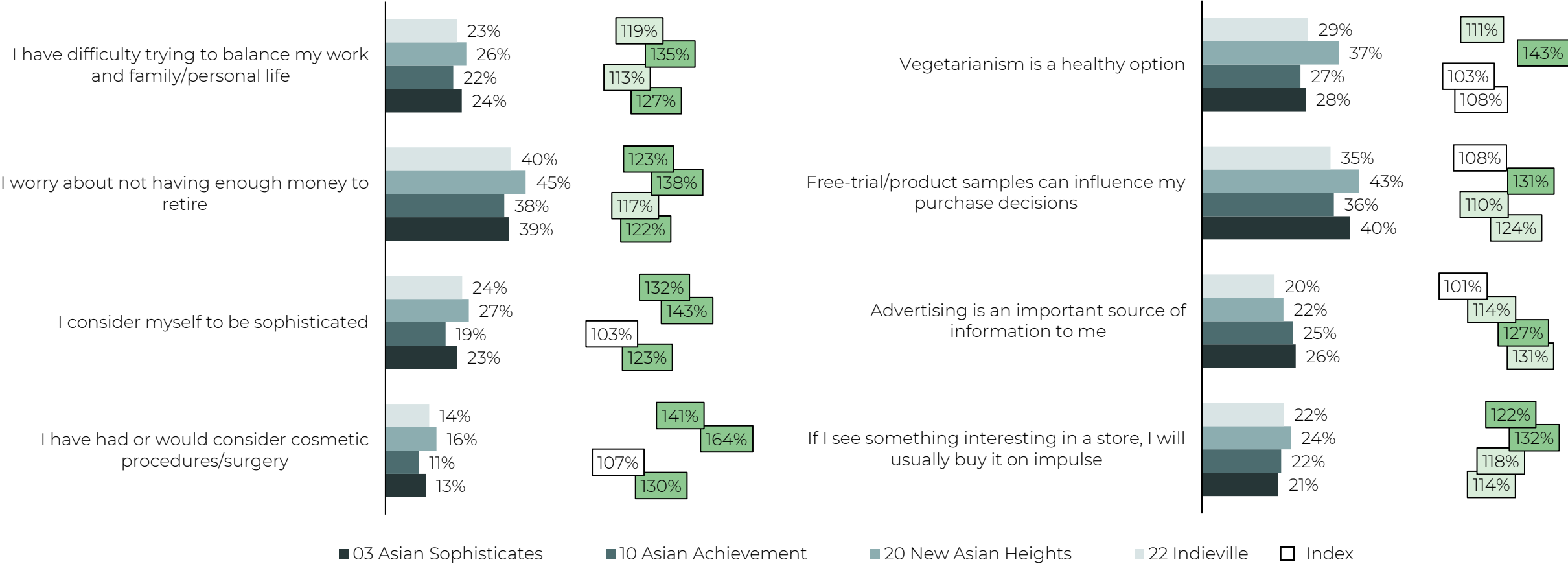
- Key psychographic statements that differentiate Niagara Falls visitors include leaning towards consumerism (influenced by advertising, impulse buying, cosmetic surgery), while also indicating a busy lifestyle.
- Life events that define Niagara Falls visitors point to them being younger individuals who are experiencing a lot of “life firsts”: completing university education, moving in with a significant other for the first time, buying/selling a home, starting a business, and changing jobs.
- Loyalty programs that Niagara Falls visitors are more likely to be members of include Starbucks, Aeroplan, PC Optimum, and credit card rewards programs among others.



# Psychographics: Top Statements

Key psychographic statements that differentiate Niagara Falls visitors include leaning towards consumerism (influenced by advertising, impulse buying, cosmetic surgery), while also indicating a busy lifestyle.

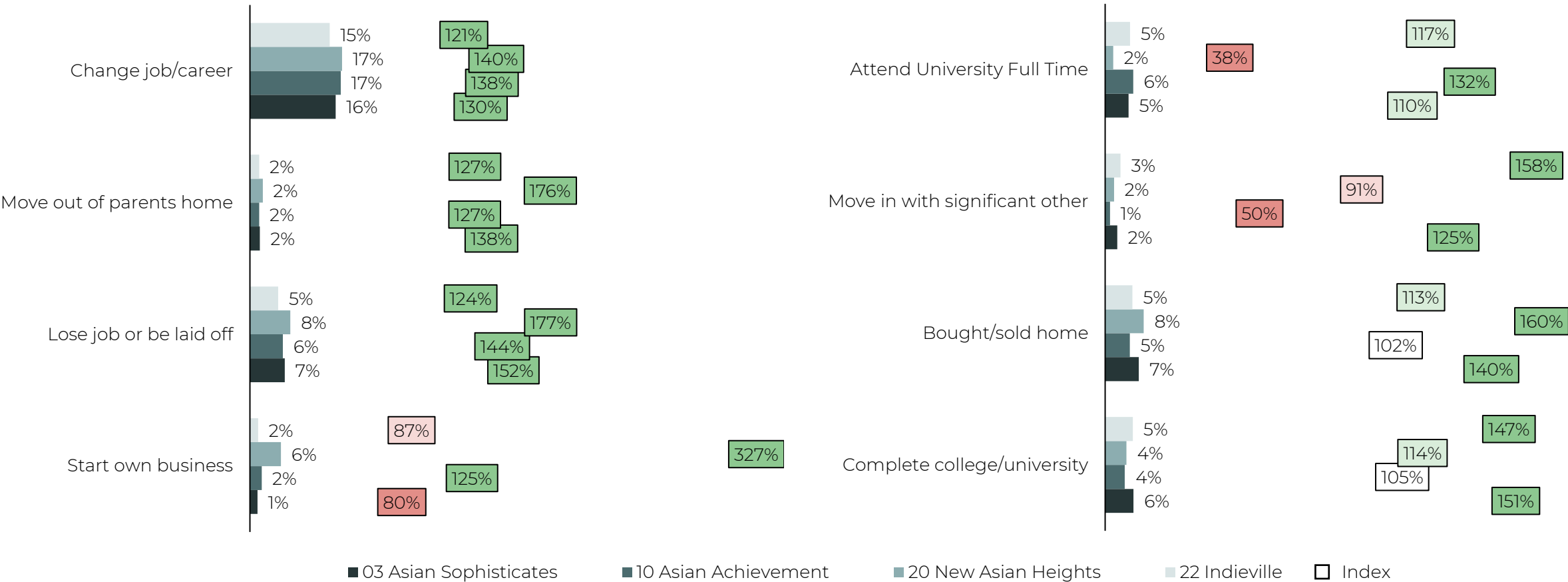
## TOP STATEMENTS AGREED WITH



# Psychographics: Life Events

Life events that define Niagara Falls visitors point to them being younger individuals who are experiencing a lot of “life firsts”: completing university education, moving in with a significant other for the first time, buying/selling a home, starting a business, and changing jobs.

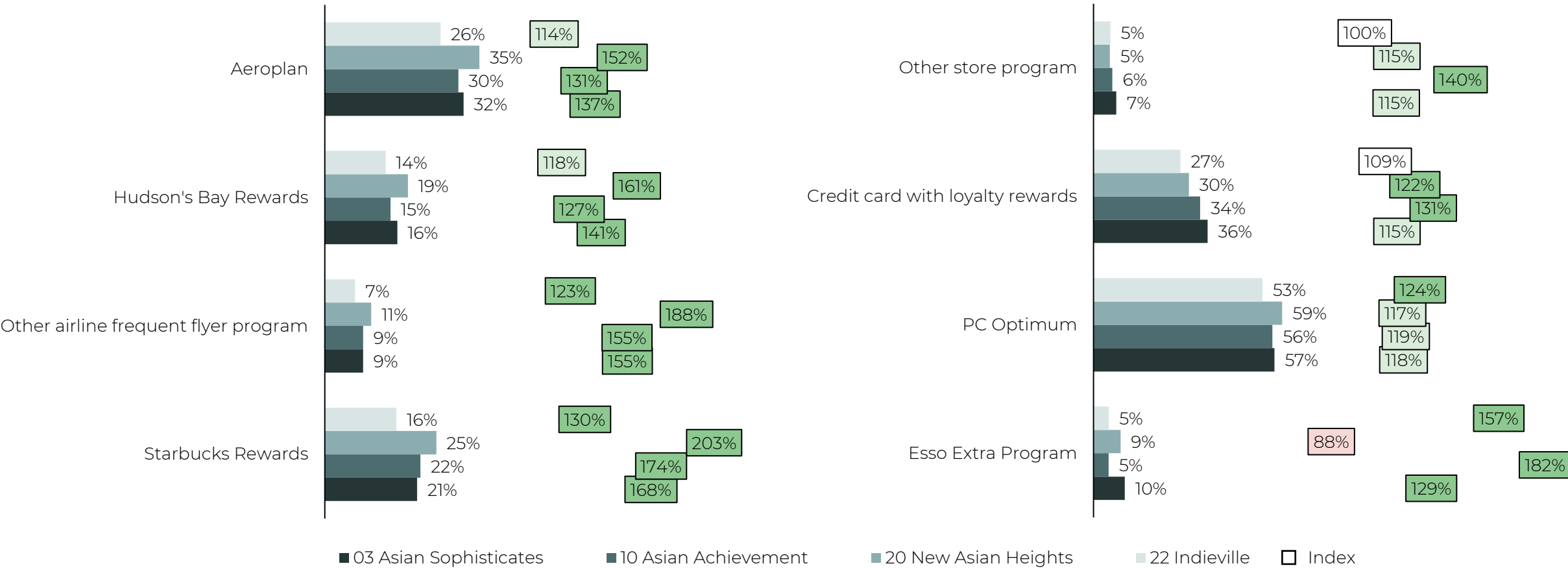
## TOP LIFE EVENTS HAPPENED (PAST 2 YEARS)



# Psychographics: Loyalty Programs

Loyalty programs that Niagara Falls visitors are more likely to be members of include Starbucks, Aeroplan, PC Optimum, and credit card rewards programs among others.

## LOYALTY PROGRAMME MEMBERSHIP





# Media Usage

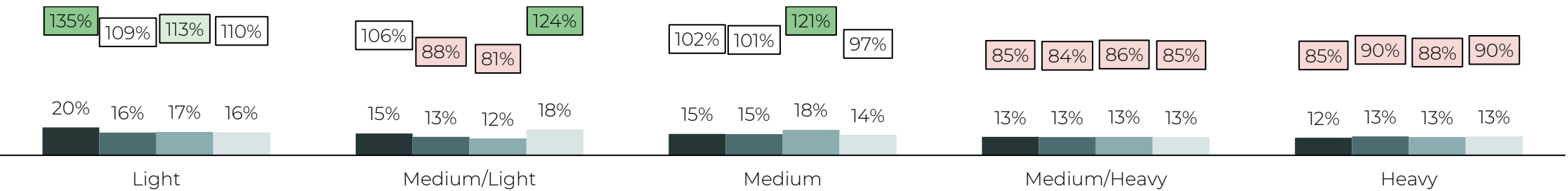
- Niagara Falls visitors are generally lighter consumers of Radio and TV compared to non-visitors. They are however generally more likely to be heavy consumers of digital media.
- Niagara Falls visitors are generally more likely to use social media compared to non-visitors. WhatsApp, LinkedIn, Reddit and Twitter (X) over-index higher than other channels, while Snapchat, Facebook and TikTok are less likely to be used.
- Key activities that define the Niagara Falls visitor's online behaviour include fashion and beauty content, restaurant reviews, travel content, and online shopping.
- Sports dominate the type of TV content that Niagara Falls visitors are more likely to watch.
- Outdoor advertising that attracts the attention of Niagara Falls visitors is dominated by that displayed on and around public transport.



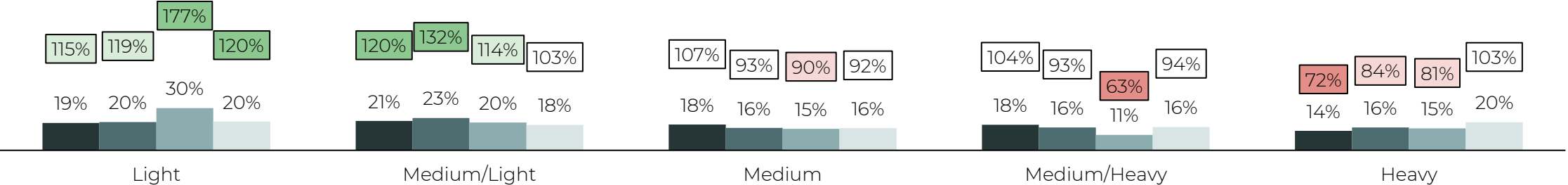
# Media Usage: By Medium

Niagara Falls visitors are generally lighter consumers of Radio and TV compared to non-visitors. They are however generally more likely to be heavy consumers of digital media.

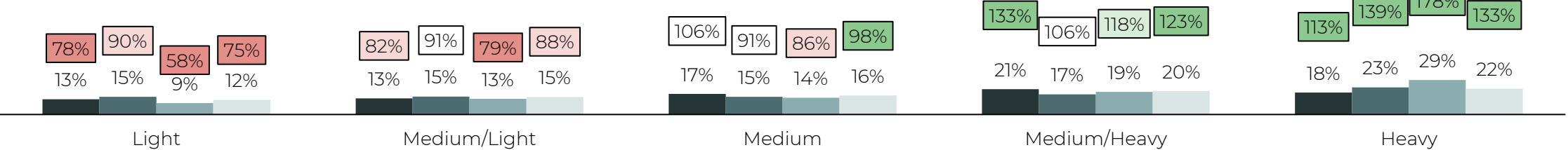
TV USAGE  
QUINTILES



RADIO USAGE  
QUINTILES



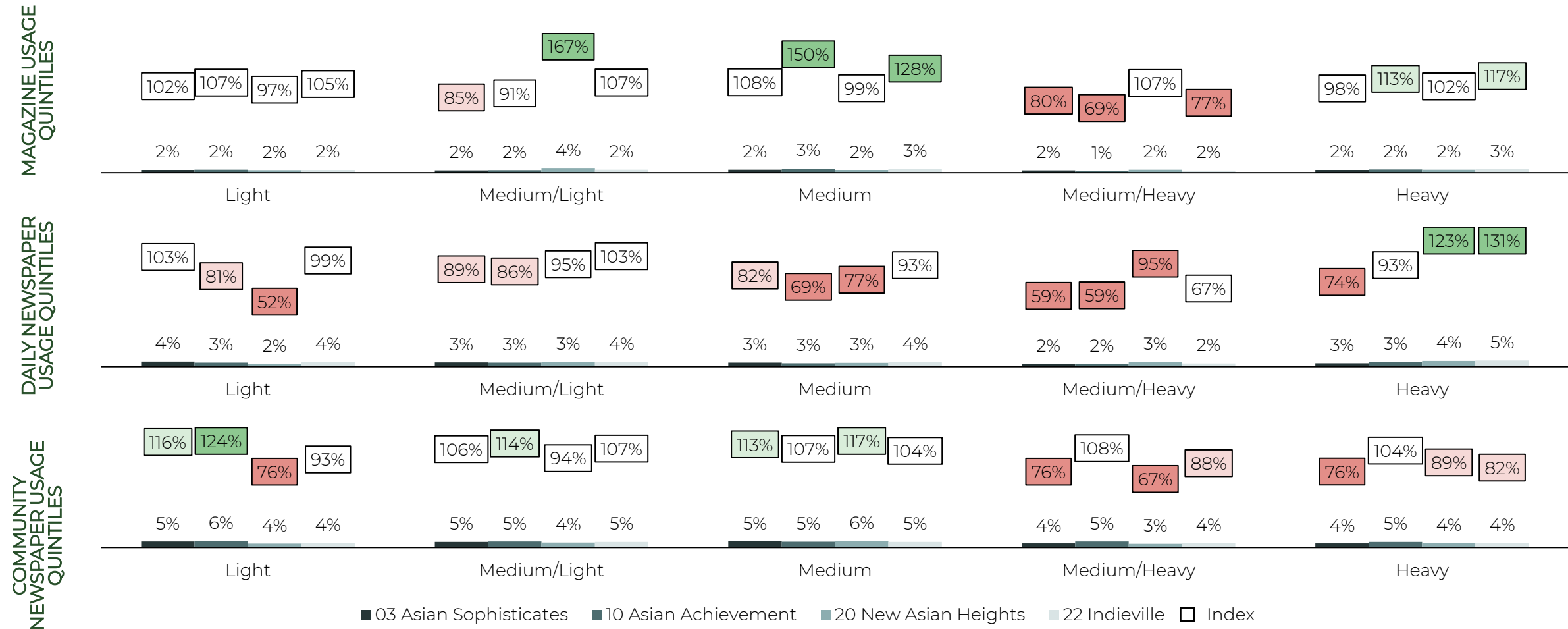
INTERNET USAGE  
QUINTILES



03 Asian Sophisticates 10 Asian Achievement 20 New Asian Heights 22 Indieville Index

# Media Usage: By Medium

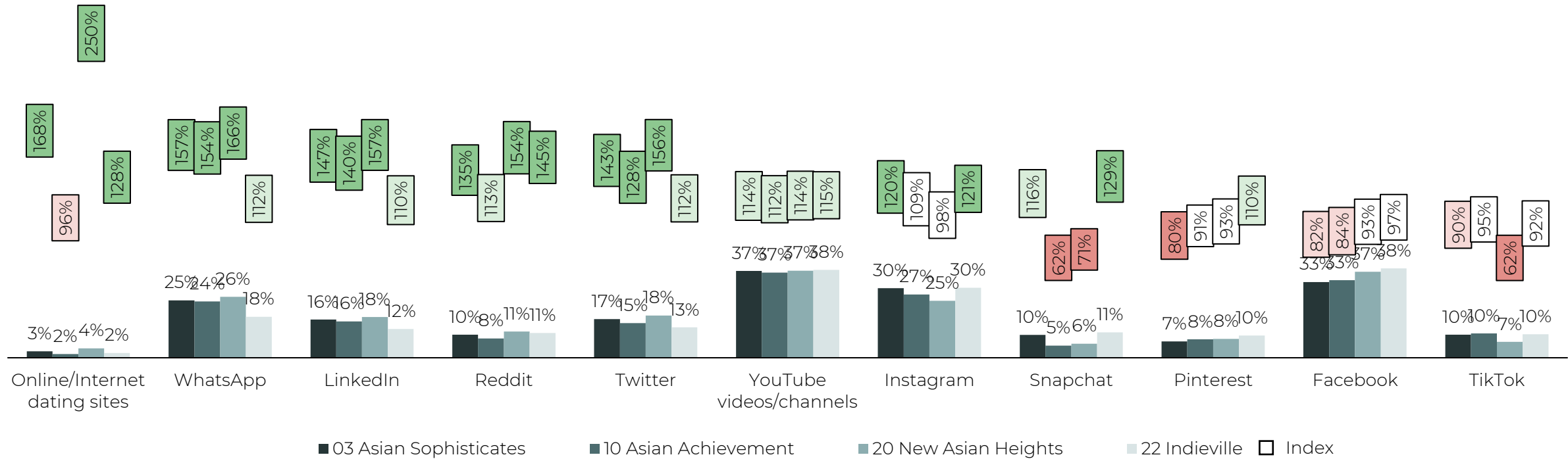
Overall incidence of print media usage is low, although there is some indication that Niagara Falls visitors are more likely than non-users to be heavy consumers of magazines and daily newspapers.



# Media Usage: Social Channels

Niagara Falls visitors are generally more likely to use social media compared to non-visitors. WhatsApp, LinkedIn, Reddit and Twitter (X) over-index higher than other channels, while Snapchat, Facebook and TikTok are less likely to be used. A high prevalence for using online dating sites is another indication of this being a younger individual.

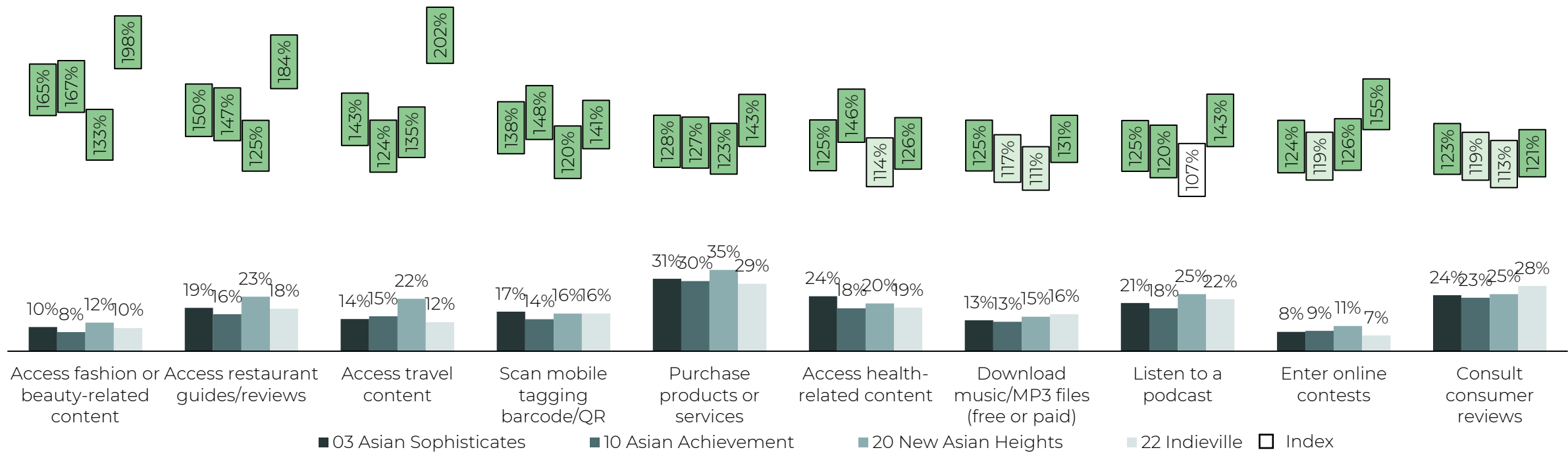
SOCIAL NETWORKS USED (PAST WEEK)



# Media Usage: Online Activities

Key activities that define the Niagara Falls visitor’s online behaviour include fashion and beauty content, restaurant reviews, travel content, and online shopping. These activities again point to a consumerism leaning tendency among these visitors.

TOP 10 INTERNET ACTIVITIES (PAST WEEK)

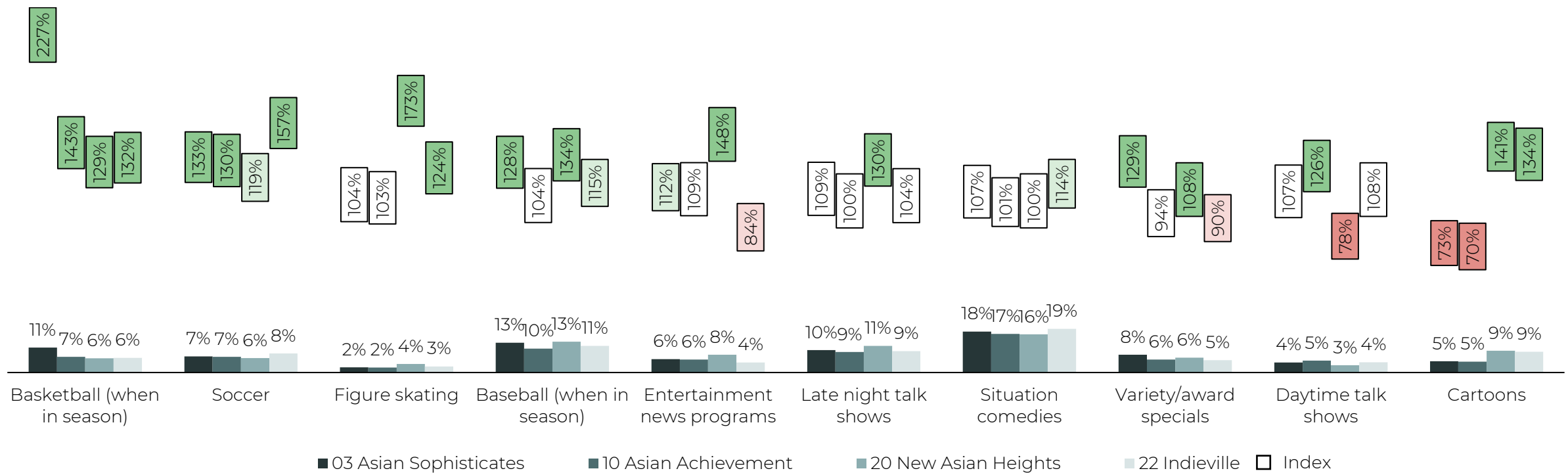




# Media Usage: Top TV Programming

Sports dominate the type of TV content that Niagara Falls visitors are more likely to watch. Other actuality type programming like entertainment news, talk shows, and award specials are also prevalent.

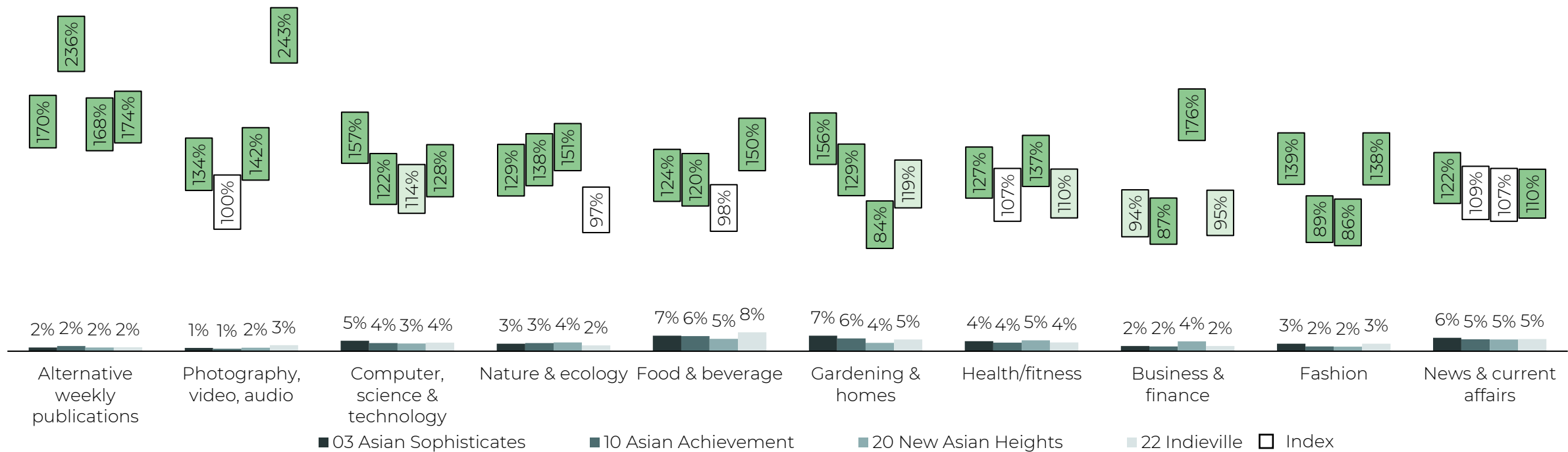
TOP 10 TV PROGRAMS WATCHED (AVERAGE WEEK)



# Media Usage: Magazines

Magazine content consumed by Niagara Falls visitors vary, with a balance between hobby related content (photography, nature, food, gardening) and informative content (business, news and current affairs).

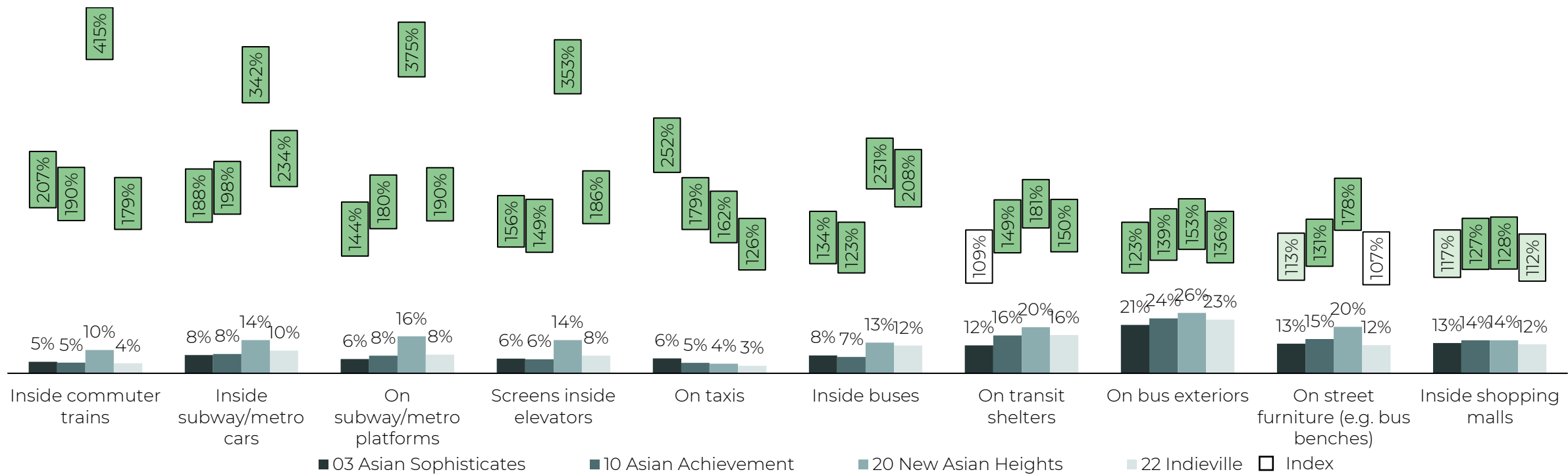
TOP 10 MAGAZINES (PRINT OR DIGITAL) READ (PAST MONTH)



# Media Usage: Out of Home

Outdoor advertising that attracts the attention of Niagara Falls visitors is dominated by that displayed on and around public transport.

TOP 10 OUTDOOR ADVERTISING NOTICED (PAST WEEK)





# Restaurants

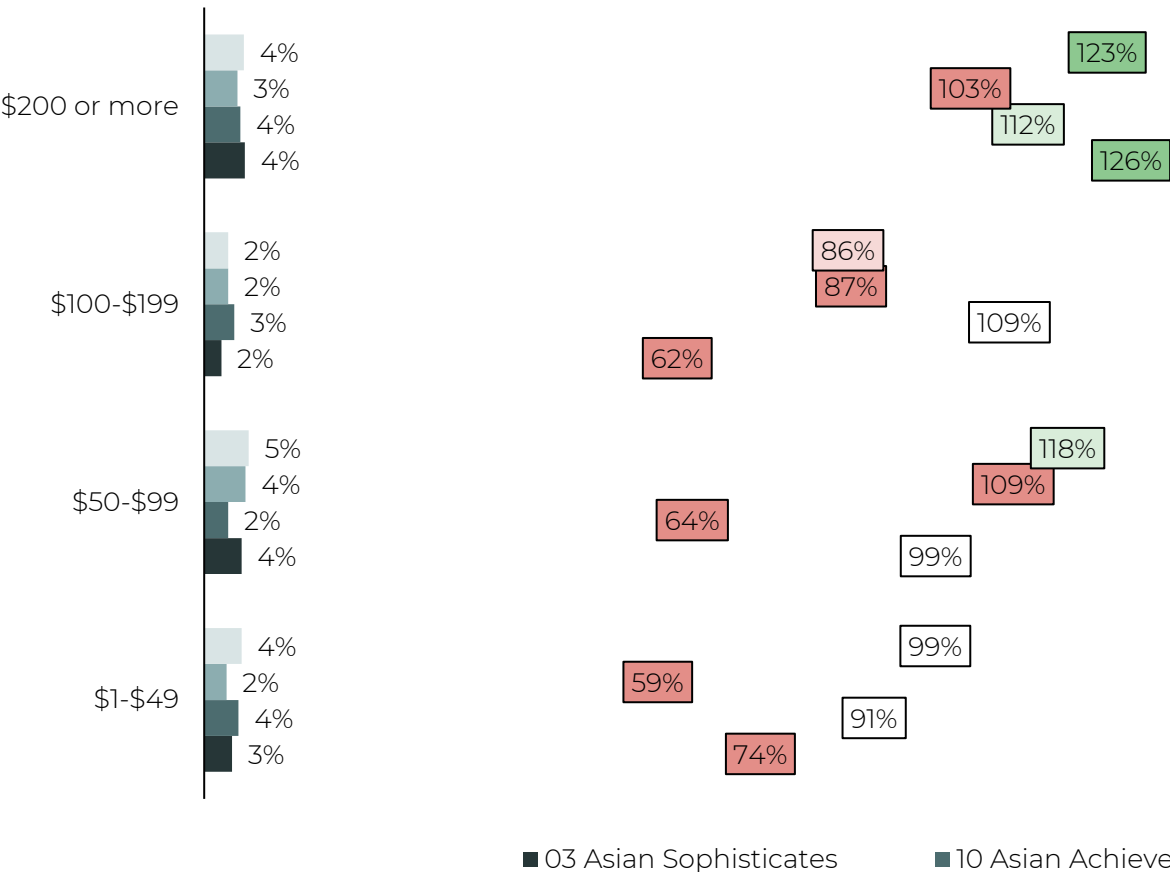
- Niagara Falls Visitors are slightly more likely to spend higher amounts at restaurants than Non-Visitors, especially for pleasure-related outings. Non-Visitors spend slightly less per visit for both business and pleasure dining.
- Niagara Falls visitors show a preference for international cuisine, over-indexing on Mexican, Italian, Asian, and other ethnicities' restaurants. Juice bars are also more likely to be popular with these visitors.
- Pizza is a popular fast food option with Niagara Falls visitors, with Pizza Pizza, Domino's, and Pizza Hut all over-indexing.
- Starbucks is a clear favourite for coffee among Niagara Falls visitors, while McDonald's and Tim Hortons have an equal likelihood to be visited compared to non-visitors of Niagara Falls.



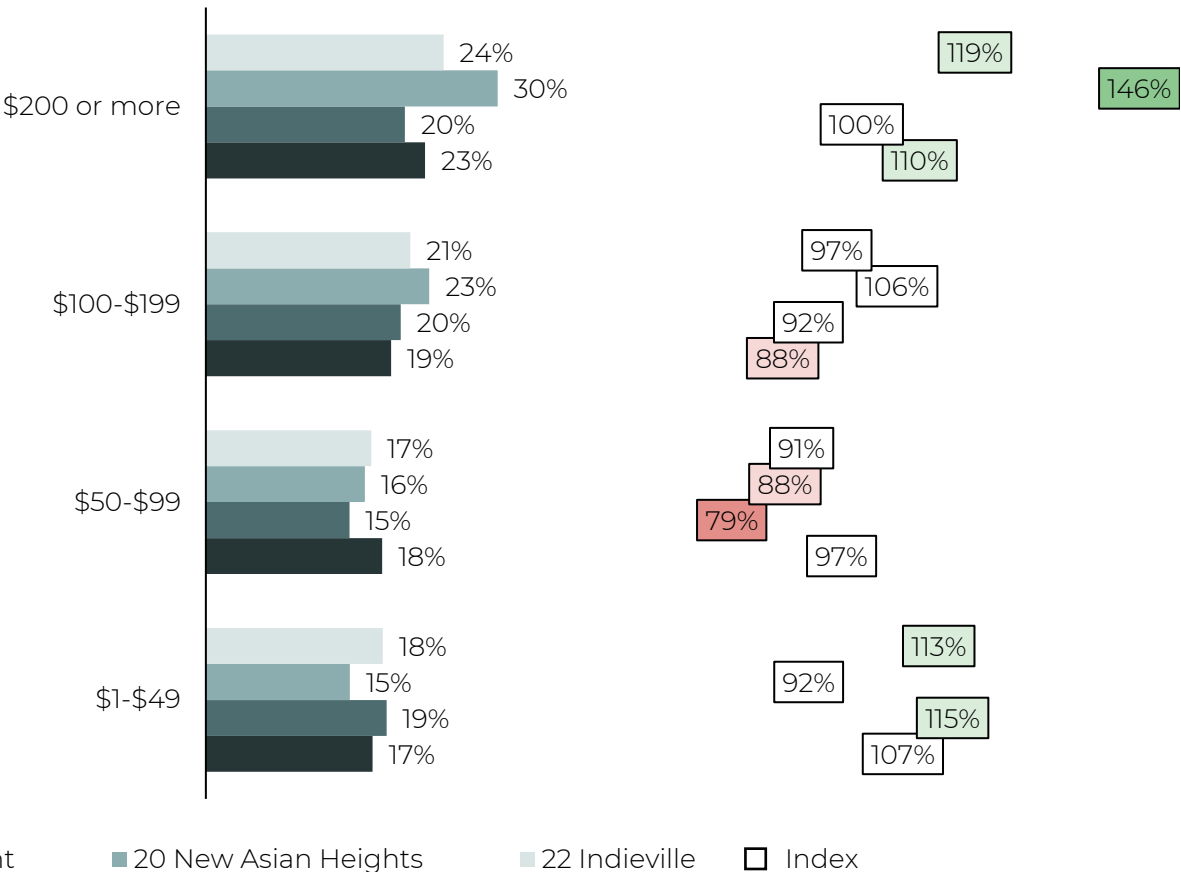
# Restaurants: Pleasure & Business Spending

Niagara Falls Visitors are slightly more likely to spend higher amounts at restaurants than Non-Visitors, especially for pleasure-related outings. Non-Visitors spend slightly less per visit for both business and pleasure dining.

AMOUNT SPENT AT RESTAURANTS FOR BUSINESS (PAST MONTH)



AMOUNT SPENT AT RESTAURANTS FOR PLEASURE (PAST MONTH)



# Restaurants: Types of Service

Niagara Falls visitors don't show a lot of differentiation from non-visitors when it pertains to food ordering methods, apart from some sub-segments being more likely to make use of online food delivery and online meal kits. Drive throughs are less prevalent for Niagara Falls visitors.

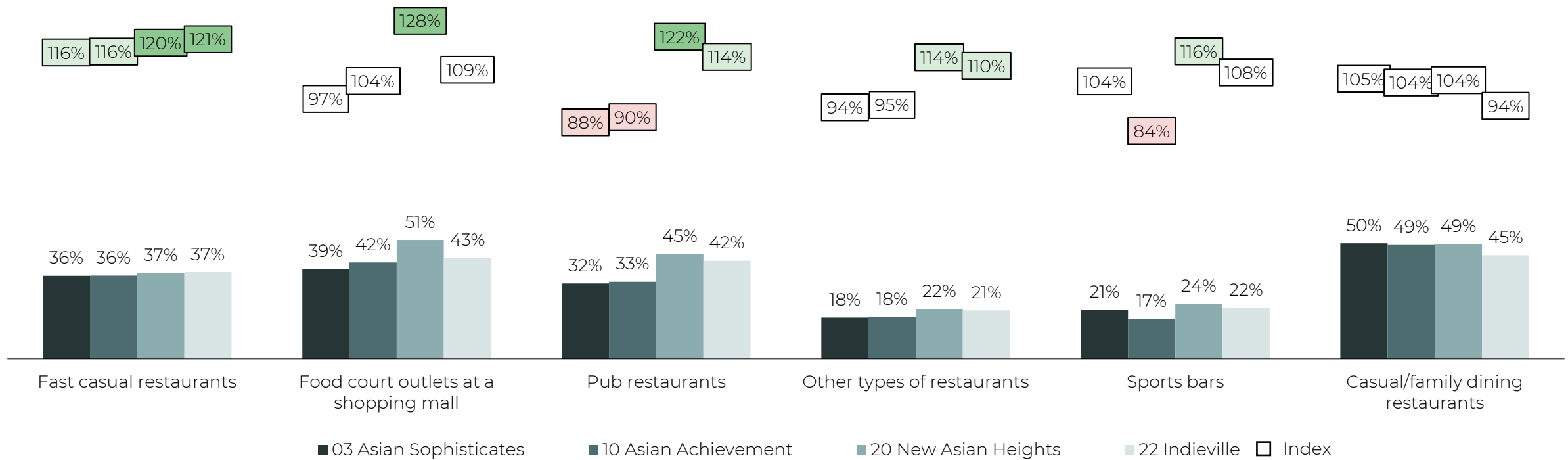
FOOD ORDERING METHODS USED (PAST MONTH)



# Restaurants: Types

Usage of different restaurant service types is also not highly differentiated for Niagara Falls visitors, with only the usage of Fast casual restaurants standing out slightly.

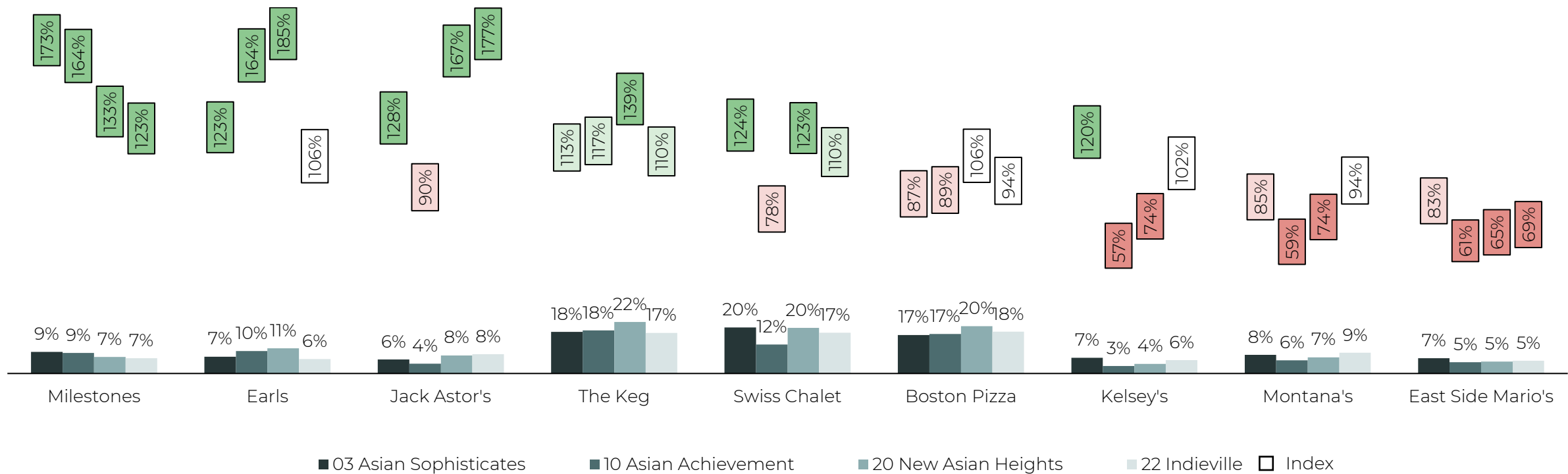
RESTAURANT SERVICE TYPE VISITED (PAST YEAR)



# Restaurants: Casual/ Family Restaurants

Casual restaurants that are more likely to enjoy Niagara Falls visitors' patronage include Milestones, Earls, and Jack Astor's. Montana's and East Side Mario's are less likely to be visited by Niagara Falls visitors.

CASUAL / FAMILY RESTAURANTS VISITED OR ORDERED FROM (PAST YEAR)

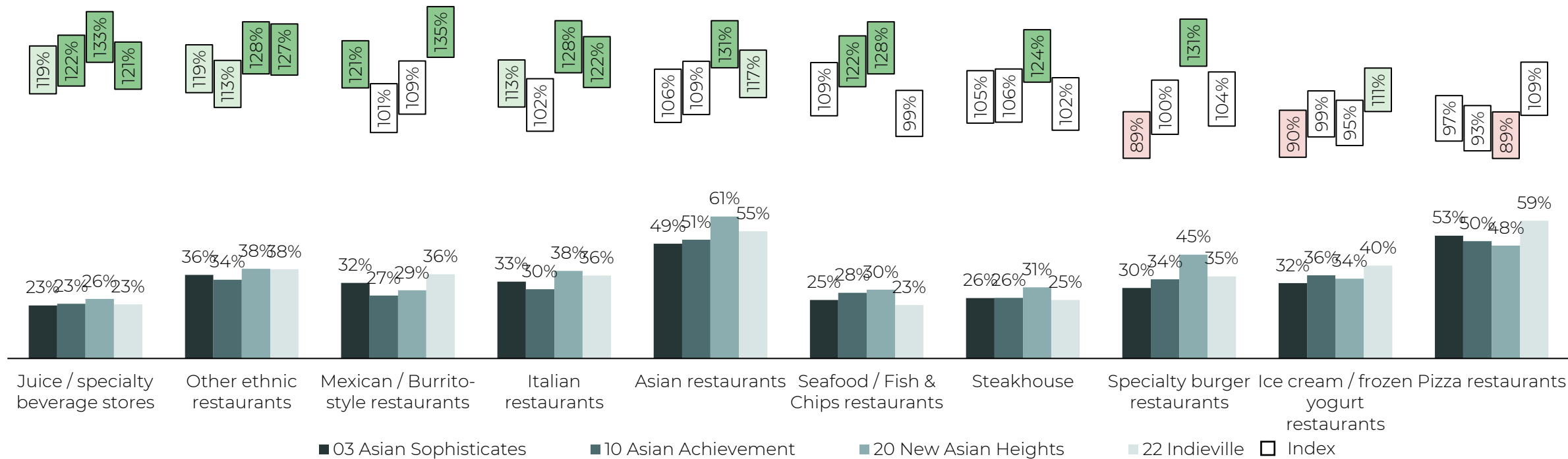




# Restaurants: Type of Cuisine

Niagara Falls visitors show a preference for international cuisine, over-indexing on Mexican, Italian, Asian, and other ethnicities' restaurants. Juice bars are also more likely to be popular with these visitors.

