

RTO 9 Consumer Insights Survey

Fall/Winter Survey 2024



Key Objectives

To understand our consumer database and their travel motivations

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



Methodology

Type of survey: Online using Survey Monkey

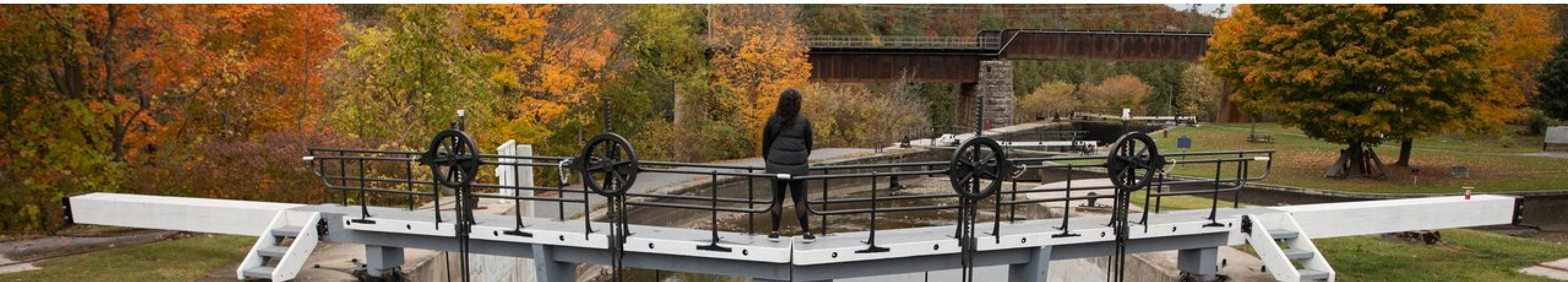
Sample location: Our consumer database (39,000 subscribers) and across Ontario

Sample size: 774 survey responses

Completion: 74%

Time spent: 6m 10 seconds

In-market dates: December 6 - 17th, 2024



Respondent Locations

PROFILE

St Catharines
Long Sault Oakville Cobourg Picton Ingleside Montreal
Iroquois Napanee Perth Burlington Manotick
Prescott ont Toronto Athens Cornwall North Stouffville
Rural Hamilton **Ottawa** Mississauga Oshawa
Smiths Falls Orleans Ajax Newmarket
Port Hope London Ontario City Kingston Gananoque
Welland Orléans Brockville Bath Belleville Yarker
Quinte West Lindsay Madoc Brighton
Stoney Creek Mallorytown