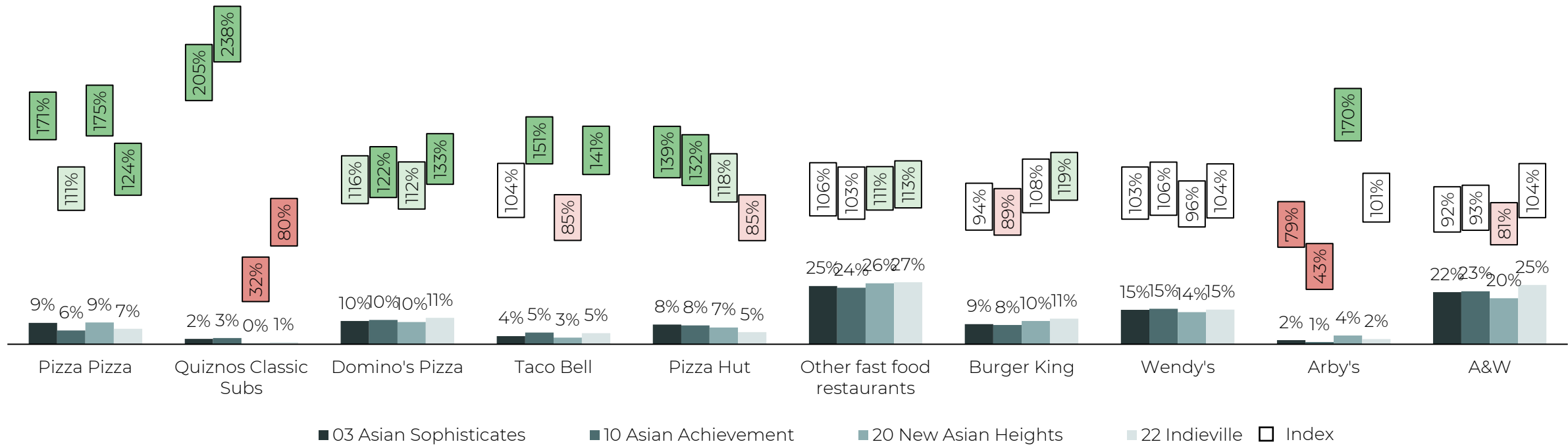
TOP 10 RESTAURANT FOOD TYPE VISITED (PAST YEAR)



# Restaurants: Fast Food Chains

Pizza is a popular fast food option with Niagara Falls visitors, with Pizza Pizza, Domino's, and Pizza Hut all over-indexing.

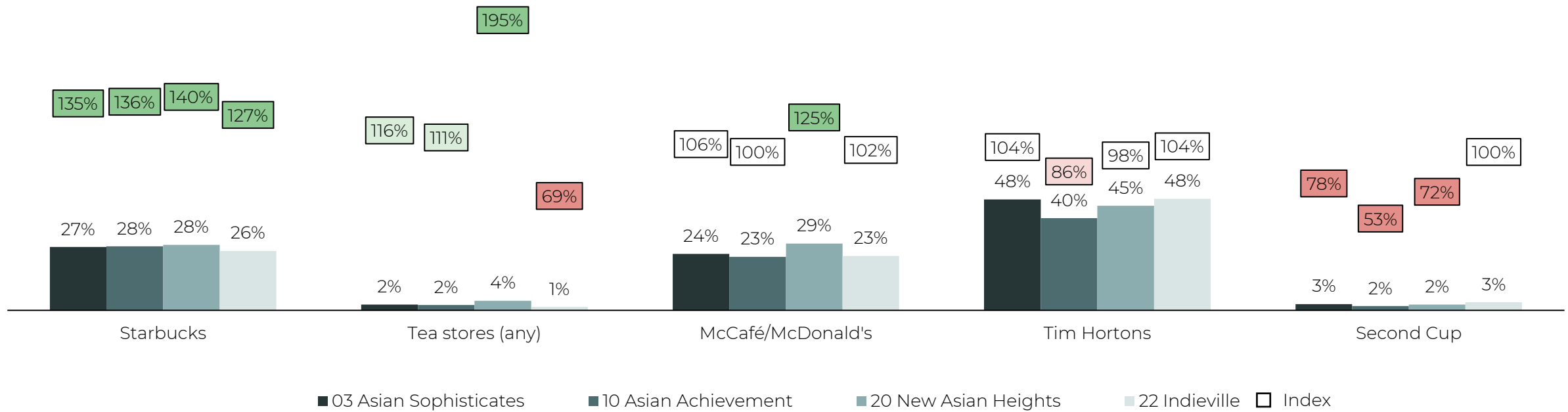
TOP 10 FAST FOOD RESTAURANTS VISITED OR ORDERED FROM (PAST MONTH)



# Restaurants: Coffee Shops

Starbucks is a clear favourite for coffee among Niagara Falls visitors, while McDonald's and Tim Hortons have an equal likelihood to be visited compared to non-visitors of Niagara Falls.

COFFEE / DONUT SHOPS VISITED OR ORDERED FROM (PAST MONTH)





# Section 3: Ottawa

## Key Segments:

- **Old Town Roads:** Older, lower-middle-income town couples and singles
- **Backcountry Boomers:** Rural, lower-middle-income older couples and singles
- **All-Terrain Families:** Younger and middle-aged suburban families





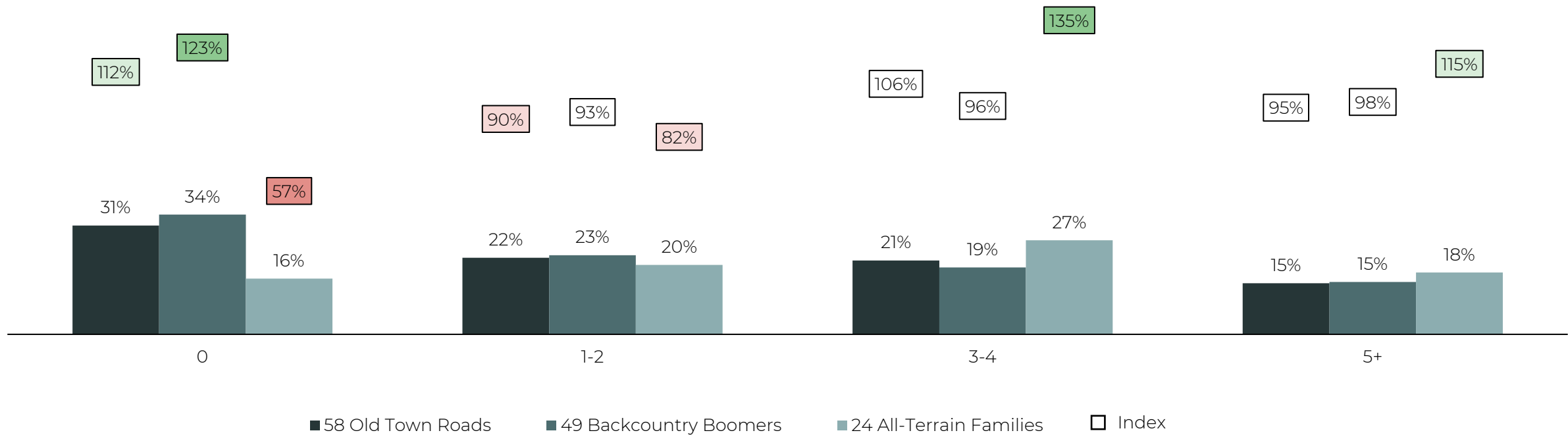
# Travel Behaviour

- Ottawa visitors are more likely to not take out-of-town vacations compared to non-visitors. There is however some indication that they spend more than non-visitors when they do travel for vacation.
- Ottawa visitors display a likelihood for more frequent business travel, both by air and car. These trips are more likely to be short-stay trips.
- Top vacation destinations for Ottawa visitors within Canada include Cape Breton Island, Prince Edward Island, Newfoundland and Labrador, Nova Scotia, and Jasper.
- US vacation destinations for Ottawa visitors are more likely to include Boston, the Midwest, Alaska, Los Angeles, and Hawaii.
- The most likely global vacation destinations for Ottawa visitors include Cuba, France, Africa, Central/South America, and Mexico.
- Ottawa visitors are more likely to use the website of an airline or hotel when planning their travel. They are less likely to make use of OTAs.
- More likely accommodation options for Ottawa visitors when on vacation include cruise ships, RVs and campers, motels, staying with friends or relatives, and bed and breakfasts.
- Ottawa visitors' airline preference include Air Canada and West Jet. They are also more likely to make use of smaller or lesser-known Canadian airlines.
- There is a higher-than-average usage of car rental and traditional taxi services among Ottawa visitors.

# Travel Behaviour: Overall Frequency of Trips

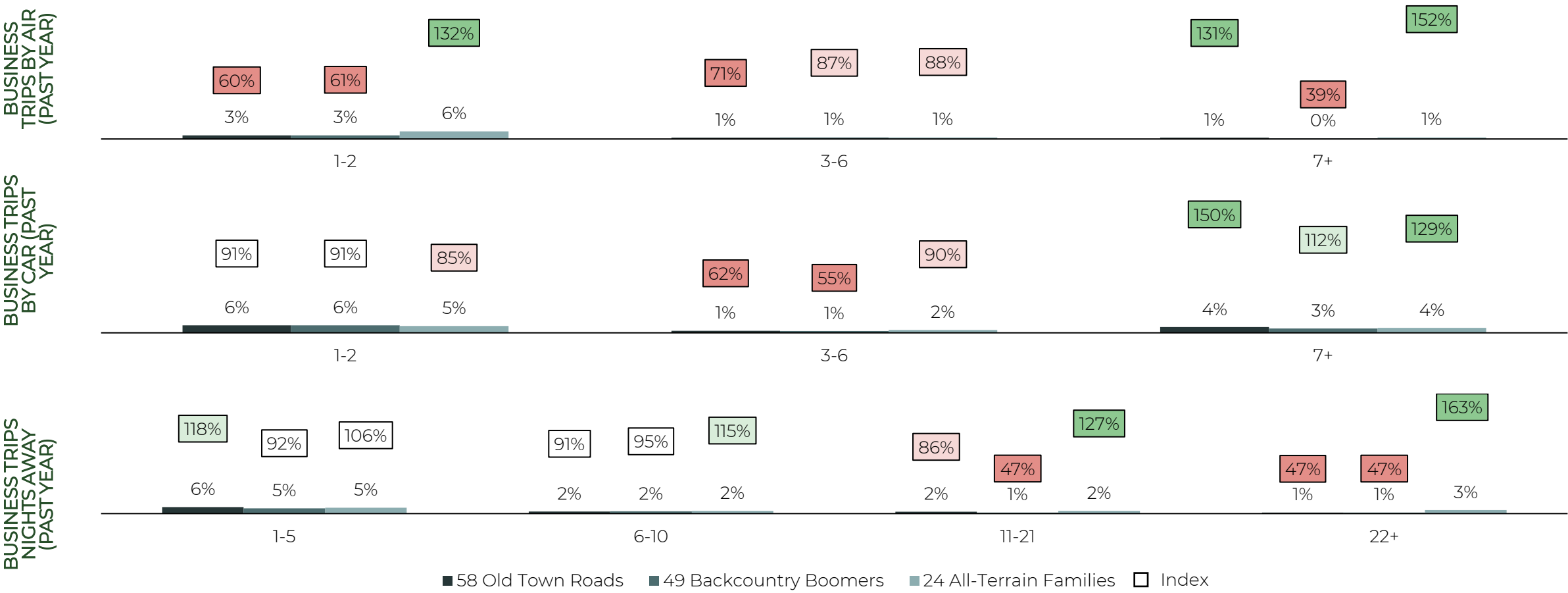
Ottawa visitors are more likely to not take out-of-town vacations compared to non-visitors.

## OUT-OF-TOWN VACATIONS (PAST 3 YEARS)



# Travel Behaviour: Frequency of Business Trips

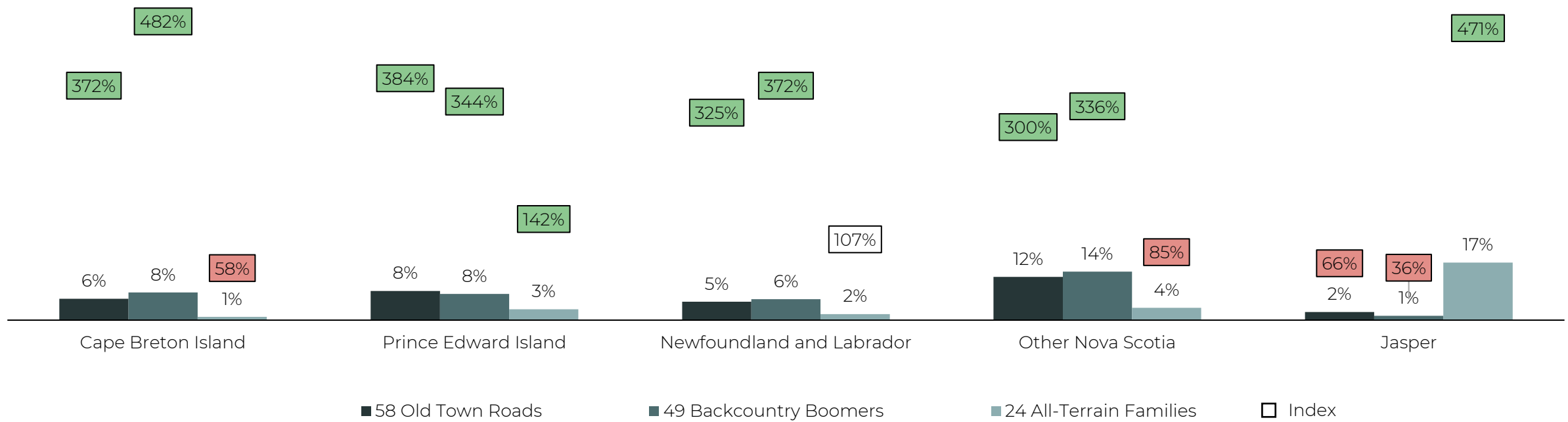
Ottawa visitors display a likelihood for more frequent business travel, both by air and car. These trips are more likely to be short-stay trips.



# Travel Behaviour: Canadian Destinations

Top vacation destinations for Ottawa visitors within Canada include Cape Breton Island, Prince Edward Island, Newfoundland and Labrador, Nova Scotia, and Jasper.

TOP 5 CANADIAN VACATION DESTINATIONS VISITED (PAST 3 YEARS)

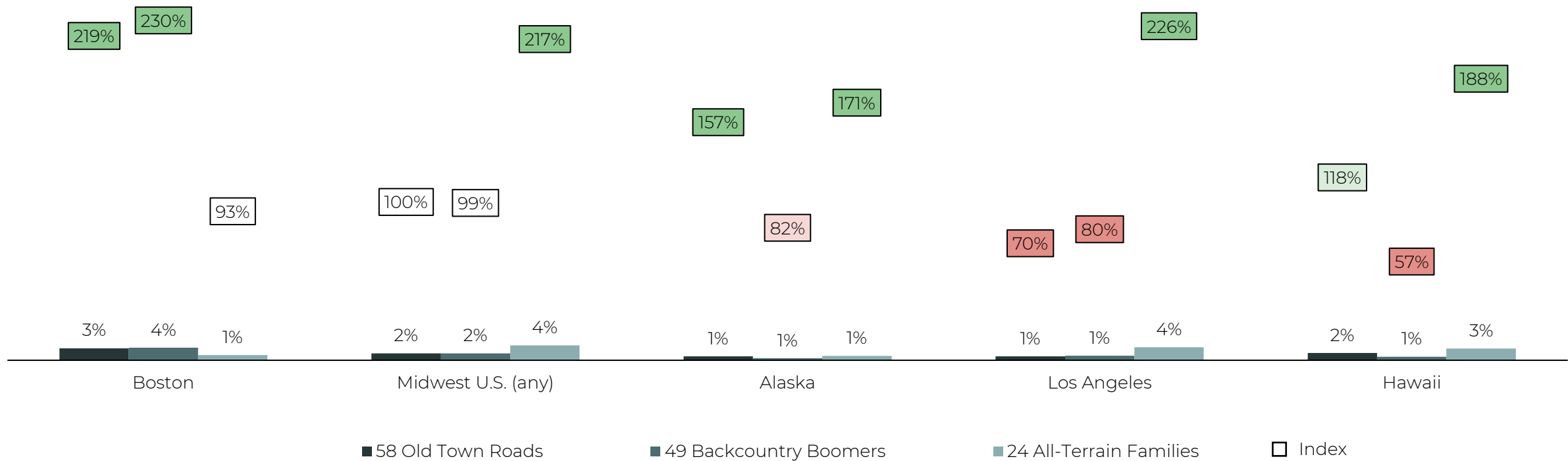




# Travel Behaviour: U.S. Destinations

US vacation destinations for Ottawa visitors are more likely to include Boston, the Midwest, Alaska, Los Angeles, and Hawaii.

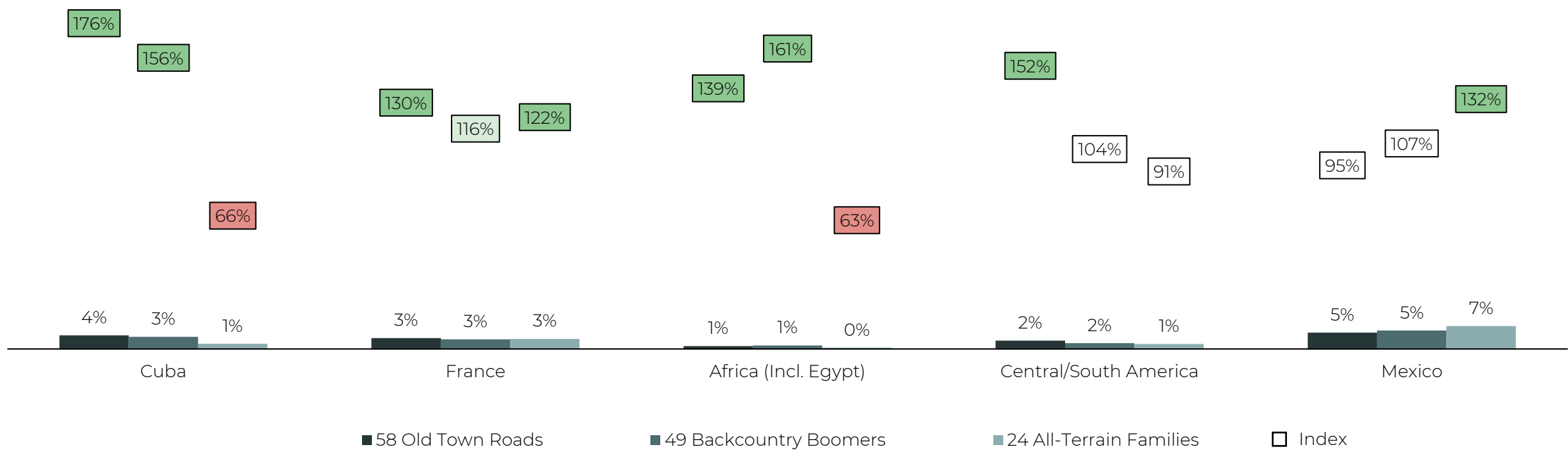
TOP 5 USA VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: Global Destinations

The most likely global vacation destinations for Ottawa visitors include Cuba, France, Africa, Central/South America, and Mexico.

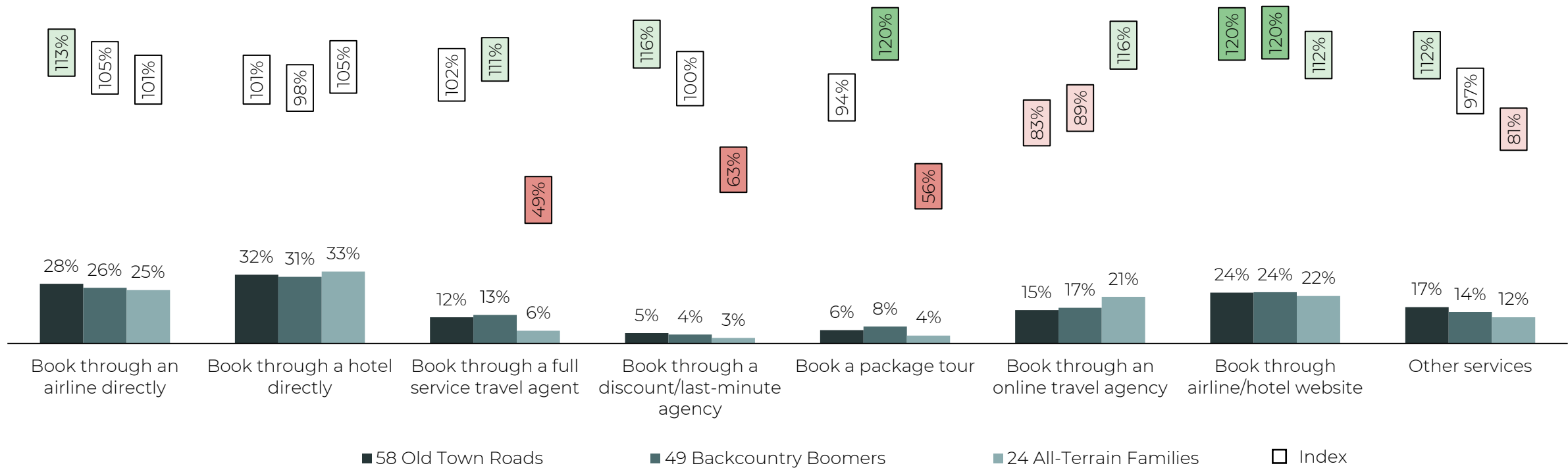
TOP 5 GLOBAL VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: Booking Channels

Ottawa visitors are more likely to use the website of an airline or hotel when planning their travel.

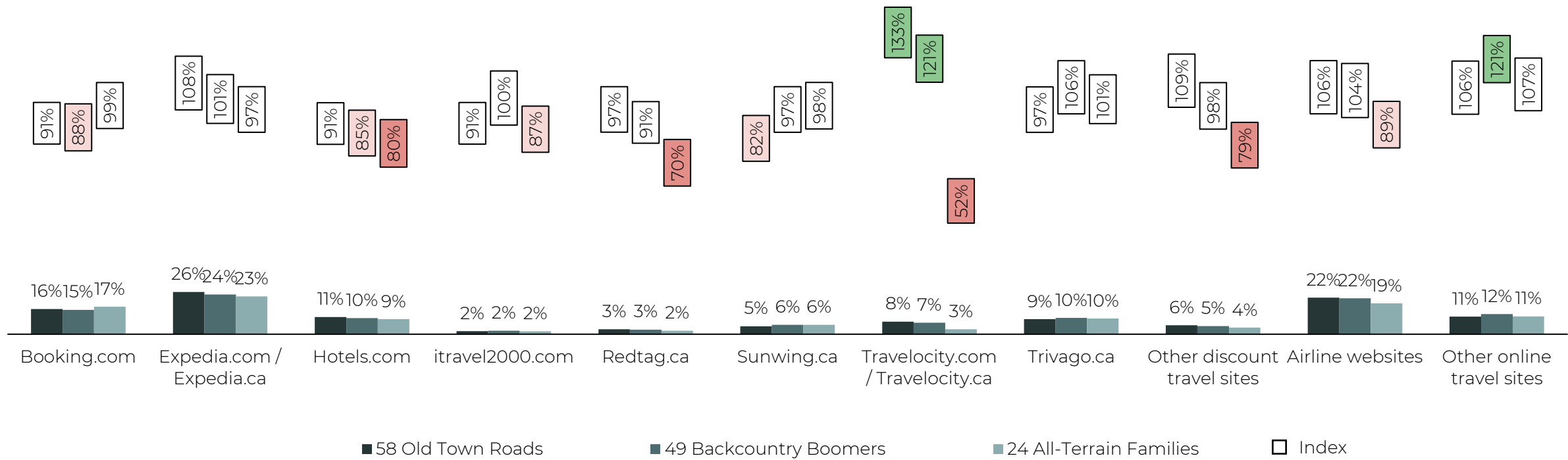
VACATION PLANNING USED (PAST 3 YEARS)



# Travel Behaviour: Online Planning & Booking

Ottawa visitors are generally less likely to make use of OTAs, with only Travelocity standing out as an OTA that is more likely to be used.

ONLINE TRAVEL SERVICES VISITED (PAST YEAR)

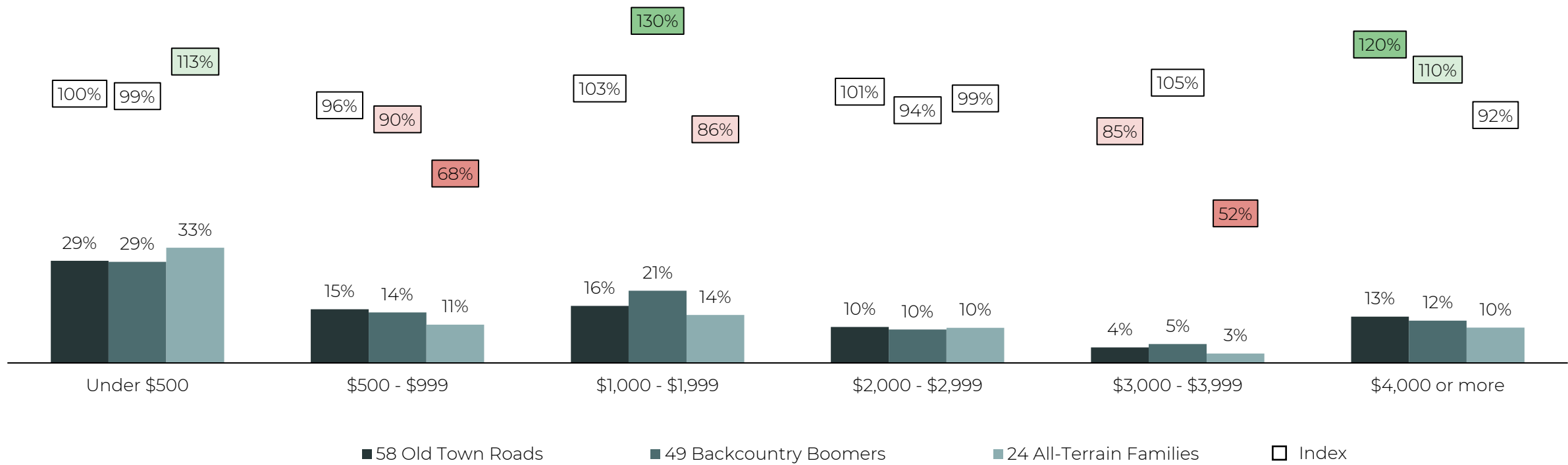




# Travel Behaviour: Spending

There is some indication that Ottawa visitors spend more than non-visitors when they travel for vacation.

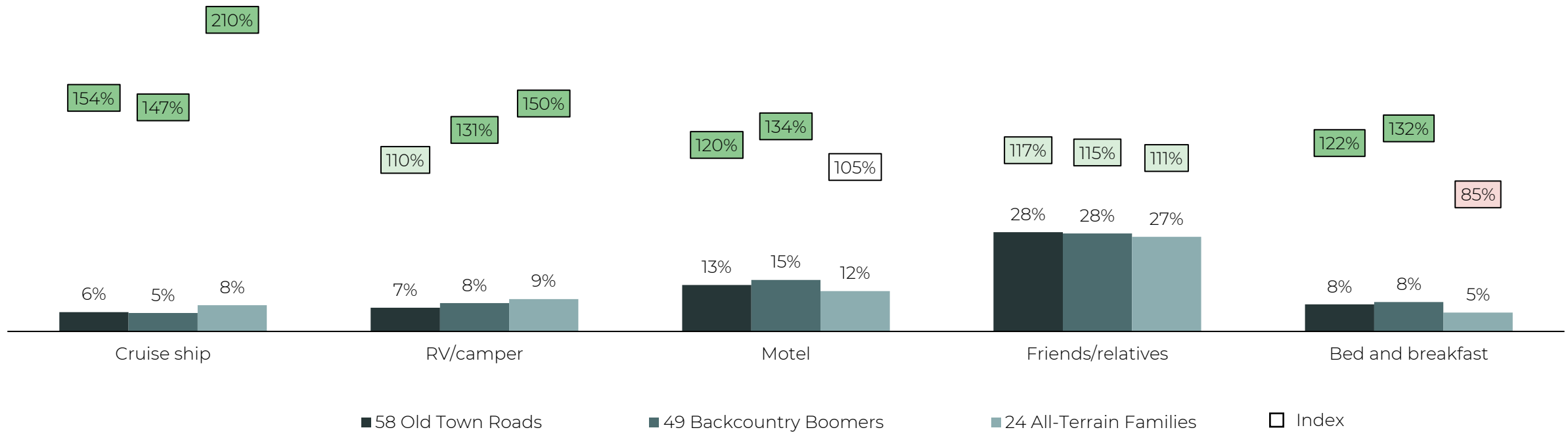
## LAST VACATION SPENDING



# Travel Behaviour: Accommodation

More likely accommodation options for Ottawa visitors when on vacation include cruise ships, RVs and campers, motels, staying with friends or relatives, and bed and breakfasts.

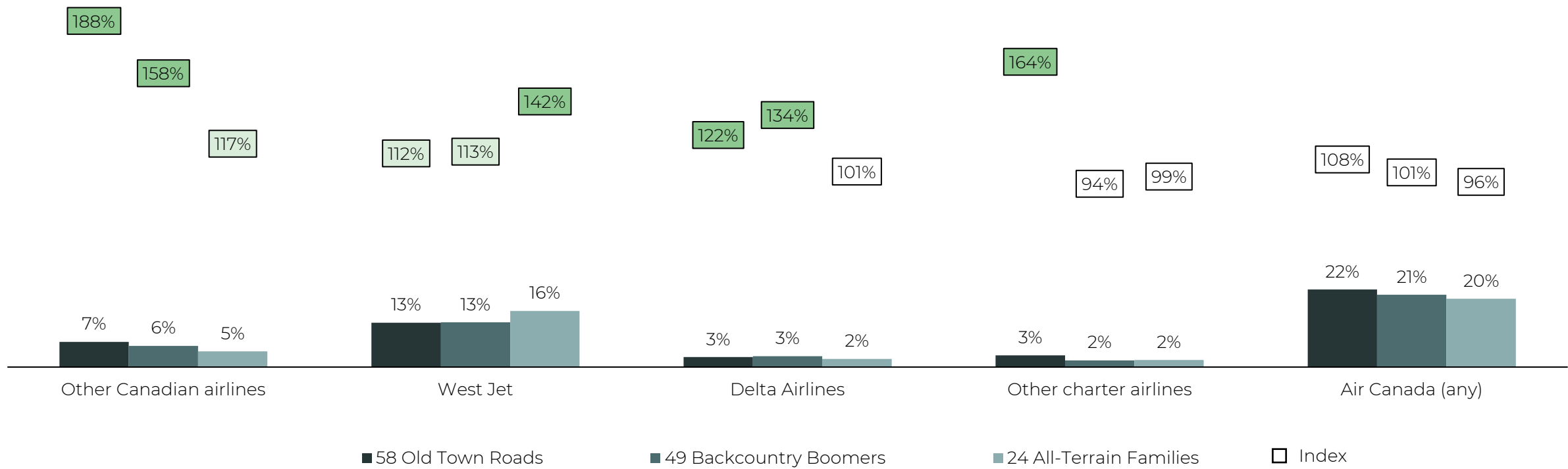
TOP 5 VACATION ACCOMMODATIONS USED (PAST 3 YEARS)



# Travel Behaviour: Airlines

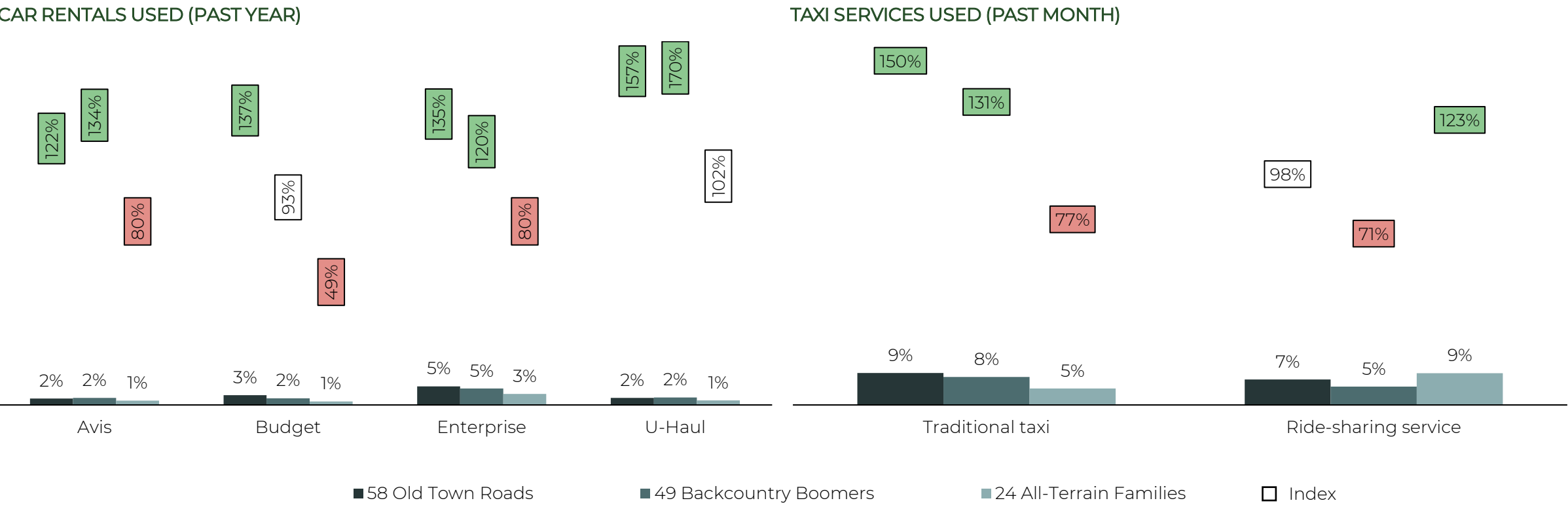
Ottawa visitors' airline preference include Air Canada and West Jet. They are also more likely to make use of smaller or lesser-known Canadian airlines.

TOP 5 AIRLINES FLOWN (PAST YEAR)



# Travel Behaviour: Car Rental & Taxi Service

There is a higher-than-average usage of car rental and traditional taxi services among Ottawa visitors.





# 3B

## Psychographics

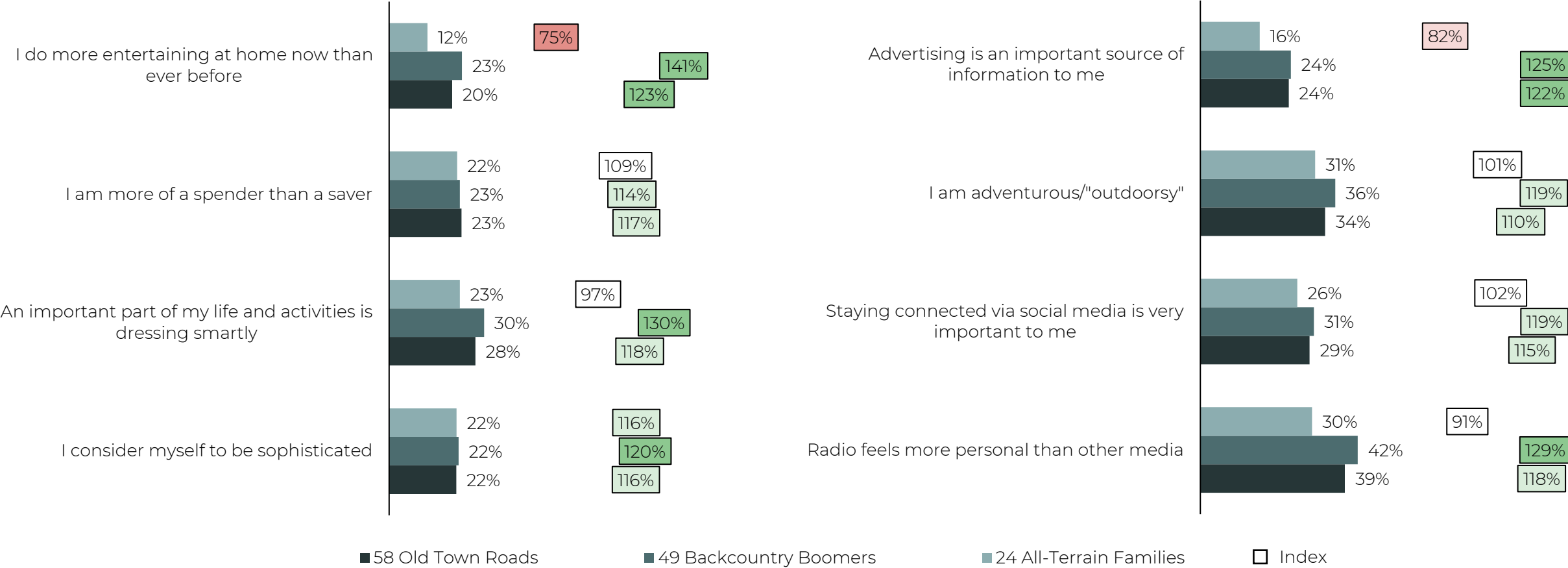
- Ottawa visitors are defined by viewing themselves as sophisticated (sophistication, dressing smartly), and have a high likelihood to entertain at home. Advertising and social media are important to them, while there is a certain fondness for radio as a medium.
- Life events that differentiate Ottawa visitors include events that point to an older demographic, such as divorce, making their last mortgage payment, having grandchildren, and parents moving into retirement homes.
- Ottawa visitors are more likely to be members of the following loyalty programs: SCENE, Tim Horton's, Canadian Tire Triangle, Air Miles, and Aeroplan among others.



# Psychographics: Top Statements

Ottawa visitors are defined by viewing themselves as sophisticated (sophistication, dressing smartly), and have a high likelihood to entertain at home. Advertising and social media are important to them, while there is a certain fondness for radio as a medium.

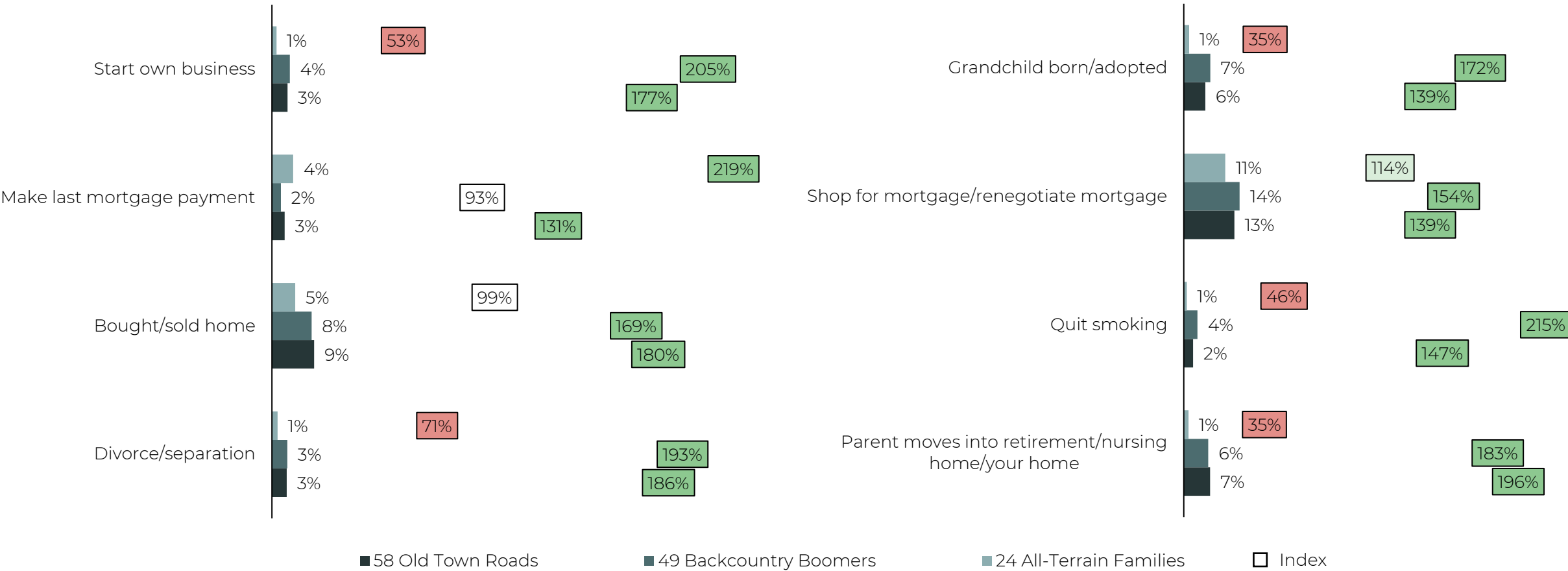
## TOP STATEMENTS AGREED WITH



# Psychographics: Life Events

Life events that differentiate Ottawa visitors include events that point to an older demographic, such as divorce, making their last mortgage payment, having grandchildren, and parents moving into retirement homes.

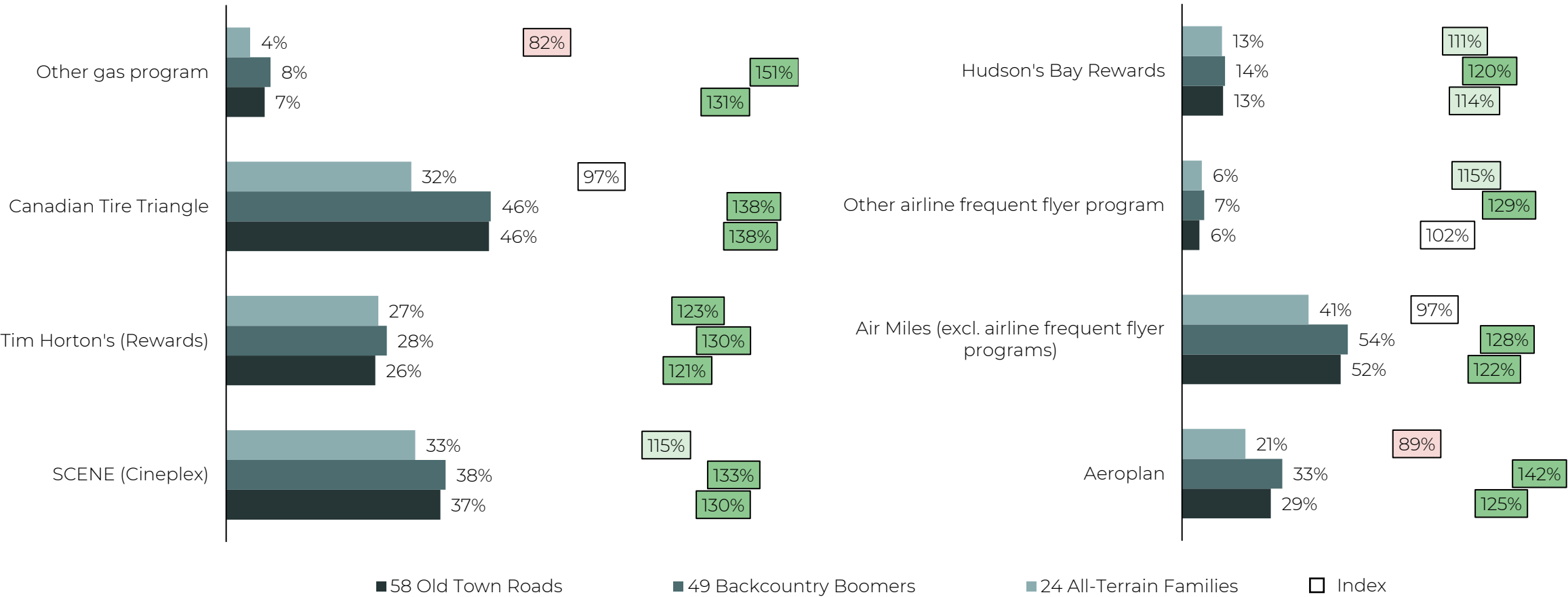
## TOP LIFE EVENTS HAPPENED (PAST 2 YEARS)



# Psychographics: Loyalty Programs

Ottawa visitors are more likely to be members of the following loyalty programs: SCENE, Tim Horton's, Canadian Tire Triangle, Air Miles, and Aeroplan among others.

## LOYALTY PROGRAMME MEMBERSHIP



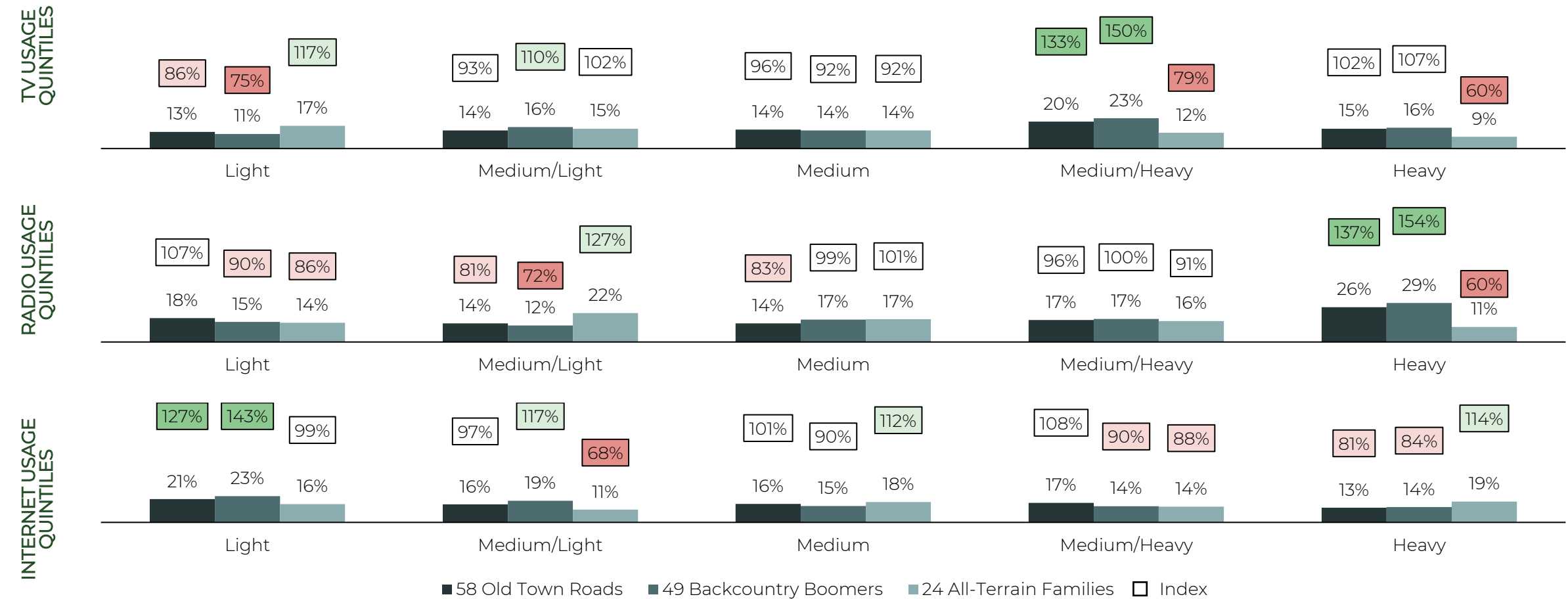


# Media Usage

- Ottawa visitors are more likely to be heavy consumers of radio as a medium. They also skew towards medium/heavy consumers of TV, and are more likely to be light consumers of digital media.
- There is a trend towards heavier consumption of magazines among Ottawa visitors, but they tend to be lighter consumers of newspapers.
- Social networks that over-index for Ottawa visitors include Pinterest and Facebook. Snapchat and Twitter (X) is also important to certain sub-segments of these visitors.
- Watching streaming content and using discount coupons are the two highest over-indexing online activities for Ottawa visitors.
- Ottawa visitors' TV watching preferences seem to indicate an older demographic in general.
- Out-of-home advertising is not highly noticed by Ottawa visitors, with many channels being noticed significantly below the average for non-visitors.