Profile of Survey Responses

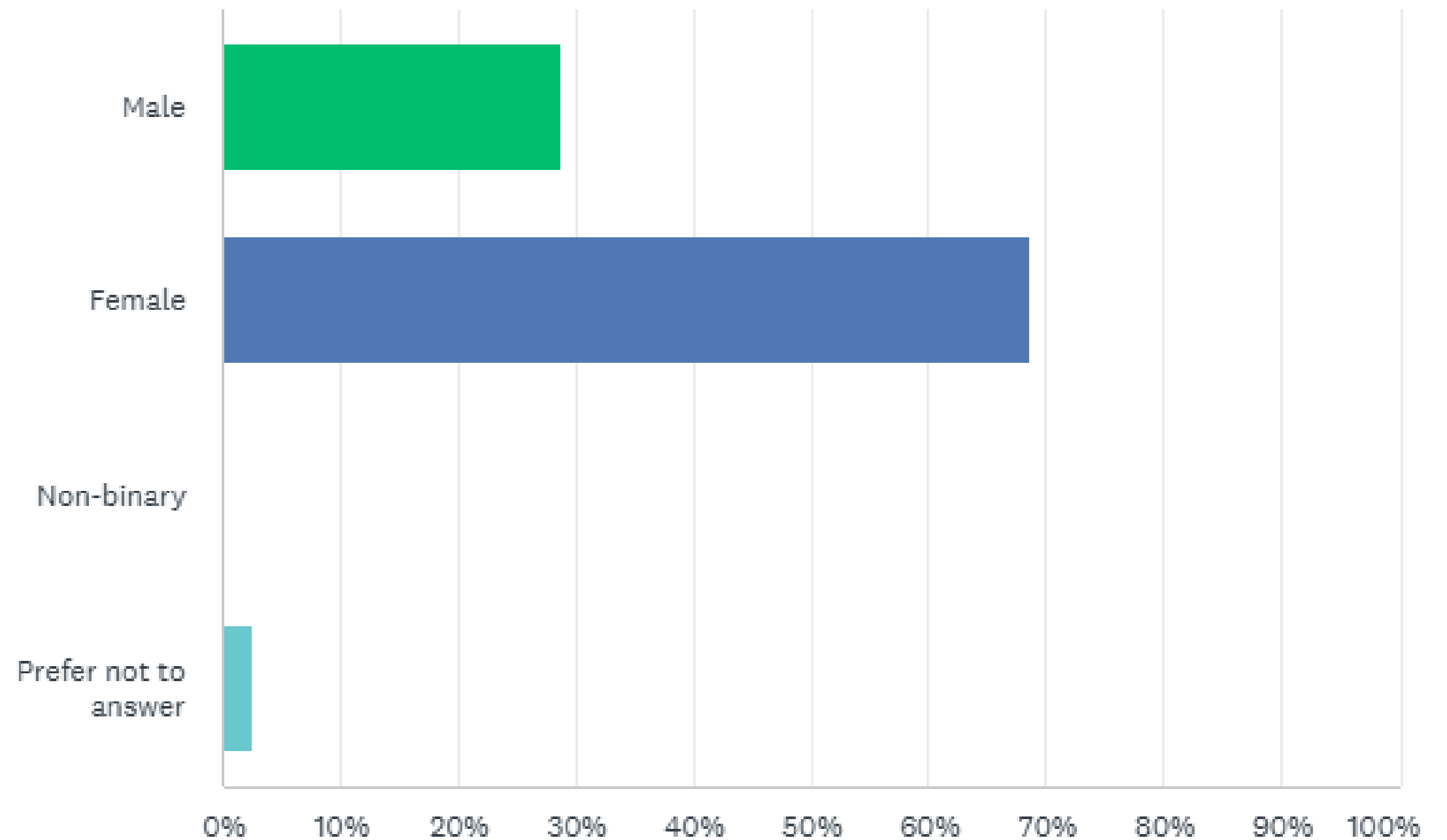
PROFILE

68% Female

29% Male

0% Non-binary

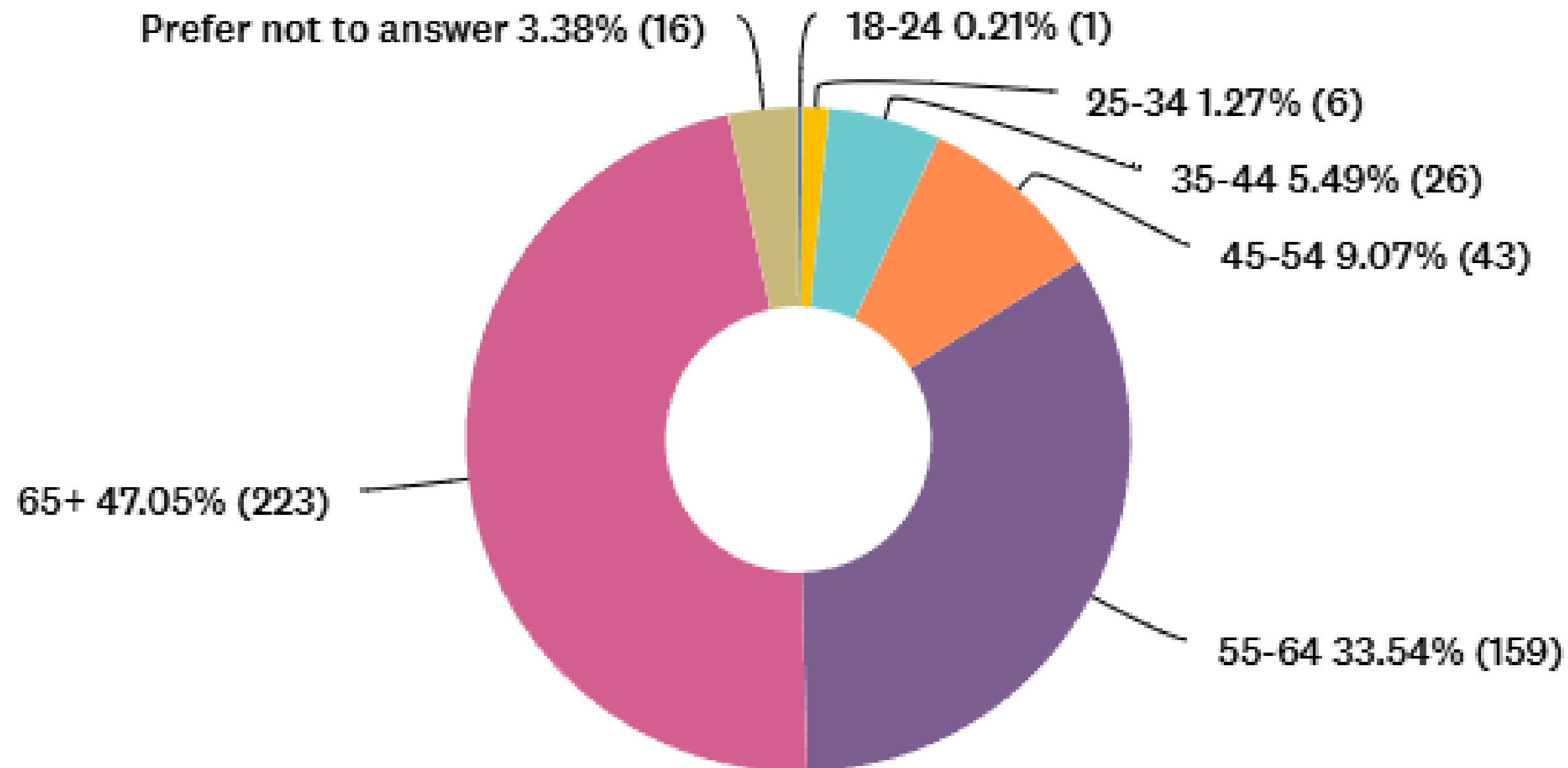
3% Prefer not to answer