# Media Usage: By Medium

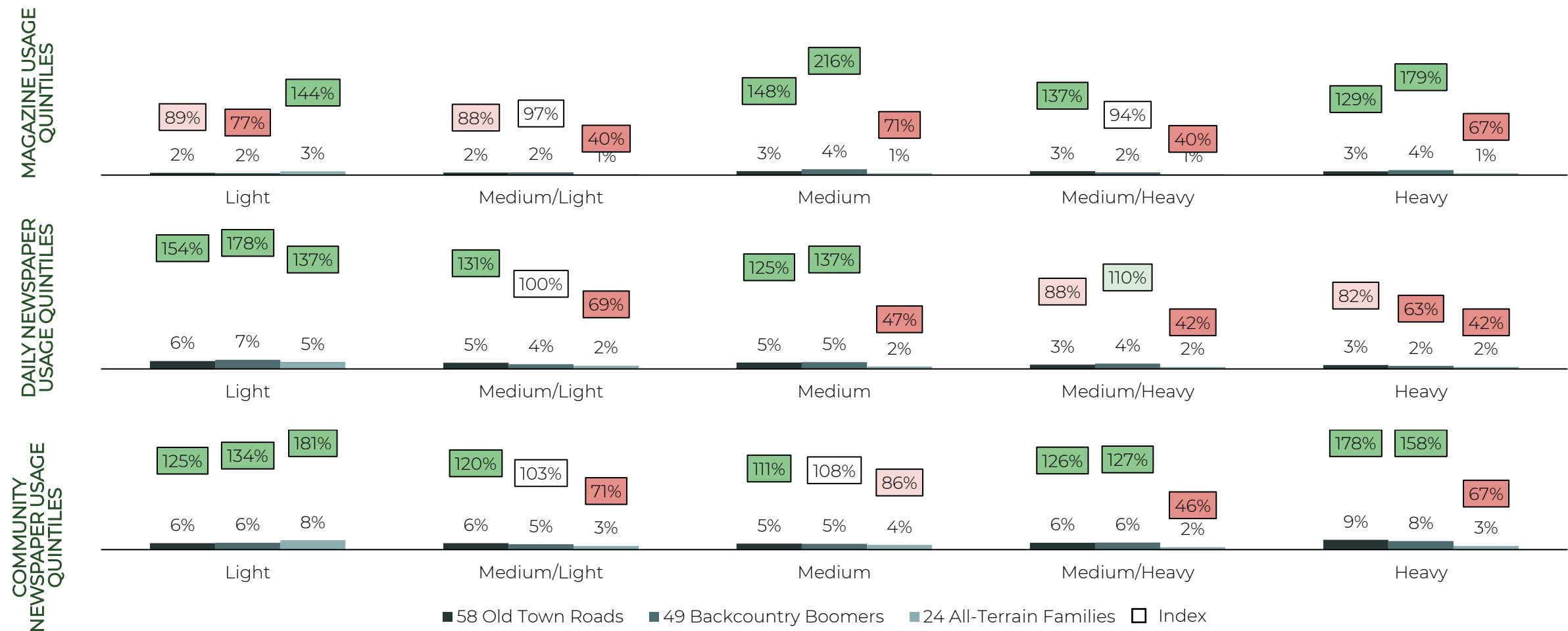
In-line with their psychographic profile, Ottawa visitors are more likely to be heavy consumers of radio as a medium. They also skew towards medium/heavy consumers of TV, and are more likely to be light consumers of digital media.





# Media Usage: By Medium

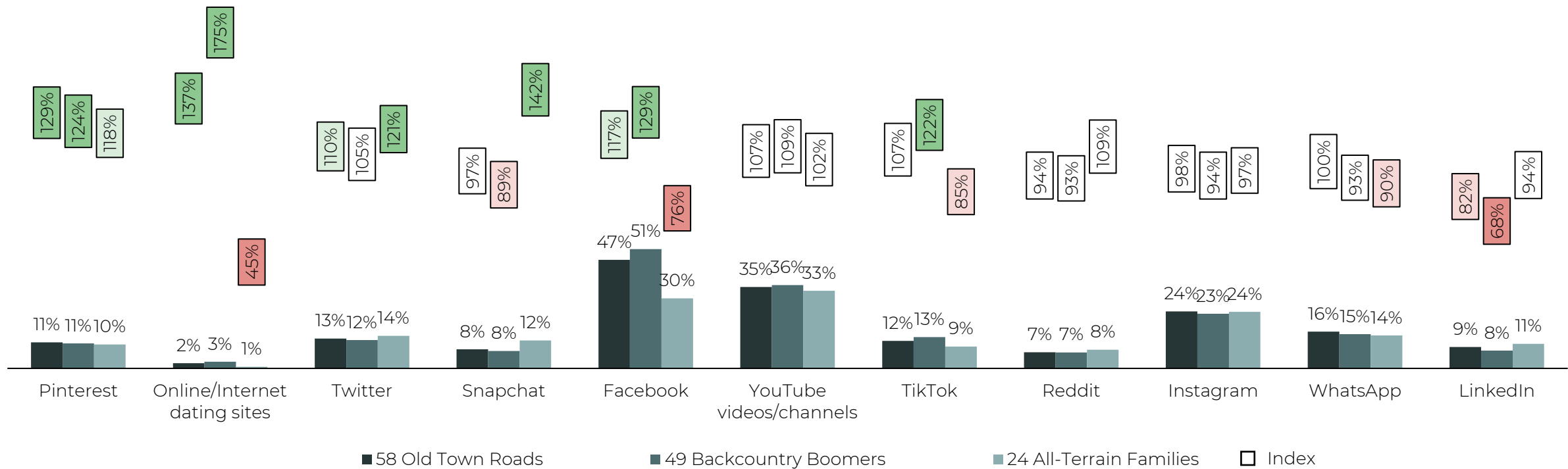
There is a trend towards heavier consumption of magazines among Ottawa visitors, but they tend to be lighter consumers of newspapers.



# Media Usage: Social Channels

Social networks that over-index for Ottawa visitors include Pinterest and Facebook. Snapchat and Twitter (X) is also important to certain sub-segments of these visitors.

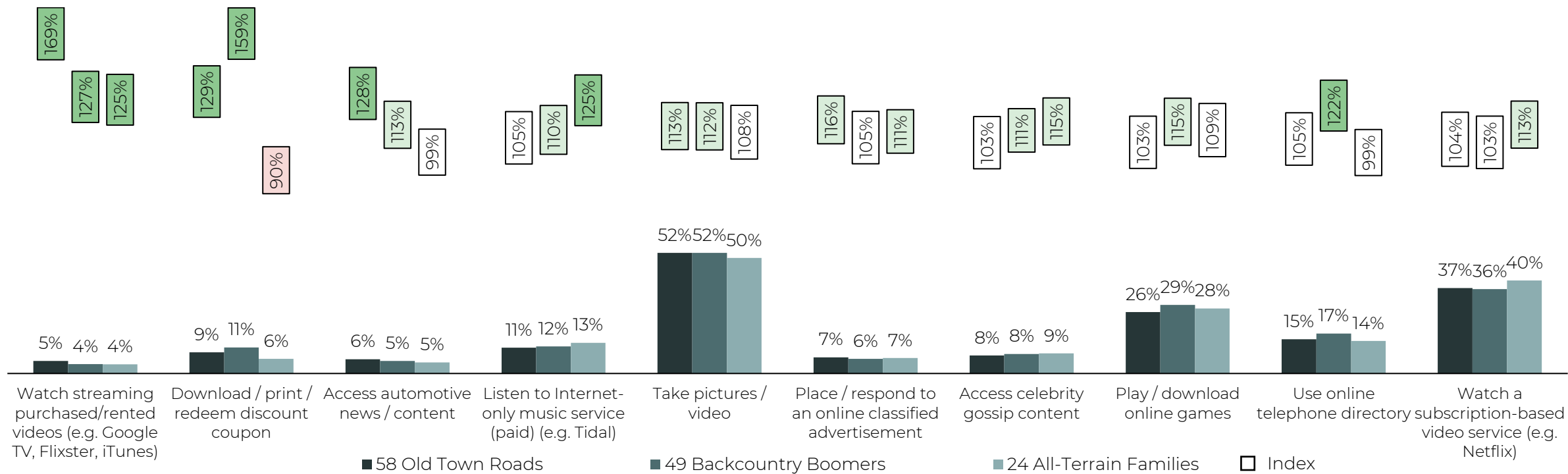
SOCIAL NETWORKS USED (PAST WEEK)



# Media Usage: Online Activities

Watching streaming content and using discount coupons are the two highest over-indexing online activities for Ottawa visitors. Their online behaviour in general does not differ significantly from non-visitors, however.

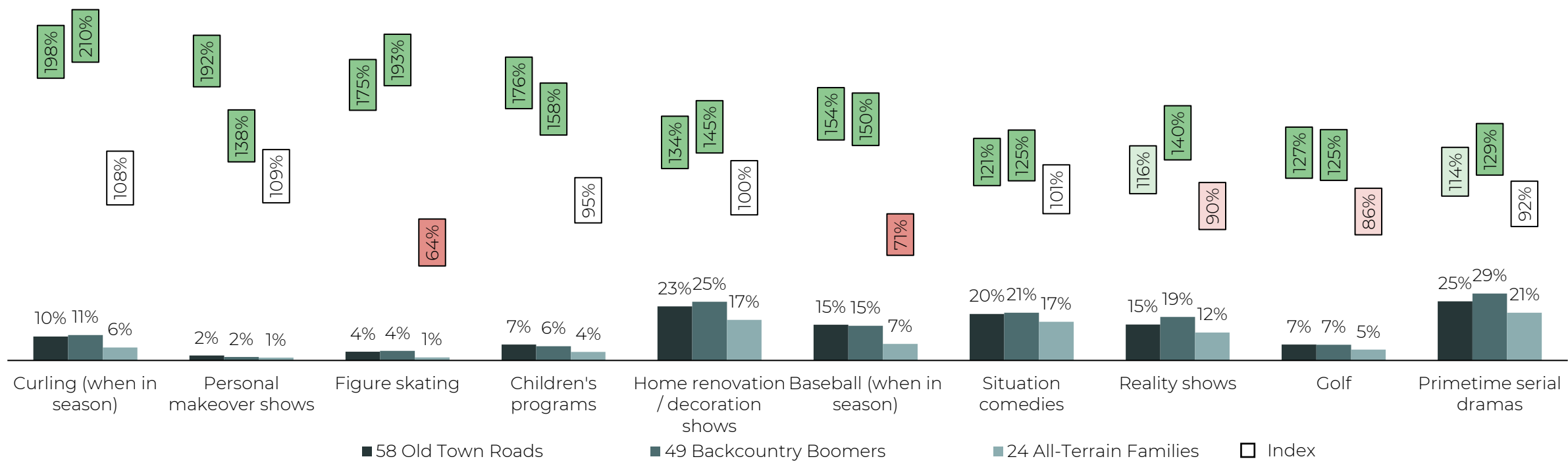
TOP 10 INTERNET ACTIVITIES (PAST WEEK)



# Media Usage: Top TV Programming

Ottawa visitors are much more likely than non-visitors to watch Curling on TV when in season. Their TV watching preferences seem to indicate an older demographic in general.

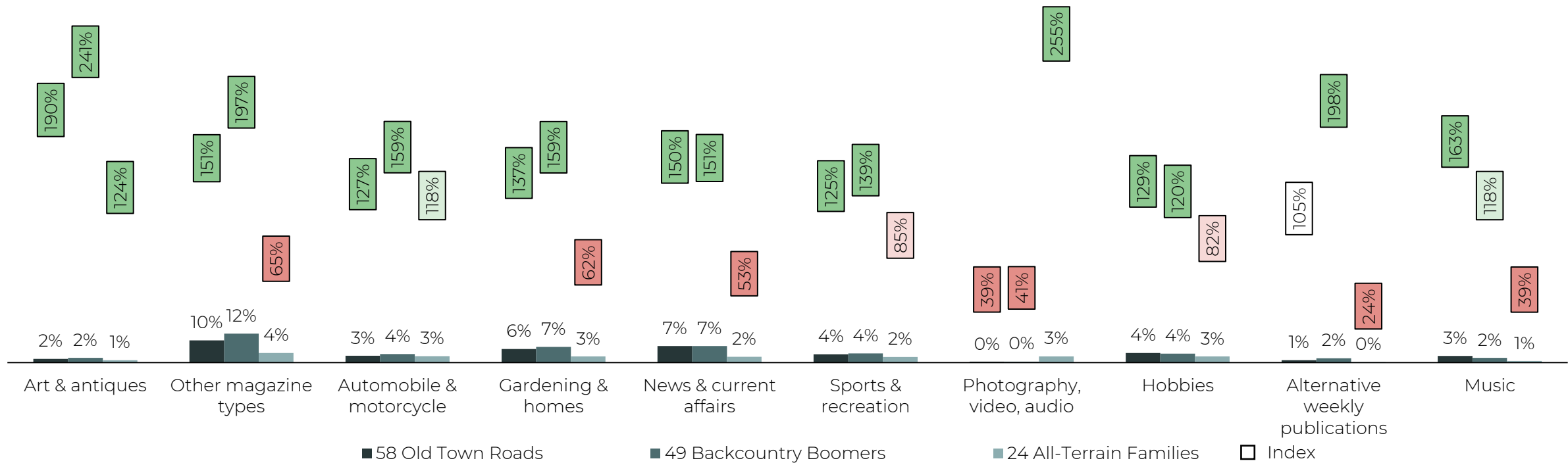
TOP 10 TV PROGRAMS WATCHED (AVERAGE WEEK)



# Media Usage: Magazines

Ottawa visitors are more likely than non-visitors to read magazines about arts and antiques, automobiles, gardening, and current affairs.

TOP 10 MAGAZINES (PRINT OR DIGITAL) READ (PAST MONTH)

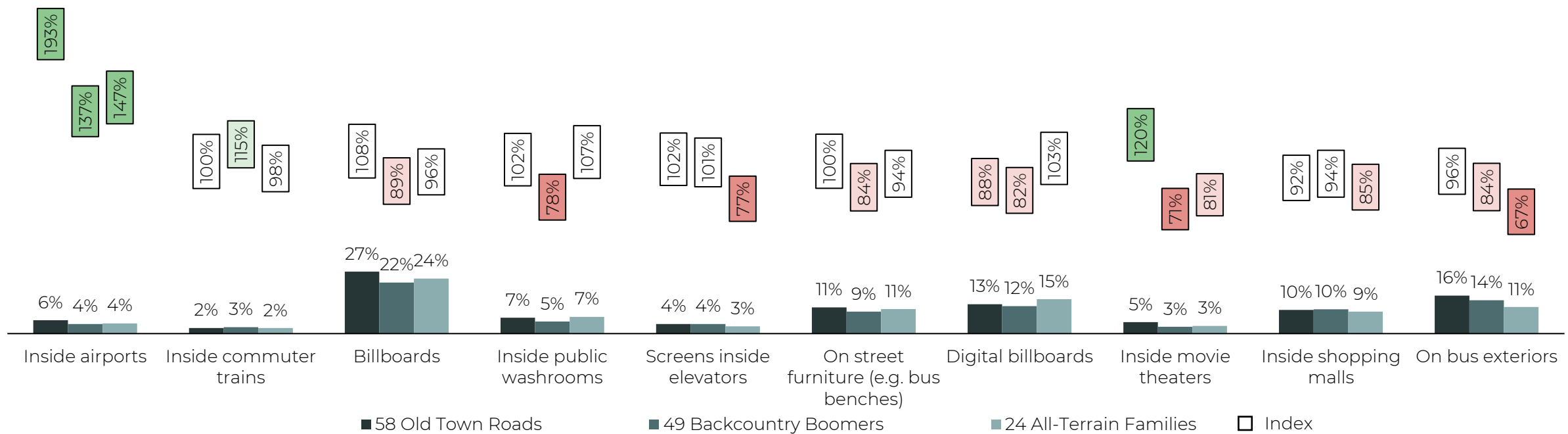




# Media Usage: Out of Home

Out-of-home advertising is not highly noticed by Ottawa visitors, with many channels being noticed significantly below the average for non-visitors.

TOP 10 OUTDOOR ADVERTISING NOTICED (PAST WEEK)





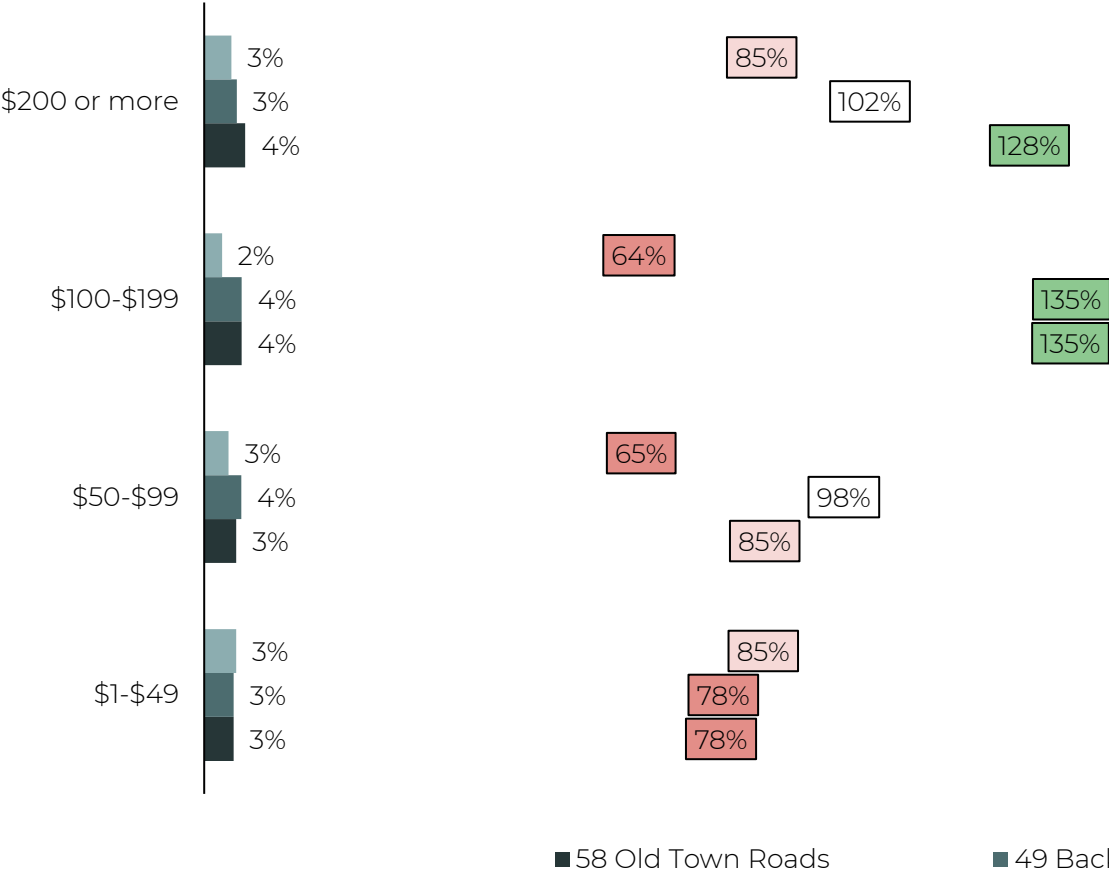
# Restaurants

- Ottawa visitors tend to spend higher than average for restaurant outings for business purposes, but are more likely to spend lower amounts when it is for personal or pleasure purposes.
- There is a higher-than-average preference for drive throughs and eat-in restaurants among Ottawa visitors, while delivery services (online, home delivery, and meal kits) are less preferred.
- Ottawa visitors show a higher-than-average preference for pub restaurants, with some sub-segments also showing a preference for food courts within malls.
- Ottawa visitors show a liking for seafood/fish & chips restaurants, with some sub-segments also showing a preference for steakhouses and juice bars. International cuisine seems to be less popular with these visitors.
- While incidence is low, Ottawa visitors are more likely to show a preference for Second Cup and smaller Tea stores. Of the larger chains, Tim Hortons is the most preferred.

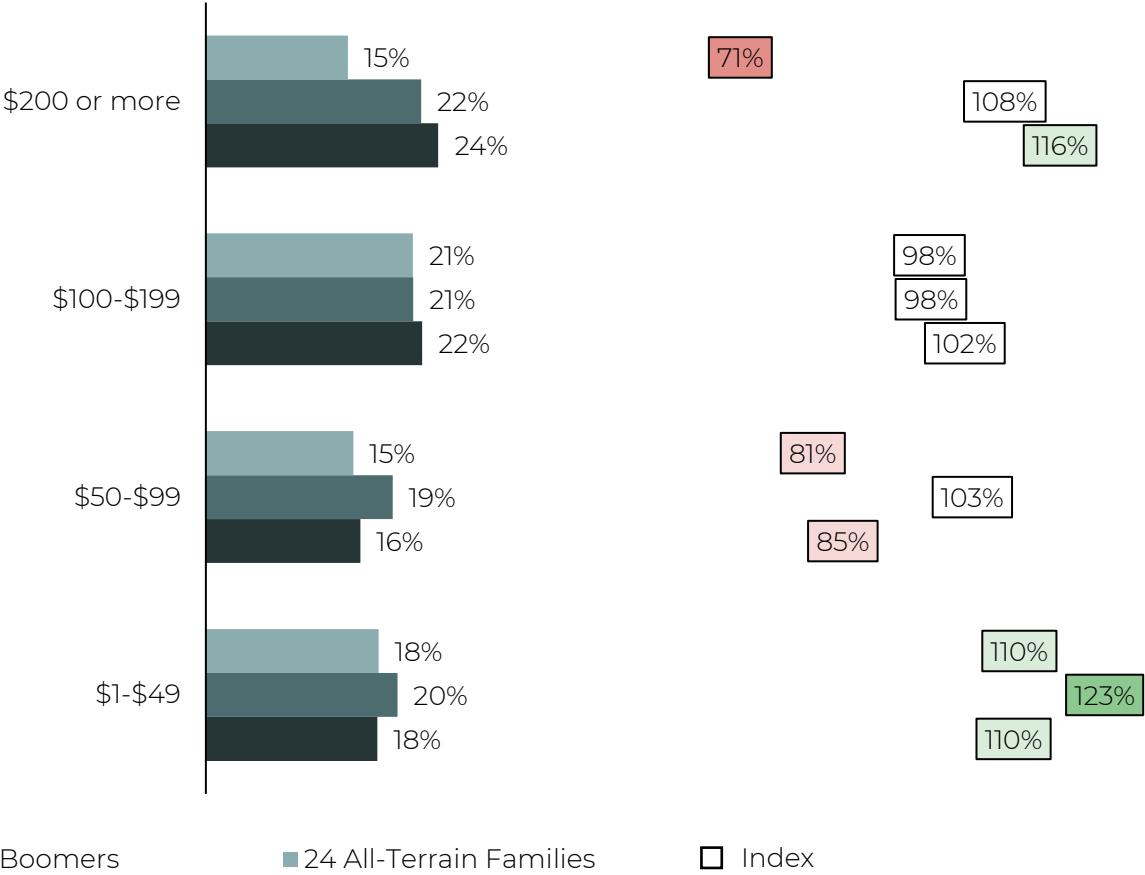
# Restaurants: Pleasure & Business Spending

Ottawa visitors tend to spend higher than average for restaurant outings for business purposes, but are more likely to spend lower amounts when it is for personal or pleasure purposes.

AMOUNT SPENT AT RESTAURANTS FOR BUSINESS (PAST MONTH)



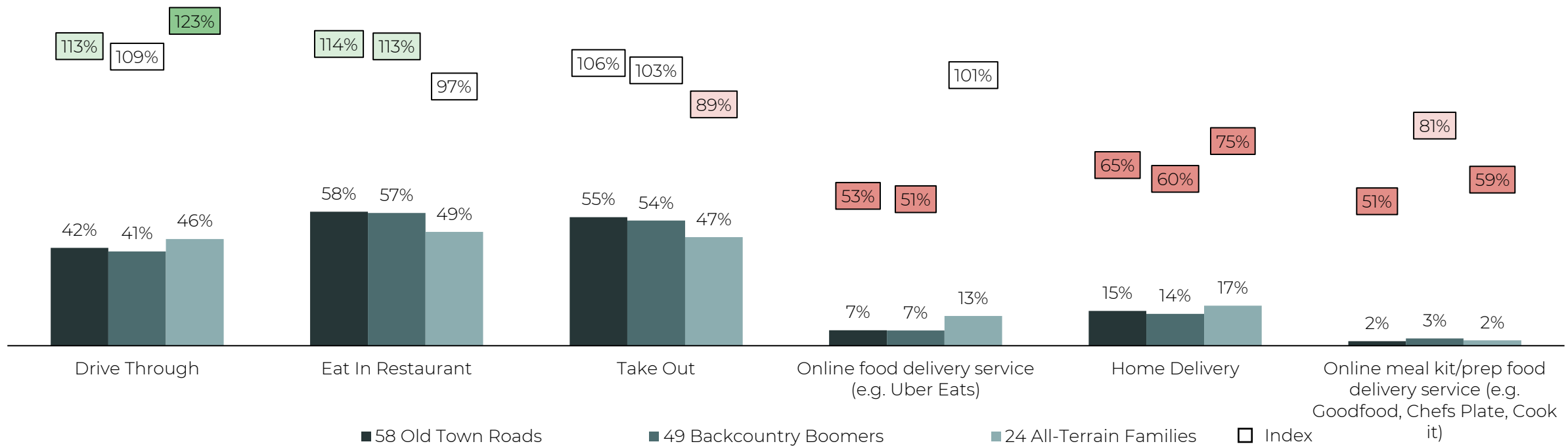
AMOUNT SPENT AT RESTAURANTS FOR PLEASURE (PAST MONTH)



# Restaurants: Types

There is a higher-than-average preference for drive throughs and eat-in restaurants among Ottawa visitors, while delivery services (online, home delivery, and meal kits) are less preferred.

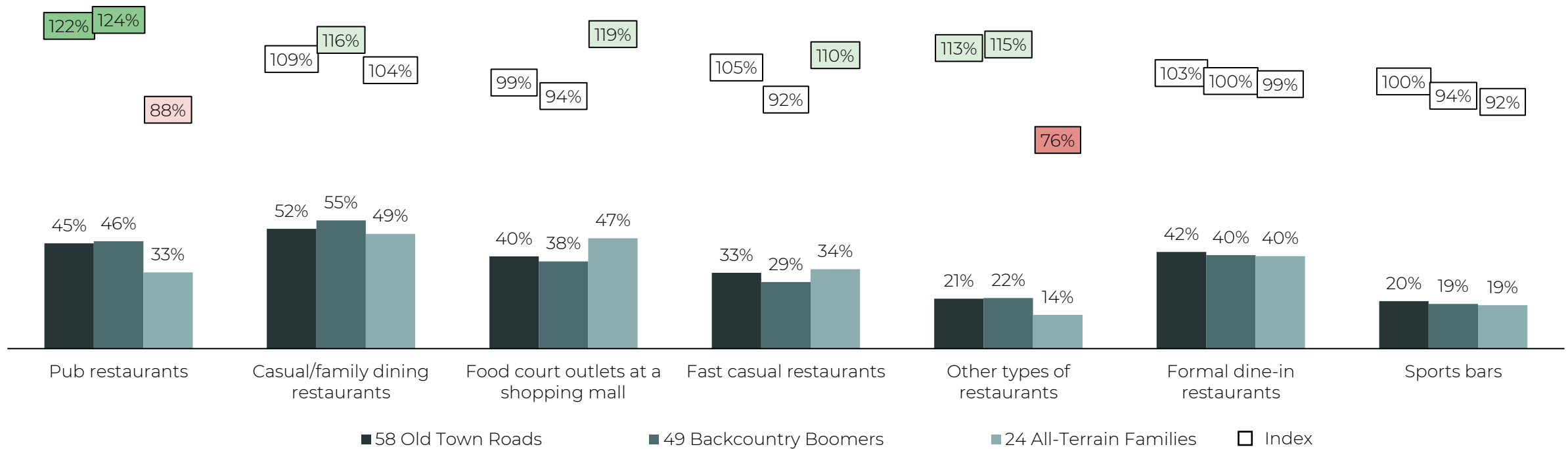
FOOD ORDERING METHODS USED (PAST MONTH)



# Restaurants: Types of Service

Ottawa visitors show a higher-than-average preference for pub restaurants, with some sub-segments also showing a preference for food courts within malls.

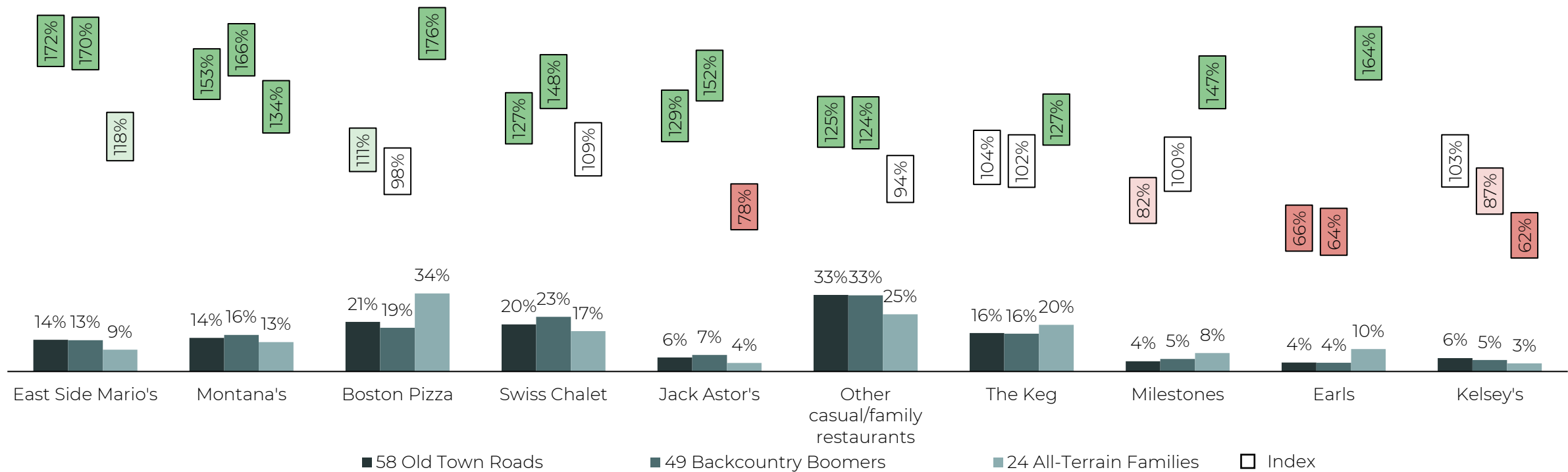
RESTAURANT SERVICE TYPE VISITED (PAST YEAR)



# Restaurants: Casual/ Family Restaurants

Key casual restaurants preferred by Ottawa visitors include East Side Mario's, Montana's, Boston Pizza, and Swiss Chalet. Milestones, Earls, and Kelsey's are less likely to be frequented by these visitors.

CASUAL / FAMILY RESTAURANTS VISITED OR ORDERED FROM (PAST YEAR)

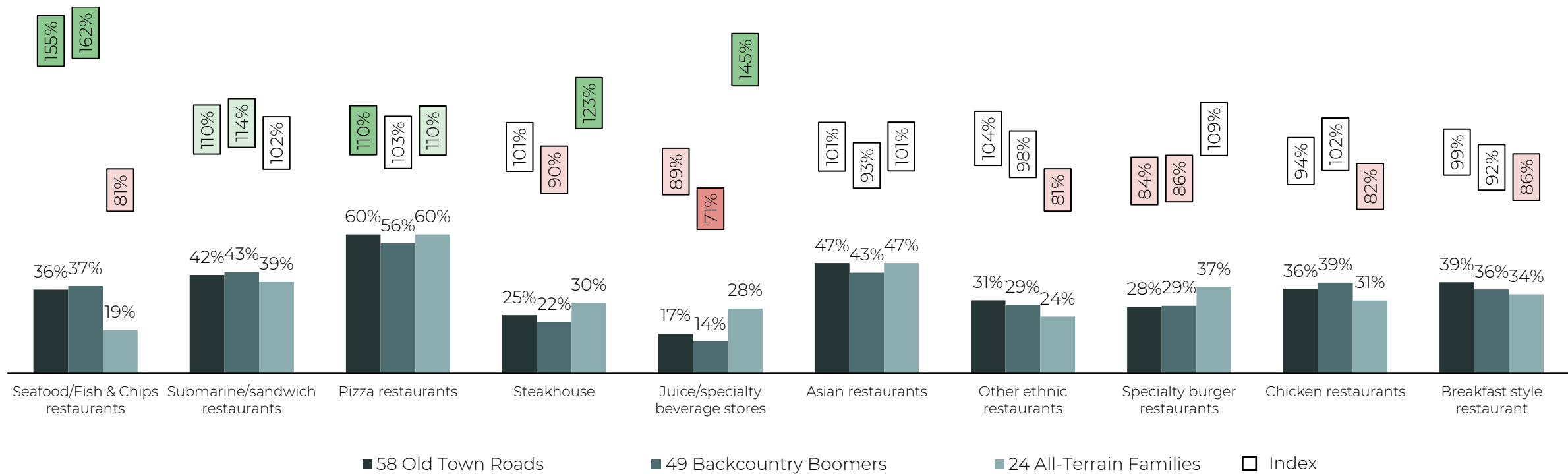




# Restaurants: Type of Cuisine

Ottawa visitors show a liking for seafood/fish & chips restaurants, with some sub-segments also showing a preference for steakhouses and juice bars. International cuisine seems to be less popular with these visitors.

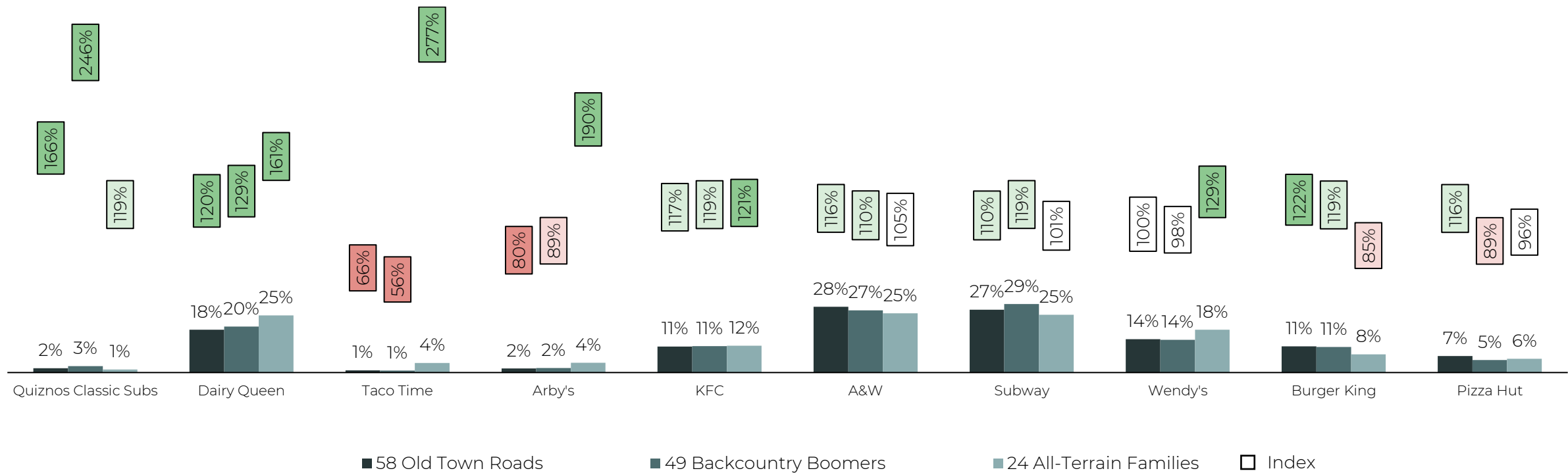
TOP 10 RESTAURANT FOOD TYPE VISITED (PAST YEAR)



# Restaurants: Fast Food Chains

Fast food chains preferred by Ottawa visitors include Quiznos, Dairy Queen, and KFC.

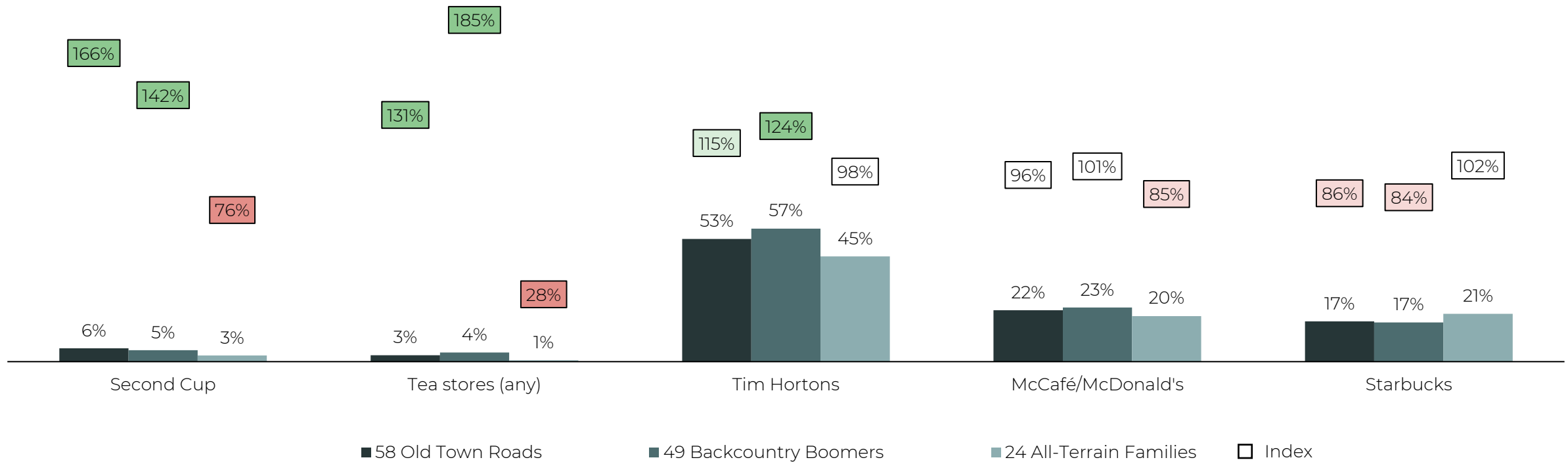
TOP 10 FAST FOOD RESTAURANTS VISITED OR ORDERED FROM (PAST MONTH)



# Restaurants: Coffee Shops

While incidence is low, Ottawa visitors are more likely to show a preference for Second Cup and smaller Tea stores. Of the larger chains, Tim Hortons is the most preferred.

COFFEE / DONUT SHOPS VISITED OR ORDERED FROM (PAST MONTH)





# Section 4: Toronto

## Key Segments:

- **Suburban Sports:** Upper-middle-income, younger and middle-aged suburbanites
- **Friends & Roomies:** Young, culturally diverse lower-middle-income city dwellers
- **Backcountry Boomers:** Rural, lower-middle-income older couples and singles
- **Old Town Roads:** Older, lower-middle-income town couples and singles



# Travel Behaviour

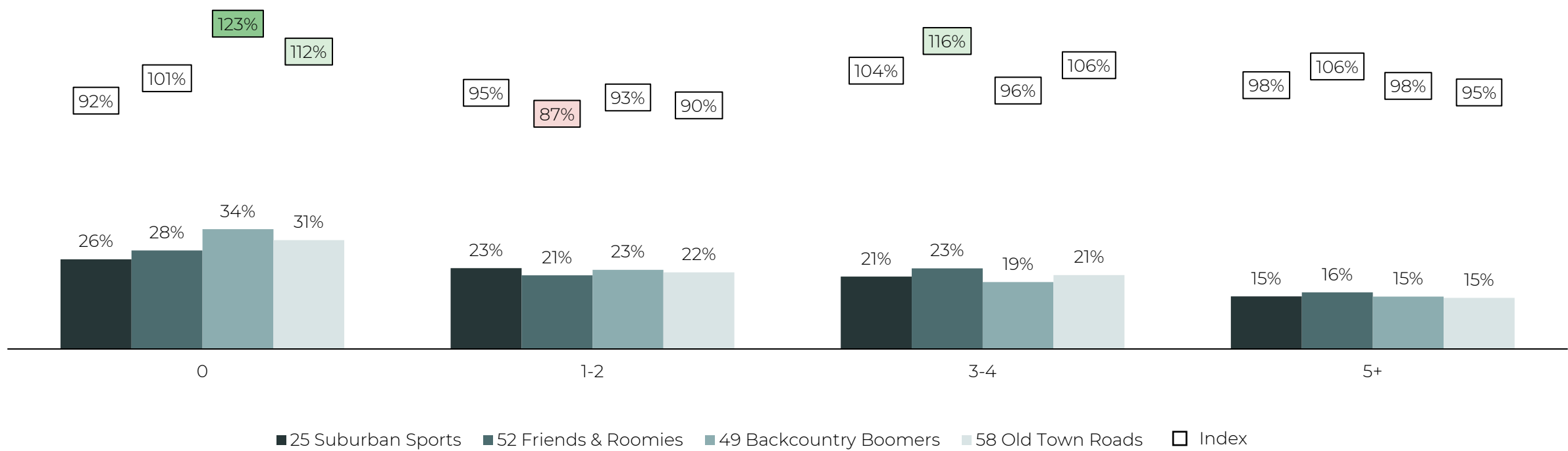
- Toronto visitors do not display any specific trends in their out-of-town vacationing behaviours, following a similar pattern to that of non-visitors.
- Toronto visitors are more likely to not use air travel for business, but display a tendency towards short-stay business trips using car travel.
- Key vacation destinations within Canada for Toronto visitors include Cape Breton Island, Prince Edward Island, Newfoundland and Labrador, Nova Scotia, and New Brunswick.
- US vacation destinations for Toronto visitors include Boston, Western states, Hawaii, Alaska, and the US Midwest.
- Global vacation destinations for Toronto visitors are more likely to be Africa, Australia/New Zealand, Central/South America, Cuba, and other smaller destinations.
- Toronto visitors are more likely to book through an airline/hotel website when planning their vacation. OTAs are also favoured by certain sub-segments. Travelocity is by far the most significant OTA that Toronto visitors are more likely to use.
- Accommodations used by Toronto visitors when going on vacation include cruise ships, bed and breakfasts, RVs and campers, Motels, and vacation rentals.
- Airlines preferred by Toronto visitors include West Jet, smaller Canadian airlines, Delta, and European airlines.



# Travel Behaviour: Overall Frequency of Trips

Toronto visitors do not display any specific trends in their out-of-town vacationing behaviours, following a similar pattern to that of non-visitors.

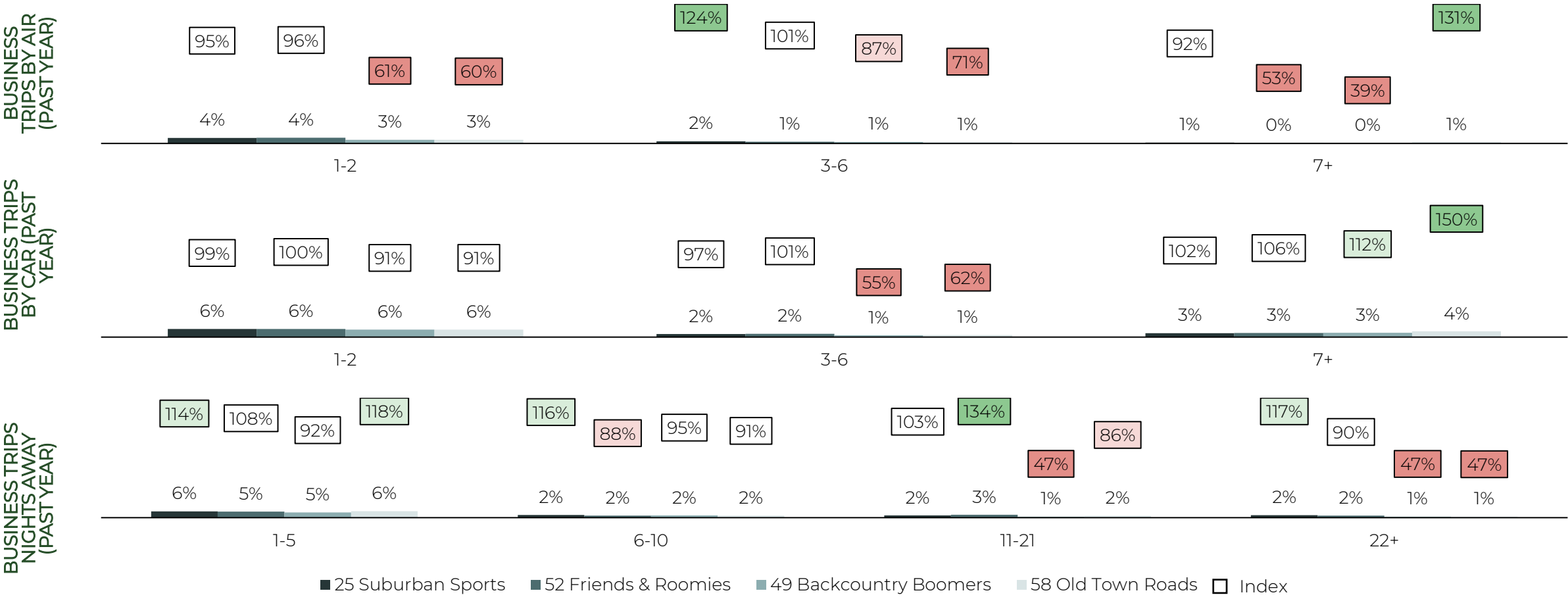
## OUT-OF-TOWN VACATIONS (PAST 3 YEARS)





# Travel Behaviour: Frequency of Business Trips

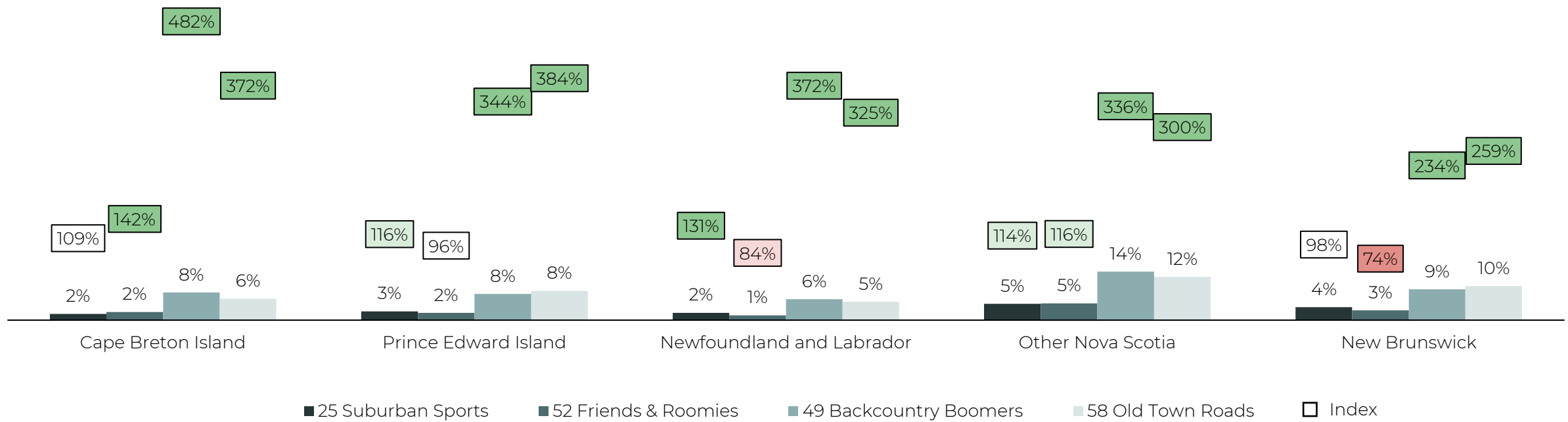
Toronto visitors are more likely to not use air travel for business, but display a tendency towards short-stay business trips using car travel.