Profile of Survey Responses

Age Ranges

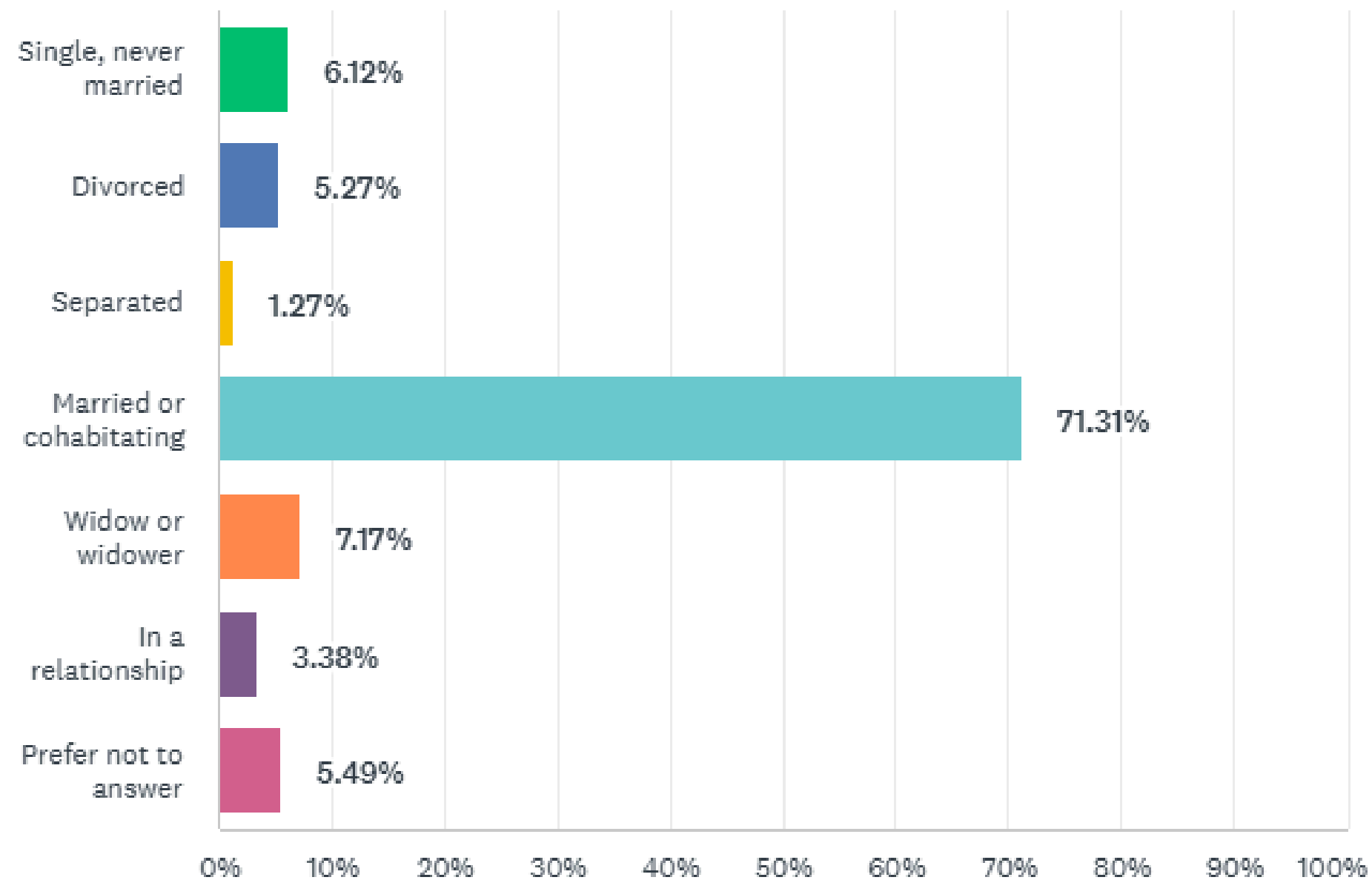
PROFILE



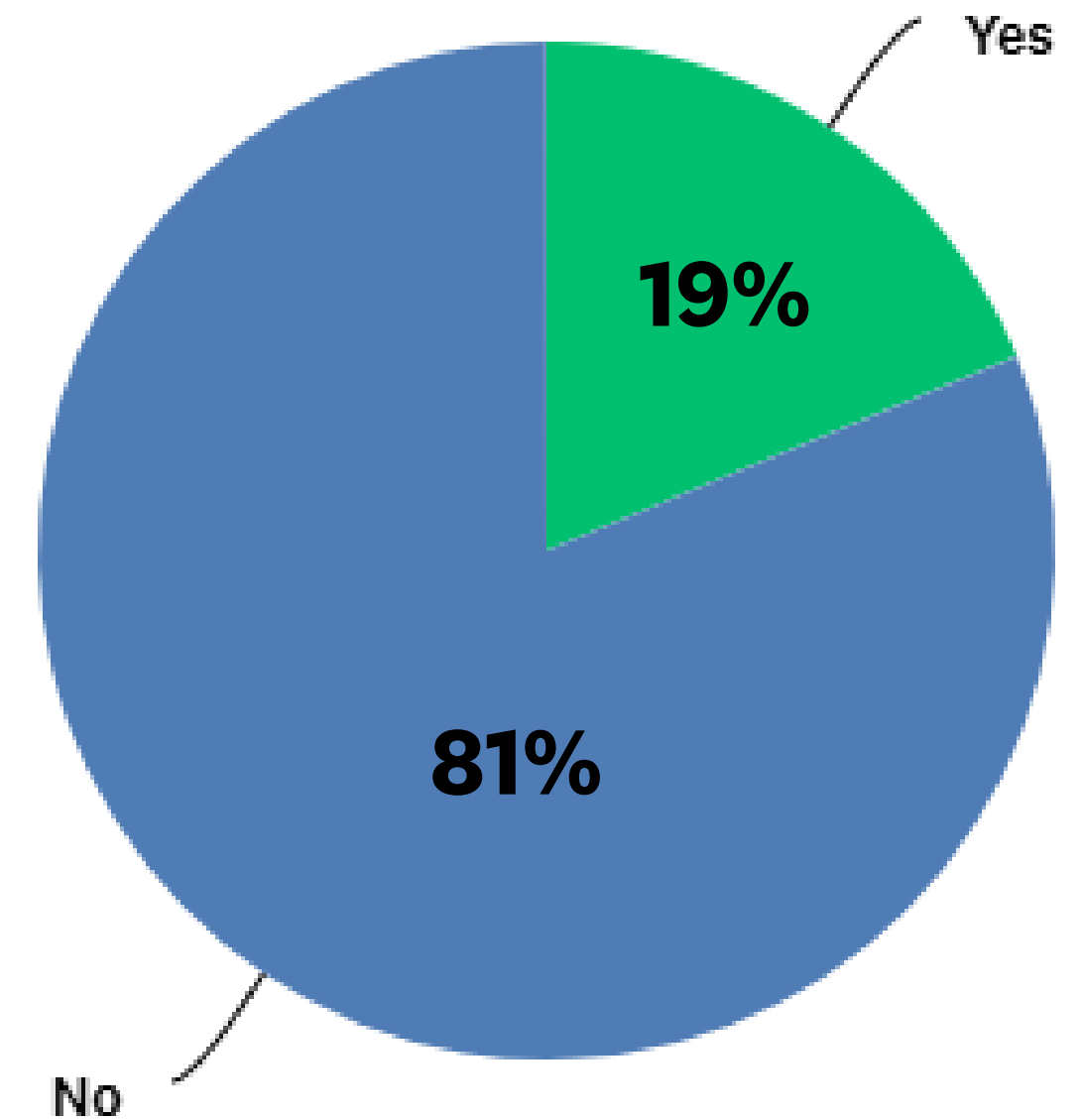
Profile of Survey Responses

PROFILE

Marital Status



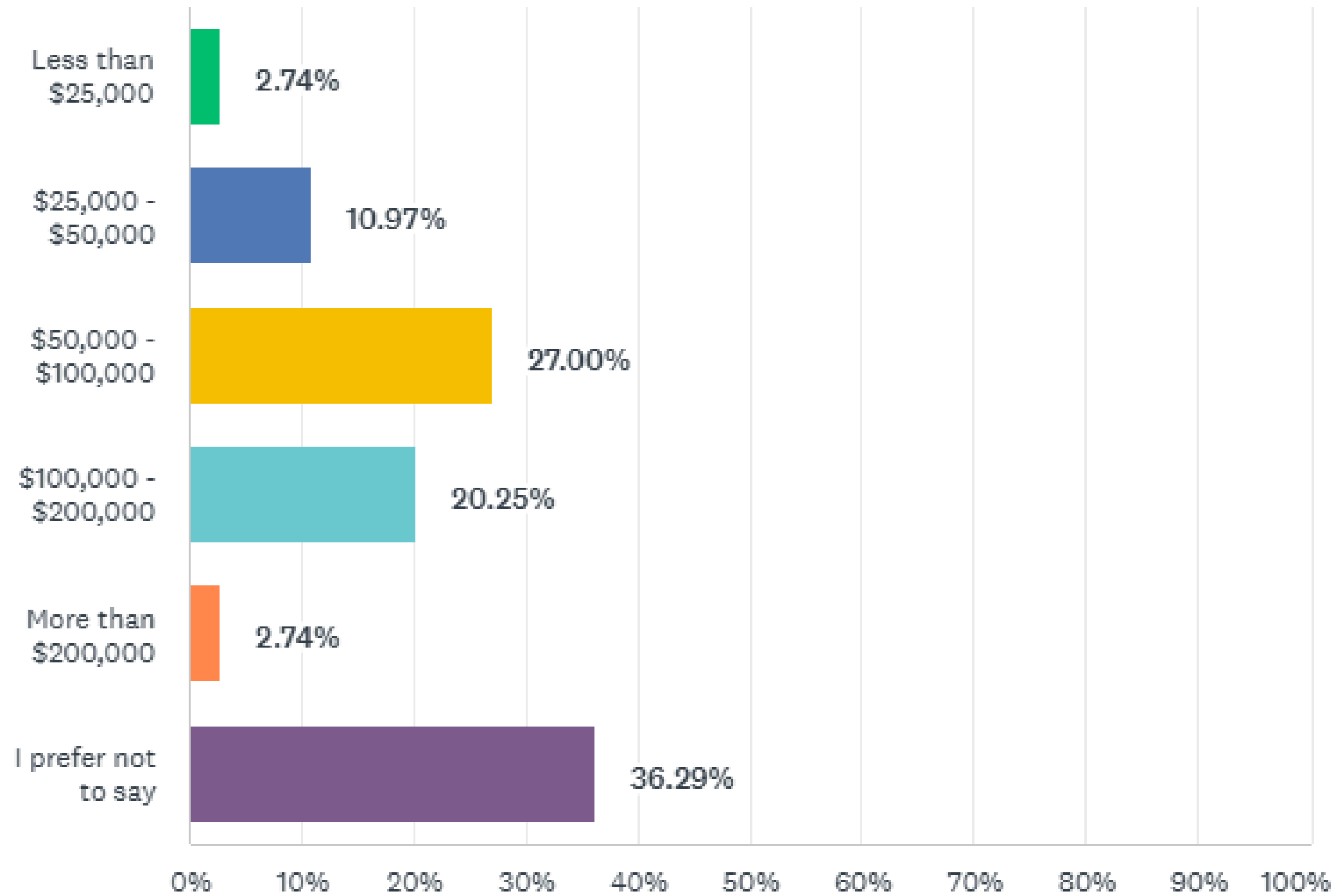
Children in household



Profile of Survey Responses

Level of annual household income

PROFILE



Travel Priorities for Leisure Travel in the Next 12 Months