# Travel Behaviour: Canadian Destinations

Key vacation destinations within Canada for Toronto visitors include Cape Breton Island, Prince Edward Island, Newfoundland and Labrador, Nova Scotia, and New Brunswick.

TOP 5 CANADIAN VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: U.S. Destinations

US vacation destinations for Toronto visitors include Boston, Western states, Hawaii, Alaska, and the US Midwest.

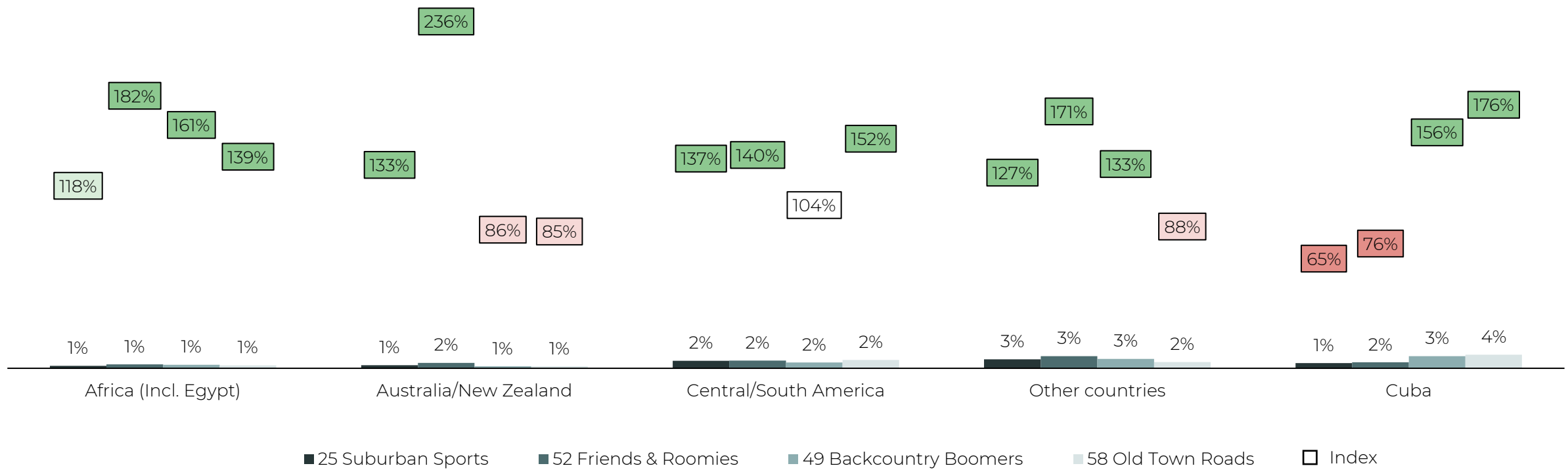
TOP 5 USA VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: Global Destinations

Global vacation destinations for Toronto visitors are more likely to be Africa, Australia/New Zealand, Central/South America, Cuba, and other smaller destinations.

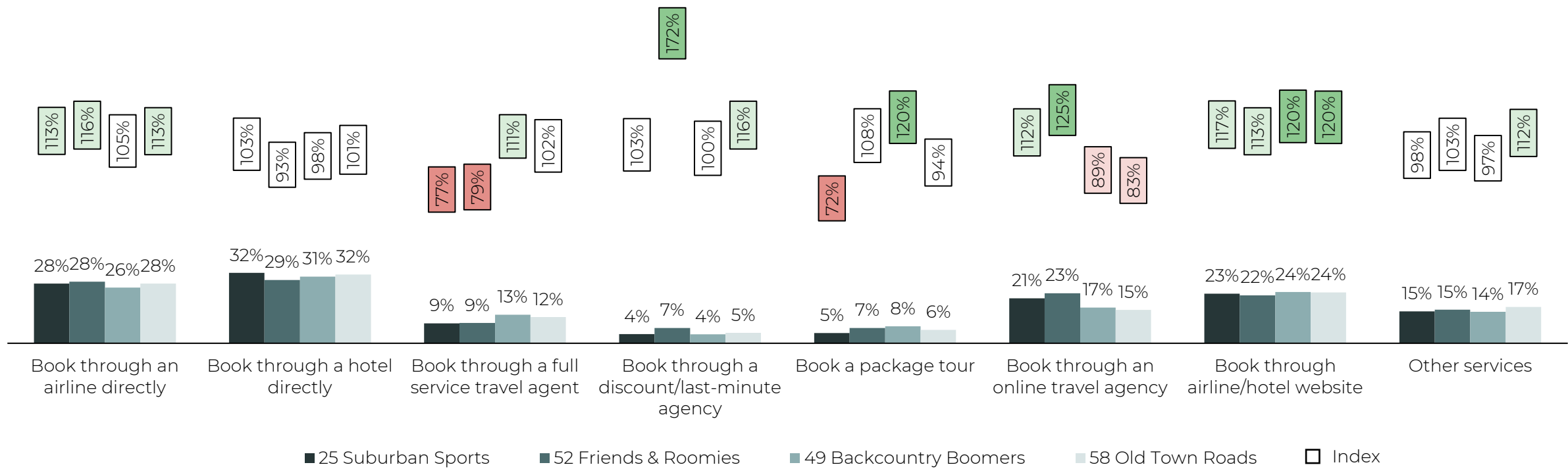
TOP 5 GLOBAL VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: Booking Channels

Toronto visitors are more likely to book through an airline/hotel website when planning their vacation. OTAs are also favoured by certain sub-segments.

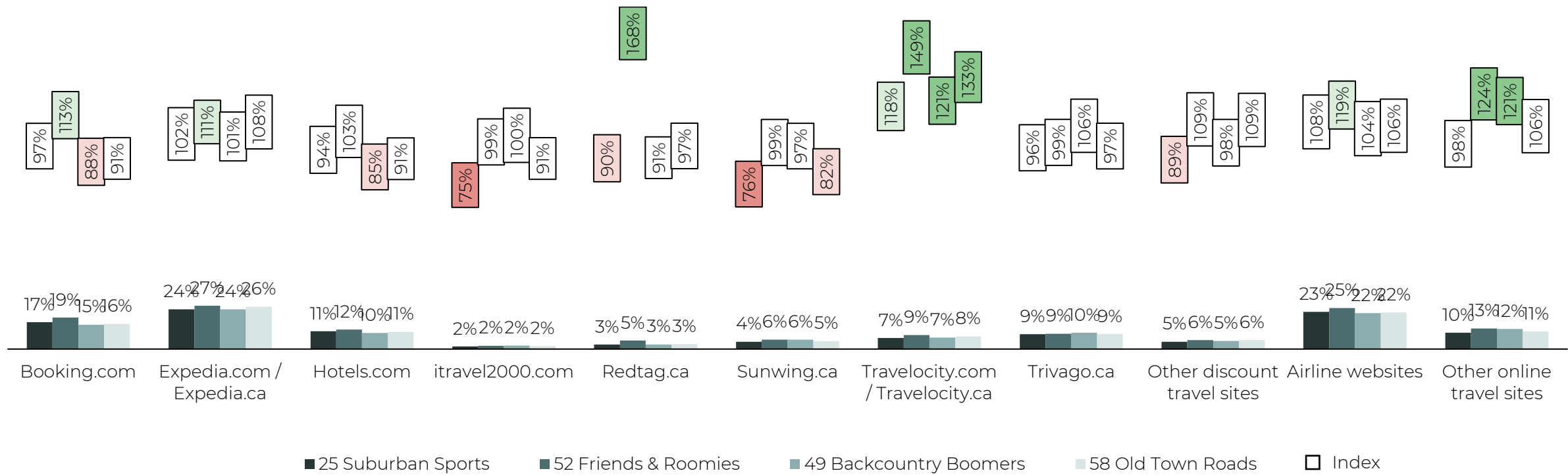
VACATION PLANNING USED (PAST 3 YEARS)



# Travel Behaviour: Online Planning & Booking

Travelocity is by far the most significant OTA that Toronto visitors are more likely to use.

ONLINE TRAVEL SERVICES VISITED (PAST YEAR)

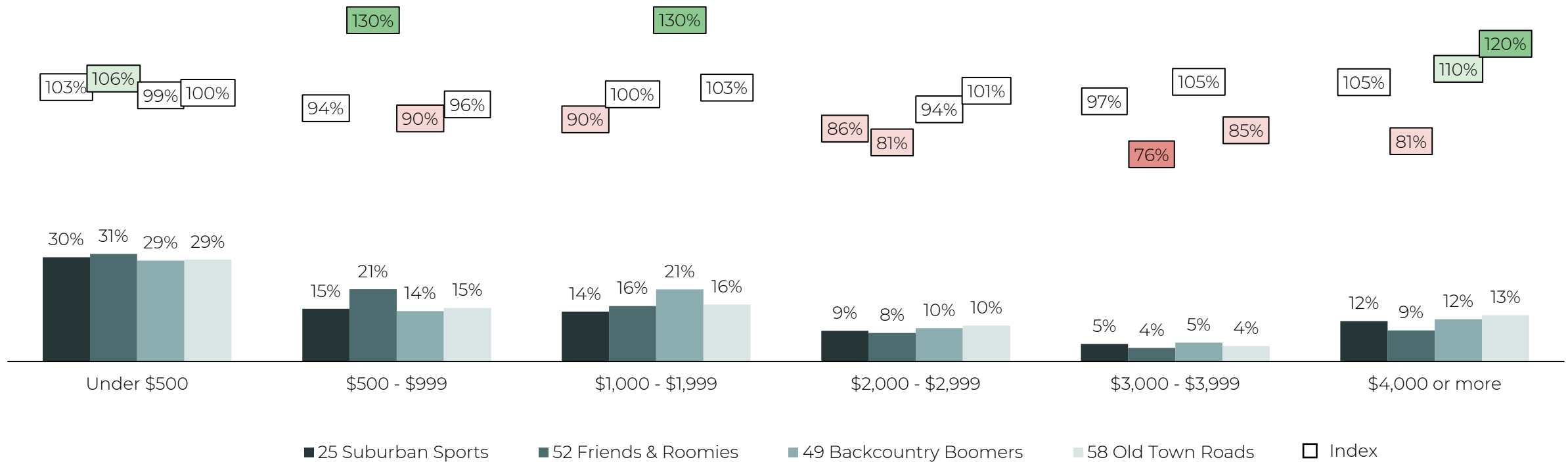




# Travel Behaviour: Spending

Toronto visitors' spending when on vacation varies by sub-segment, with some segments being more likely to spend modestly while others are willing to spend more extravagantly.

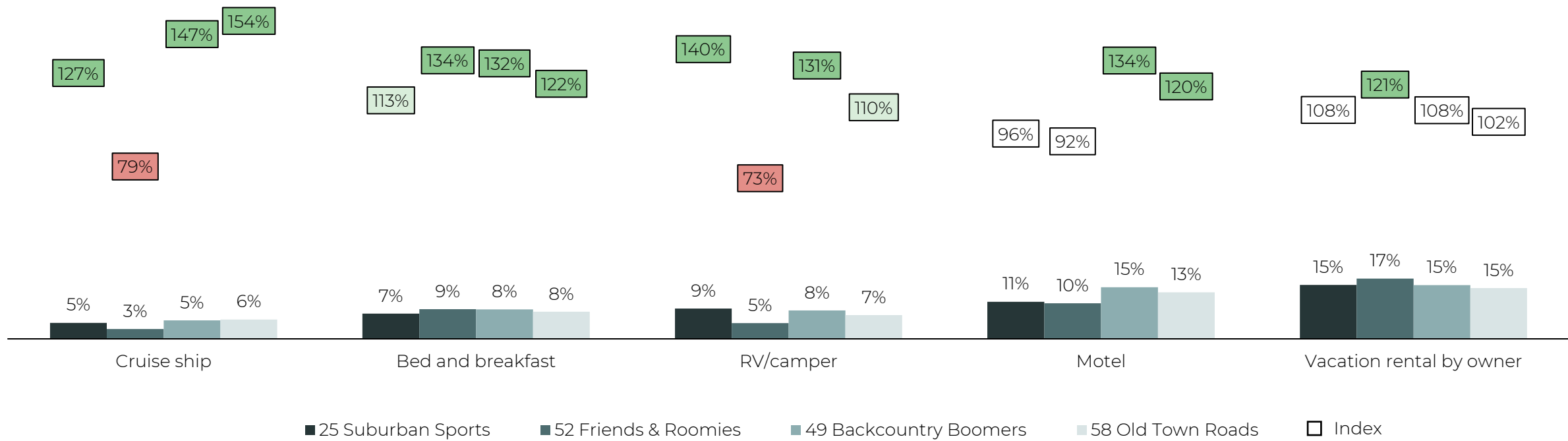
## LAST VACATION SPENDING



# Travel Behaviour: Accommodation

Accommodations used by Toronto visitors when going on vacation include cruise ships, bed and breakfasts, RVs and campers, Motels, and vacation rentals.

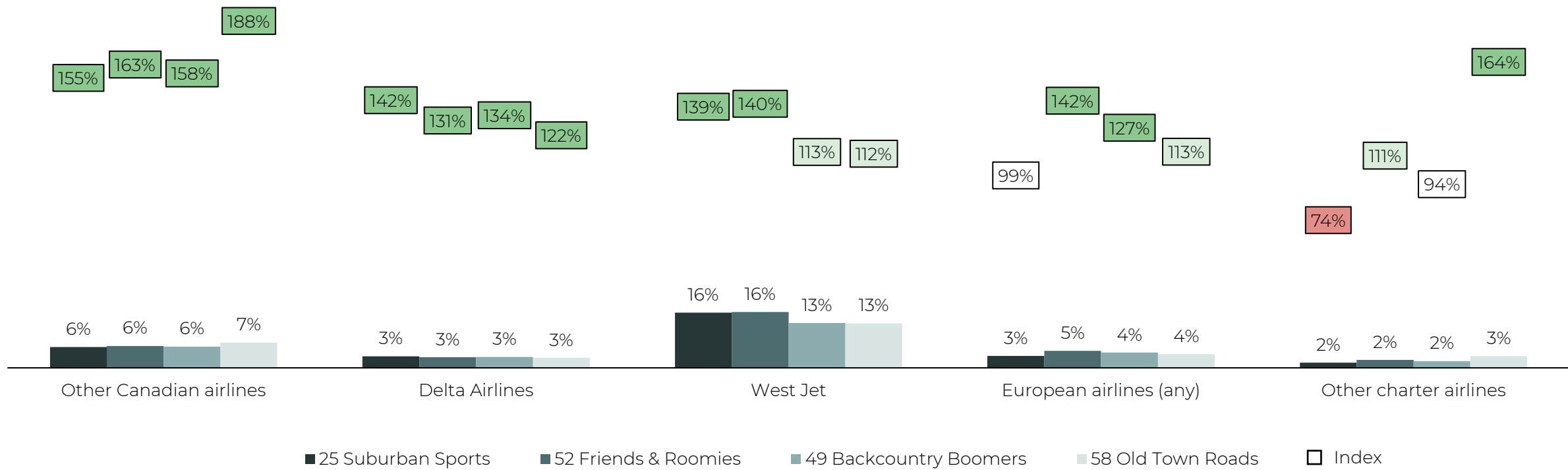
TOP 5 VACATION ACCOMMODATIONS USED (PAST 3 YEARS)



# Travel Behaviour: Airlines

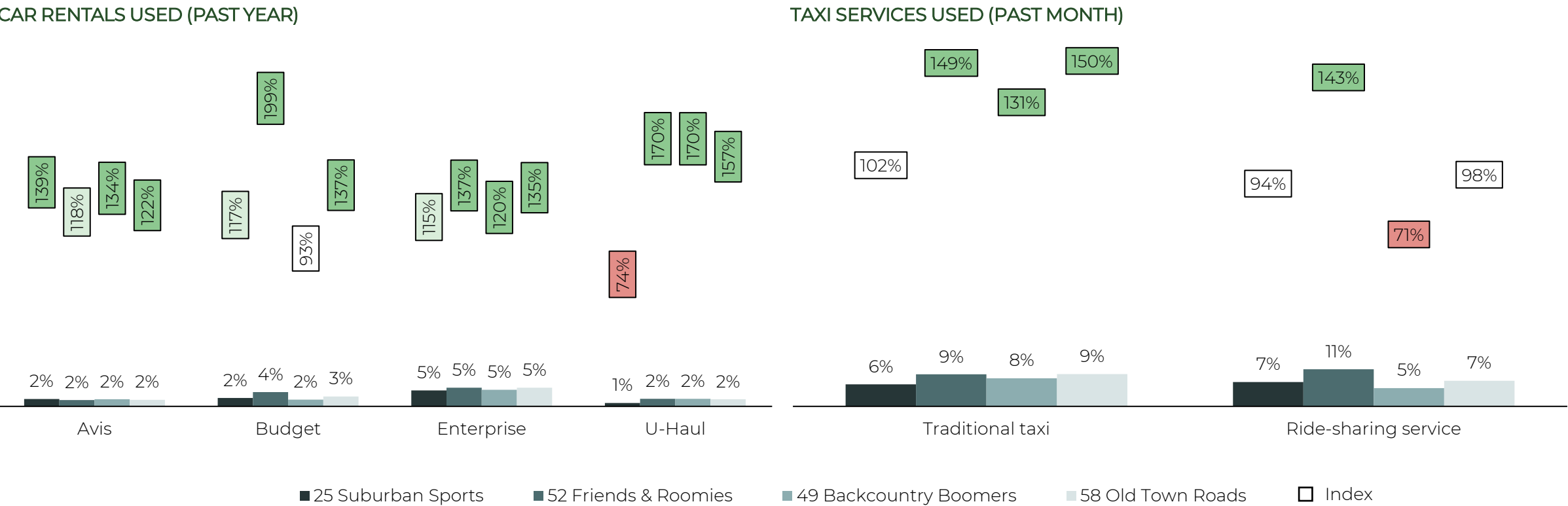
Air Canada is absent from the top 5 airlines preferred by Toronto visitors. Airlines that are preferred include West Jet, smaller Canadian airlines, Delta, and European airlines.

TOP 5 AIRLINES FLOWN (PAST YEAR)



# Travel Behaviour: Car Rental & Taxi Service

Toronto visitors are more likely to make use of car rental services, and are more likely to use traditional taxis compared to non-visitors.





# 4B

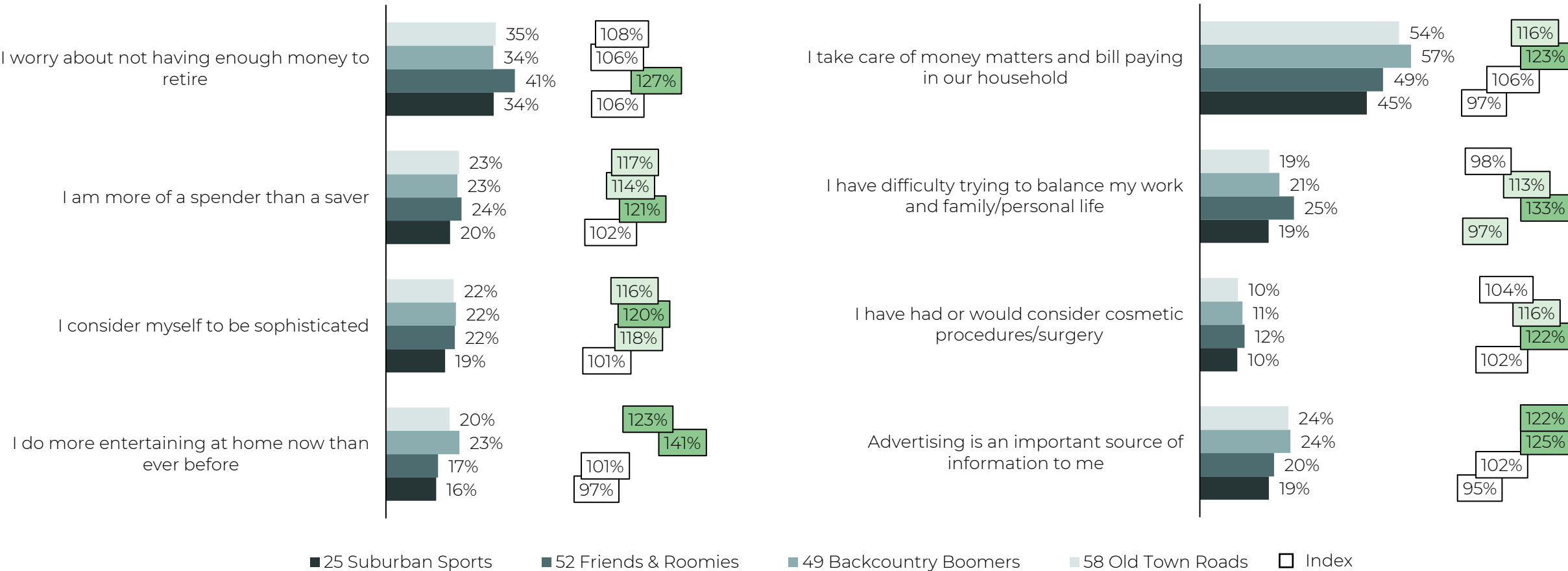
## Psychographics

- Toronto visitors are more likely to entertain at home, and consider themselves to be spenders rather than savers. This does result in them worrying about having enough money for the future, while admitting that advertising is important to them.
- Different sub-segments of Toronto visitors are at different stages of their lives based on recent life events. There seems to be a dichotomy of older visitors who have experienced having grandchildren and dealing with retiring parents, while a younger cohort is experiencing things like moving in with a significant other or buying/selling a home.
- Loyalty programs used by Toronto visitors include SCENE, Tim Horton's, PC Optimum, and credit card loyalty programs among others.

# Psychographics: Top Statements

Toronto visitors are more likely to entertain at home, and consider themselves to be spenders rather than savers. This does result in them worrying about having enough money for the future, while admitting that advertising is important to them.

## TOP STATEMENTS AGREED WITH

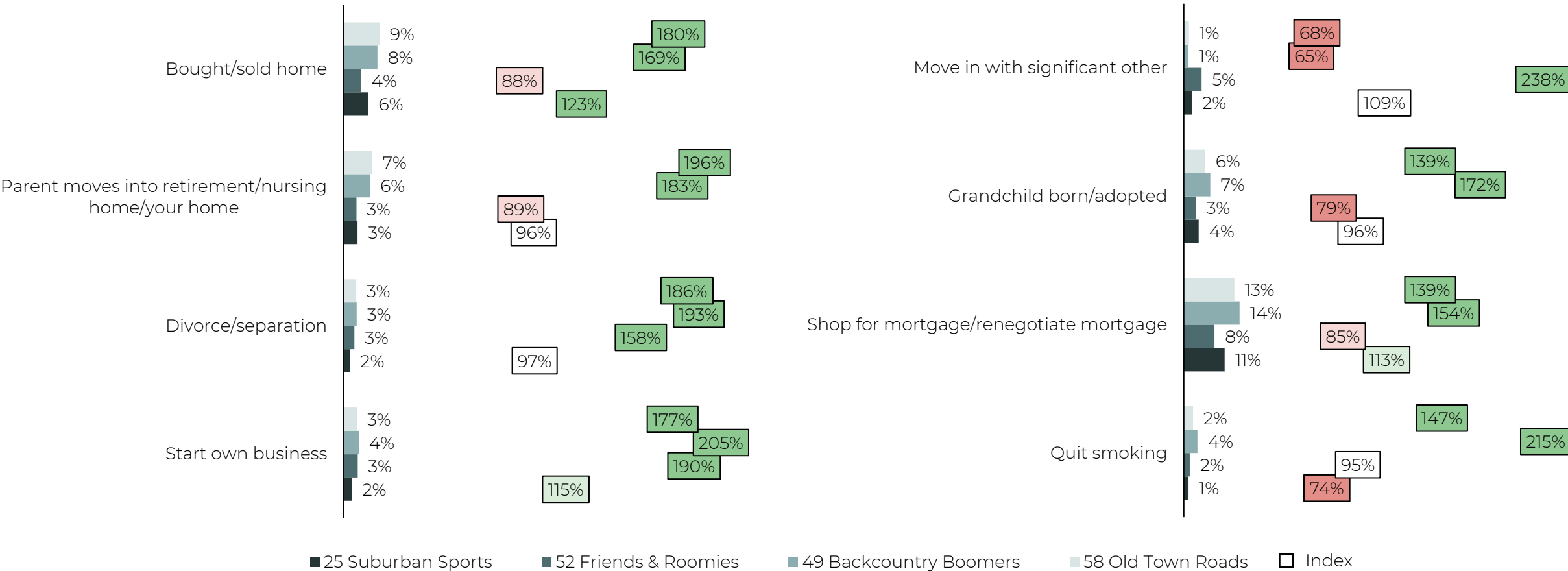




# Psychographics: Life Events

Different sub-segments of Toronto visitors are at different stages of their lives based on recent life events. There seems to be a dichotomy of older visitors who have experienced having grandchildren and dealing with retiring parents, while a younger cohort is experiencing things like moving in with a significant other or buying/selling a home.

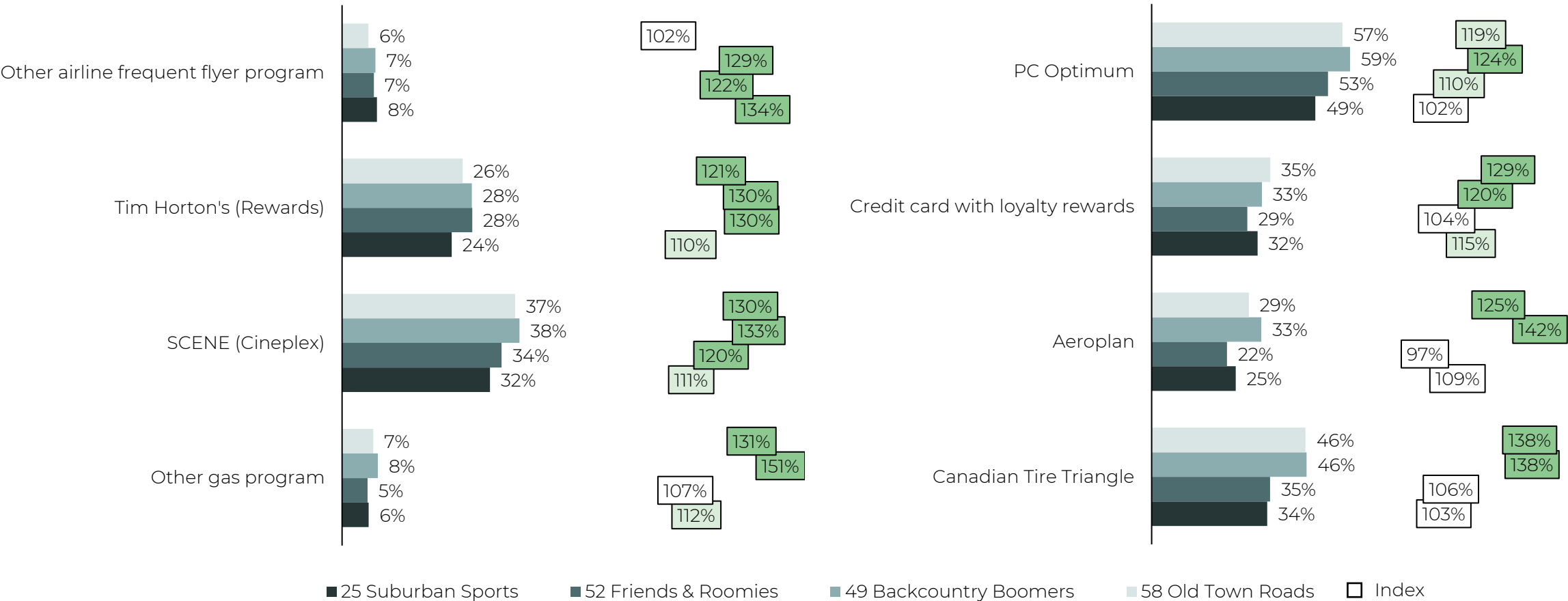
## TOP LIFE EVENTS HAPPENED (PAST 2 YEARS)



# Psychographics: Loyalty Programs

Loyalty programs used by Toronto visitors include SCENE, Tim Horton's, PC Optimum, and credit card loyalty programs among others.

## LOYALTY PROGRAMME MEMBERSHIP





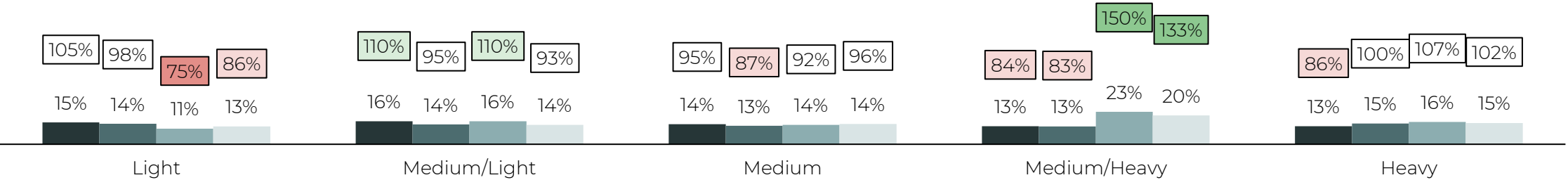
# Media Usage

- Toronto visitors display roughly average TV, radio, and Internet consumption, with older sub-segments skewing more towards heavy consumption of TV and radio.
- There is a tendency towards heavy consumption of magazines among Toronto visitors, while newspaper consumption tends to be lighter.
- Toronto visitors over-index on using online dating sites within their social media repertoire. Other important channels include Reddit, Pinterest, and Snapchat.
- Magazine types that over-index for Toronto visitors include art and antiques, news and current affairs, and nature and ecology. Gardening and sports also play an important role to certain sub-segments.
- Toronto visitors are less likely to notice the generally more prevalent types of outdoor advertising such as bus exteriors and billboards. Advertising in commuter spaces are more likely to be noticed by them.

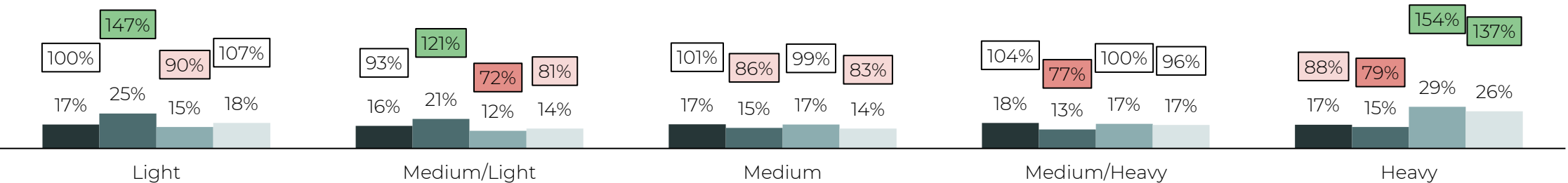
# Media Usage: By Medium

Toronto visitors display roughly average TV, radio, and Internet consumption, with older sub-segments skewing more towards heavy consumption of TV and radio.

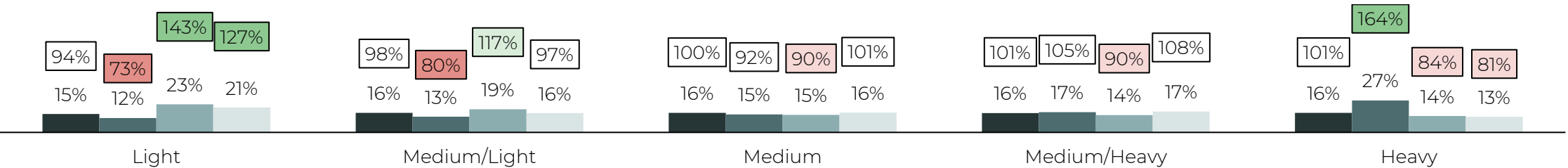
TV USAGE  
QUINTILES



RADIO USAGE  
QUINTILES



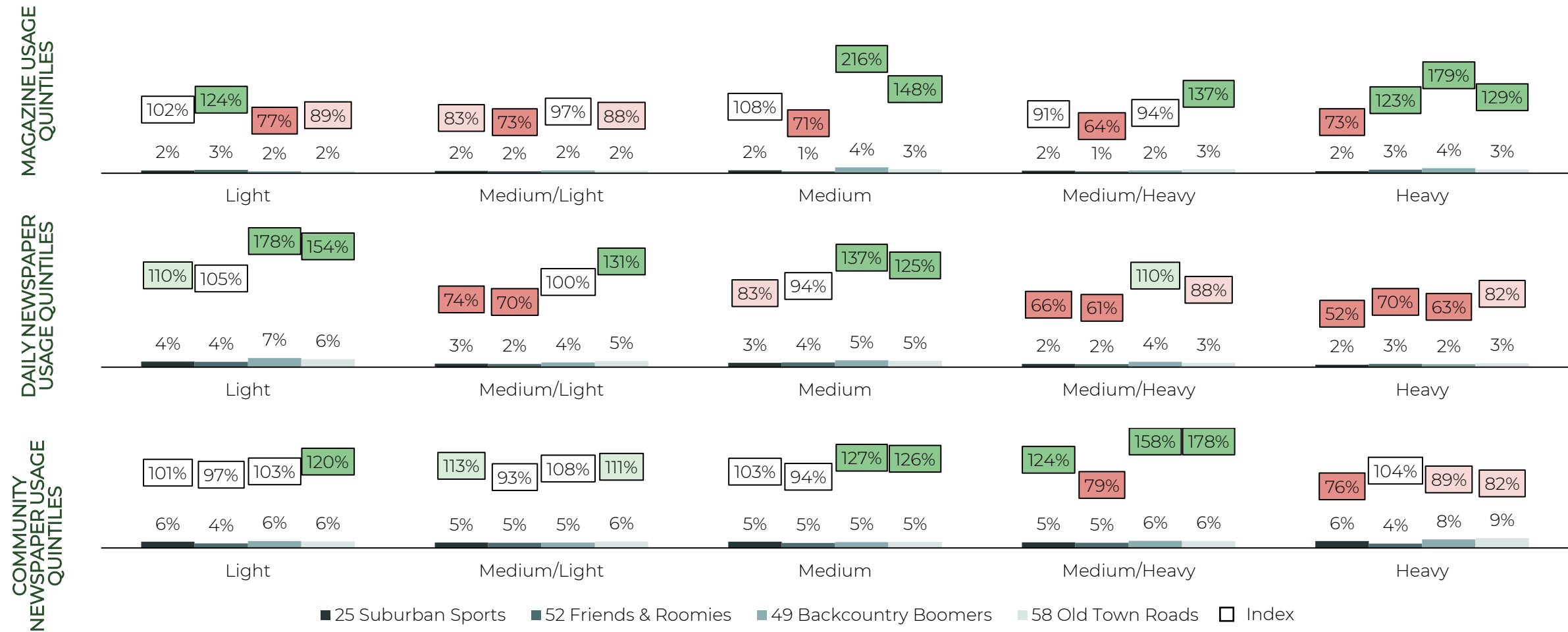
INTERNET USAGE  
QUINTILES



■ 25 Suburban Sports ■ 52 Friends & Roomies ■ 49 Backcountry Boomers ■ 58 Old Town Roads □ Index

# Media Usage: By Medium

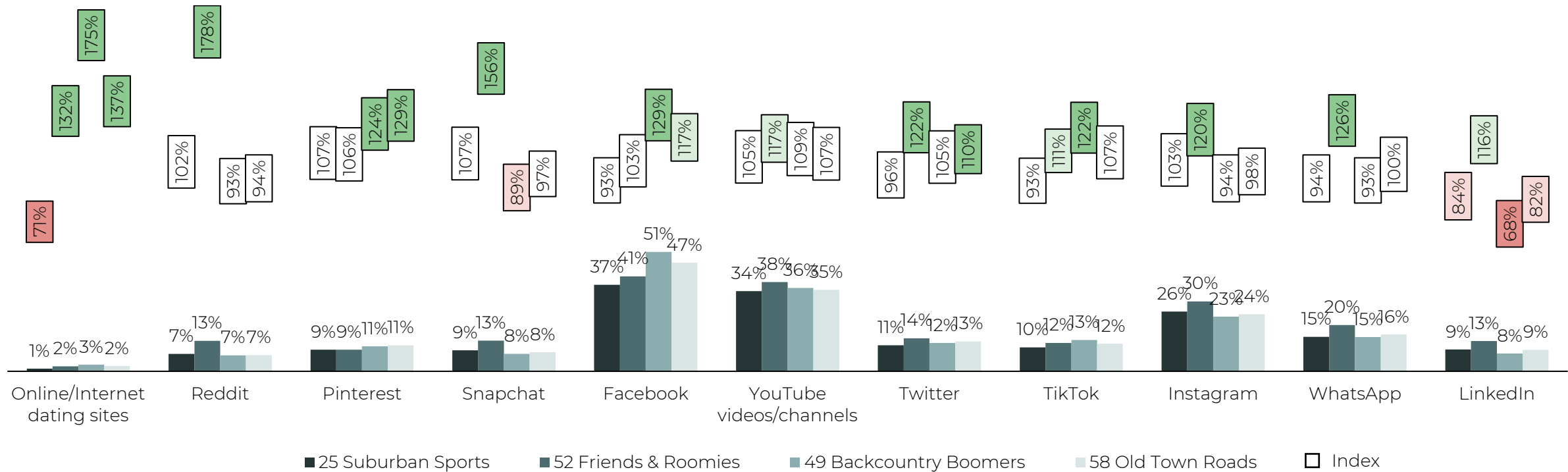
There is a tendency towards heavy consumption of magazines among Toronto visitors, while newspaper consumption tends to be lighter.



# Media Usage: Social Channels

Toronto visitors over-index on using online dating sites within their social media repertoire. Other important channels include Reddit, Pinterest, and Snapchat.

SOCIAL NETWORKS USED (PAST WEEK)

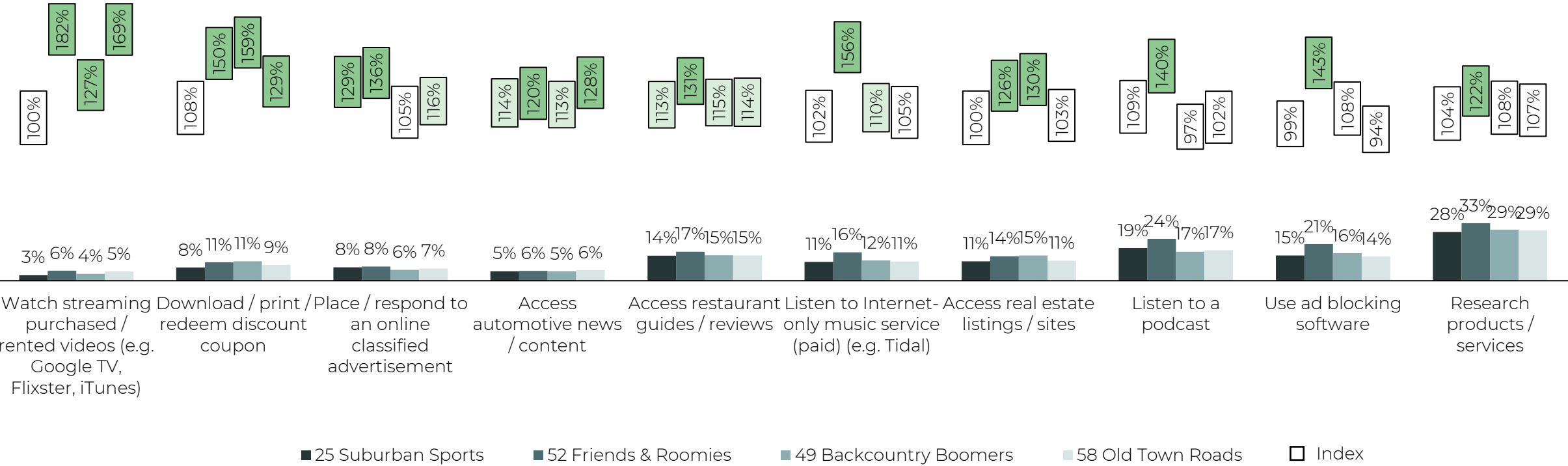




# Media Usage: Online Activities

Online activities of Toronto visitors include watching streaming services, using discount coupons, placing or responding to classified ads, accessing automotive news and content, and reading restaurant guides or reviews.

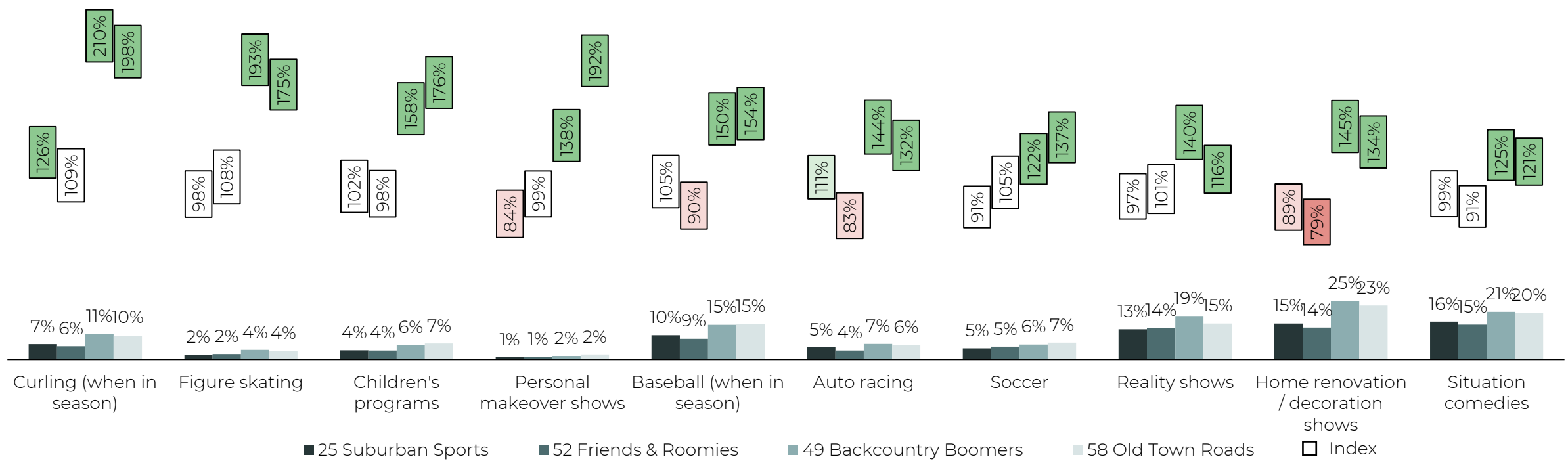
TOP 10 INTERNET ACTIVITIES (PAST WEEK)



# Media Usage: Top TV Programming

Older sub-segments within Toronto visitors are more likely to over-index on TV watching, with key content including Curling, Figure Skating, home renovation shows and sitcoms.

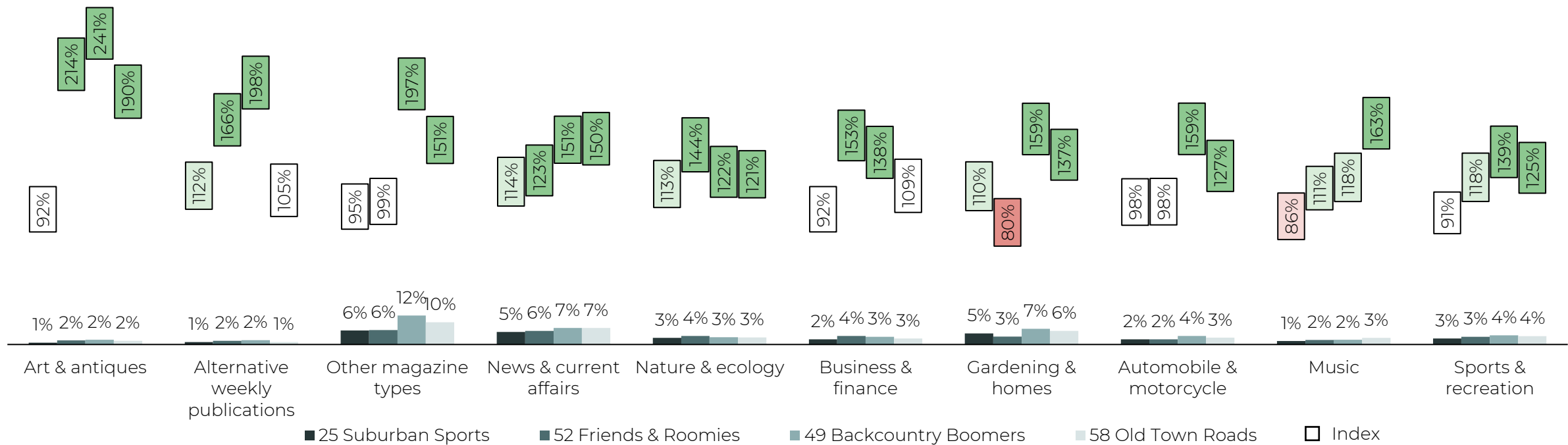
TOP 10 TV PROGRAMS WATCHED (AVERAGE WEEK)



# Media Usage: Magazines

Magazine types that over-index for Toronto visitors include art and antiques, news and current affairs, and nature and ecology. Gardening and sports also play an important role to certain sub-segments.