PRIORITIES

31%

Would make it a 3-nights + trip

51%

Would make it a 2-night trip

89%

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

18%

Would make it a 1-night

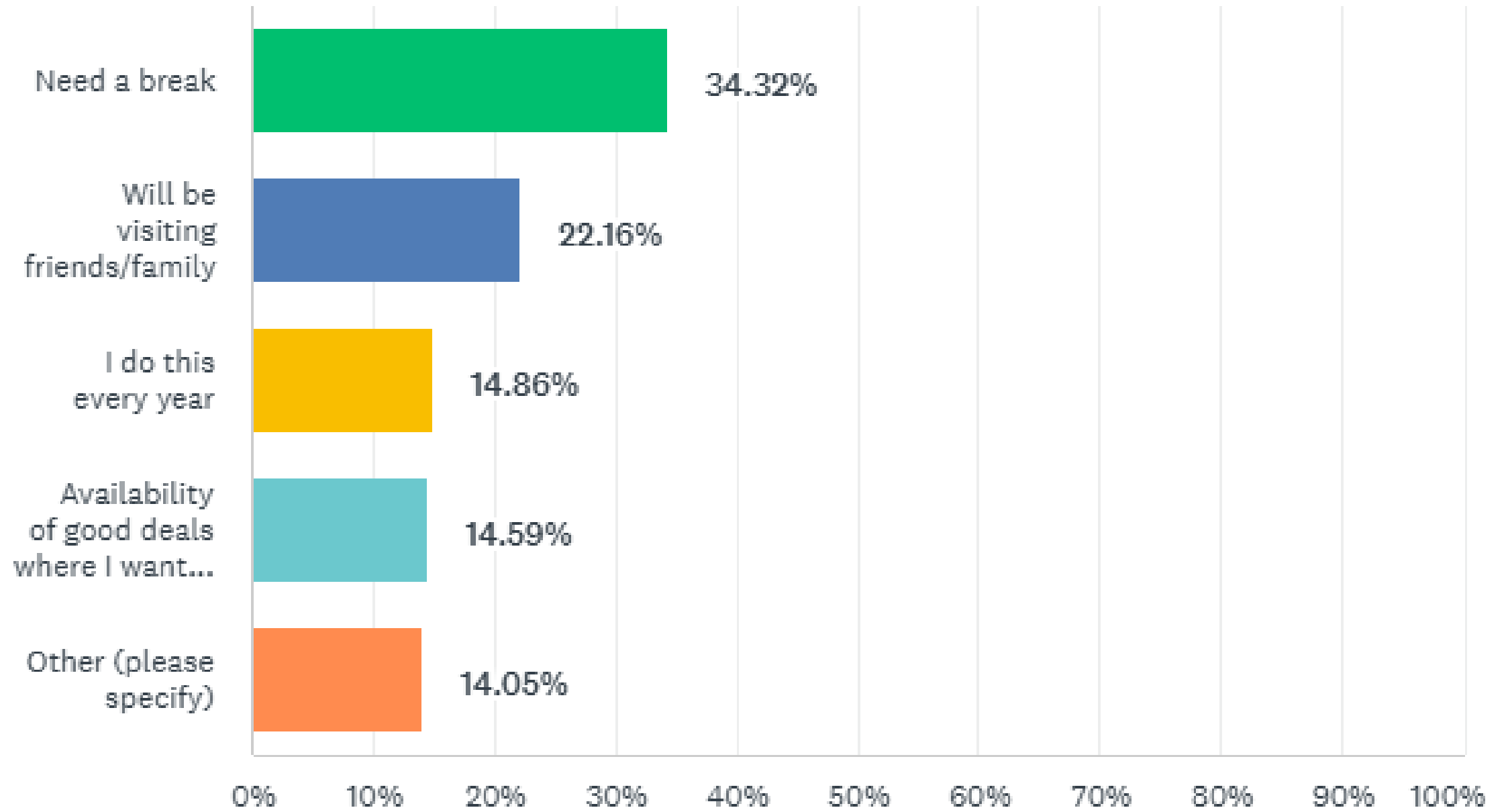
Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES

34%

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

Up 4% from spring survey.



Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES

Barriers to Travel

37%

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

Up 6% from spring survey.