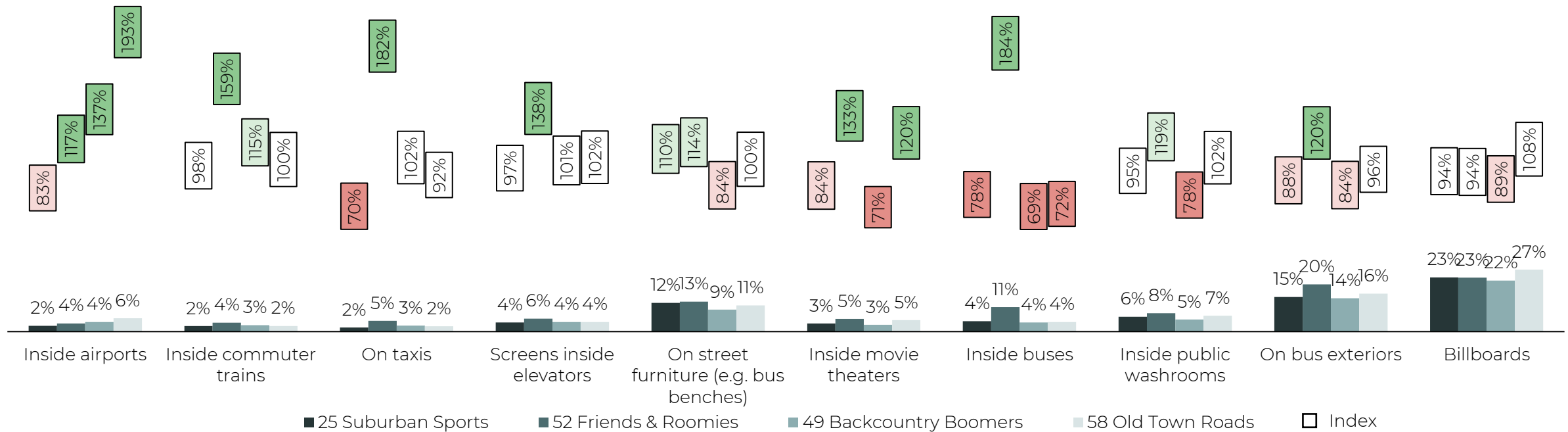
TOP 10 MAGAZINES (PRINT OR DIGITAL) READ (PAST MONTH)



# Media Usage: Out of Home

Toronto visitors are less likely to notice the generally more prevalent types of outdoor advertising such as bus exteriors and billboards. Advertising in commuter spaces are more likely to be noticed by them.

TOP 10 OUTDOOR ADVERTISING NOTICED (PAST WEEK)





# 4D

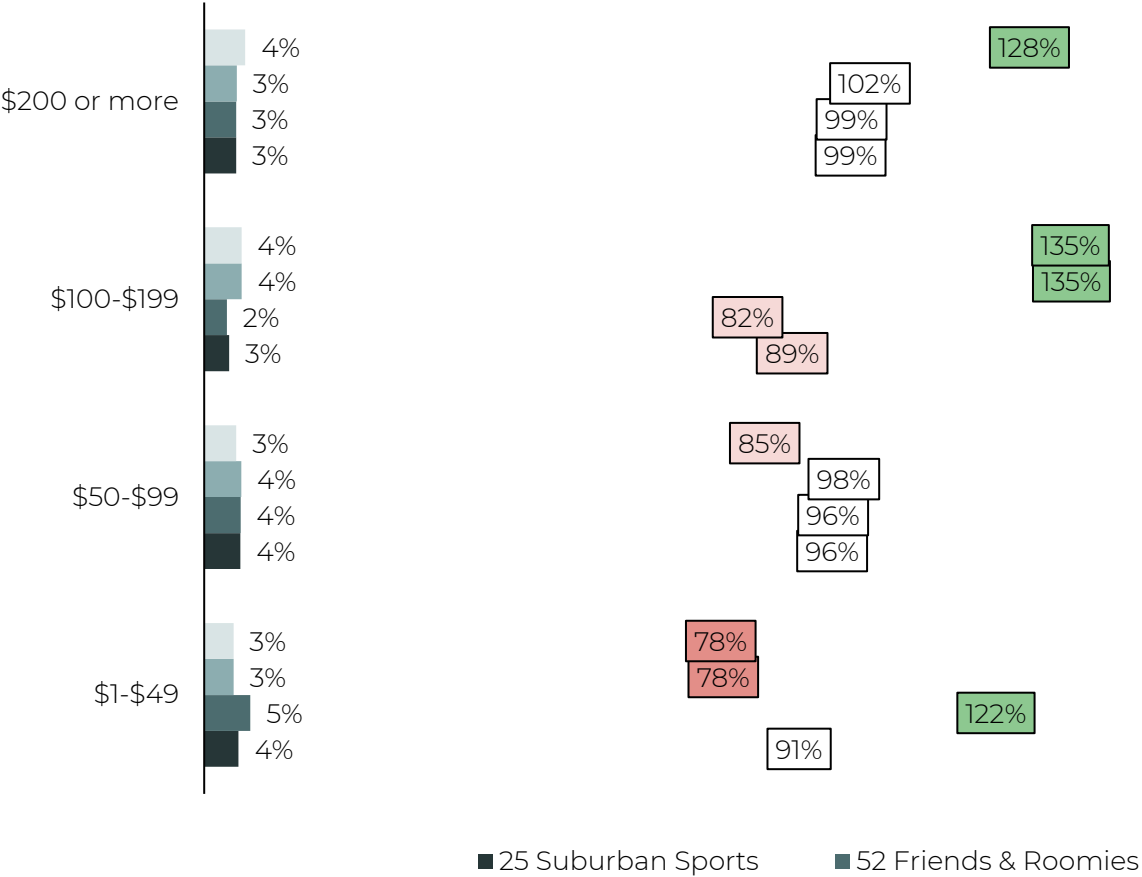
## Restaurants

- Toronto visitors are more likely to spend more on restaurant outings for business purposes, compared to non-visitors. Their spending behaviour when eating out for personal reasons is similar to that of non-visitors.
- More traditional food ordering methods are favoured by Toronto visitors, while online delivery options generally under-index for them.
- Other than pub restaurants, there aren't any clear restaurant types that over-index for Toronto visitors.
- Seafood restaurants are favoured by all Toronto visitors. Other restaurant preferences do not differ significantly from non-visitors.
- Toronto visitor generally prefer smaller tea stores and Second Cup. Older sub-segments show a preference for Tim Hortons, while younger segments are more likely to prefer Starbucks.

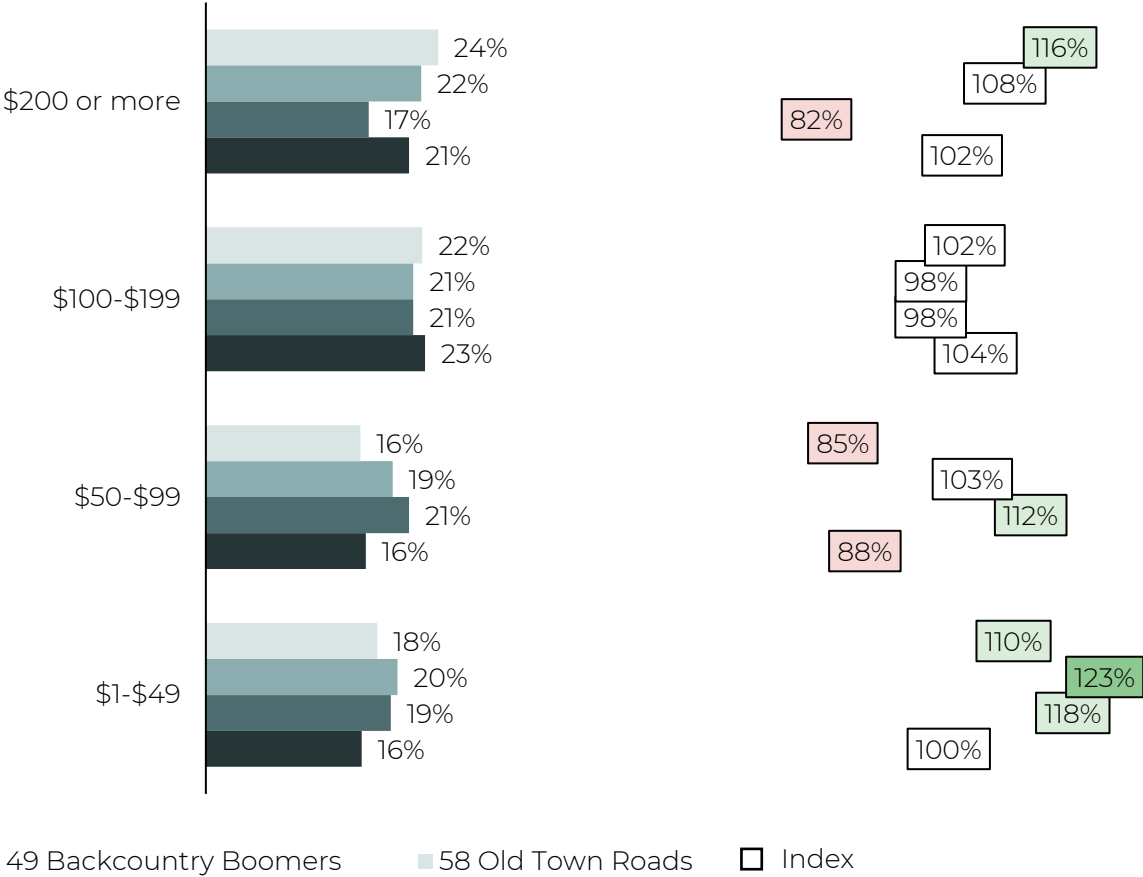
# Restaurants: Pleasure & Business Spending

Toronto visitors are more likely to spend more on restaurant outings for business purposes, compared to non-visitors. Their spending behaviour when eating out for personal reasons is similar to that of non-visitors.

AMOUNT SPENT AT RESTAURANTS FOR BUSINESS (PAST MONTH)



AMOUNT SPENT AT RESTAURANTS FOR PLEASURE (PAST MONTH)

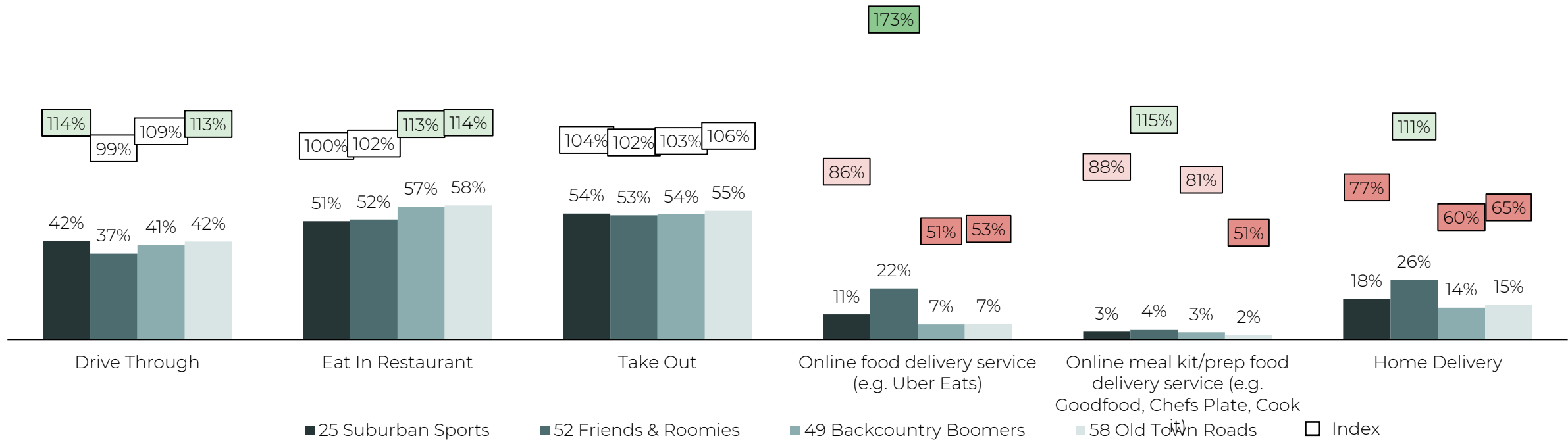




# Restaurants: Types of Service

More traditional food ordering methods are favoured by Toronto visitors, while online delivery options generally under-index for them.

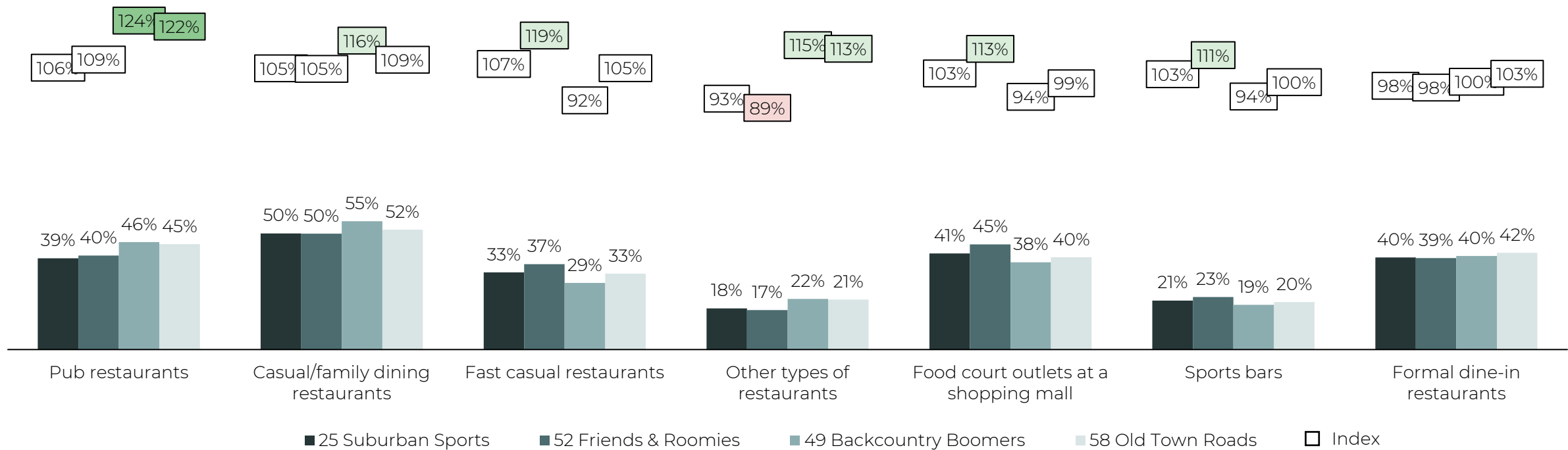
FOOD ORDERING METHODS USED (PAST MONTH)



# Restaurants: Types

Other than pub restaurants, there aren't any clear restaurant types that over-index for Toronto visitors.

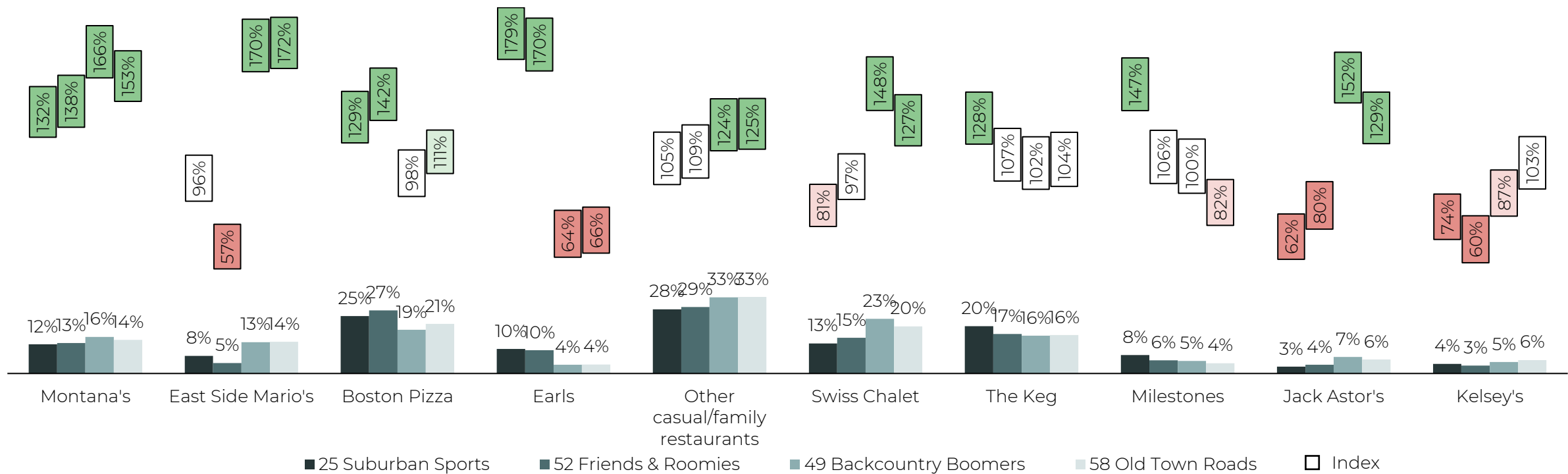
RESTAURANT SERVICE TYPE VISITED (PAST YEAR)



# Restaurants: Casual/ Family Restaurants

Casual restaurants that are more likely to enjoy the patronage of Toronto visitors include Montana's and Boston Pizza. East Dide Mario's is more preferred by older sub-segments, while younger segments are more likely to prefer Earls.

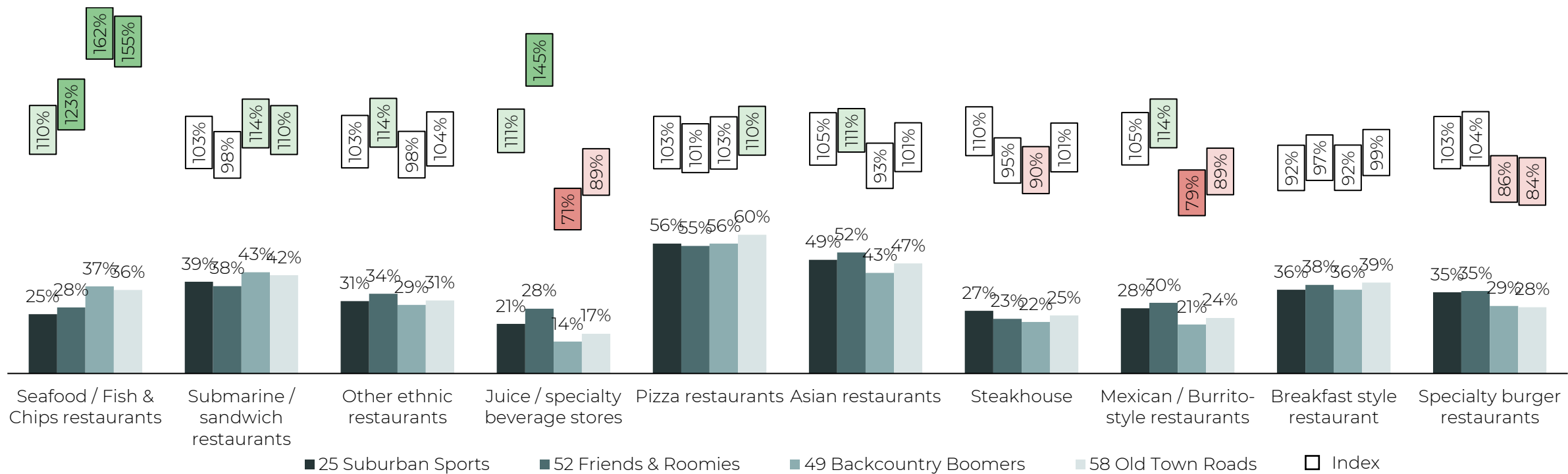
CASUAL / FAMILY RESTAURANTS VISITED OR ORDERED FROM (PAST YEAR)



# Restaurants: Type of Cuisine

Seafood restaurants are favoured by all Toronto visitors. Other restaurant preferences do not differ significantly from non-visitors.

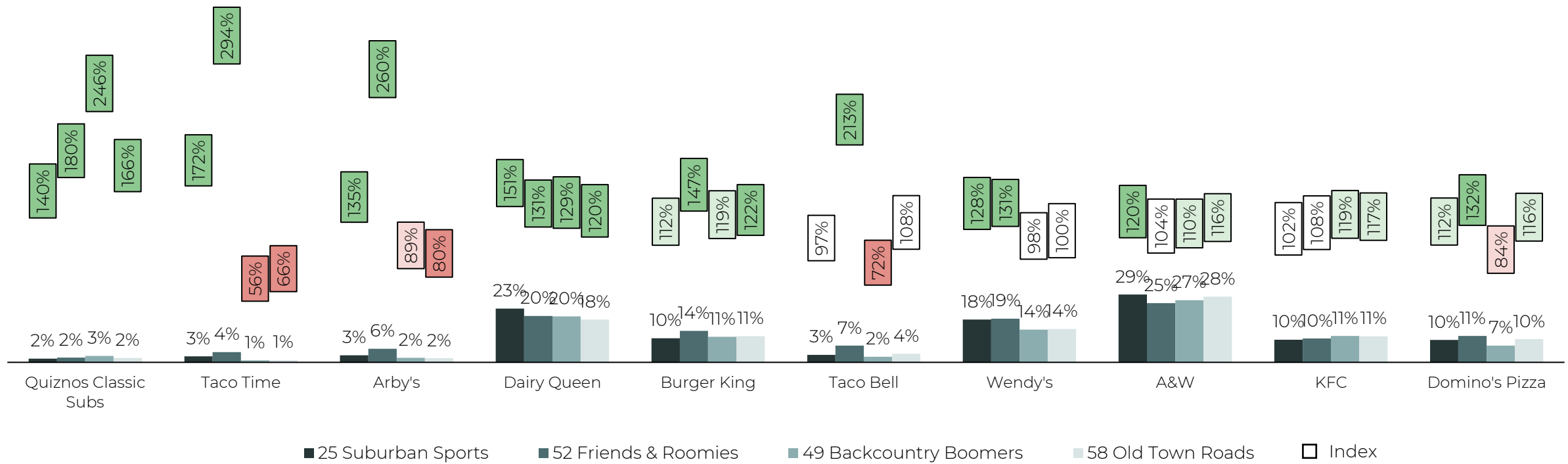
TOP 10 RESTAURANT FOOD TYPE VISITED (PAST YEAR)



# Restaurants: Fast Food Chains

Quiznos, Dairy Queen, and Burger King are preferred fast food destinations for Toronto visitors. Other notable restaurants include Wendy's and A&W.

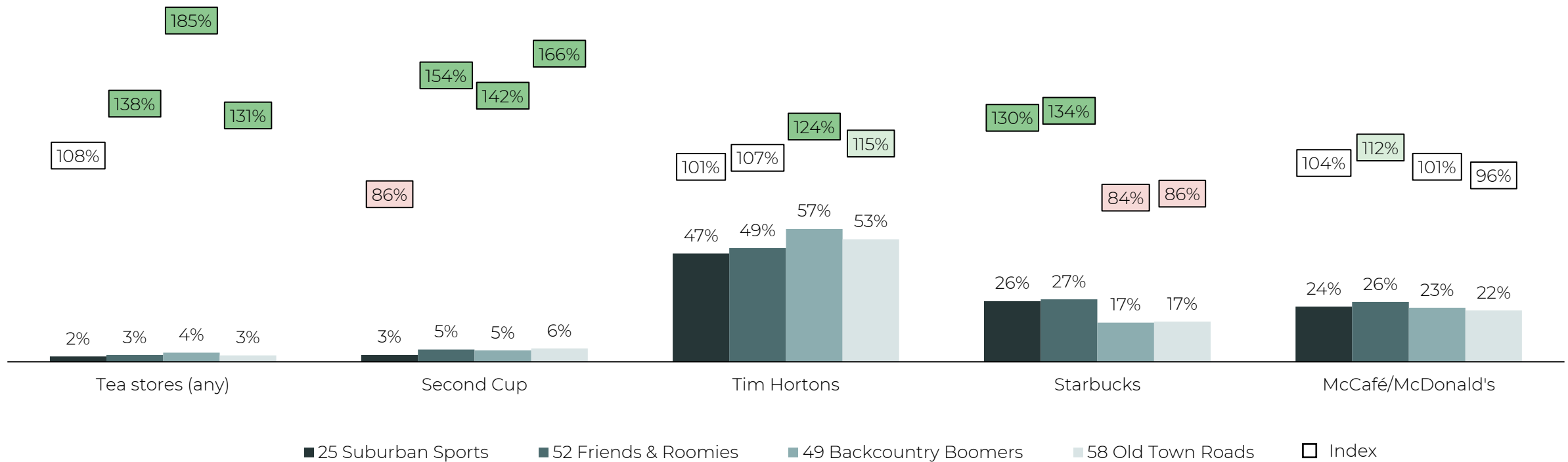
TOP 10 FAST FOOD RESTAURANTS VISITED OR ORDERED FROM (PAST MONTH)



# Restaurants: Coffee Shops

Toronto visitor generally prefer smaller tea stores and Second Cup. Older sub-segments show a preference for Tim Hortons, while younger segments are more likely to prefer Starbucks.

COFFEE / DONUT SHOPS VISITED OR ORDERED FROM (PAST MONTH)







# Section 5: Cottage Country

## Key Segments:

- **New Asian Heights:** Younger singles and couples with high levels of university degrees, primarily of Asian descent
- **Eat, Play, Love:** Younger urban singles with high levels of university degrees
- **Juggling Acts:** Younger, lower-middle-income urban singles and families



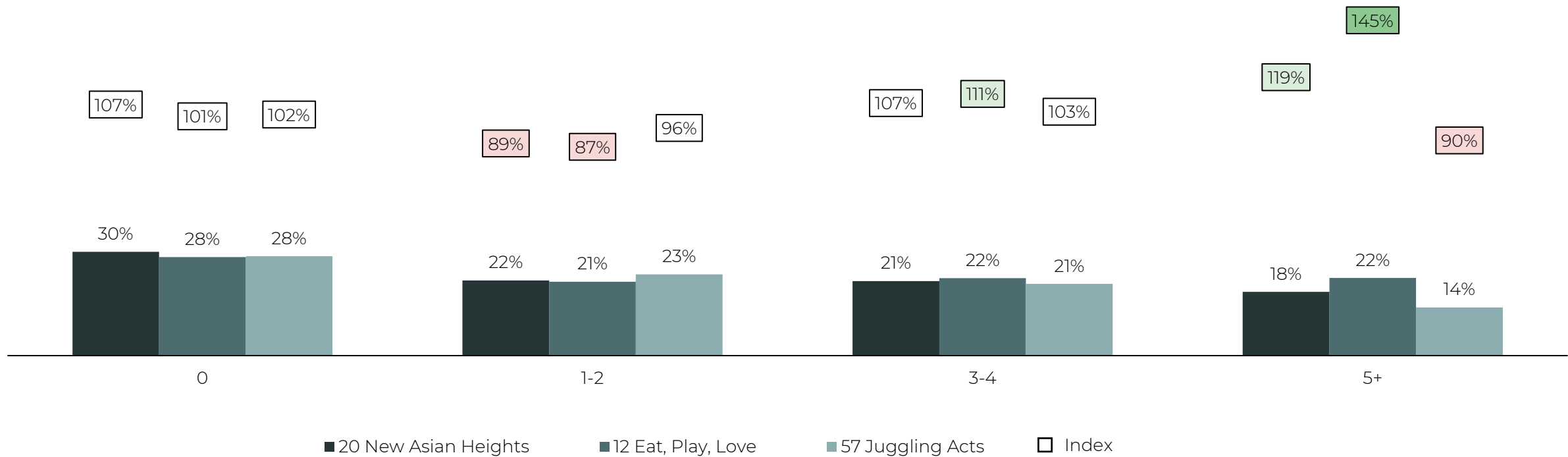
# Travel Behaviour

- Cottage Country visitors are more likely to take more out-of-town vacations compared to non-visitors. Business travel is however a less frequent activity for them.
- Key vacation destinations within Canada for Cottage Country visitors include Victoria, British Columbia, Whistler, Vancouver, and Banff.
- US destinations that are more likely to be visited for vacation by Cottage Country visitors include Hawaii, Alaska, Los Angeles, Western states, and Las Vegas.
- Cottage Country visitors are more likely to visit Asia, UK/Ireland, Africa, Mexico, and smaller European countries when traveling internationally for vacation.
- Cottage Country visitors make use of a variety of channels when planning their vacation, with only direct hotel bookings and travel agents not over-indexing for usage. Discount or last-minute agencies are more likely to be used by all Cottage Country visitors.
- OTAs are used significantly by Cottage Country visitors, with Travelocity being the most likely to be used more than non-visitors.
- Cottage Country visitors are more likely to spend more than \$2,000 when going on vacation compared to non-visitors.
- Accommodation options used by Cottage Country visitors when going on vacation include package tours, vacation rentals, bed and breakfasts, boats, and cruise ships.

# Travel Behaviour: Overall Frequency of Trips

Cottage Country visitors are more likely to take more out-of-town vacations compared to non-visitors.

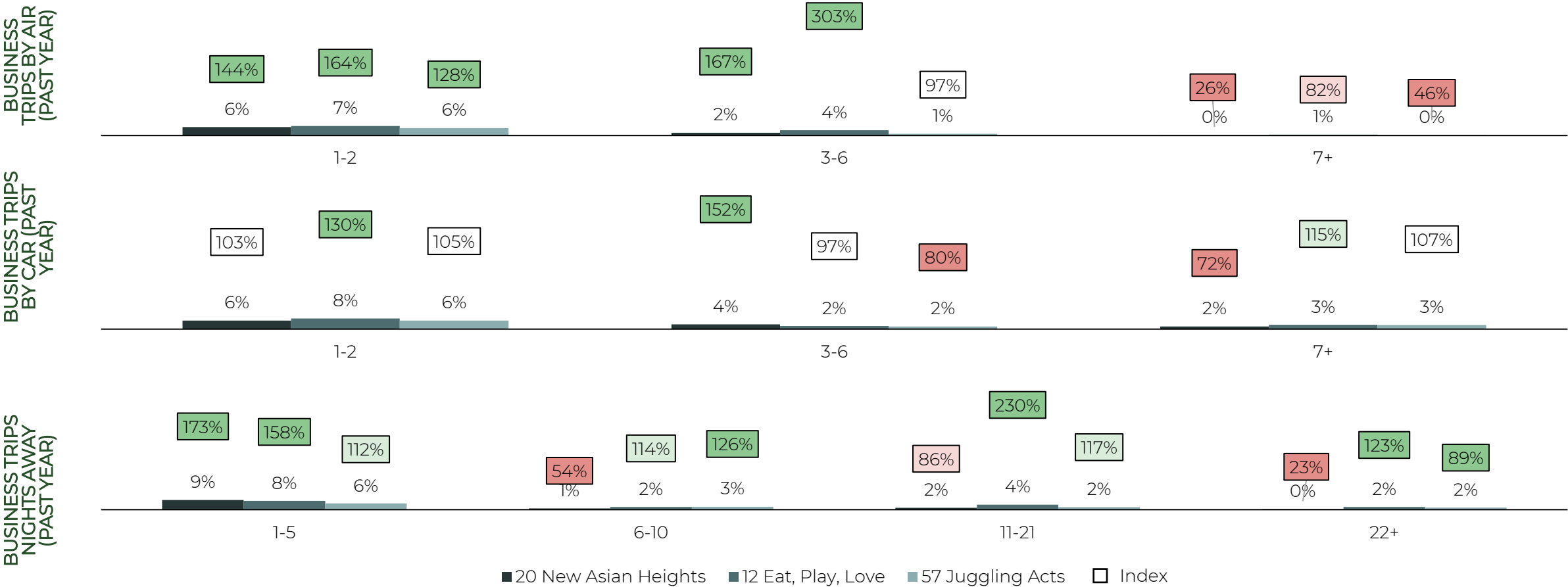
## OUT-OF-TOWN VACATIONS (PAST 3 YEARS)





# Travel Behaviour: Frequency of Business Trips

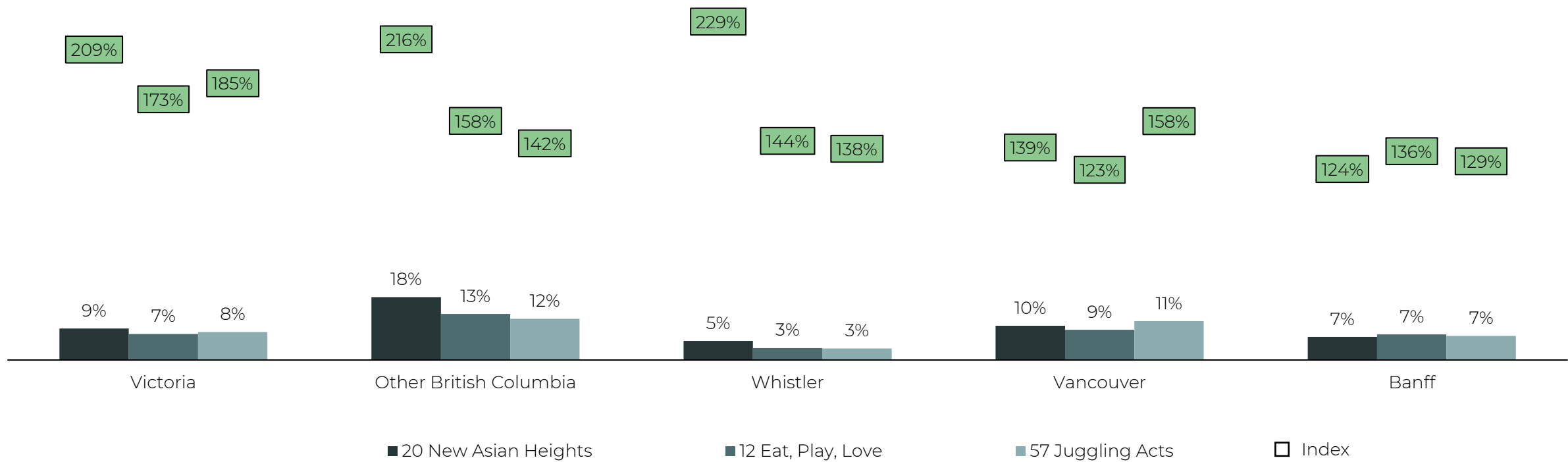
Business travel is however a less frequent activity for Cottage Country visitors.



# Travel Behaviour: Canadian Destinations

Key vacation destinations within Canada for Cottage Country visitors include Victoria, British Columbia, Whistler, Vancouver, and Banff.

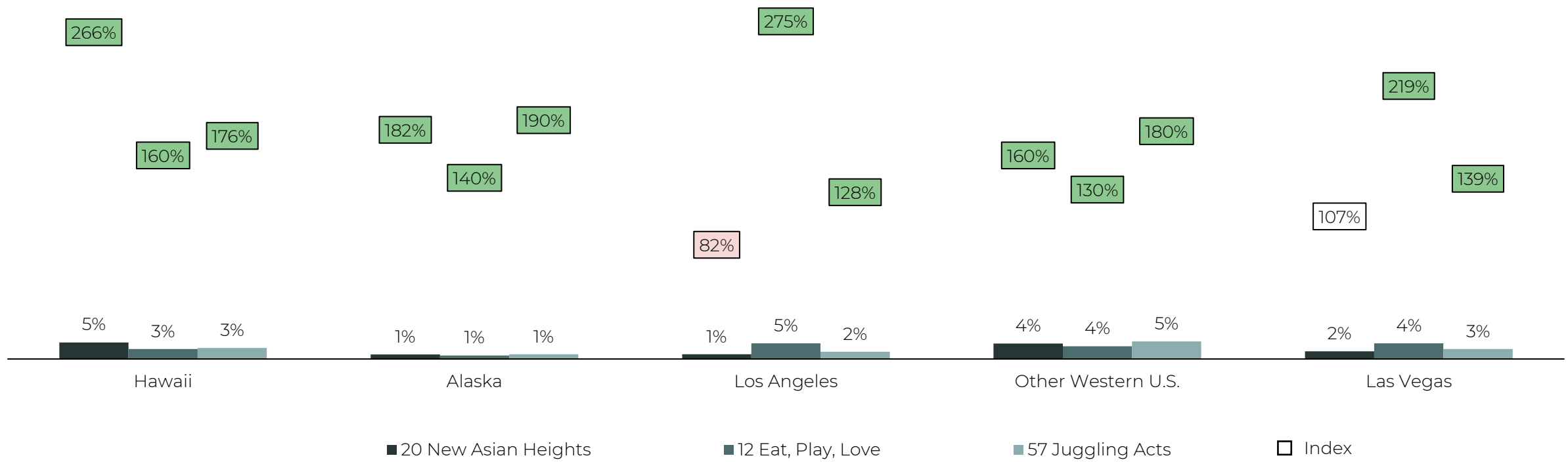
TOP 5 CANADIAN VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: U.S. Destinations

US destinations that are more likely to be visited for vacation by Cottage Country visitors include Hawaii, Alaska, Los Angeles, Wester states, and Las Vegas.

TOP 5 USA VACATION DESTINATIONS VISITED (PAST 3 YEARS)

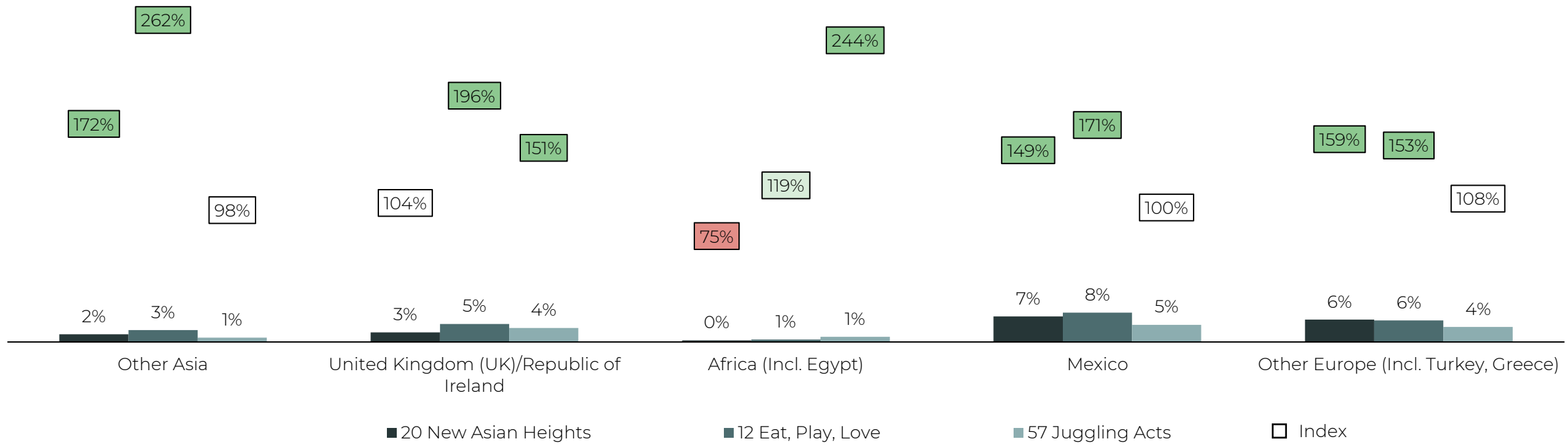




# Travel Behaviour: Global Destinations

Cottage Country visitors are more likely to visit Asia, UK/Ireland, Africa, Mexico, and smaller European countries when traveling internationally for vacation.

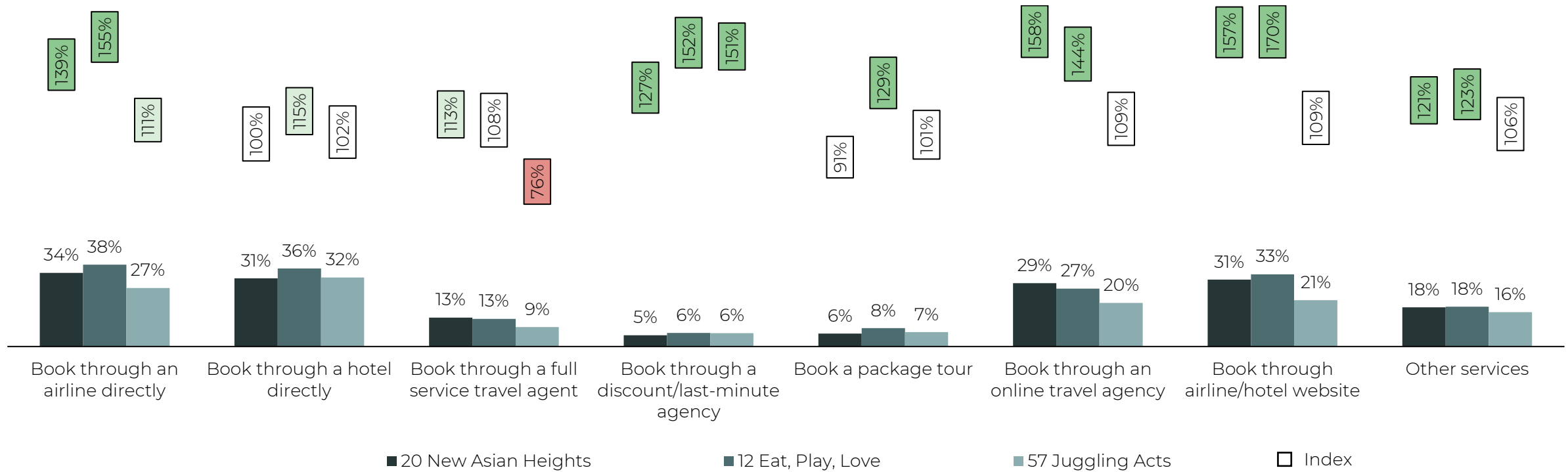
TOP 5 GLOBAL VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: Booking Channels

Cottage Country visitors make use of a variety of channels when planning their vacation, with only direct hotel bookings and travel agents not over-indexing for usage. Discount or last-minute agencies are more likely to be used by all Cottage Country visitors.

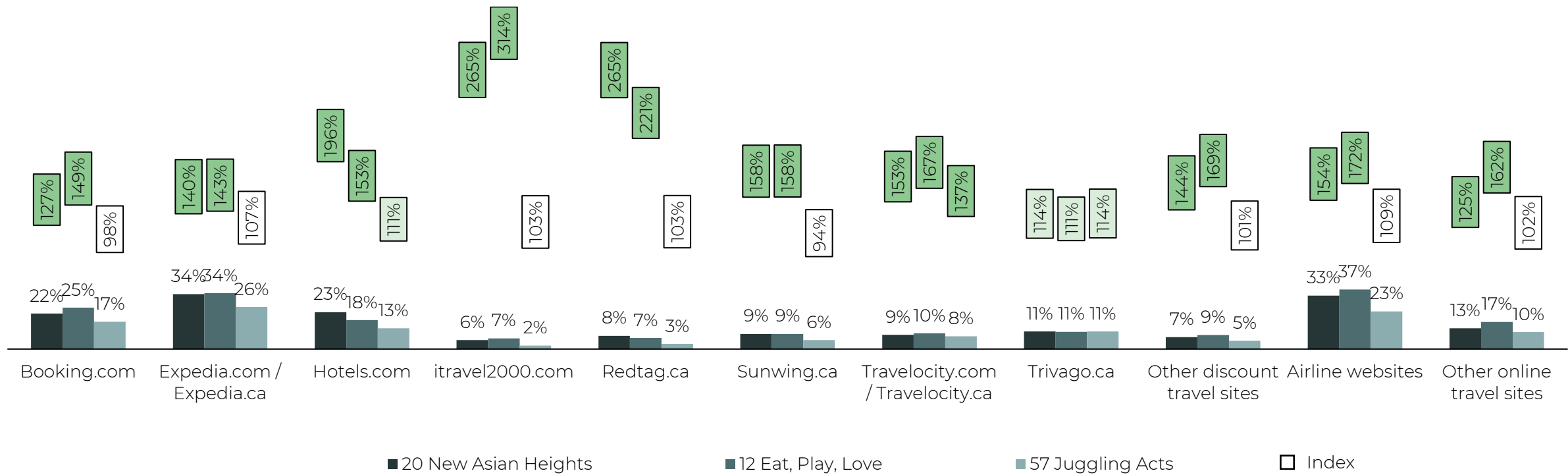
VACATION PLANNING USED (PAST 3 YEARS)



# Travel Behaviour: Online Planning & Booking

OTAs are used significantly by Cottage Country visitors, with Travelocity being the most likely to be used more than non-visitors.

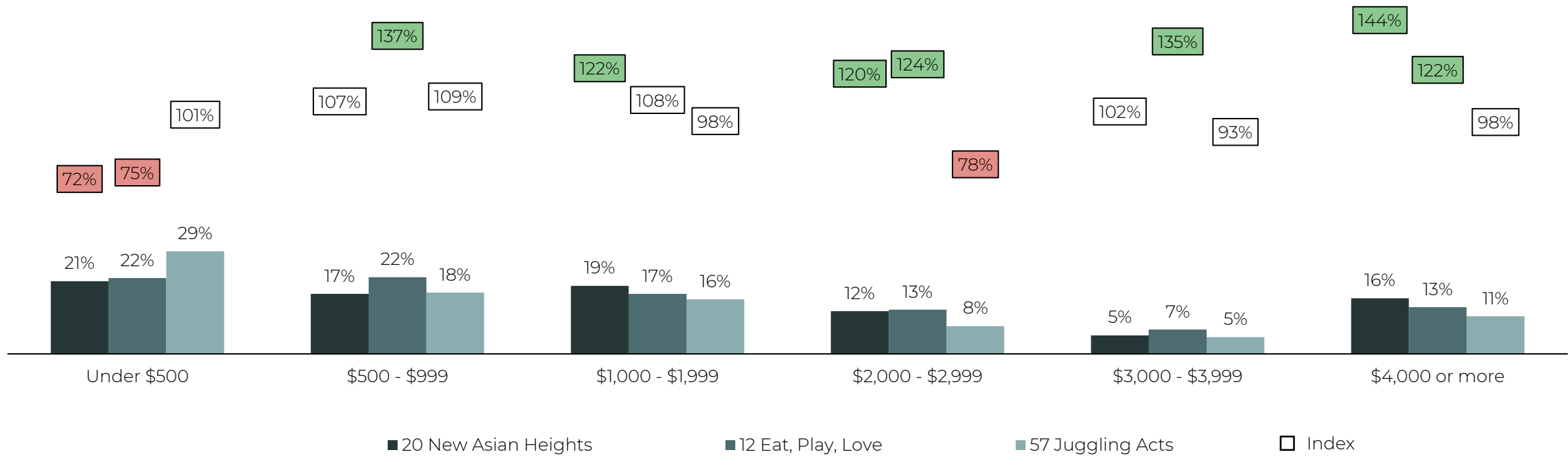
ONLINE TRAVEL SERVICES VISITED (PAST YEAR)



# Travel Behaviour: Spending

Cottage Country visitors are more likely to spend more than \$2,000 when going on vacation compared to non-visitors.

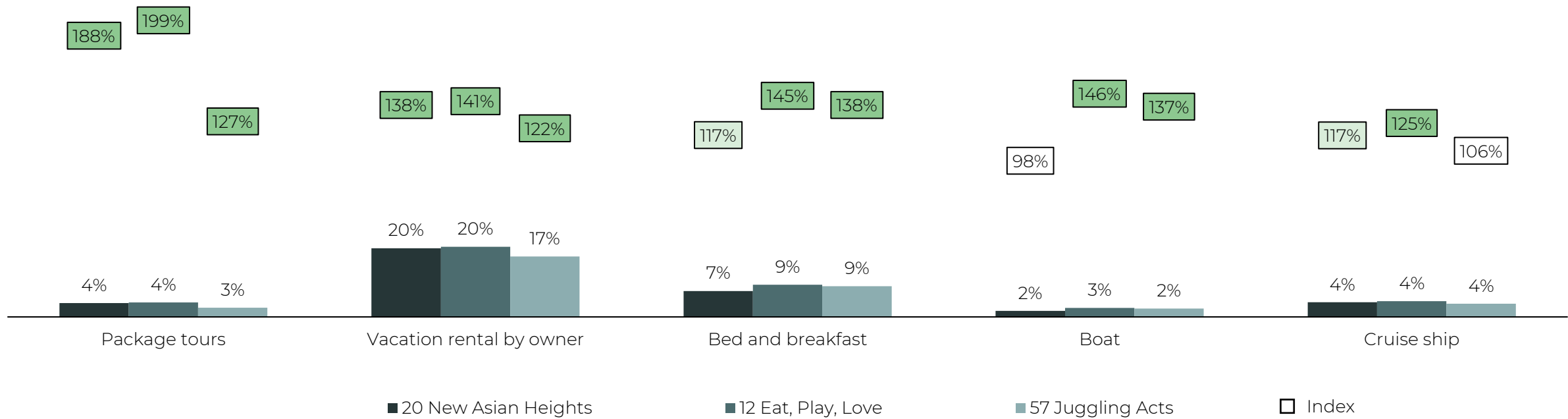
## LAST VACATION SPENDING



# Travel Behaviour: Accommodation

Accommodation options used by Cottage Country visitors when going on vacation include package tours, vacation rentals, bed and breakfasts, boats, and cruise ships.

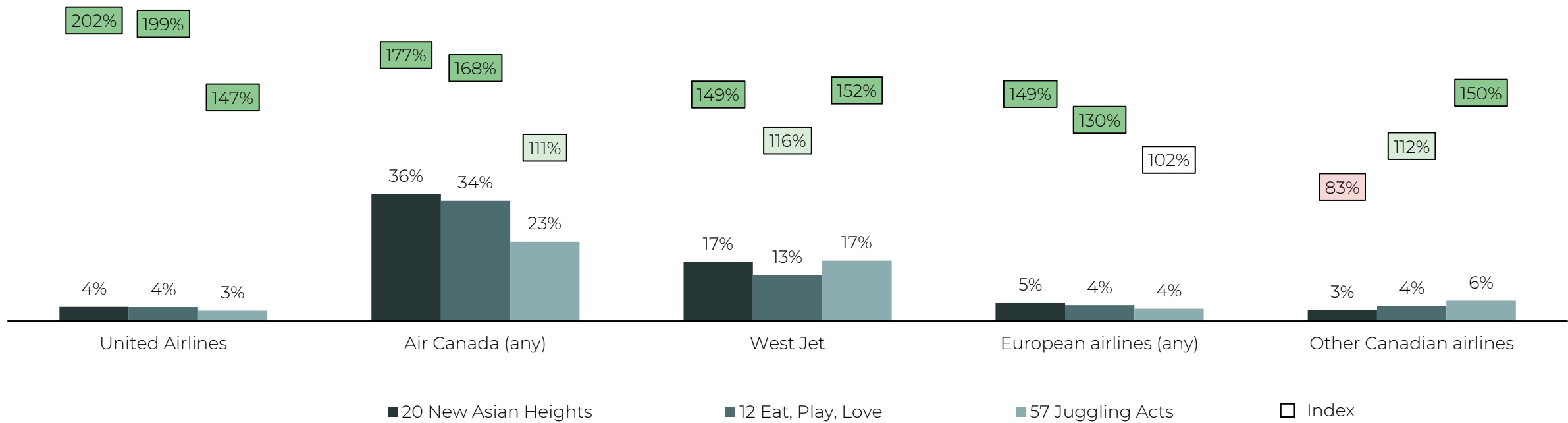
TOP 5 VACATION ACCOMMODATIONS USED (PAST 3 YEARS)



# Travel Behaviour: Airlines

United Airlines, Air Canada, and West Jet are favoured by all Cottage Country visitor segments.

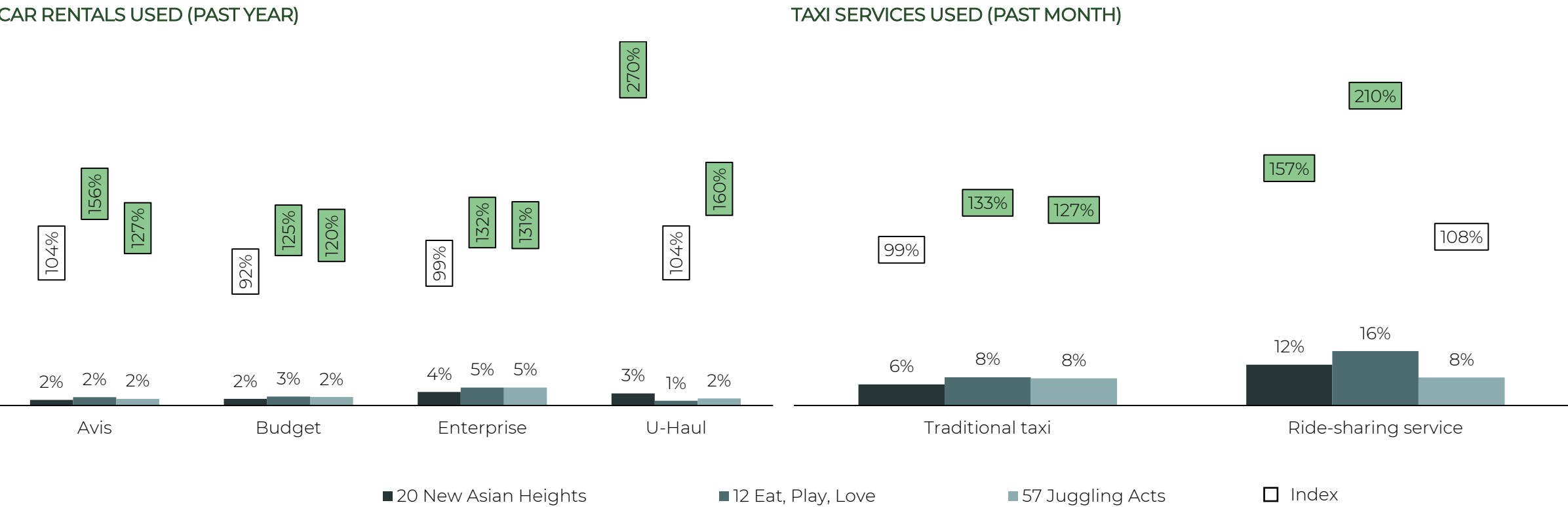
TOP 5 AIRLINES FLOWN (PAST YEAR)





# Travel Behaviour: Car Rental & Taxi Service

Cottage Country visitors are more likely to make use of car rental services than non-visitors. They are also more likely to prefer both traditional taxi services and ride-sharing services.





# 5B

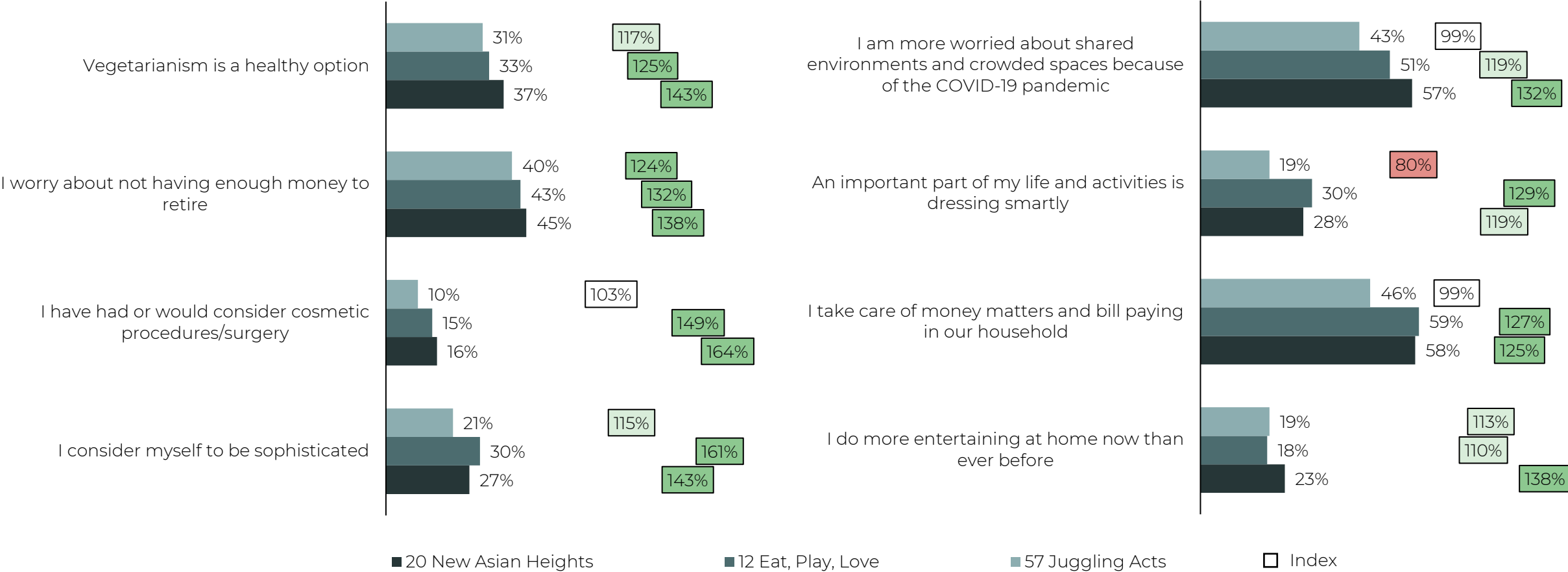
## Psychographics

- Cottage Country visitors define themselves as being sophisticated, but worry about having enough money for the future. They like to entertain at home, and are more likely to consider vegetarianism as a healthy lifestyle choice.
- Cottage Country visitors have recently experienced life events more aligned to a younger demographic, including completing university, moving out of their parents' home, having children, moving in with a significant other, and buying or selling a house. Their professional lives are also dynamic, having recently changed jobs or career, or starting their own business.
- Loyalty programs favoured by Cottage Country visitors include Starbucks Rewards, frequent flyer programs, Hudson's Bay Rewards, Aeroplan, SCENE, Tim Horton's, and PC Optimum.

# Psychographics: Top Statements

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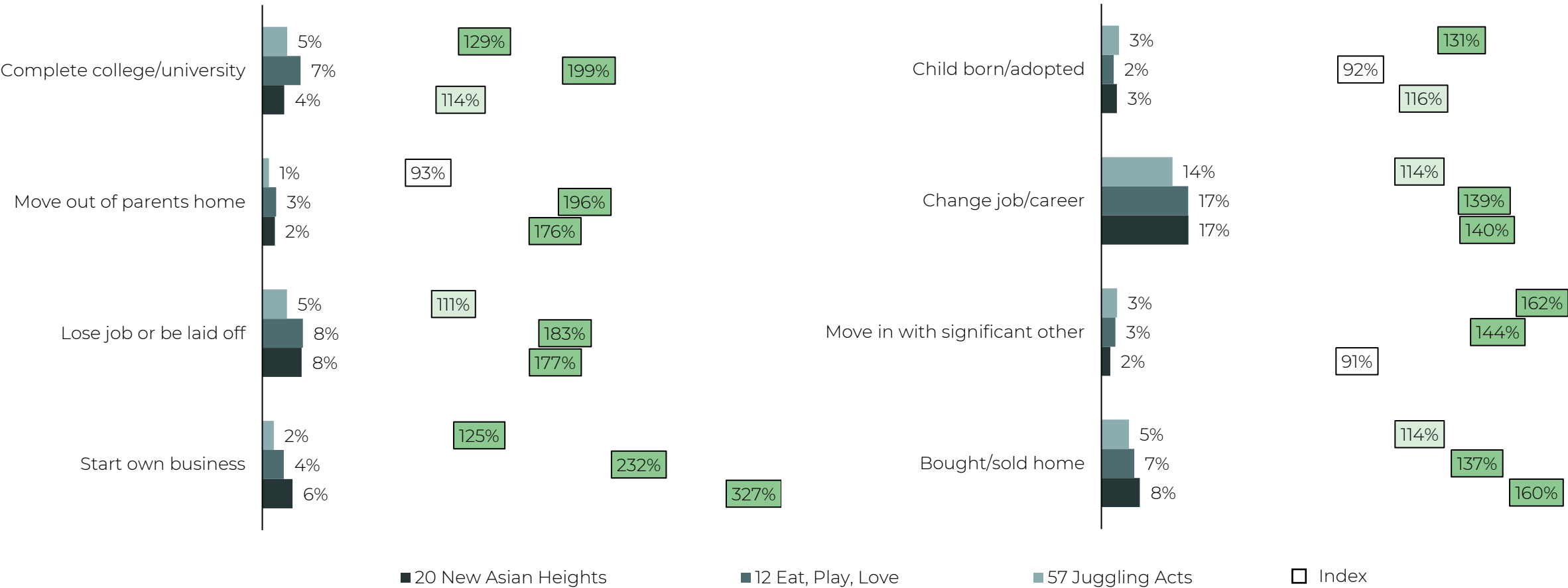
## TOP STATEMENTS AGREED WITH



# Psychographics: Life Events

Cottage Country visitors have recently experienced life events more aligned to a younger demographic, including completing university, moving out of their parents' home, having children, moving in with a significant other, and buying or selling a house. Their professional lives are also dynamic, having recently changed jobs or career, or starting their own business.

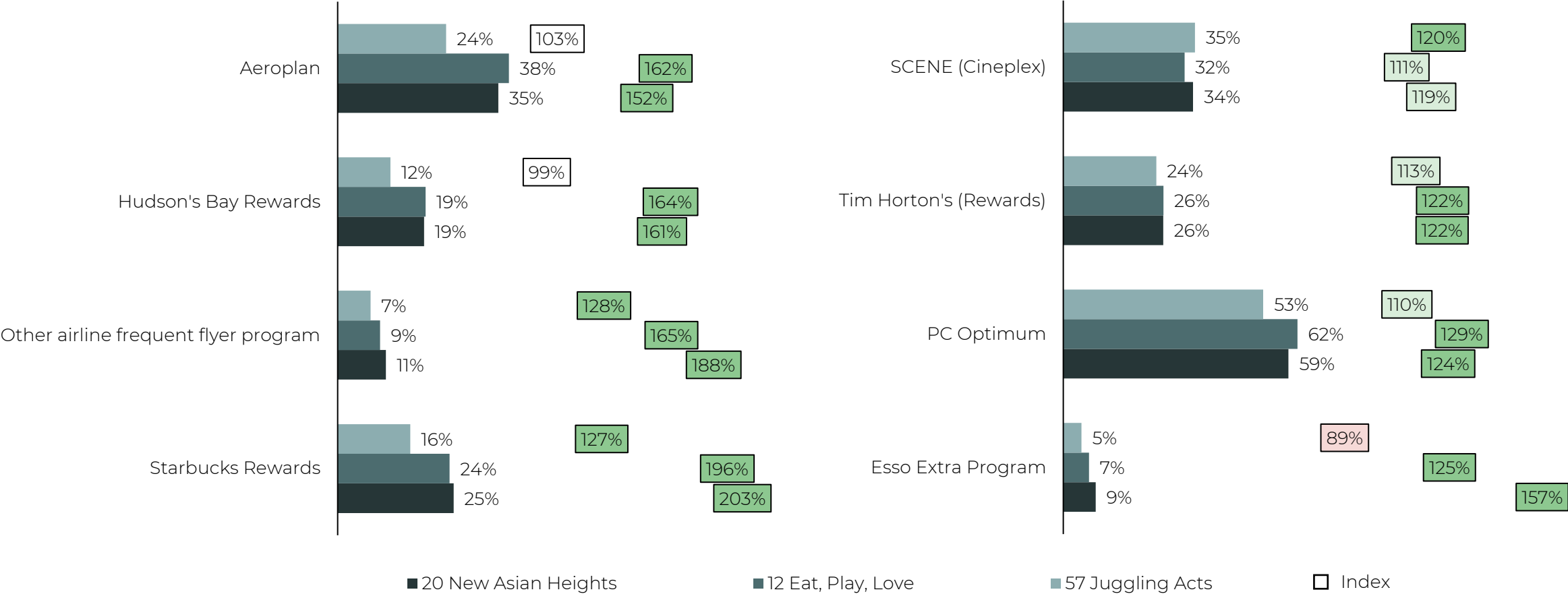
TOP LIFE EVENTS HAPPENED (PAST 2 YEARS)



# Psychographics: Loyalty Programs

Loyalty programs favoured by Cottage Country visitors include Starbucks Rewards, frequent flyer programs, Hudson’s Bay Rewards, Aeroplan, SCENE, Tim Horton’s, and PC Optimum.

## LOYALTY PROGRAMME MEMBERSHIP





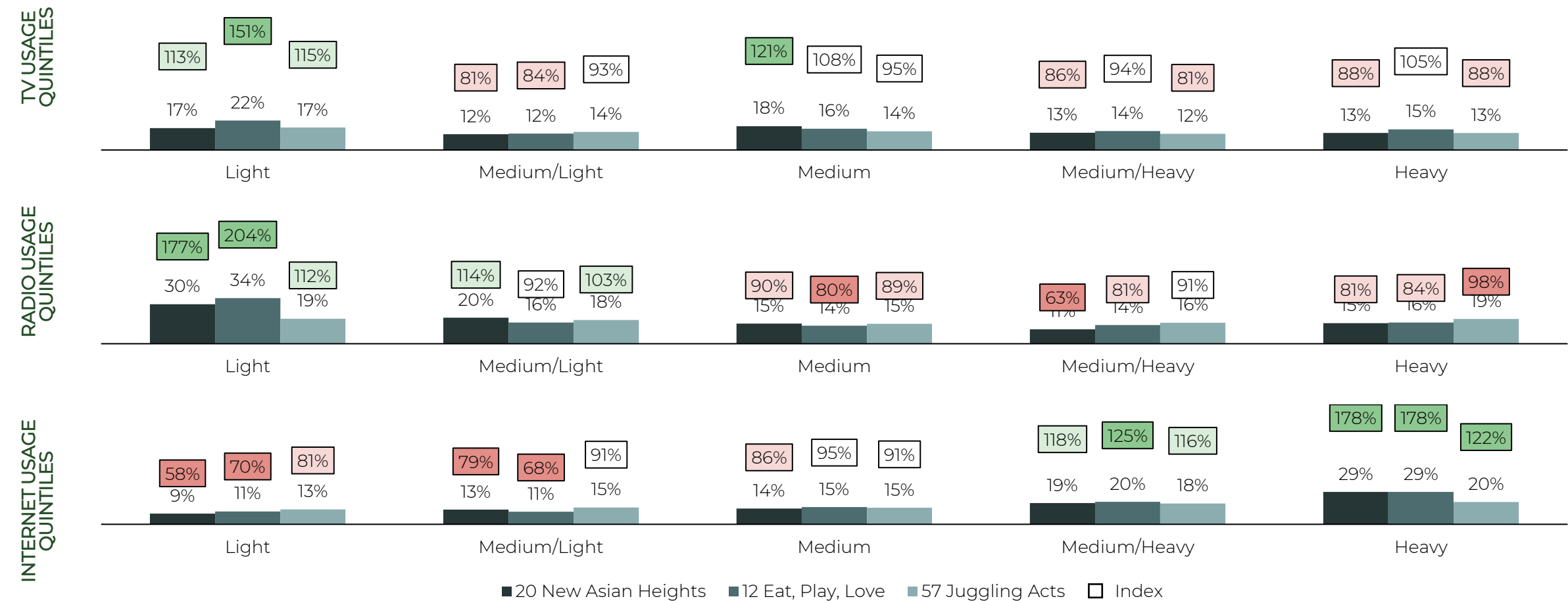


# Media Usage

- Cottage Country visitors are more likely to be light consumers of TV and Radio, while skewing towards heavy usage of digital media.
- Cottage Country visitors are more likely than non-visitors to use online dating sites. Other important social media channels include Reddit, LinkedIn, WhatsApp and Twitter (X). Snapchat and TikTok are less used by these visitors.
- Listening to podcasts is a key online activity for all Cottage Country visitor segments, as well as accessing restaurant guides and reviews. Online contests and online magazines are also more likely activities, while fashion, beauty, and travel content is favoured by some sub-segments.
- Sports programming is generally important TV content for Cottage Country visitors, while higher prevalence of Cartoons may indicate the presence of children in the household. Drama and Sci-Fi series are also more prevalent compared to non-visitors.

# Media Usage: By Medium

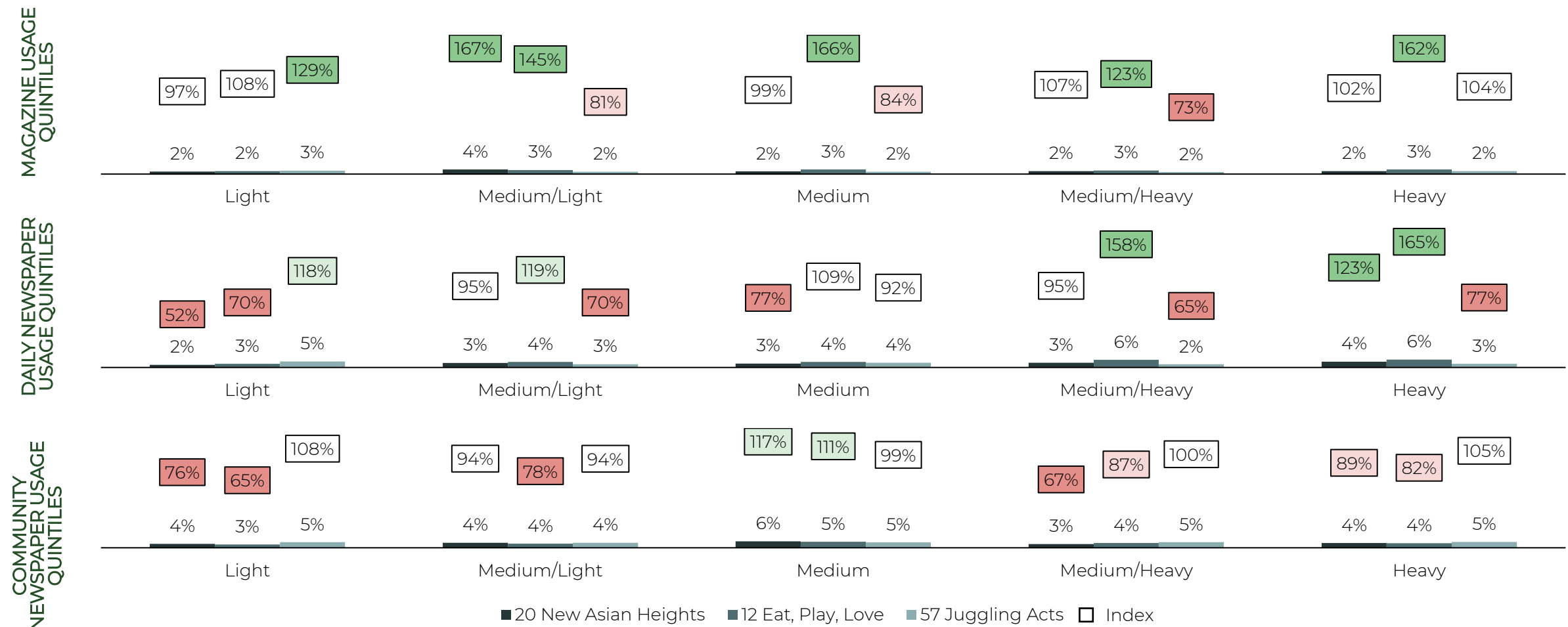
Cottage Country visitors are more likely to be light consumers of TV and Radio, while skewing towards heavy usage of digital media.





# Media Usage: By Medium

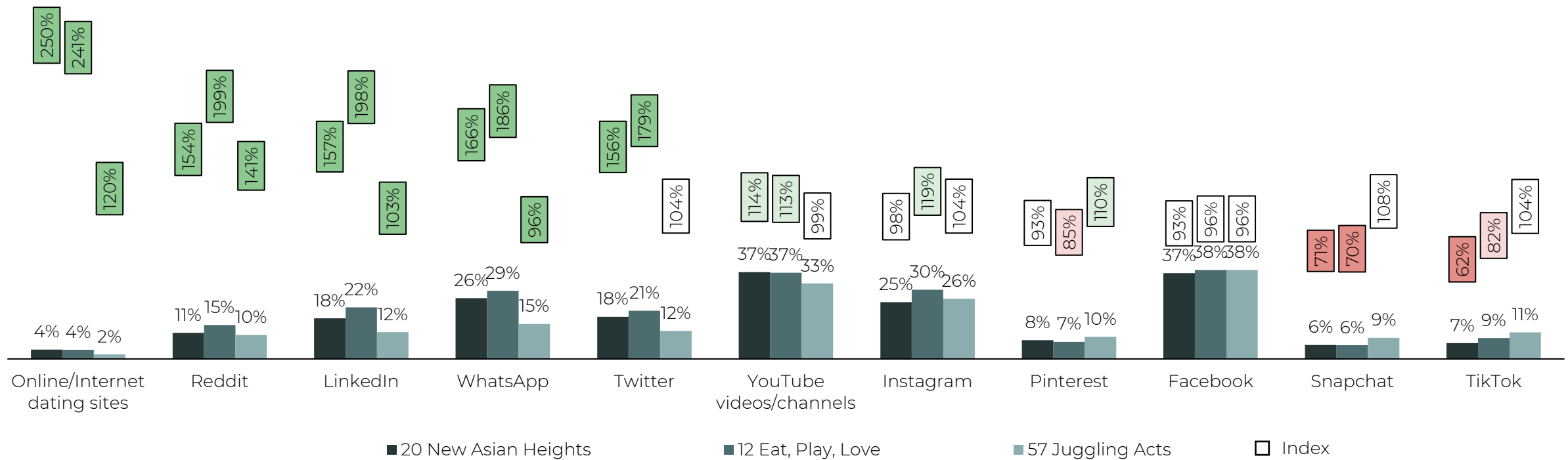
There's a greater chance of Cottage Country visitors being heavier consumers of daily newspapers, while they are less likely to consume community newspapers at all. Magazine usage depends on the visitors' sub-segment.



# Media Usage: Social Channels

Cottage Country visitors are more likely than non-visitors to use online dating sites. Other important social media channels include Reddit, LinkedIn, WhatsApp and Twitter (X). Snapchat and TikTok are less used by these visitors.

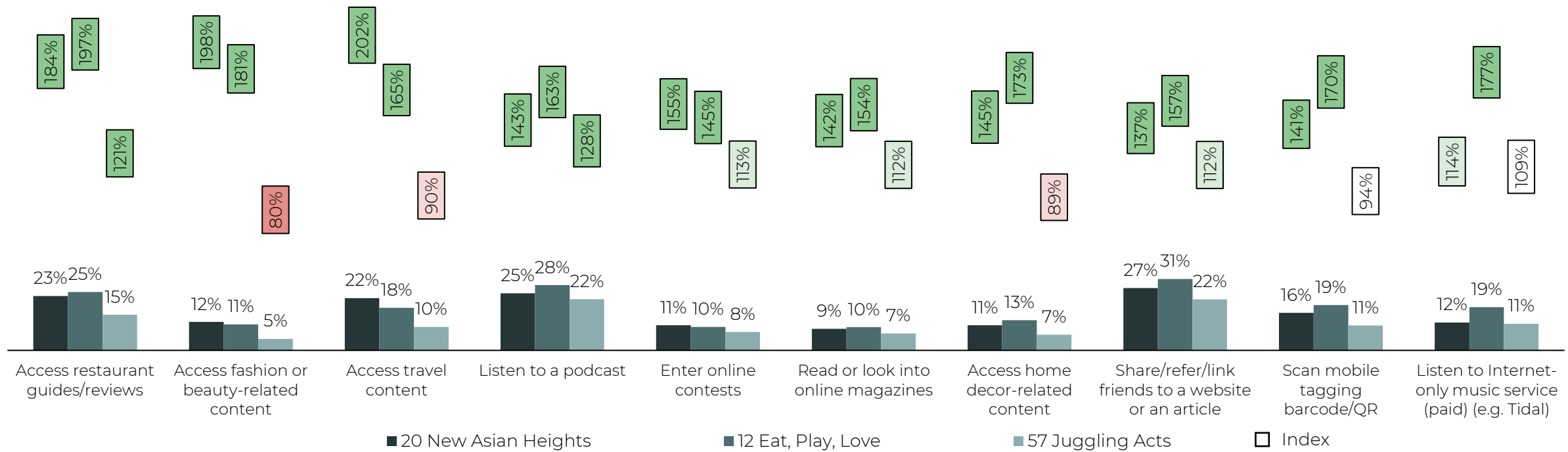
SOCIAL NETWORKS USED (PAST WEEK)



# Media Usage: Online Activities

Listening to podcasts is a key online activity for all Cottage Country visitor segments, as well as accessing restaurant guides and reviews. Online contests and online magazines are also more likely activities, while fashion, beauty, and travel content is favoured by some sub-segments.

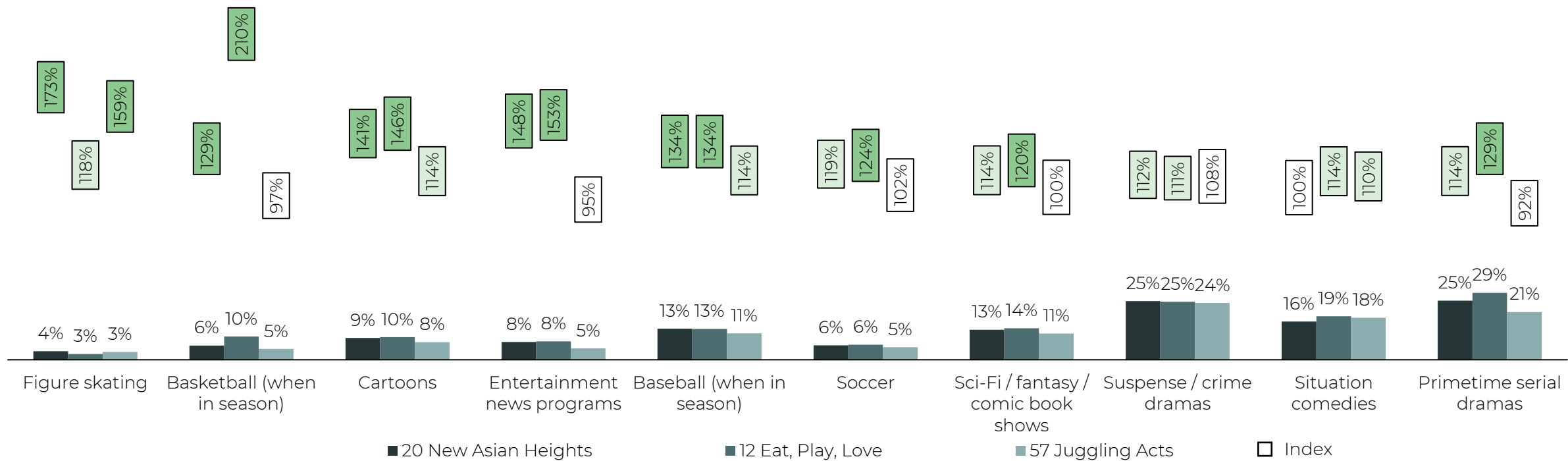
TOP 10 INTERNET ACTIVITIES (PAST WEEK)



# Media Usage: Top TV Programming

Sports programming is generally important TV content for Cottage Country visitors, while higher prevalence of Cartoons may indicate the presence of children in the household. Drama and Sci-Fi series are also more prevalent compared to non-visitors.

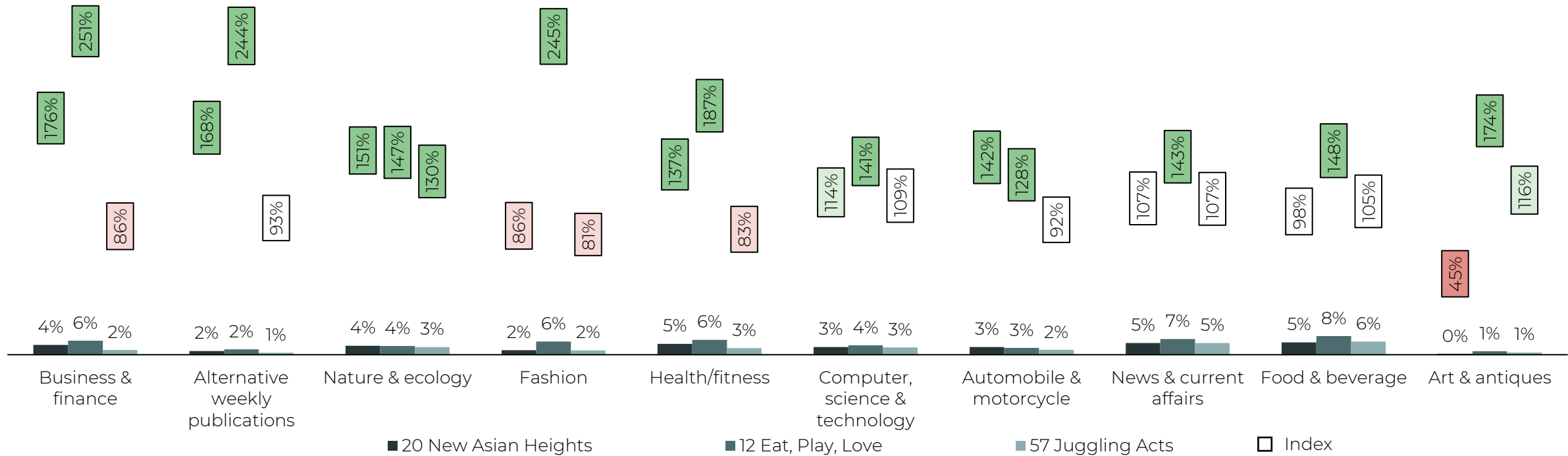
TOP 10 TV PROGRAMS WATCHED (AVERAGE WEEK)



# Media Usage: Magazines

Nature and ecology is a category of magazine that is more likely to be read by all Cottage Country visitor segments. Computer science and technology, automobiles, and current affairs are also important categories.

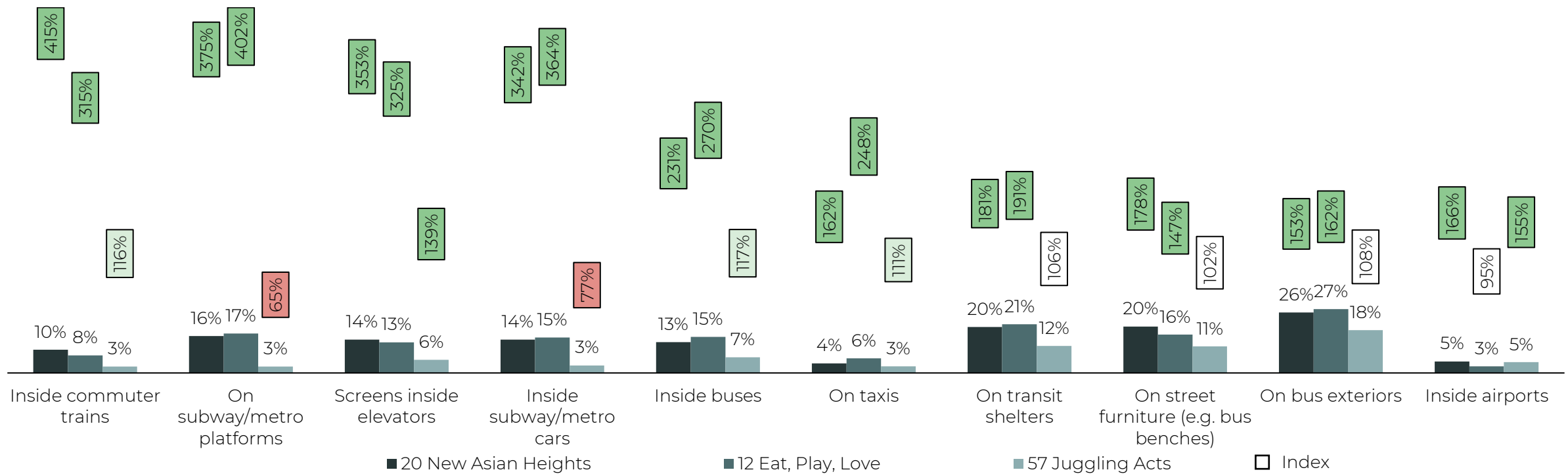
TOP 10 MAGAZINES (PRINT OR DIGITAL) READ (PAST MONTH)



# Media Usage: Out of Home

Categories of outdoor advertising that are more likely to be noticed by all segments of Cottage Country visitors include the inside of different commuter options, as well as elevator screens.

TOP 10 OUTDOOR ADVERTISING NOTICED (PAST WEEK)







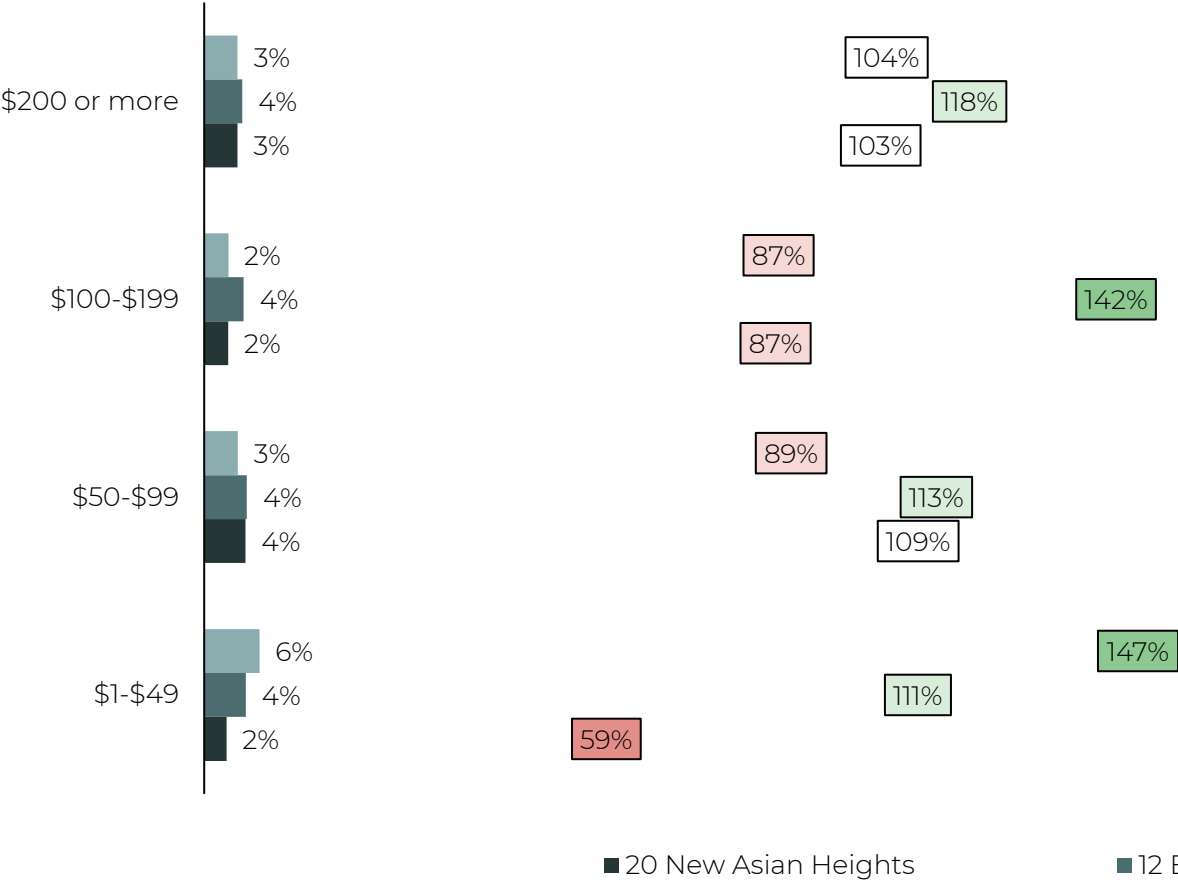
# Restaurants

- Cottage Country visitors are significantly more likely to spend more on restaurant visits for pleasure compared to non-visitors.
- Online food delivery services are more likely to be used by Cottage Country visitors, while drive throughs are less likely.
- Restaurant service types that are more likely to be visited by Cottage Country visitors include fast casual restaurants and pubs. Formal dine-in restaurants are also preferred by the majority of visitor segments.
- Juice bars, seafood restaurants, and steakhouses are universally more preferred by all Cottage Country visitor segments compared to non-visitors. International cuisine, especially Asian and Italian, is also important to the majority of sub-segments.
- Starbucks is the most universally preferred coffee shop by Cottage Country visitors. Smaller tea stores and McDonald's also enjoy some preference among certain sub-segments.

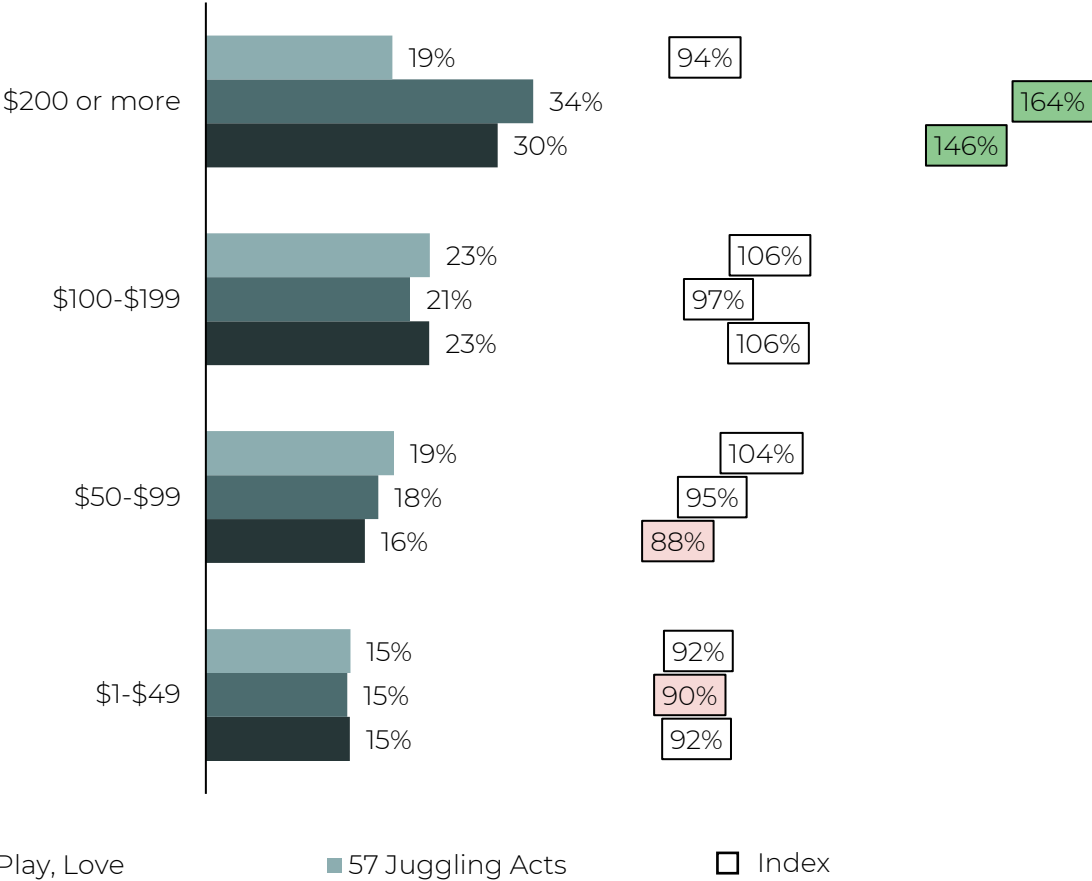
# Restaurants: Pleasure & Business Spending

Cottage Country visitors are significantly more likely to spend more on restaurant visits for pleasure compared to non-visitors. This is somewhat true for business visits as well, but there is also a likelihood of spending less when visiting restaurants for business purposes.

AMOUNT SPENT AT RESTAURANTS FOR BUSINESS (PAST MONTH)



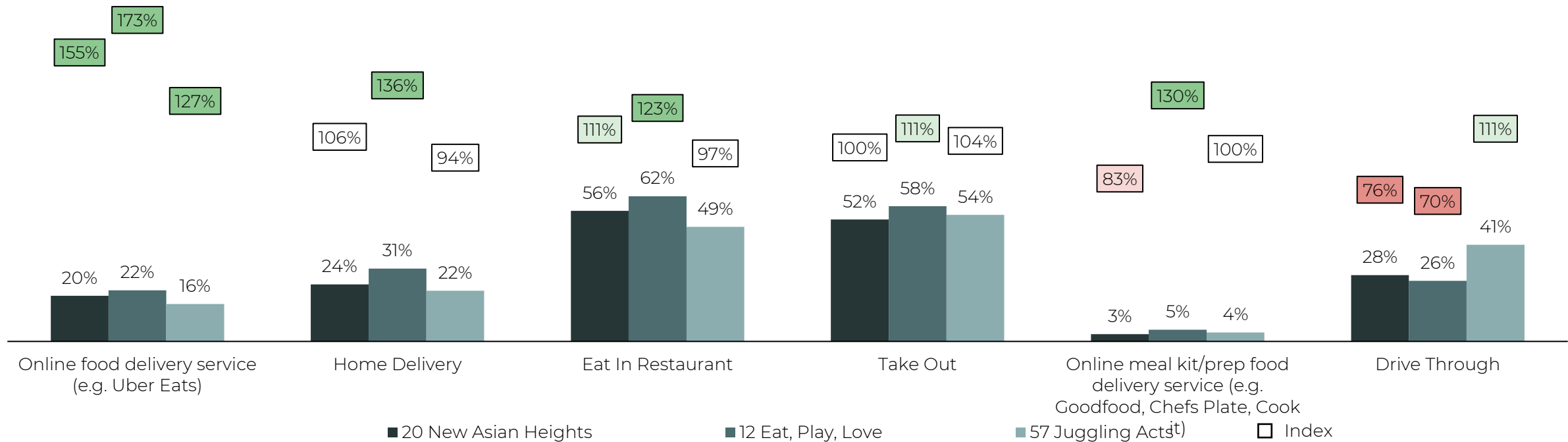
AMOUNT SPENT AT RESTAURANTS FOR PLEASURE (PAST MONTH)



# Restaurants: Types

Online food delivery services are more likely to be used by Cottage Country visitors, while drive throughs are less likely.

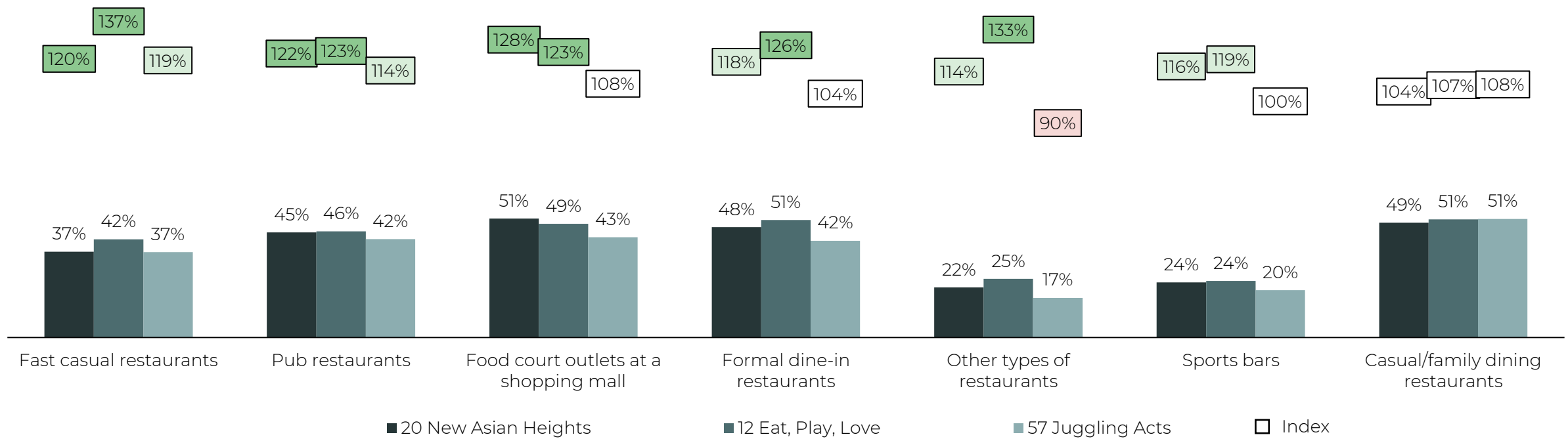
FOOD ORDERING METHODS USED (PAST MONTH)



# Restaurants: Types of Service

Restaurant service types that are more likely to be visited by Cottage Country visitors include fast casual restaurants and pubs. Formal dine-in restaurants are also preferred by the majority of visitor segments.

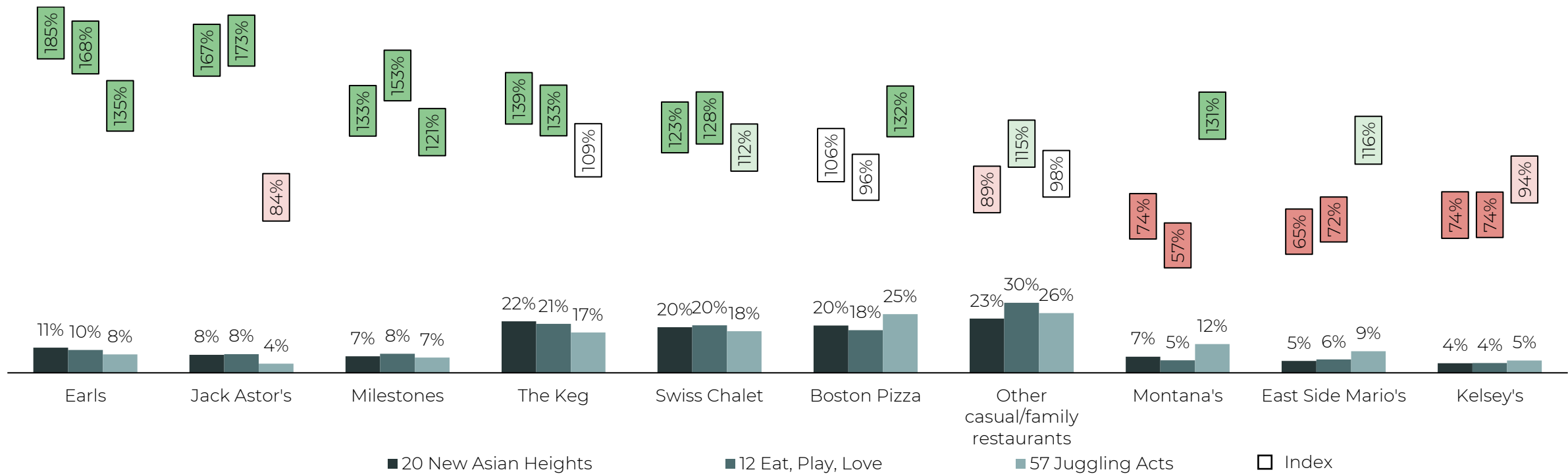
RESTAURANT SERVICE TYPE VISITED (PAST YEAR)



# Restaurants: Casual/ Family Restaurants

Casual restaurants preferred by Cottage Country visitors include Earls, Milestones, and Swiss Chalet. Kelsey's enjoys lower than average patronage from these visitors.

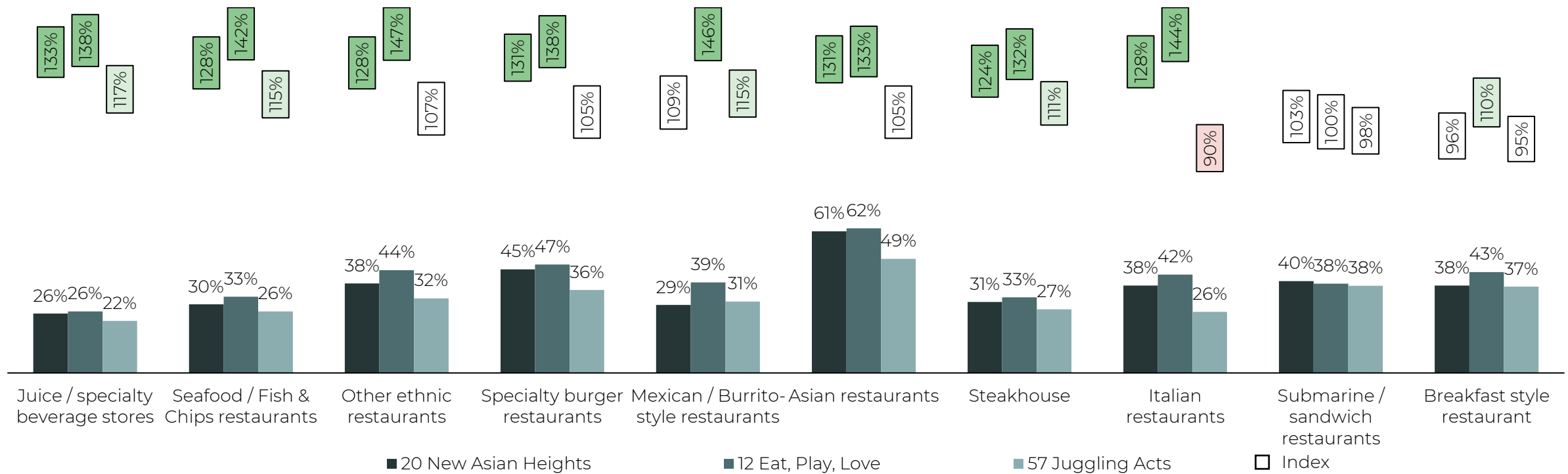
CASUAL / FAMILY RESTAURANTS VISITED OR ORDERED FROM (PAST YEAR)



# Restaurants: Type of Cuisine

Juice bars, seafood restaurants, and steakhouses are universally more preferred by all Cottage Country visitor segments compared to non-visitors. International cuisine, especially Asian and Italian, is also important to the majority of sub-segments.

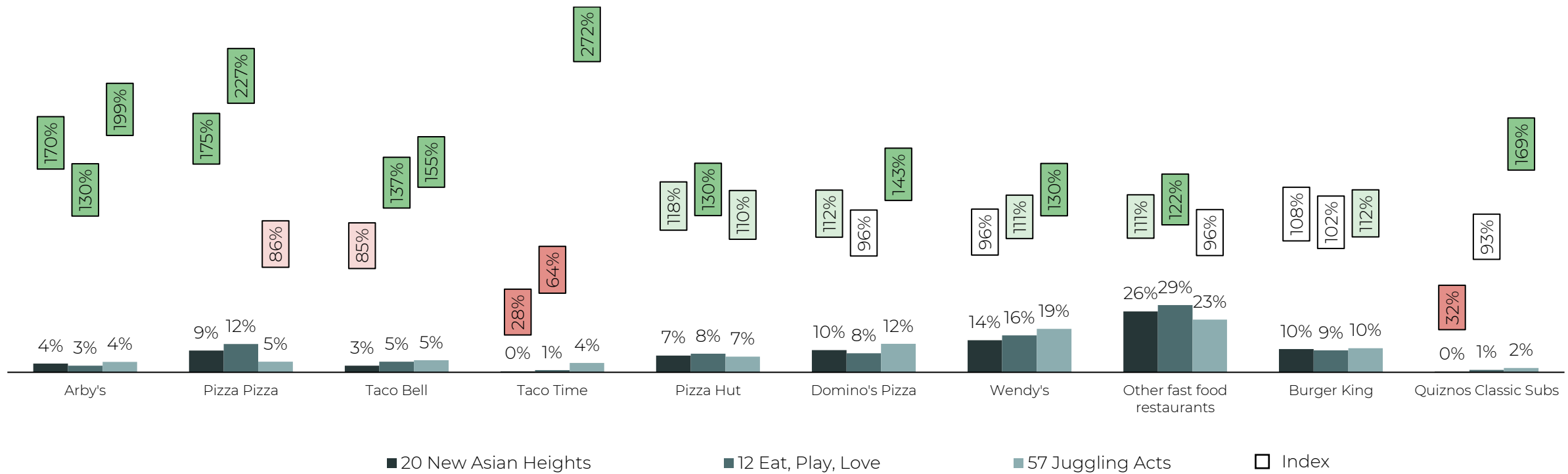
TOP 10 RESTAURANT FOOD TYPE VISITED (PAST YEAR)



# Restaurants: Fast Food Chains

Fast food restaurants that over-index for all Cottage Country visitors include Arby's and Pizza Hut. Pizza Pizza, Taco Bell, Dominos, and Wendy's are also important to a majority of segments.

TOP 10 FAST FOOD RESTAURANTS VISITED OR ORDERED FROM (PAST MONTH)

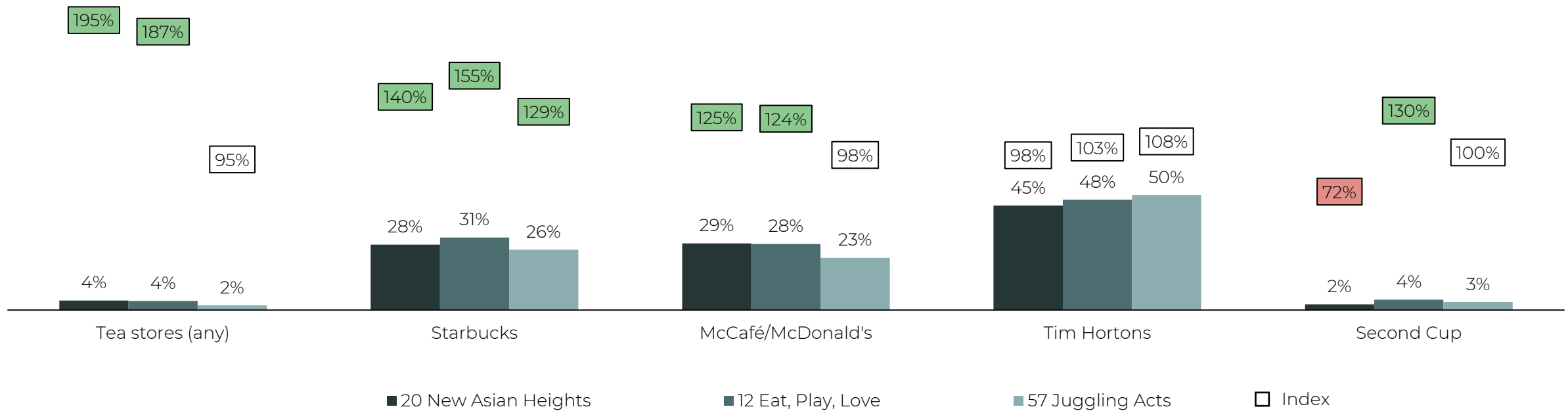




# Restaurants: Coffee Shops

Starbucks is the most universally preferred coffee shop by Cottage Country visitors. Smaller tea stores and McDonald’s also enjoy some preference among certain sub-segments.

COFFEE / DONUT SHOPS VISITED OR ORDERED FROM (PAST MONTH)





# Section 6: Rest of Ontario

## Key Segments:

- **All-Terrain Families:** Younger and middle-aged suburban families
- **Suburban Sports:** Upper-middle-income, younger and middle-aged suburbanites
- **Juggling Acts:** Young, culturally diverse lower-middle-income city dwellers



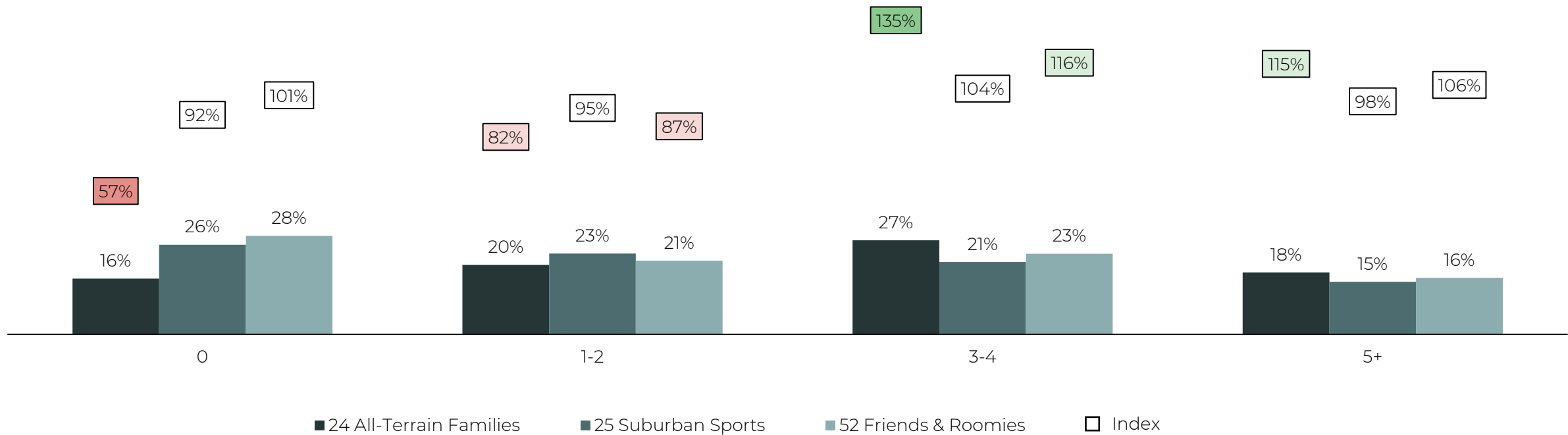
# Travel Behaviour

- Rest of Ontario visitors tend to be more likely to take 3 or more out-of-town vacations in a 3-year period, compared to non-visitors.
- Rest of Ontario visitors are more likely to have spent more than 22 nights away on business within the past year, also showing a higher likelihood for business trips both by air and road.
- Rest of Ontario visitors are more likely to have visited Jasper, Manitoba, Saskatchewan, Banff, and Alberta when traveling within Canada on vacation.
- US destinations that are more prevalent for Rest of Ontario visitors include Hawaii, San Francisco, Los Angeles, the US Midwest, and Western states.
- International destinations that over-index for Rest of Ontario visitors include Australia/New Zealand, Central/South America, Africa, UK/Ireland, and other smaller global destinations.
- Holistically, Rest of Ontario visitors are more likely to use OTAs or airline/hotel websites when planning their vacations. Travel agents are much less preferred, while package tours are also less popular.
- Rest of Ontario visitors tend to spend on the lower end of the spectrum when on vacation compared to non-visitors, while being less likely to spend more than \$2,000 per trip.
- Accommodation options used by Rest of Ontario visitors when going on vacation include cruise ships, boats, RVs and campers, Condominiums, and Bed and Breakfasts.

# Travel Behaviour: Overall Frequency of Trips

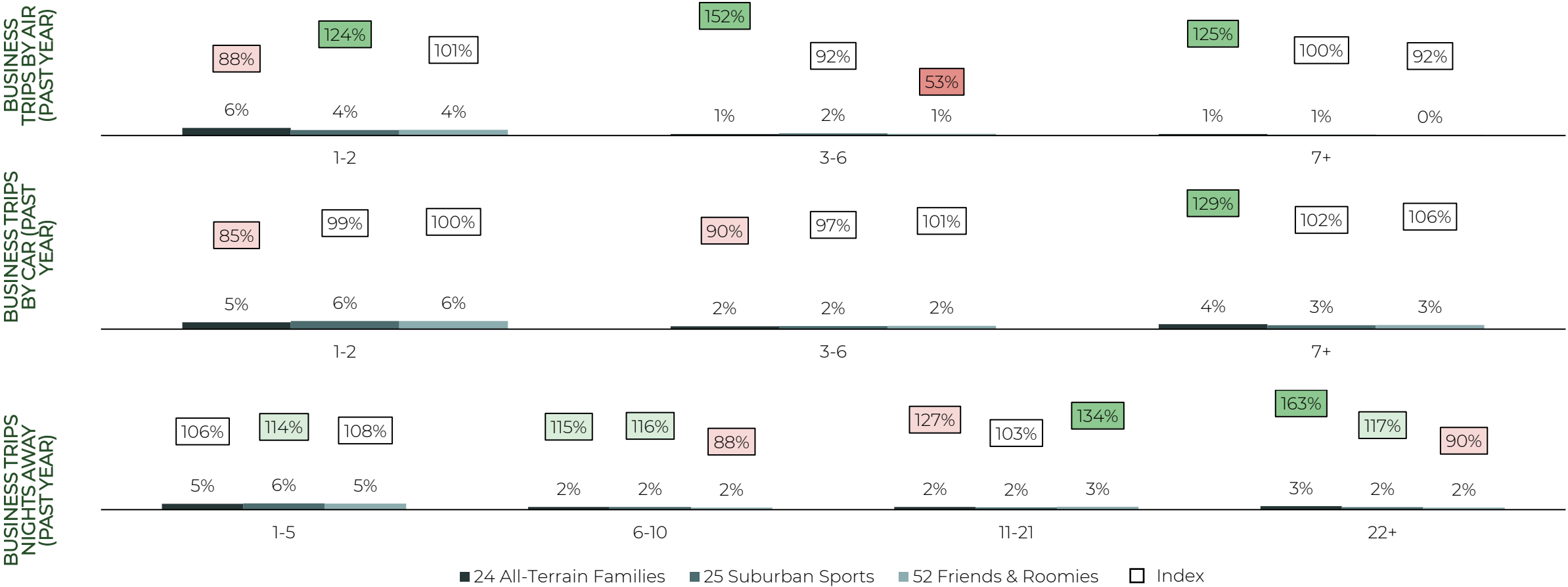
Rest of Ontario visitors tend to be more likely to take 3 or more out-of-town vacations in a 3-year period, compared to non-visitors.

OUT-OF-TOWN VACATIONS (PAST 3 YEARS)



# Travel Behaviour: Frequency of Business Trips

Rest of Ontario visitors are more likely to have spent more than 22 nights away on business within the past year, also showing a higher likelihood for business trips both by air and road.

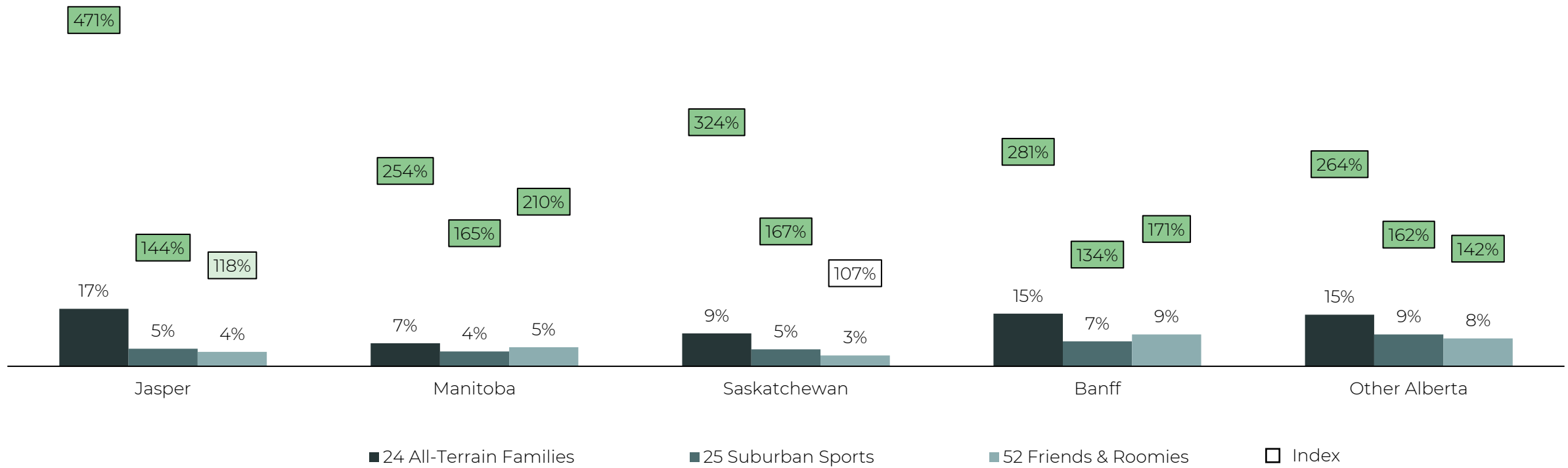




# Travel Behaviour: Canadian Destinations

Rest of Ontario visitors are more likely to have visited Jasper, Manitoba, Saskatchewan, Banff, and Alberta when traveling within Canada on vacation.

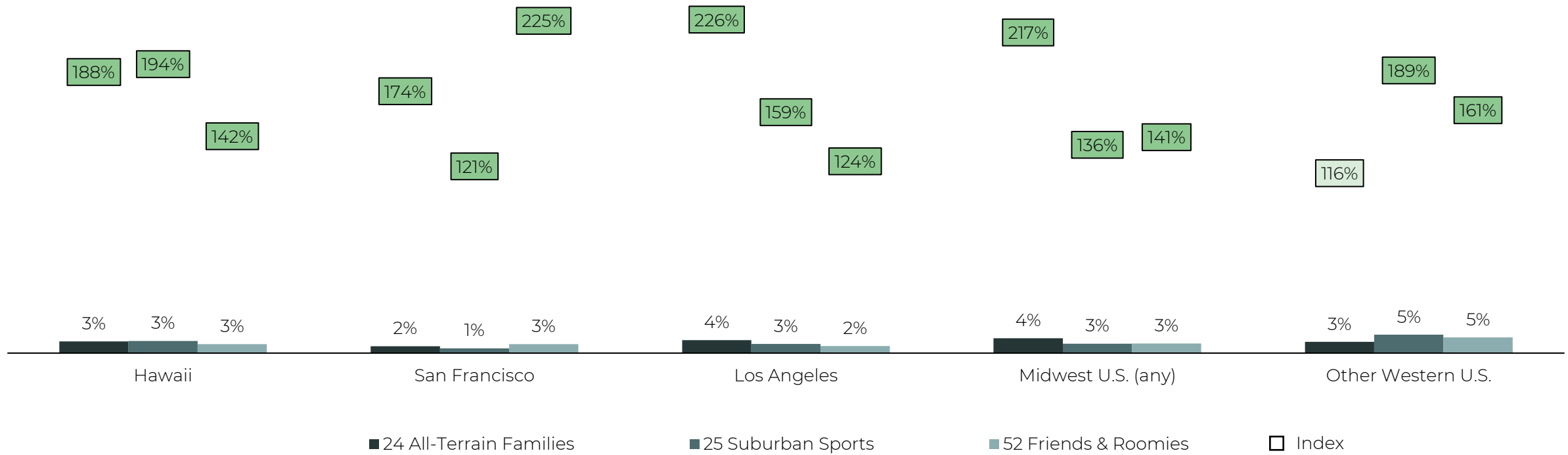
TOP 5 CANADIAN VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: U.S. Destinations

US destinations that are more prevalent for Rest of Ontario visitors include Hawaii, San Francisco, Los Angeles, the US Midwest, and Western states.

TOP 5 USA VACATION DESTINATIONS VISITED (PAST 3 YEARS)

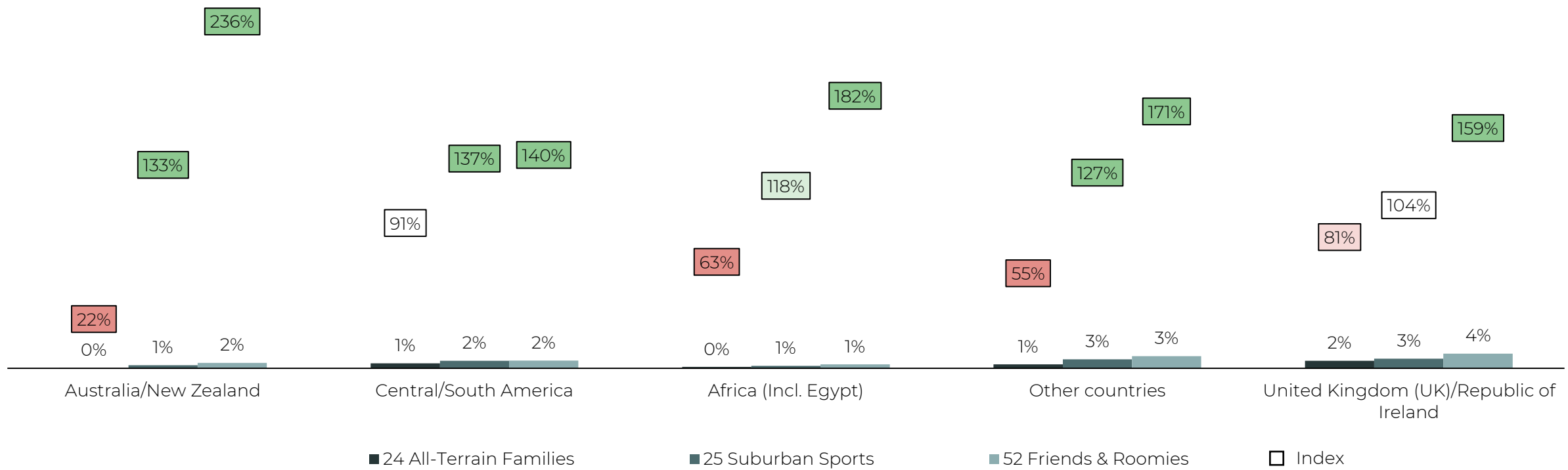




# Travel Behaviour: Global Destinations

International destinations that over-index for Rest of Ontario visitors include Australia/New Zealand, Central/South America, Africa, UK/Ireland, and other smaller global destinations.

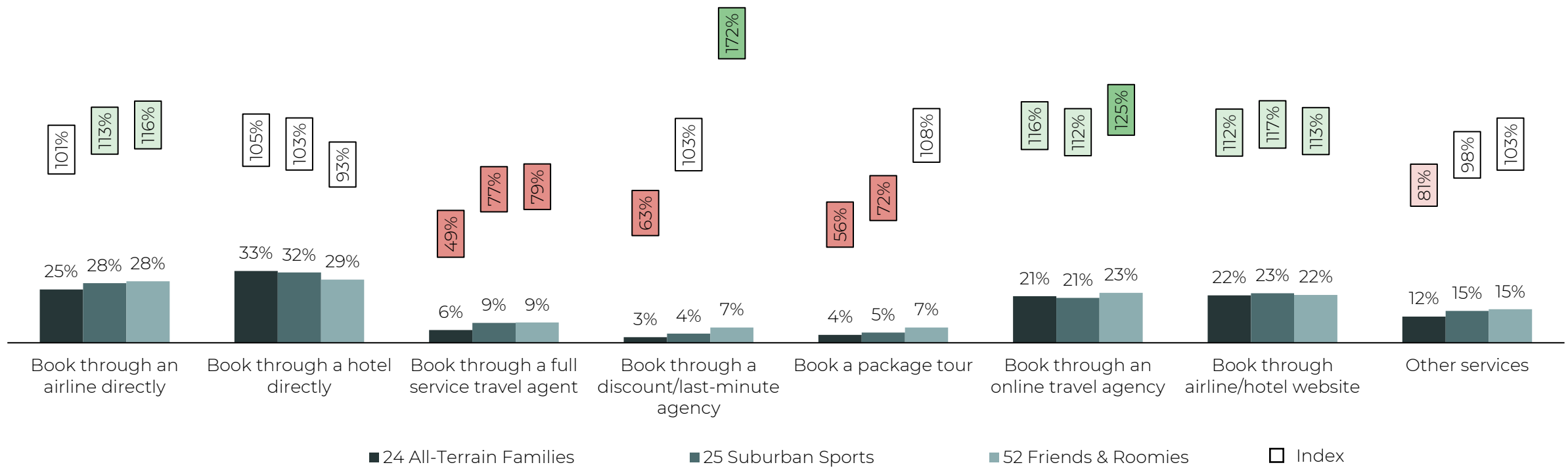
TOP 5 GLOBAL VACATION DESTINATIONS VISITED (PAST 3 YEARS)



# Travel Behaviour: Booking Channels

Holistically, Rest of Ontario visitors are more likely to use OTAs or airline/hotel websites when planning their vacations. Travel agents are much less preferred, while package tours are also less popular.

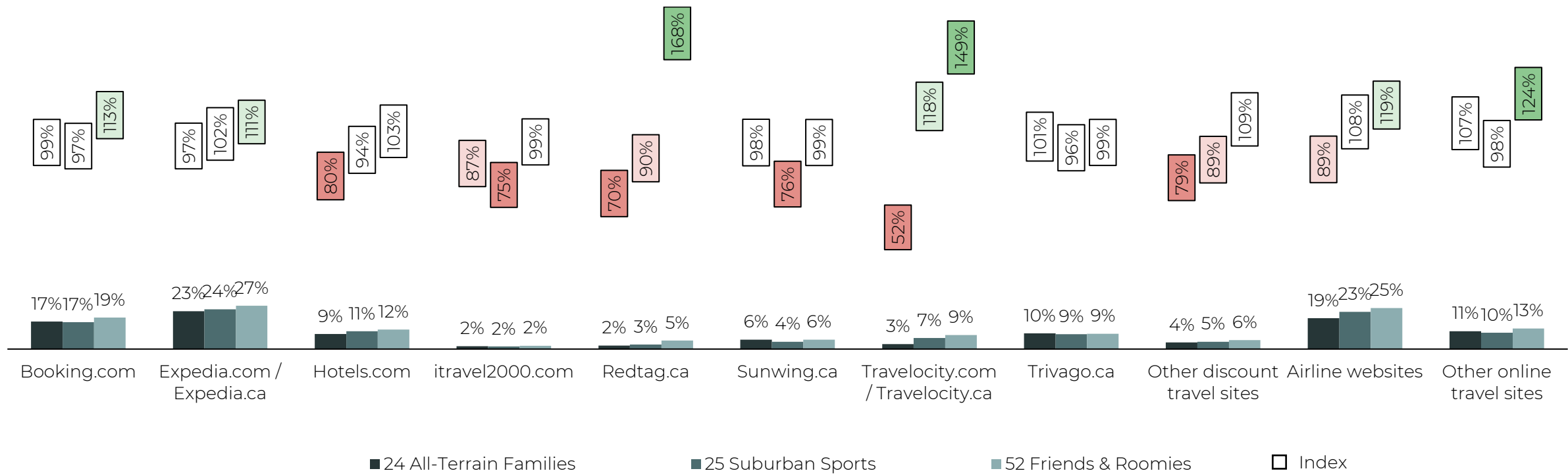
VACATION PLANNING USED (PAST 3 YEARS)



# Travel Behaviour: Online Planning & Booking

There is not single OTA that stands out for Rest of Ontario travelers, although Travelocity over-indexes for a majority of sub-segments.

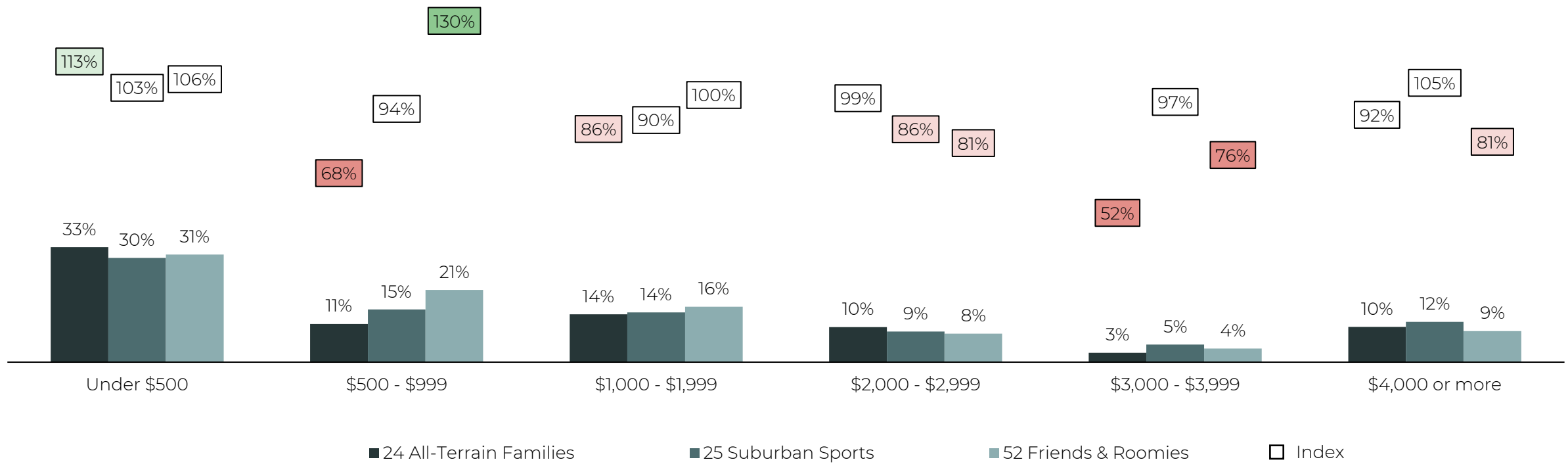
## ONLINE TRAVEL SERVICES VISITED (PAST YEAR)



# Travel Behaviour: Spending

Rest of Ontario visitors tend to spend on the lower end of the spectrum when on vacation compared to non-visitors, while being less likely to spend more than \$2,000 per trip.

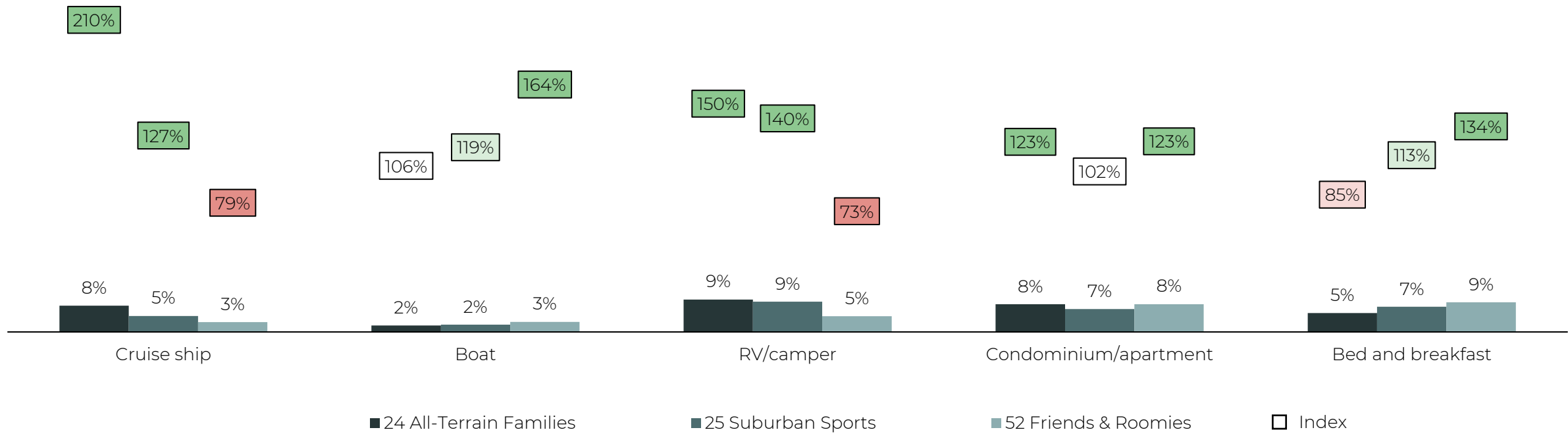
## LAST VACATION SPENDING



# Travel Behaviour: Accommodation

Accommodation options used by Rest of Ontario visitors when going on vacation include cruise ships, boats, RVs and campers, Condominiums, and Bed and Breakfasts.

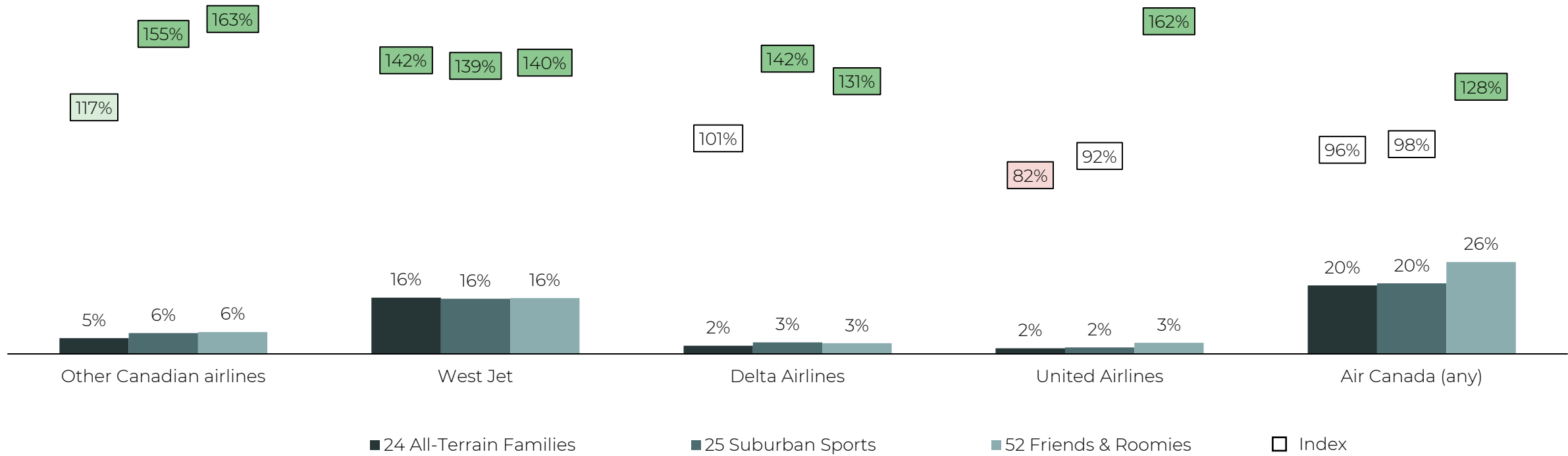
TOP 5 VACATION ACCOMMODATIONS USED (PAST 3 YEARS)



# Travel Behaviour: Airlines

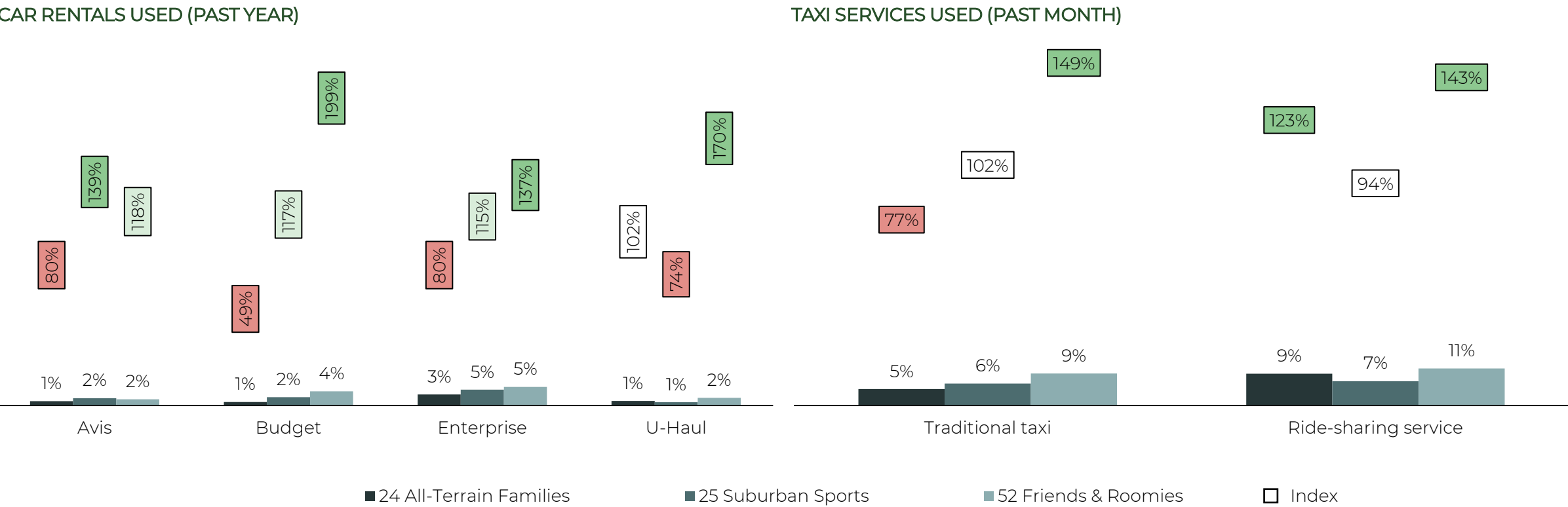
West Jet over-indexes for all Rest of Ontario visitor segments when considering airline usage. Smaller Canadian airlines are also more likely to be used.

TOP 5 AIRLINES FLOWN (PAST YEAR)



# Travel Behaviour: Car Rental & Taxi Service

Rest of Ontario visitors are more likely to prefer ride-sharing services compared to non-visitors. Usage of car rental services is more varied, although holistically there is evidence that it is more used compared to non-visitors.







# 6B

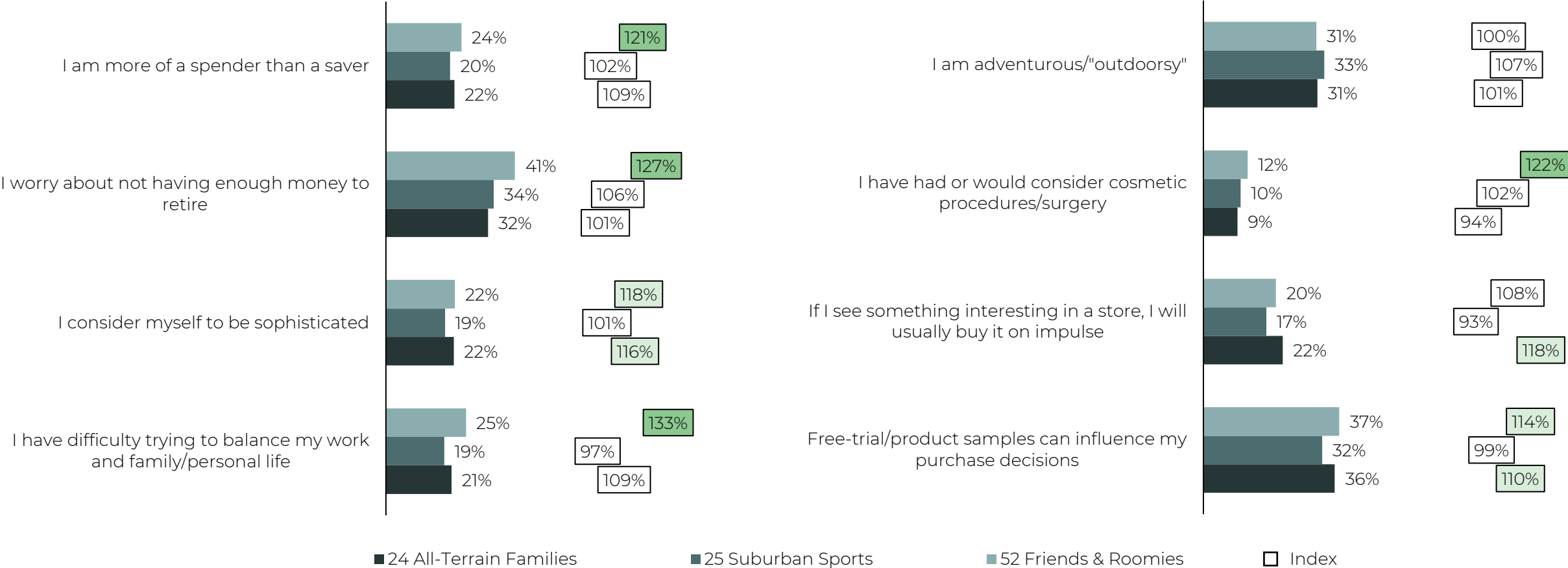
## Psychographics

- Rest of Ontario visitors don't significantly differentiate themselves from non-visitors on Psychographic statements. Statements that show some differentiation include the perception of being sophisticated, and a tendency to be influenced by free trials or samples.
- Rest of Ontario visitors are generally more likely to have experienced life events associated with a younger demographic, including purchasing a first vehicle, moving out of their parents' home, completing university, or moving in with a significant other.
- Loyalty programs used by Rest of Ontario visitors include SCENE, Tim Horton's, Starbucks, PC Optimum, Canadian Tire Triangle, and credit card loyalty programs.

# Psychographics: Top Statements

Rest of Ontario visitors don't significantly differentiate themselves from non-visitors on Psychographic statements. Statements that show some differentiation include the perception of being sophisticated, and a tendency to be influenced by free trials or samples.

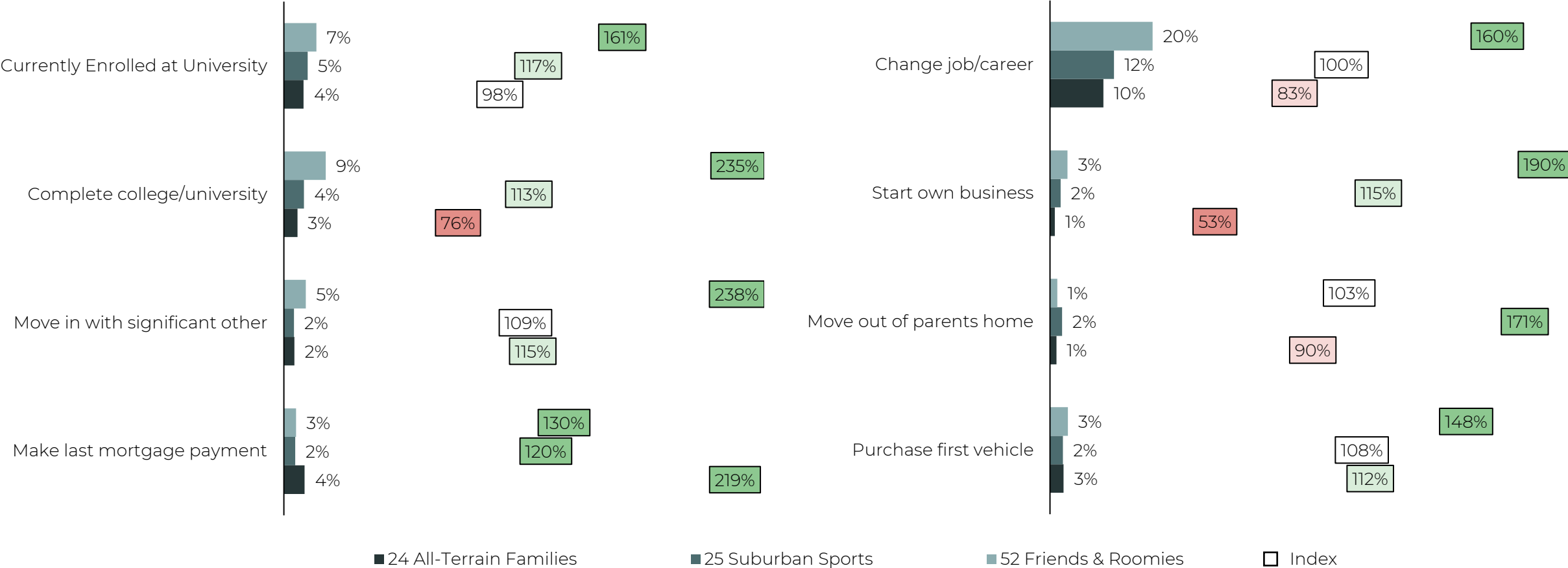
## TOP STATEMENTS AGREED WITH



# Psychographics: Life Events

Rest of Ontario visitors are generally more likely to have experienced life events associated with a younger demographic, including purchasing a first vehicle, moving out of their parents' home, completing university, or moving in with a significant other.

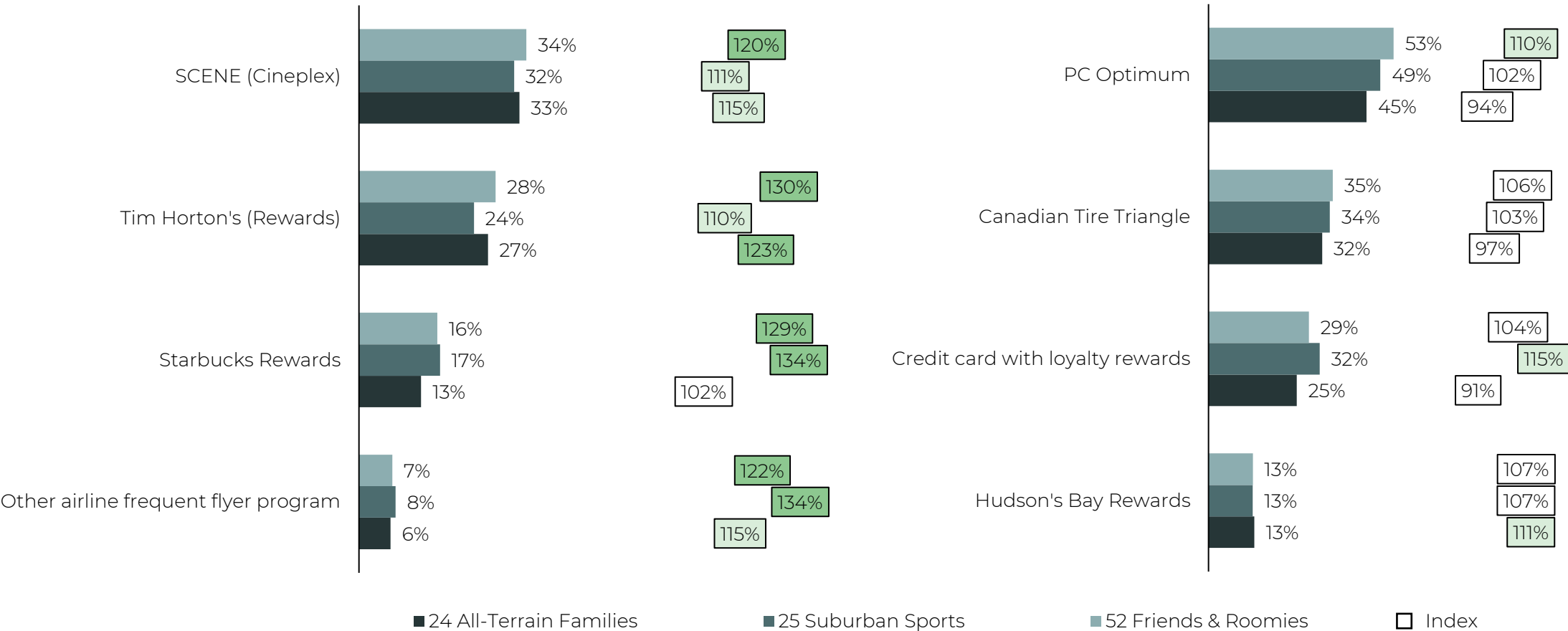
## TOP LIFE EVENTS HAPPENED (PAST 2 YEARS)



# Psychographics: Loyalty Programs

Loyalty programs used by Rest of Ontario visitors include SCENE, Tim Horton's, Starbucks, PC Optimum, Canadian Tire Triangle, and credit card loyalty programs.

## LOYALTY PROGRAMME MEMBERSHIP







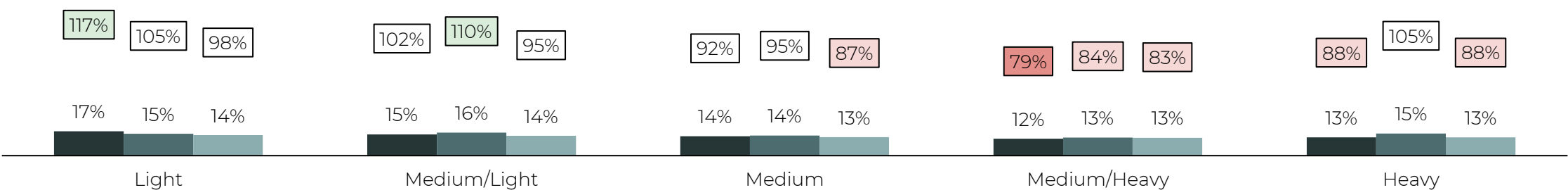
# Media Usage

- Rest of Ontario visitors tend to be lighter consumers of TV and radio, while they are more likely to be heavy consumers of digital media.
- Consumption of print media is generally lighter for Rest of Ontario visitors, although some sub-segments show a likelihood for heavier consumption of magazines and community newspapers.
- While social media channel usage is not consistent across sub-segments of Rest of Ontario visitors, Snapchat and Twitter (X) seem to be more important holistically. Online dating is not much used by Rest of Ontario visitors.
- Online activities more universally used by Rest of Ontario visitors include placing or responding to ads, downloading video content, watching streaming services, and listening to paid music services.

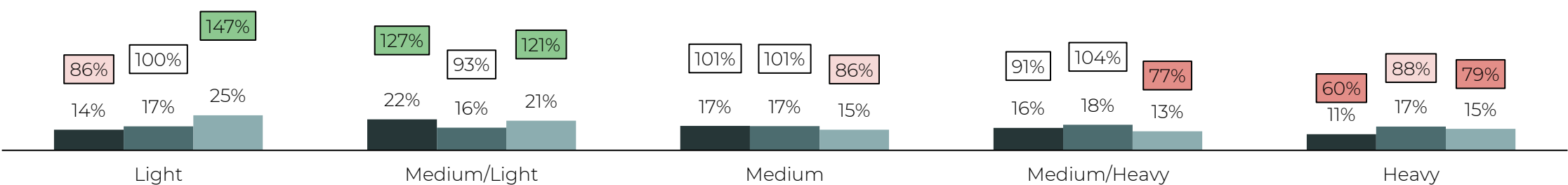
# Media Usage: By Medium

Rest of Ontario visitors tend to be lighter consumers of TV and radio, while they are more likely to be heavy consumers of digital media.

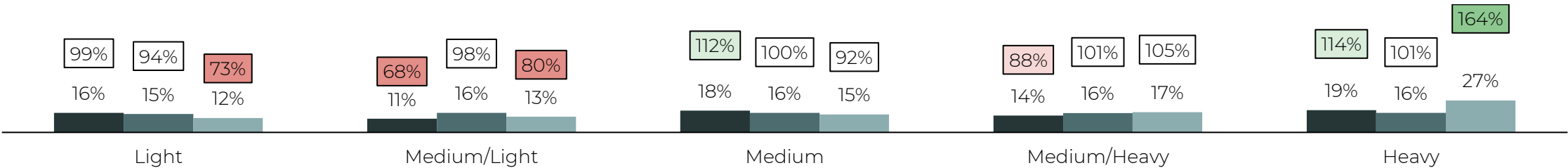
TV USAGE  
QUINTILES



RADIO USAGE  
QUINTILES



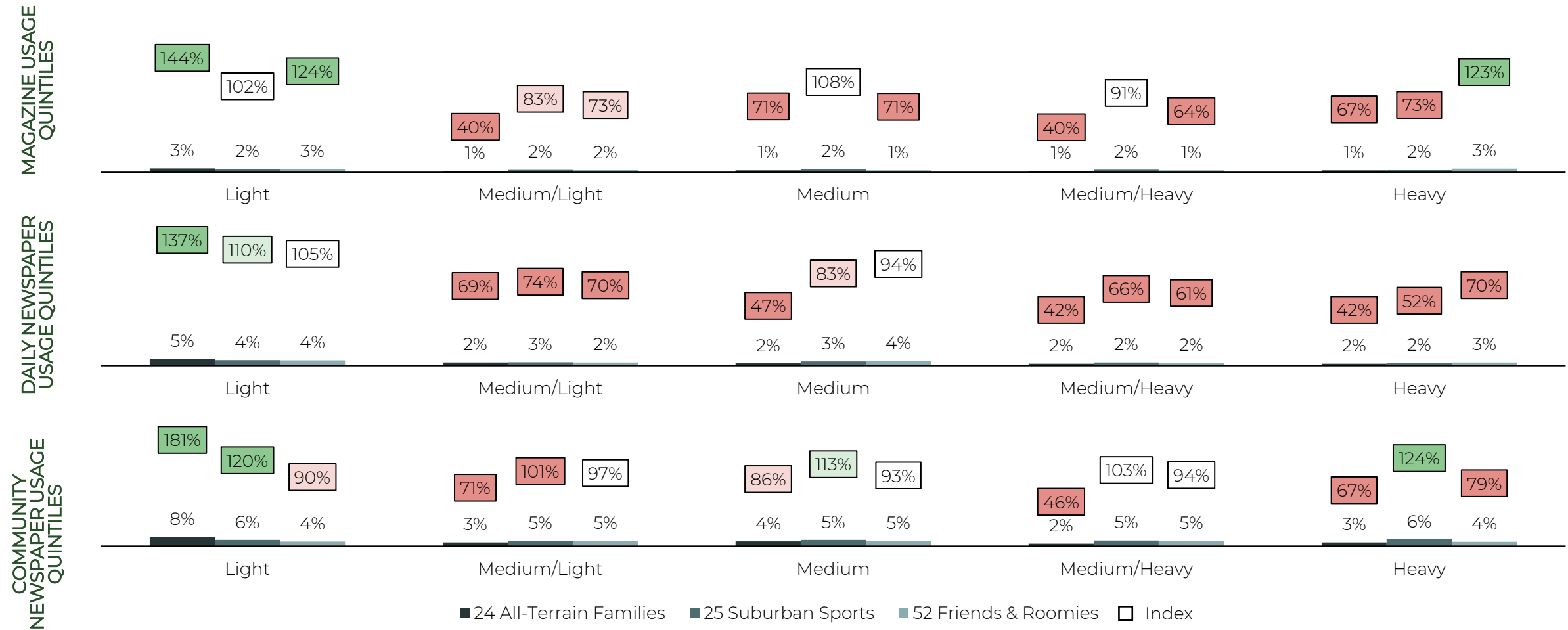
INTERNET USAGE  
QUINTILES



■ 24 All-Terrain Families ■ 25 Suburban Sports ■ 52 Friends & Roomies □ Index

# Media Usage: By Medium

Consumption of print media is generally lighter for Rest of Ontario visitors, although some sub-segments show a likelihood for heavier consumption of magazines and community newspapers.

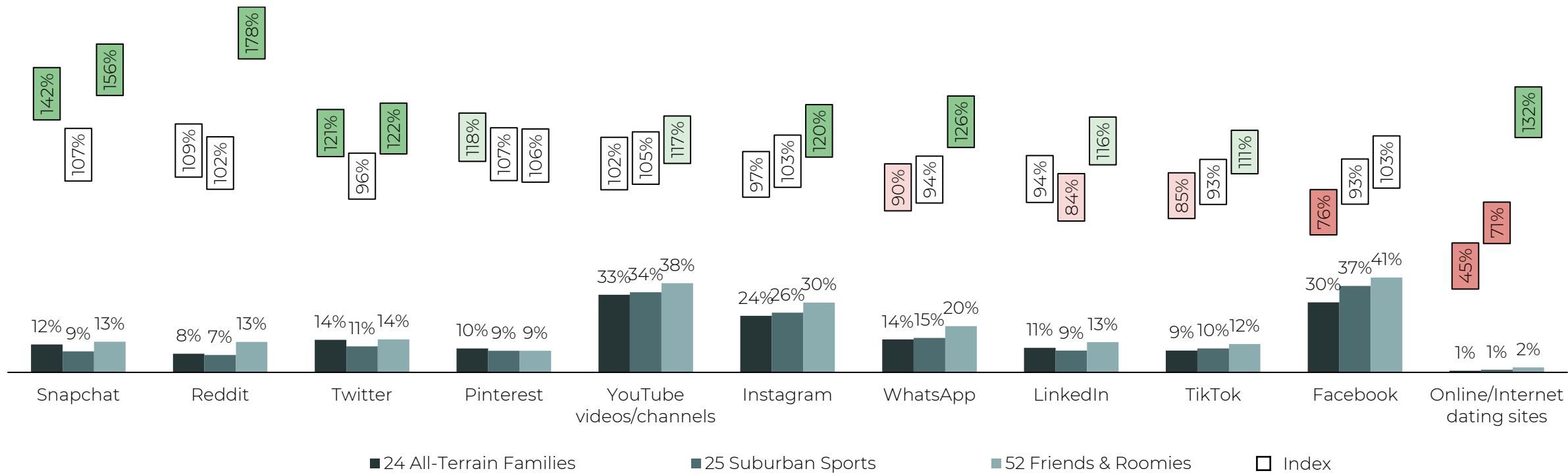




# Media Usage: Social Channels

While social media channel usage is not consistent across sub-segments of Rest of Ontario visitors, Snapchat and Twitter (X) seem to be more important holistically. Online dating is not much used by Rest of Ontario visitors.

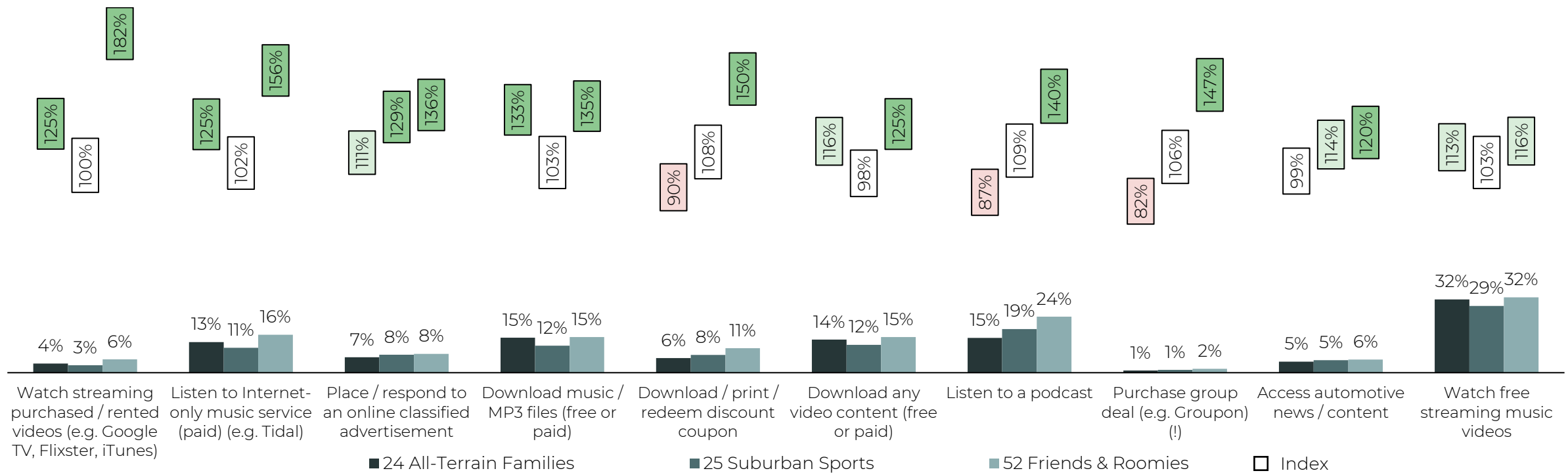
SOCIAL NETWORKS USED (PAST WEEK)



# Media Usage: Online Activities

Online activities more universally used by Rest of Ontario visitors include placing or responding to ads, downloading video content, watching streaming services, and listening to paid music services.

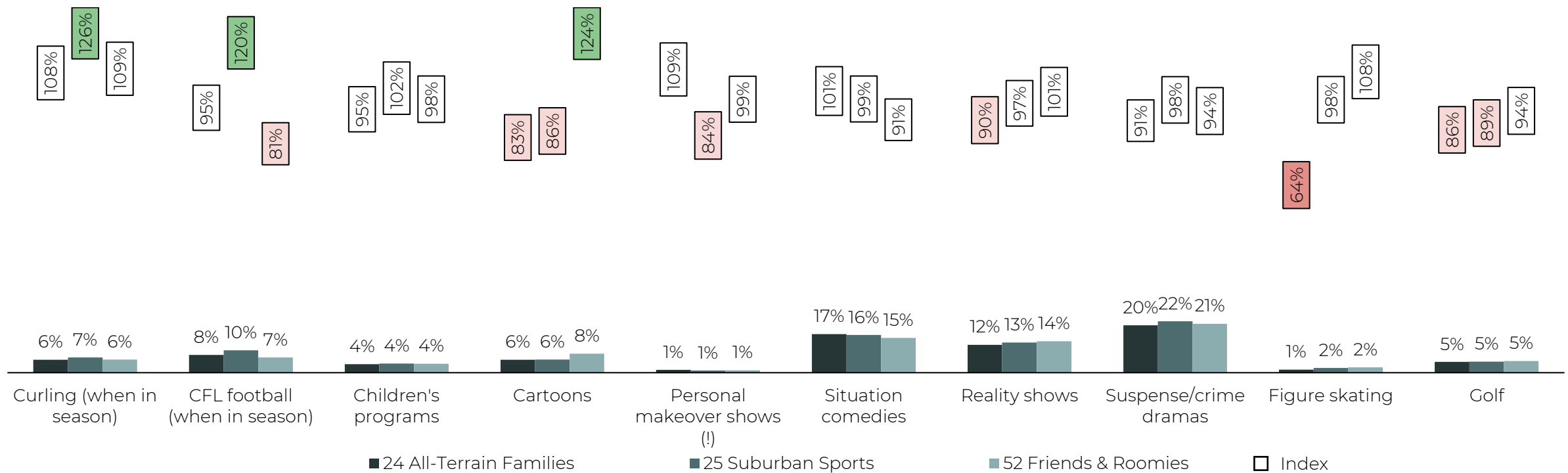
TOP 10 INTERNET ACTIVITIES (PAST WEEK)



# Media Usage: Top TV Programming

Rest of Ontario visitors do not fundamentally differentiate themselves from non-visitors in terms of TV programs watched. Sitcoms, reality shows, and suspense dramas are more prevalent at an absolute level.

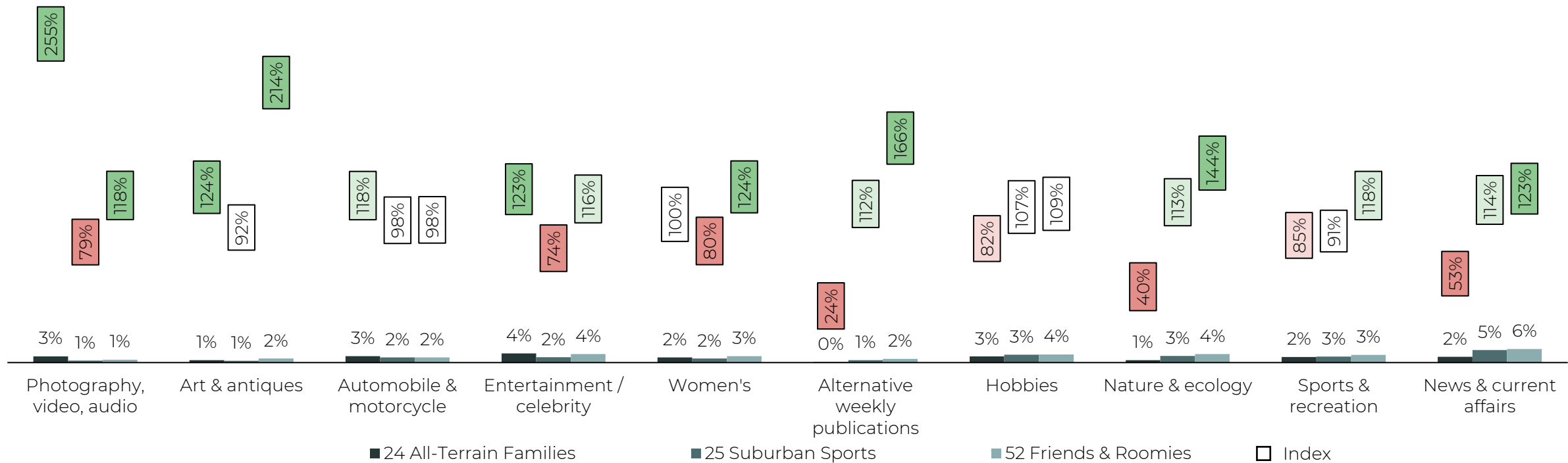
TOP 10 TV PROGRAMS WATCHED (AVERAGE WEEK)



# Media Usage: Magazines

While incidence of magazine readership is low, Rest of Ontario visitors show some increased likelihood towards reading news and current affairs, and photography magazines.

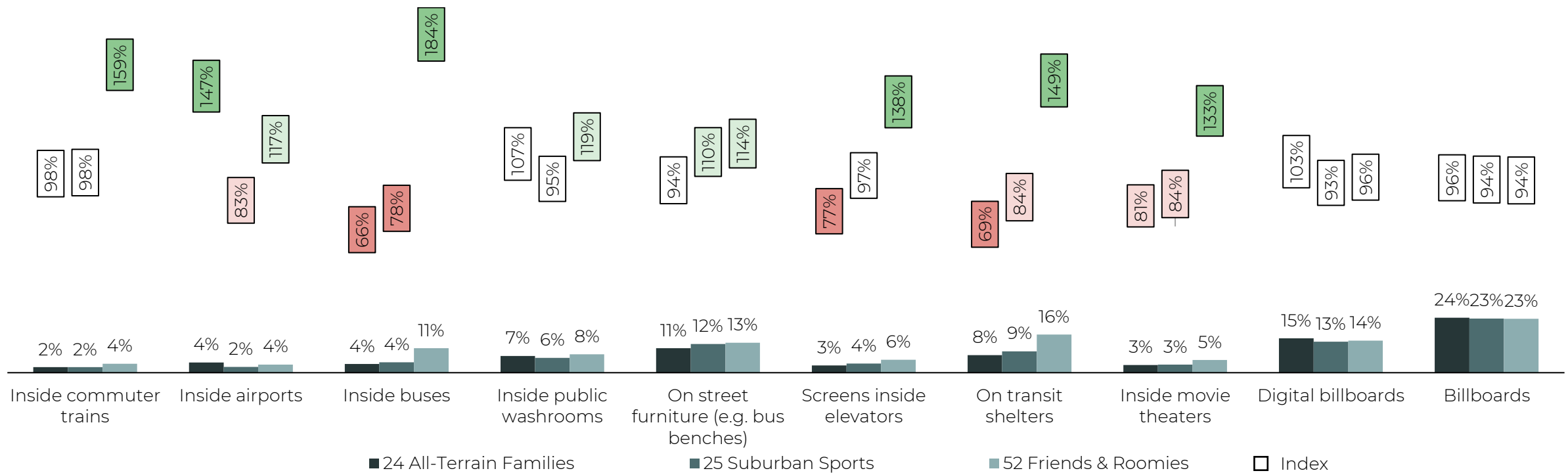
TOP 10 MAGAZINES (PRINT OR DIGITAL) READ (PAST MONTH)



# Media Usage: Out of Home

Notice of outdoor advertising is not consistent among Rest of Ontario visitor segments. Those channels that do tend to be notice more are generally related to commuter services.

TOP 10 OUTDOOR ADVERTISING NOTICED (PAST WEEK)





# Restaurants

- Rest of Ontario visitors show a tendency to spend less on restaurant visits compared to their non-visitor counterparts, whether for business or personal purposes.
- Rest of Ontario visitors are less likely to make use of online meal kit and home delivery services. Certain sub-segments are much more likely to make use of online food delivery services however.
- Casual restaurants preferred by Rest of Ontario visitors include Earls, Boston Pizza, and Montana's. Jack Astor's and Kelsey's are much less likely to be frequented by these visitors.
- Rest of Ontario visitors are more likely to visit Juice Bars compared to non-visitors.
- Rest of Ontario visitors over-index on visiting Taco Time, Arby's, Dairy Queen, Quiznos, and Wendy's compared to non-visitors.

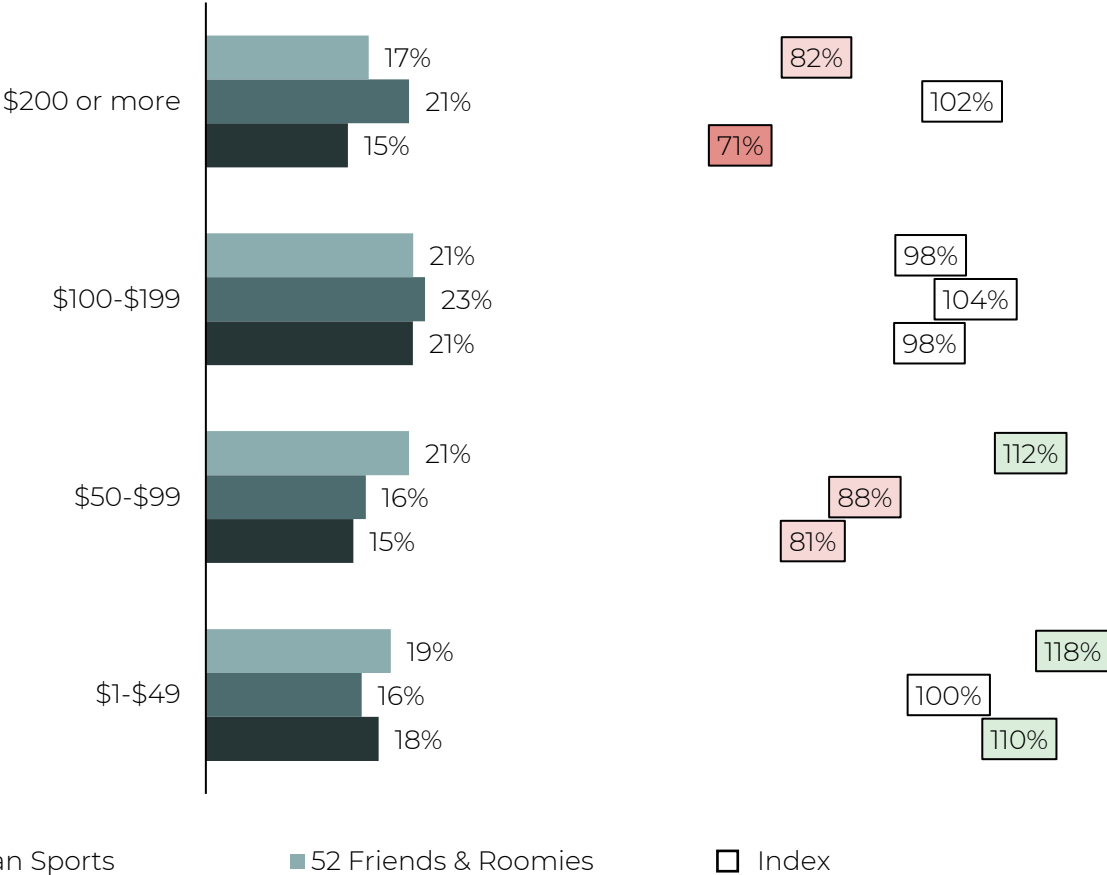
# Restaurants: Pleasure & Business Spending

Rest of Ontario visitors show a tendency to spend less on restaurant visits compared to their non-visitor counterparts, whether for business or personal purposes.

AMOUNT SPENT AT RESTAURANTS FOR BUSINESS (PAST MONTH)



AMOUNT SPENT AT RESTAURANTS FOR PLEASURE (PAST MONTH)

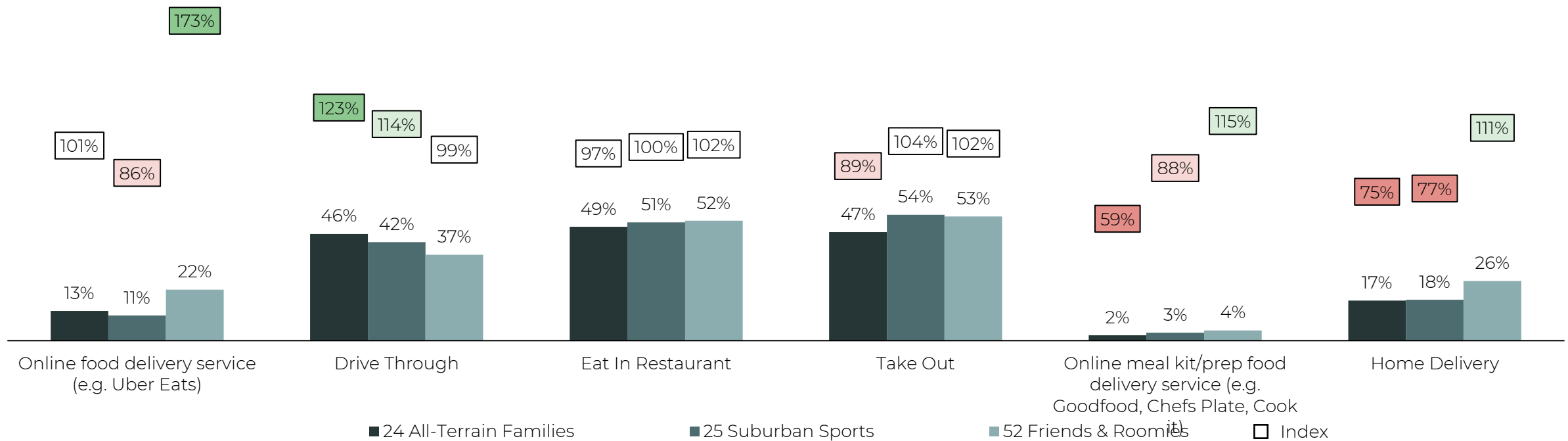




# Restaurants: Types

Rest of Ontario visitors are less likely to make use of online meal kit and home delivery services. Certain sub-segments are much more likely to make use of online food delivery services however.

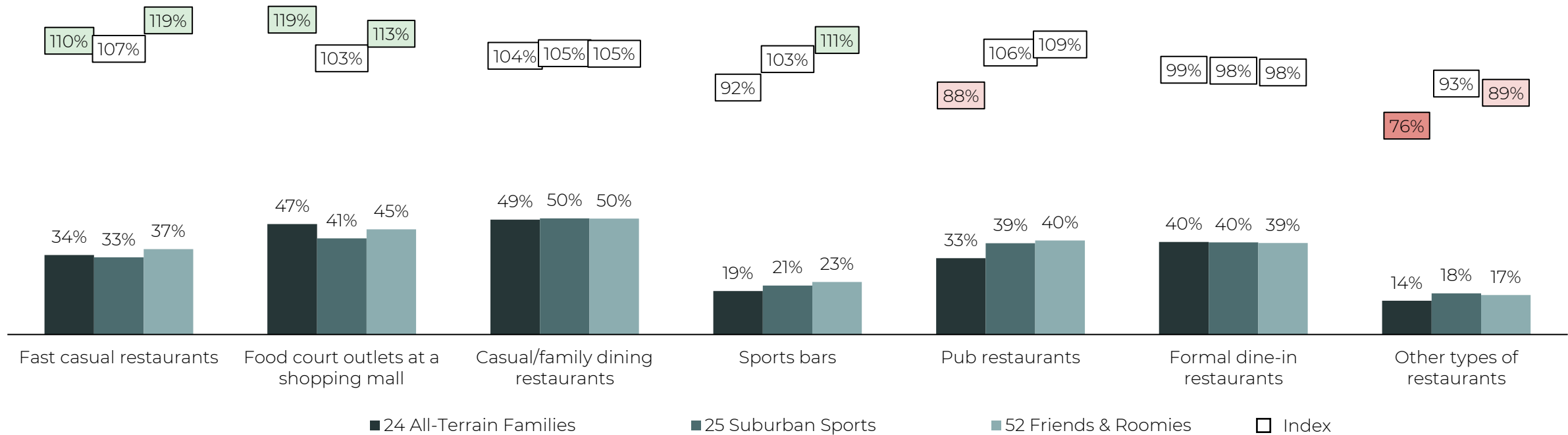
FOOD ORDERING METHODS USED (PAST MONTH)



# Restaurants: Types of Service

Rest of Ontario visitors' behaviour in terms of restaurant service types is not much differentiated from non-visitors.

RESTAURANT SERVICE TYPE VISITED (PAST YEAR)



# Restaurants: Casual/ Family Restaurants

Casual restaurants preferred by Rest of Ontario visitors include Earls, Boston Pizza, and Montana's. Jack Astor's and Kelsey's are much less likely to be frequented by these visitors.

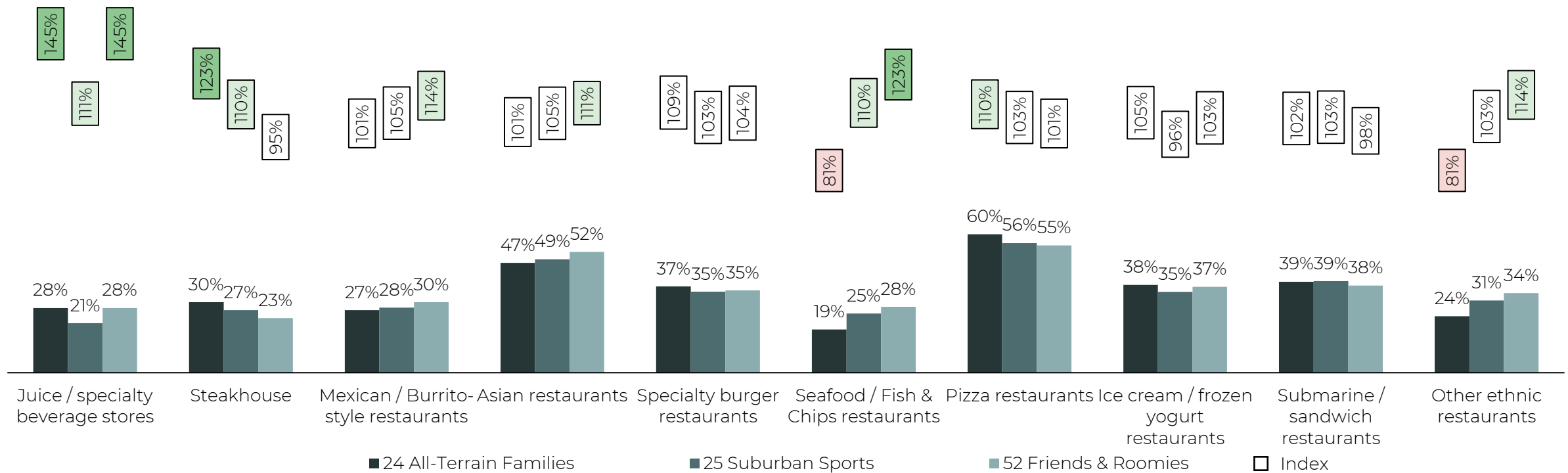
CASUAL / FAMILY RESTAURANTS VISITED OR ORDERED FROM (PAST YEAR)



# Restaurants: Type of Cuisine

Rest of Ontario visitors are more likely to visit Juice Bars compared to non-visitors. Their behaviour in terms of other restaurant types do not differ much from non-visitors.

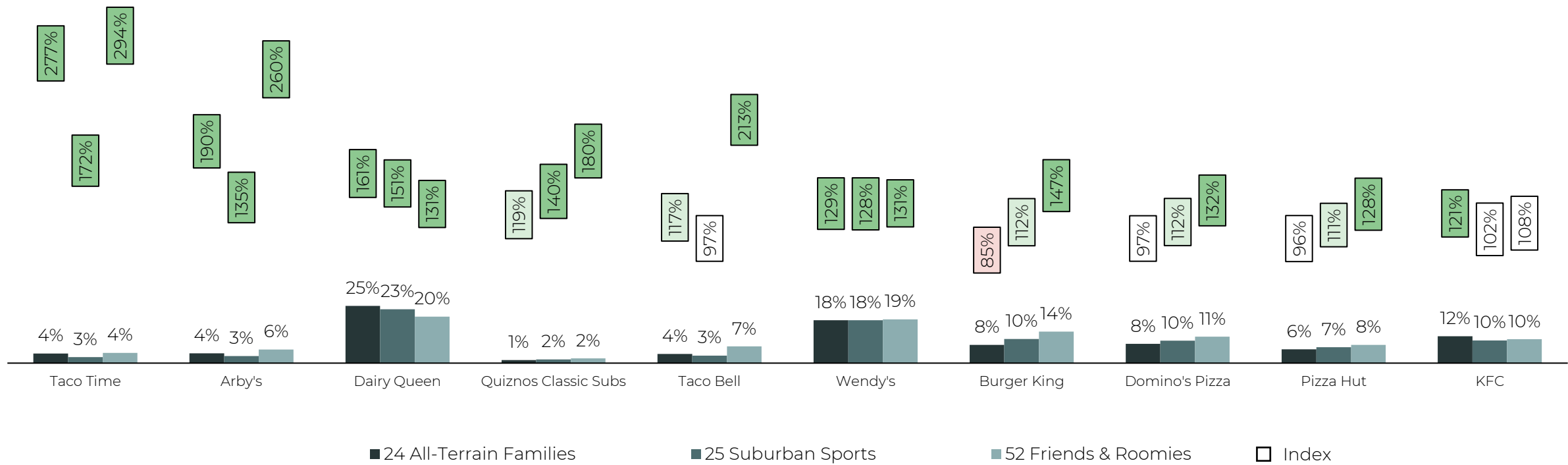
TOP 10 RESTAURANT FOOD TYPE VISITED (PAST YEAR)



# Restaurants: Fast Food Chains

Rest of Ontario visitors over-index on visiting Taco Time, Arby's, Dairy Queen, Quiznos, and Wendy's compared to non-visitors.

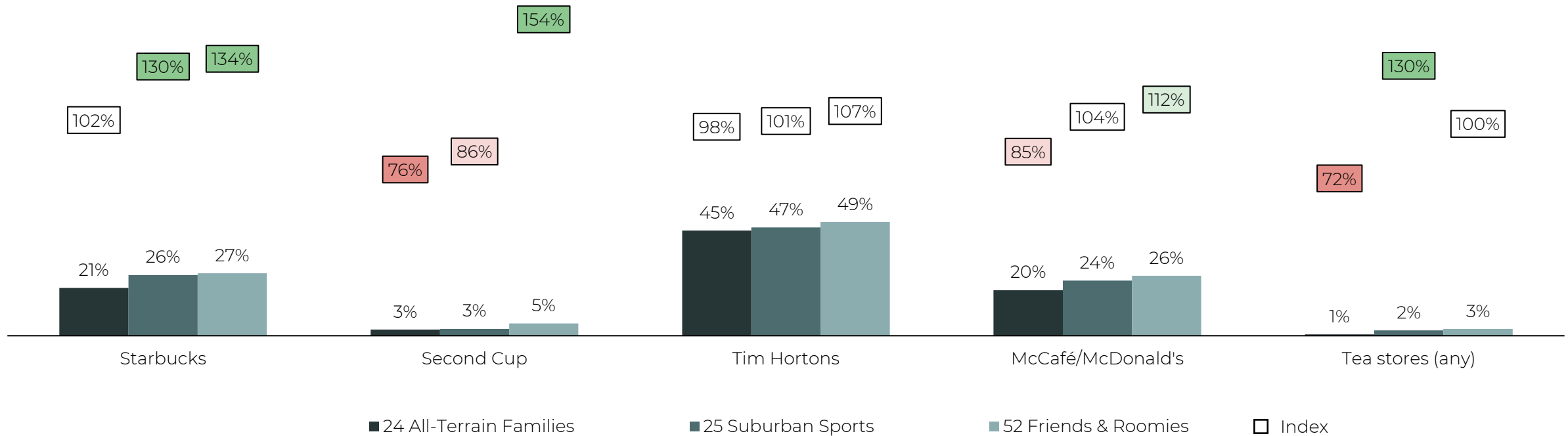
TOP 10 FAST FOOD RESTAURANTS VISITED OR ORDERED FROM (PAST MONTH)



# Restaurants: Coffee Shops

Rest of Ontario visitors are more likely to prefer Starbucks than non-visitors. They display a similar preference for Tim Horton's however compared to non-visitors.

COFFEE / DONUT SHOPS VISITED OR ORDERED FROM (PAST MONTH)





# 7 RECOMMENDATIONS



# Recommendations

Based on the insights in this report, we provide the following high-level recommendations that can be derived from the visitor profiles for each of the five regions in Ontario.

## Niagara Falls



**Leverage Digital Channels:**  
Capitalize on the high social media and online travel service usage by creating visually stunning, shareable content and running targeted ads. Focus on platforms like Instagram and TikTok to appeal to younger, digitally savvy visitors.

**Promote International Cuisine:**  
Partner with local Mexican and Italian restaurants to offer exclusive dining deals or themed events that highlight these cuisines, aligning with visitor preferences.

**Enhance Nature and Outdoor Packages:**  
Develop partnerships with destinations like Whistler and Banff to create cross-promotional campaigns emphasizing outdoor adventure, appealing to travelers seeking similar experiences.

## Ottawa



**Highlight Business-Friendly Services:**  
Promote business travel services, such as conference spaces, premium accommodations, and efficient transportation options, tailored to frequent business travelers.

**Domestic Tourism Campaigns:**  
Collaborate with Cape Breton and Prince Edward Island tourism boards to promote joint travel itineraries, focusing on cultural and natural experiences.

**Direct Booking Incentives:**  
Encourage partnerships with airlines and hotels to offer exclusive discounts or perks for direct bookings, catering to Ottawa visitors' booking preferences.

## Toronto



**Promote Road Trip Experiences:**  
Develop itineraries and packages that cater to car travelers, including scenic routes, roadside attractions, and highway-friendly accommodations.

**Diversify Cultural Offerings:**  
Highlight attractions that celebrate African and Australasian influences, tapping into Toronto visitors' interest in global cultures.

**Leverage Traditional Media:**  
Maintain a presence on TV and radio while complementing it with digital ads, ensuring broad reach among Toronto's diverse visitor demographic.

## Cottage Country

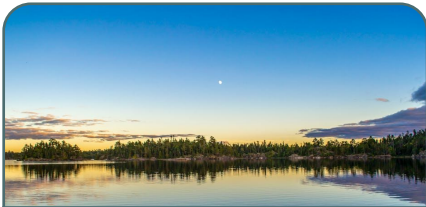


**Focus on Outdoor Adventures:**  
Promote activities like hiking, kayaking, and wildlife tours in Canadian destinations like Banff and Victoria, aligning with visitors' preferences for nature-focused travel.

**Enhance Culinary Experiences:**  
Collaborate with local restaurants to offer farm-to-table dining and unique culinary events that emphasize quality and creativity.

**Target Digital Savvy Travelers:**  
Optimize SEO and digital advertising for OTAs like Travelocity and last-minute booking platforms, ensuring visibility during their travel planning process.

## Rest of Ontario



**Promote Value Packages:**  
Offer cost-effective travel bundles, such as weekend getaways or multi-destination trips, appealing to budget-conscious travelers.

**Focus on Casual Dining Experiences:**  
Partner with casual dining chains like Boston Pizza and Starbucks to create local promotions that resonate with visitor preferences.

**Enhance Digital Presence:**  
Invest in mobile-friendly websites and apps for seamless booking experiences, targeting visitors' preference for online platforms.

## REACH OUT TO US FOR MORE INFORMATION:



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