Can't afford it	37%
Nowhere I want to visit at the moment	14%
Too busy	0%
Household/family commitments	13%
Prefer to travel in Canada, but outside Ontario	3%
Prefer to travel outside of Canada	16%
Unable to take a vacation	3%
Other	14%

Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES

Other main reasons specified as barriers to travel

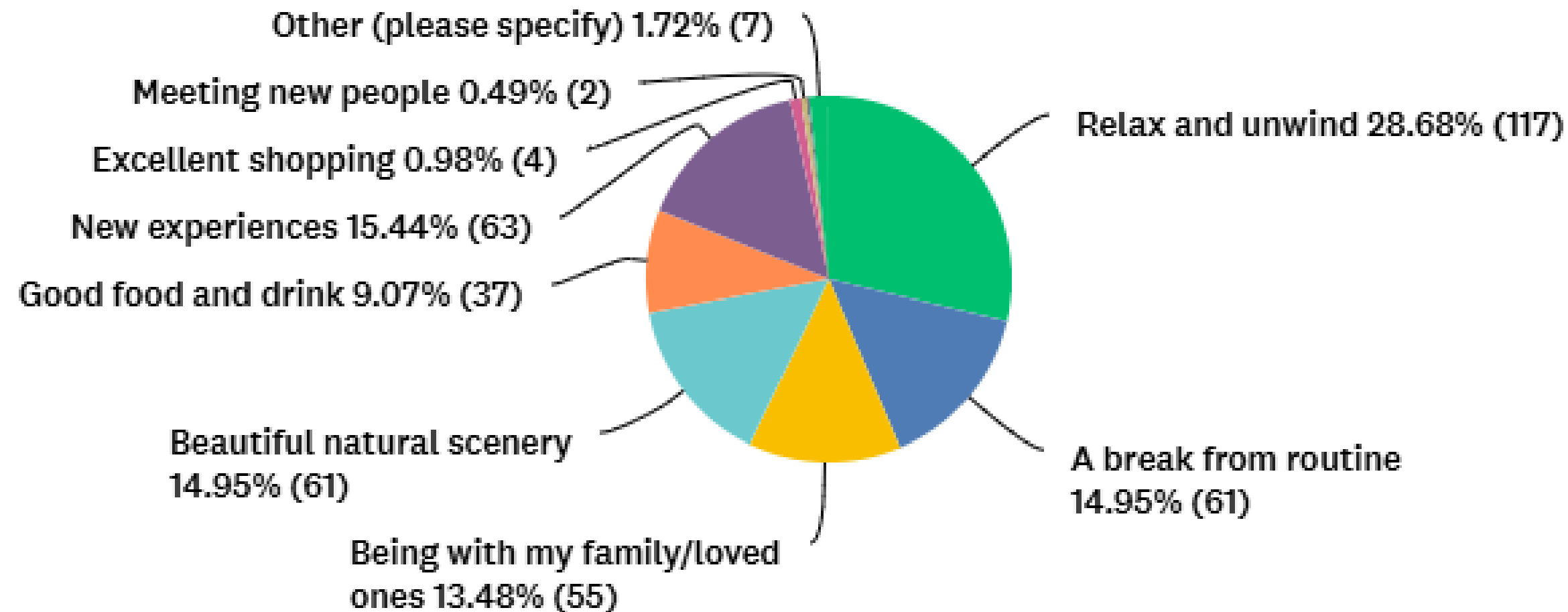


- Health reasons
- Can't leave/bring pet
- Prefer day trips and sleep at home
- Have a cottage

Primary Motivation For Planned Leisure Trips

Primary motivation remains to “Relax and unwind”.

MOTIVATION



Perspectives On Planning & Booking For Leisure Travel

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

INSPIRATION

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

34%

VERY LIKELY

52%

SOMEWHAT LIKELY

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

13%

VERY LIKELY

54%

SOMEWHAT LIKELY

Online travel sites with packages and discounts - Expedia, Landsby

24%

VERY LIKELY

44%

SOMEWHAT LIKELY

Perspectives On Planning & Booking For Leisure Travel

INSPIRATION

What your friends and family post on their Social Media accounts (includes posts sent to you from friends and family)

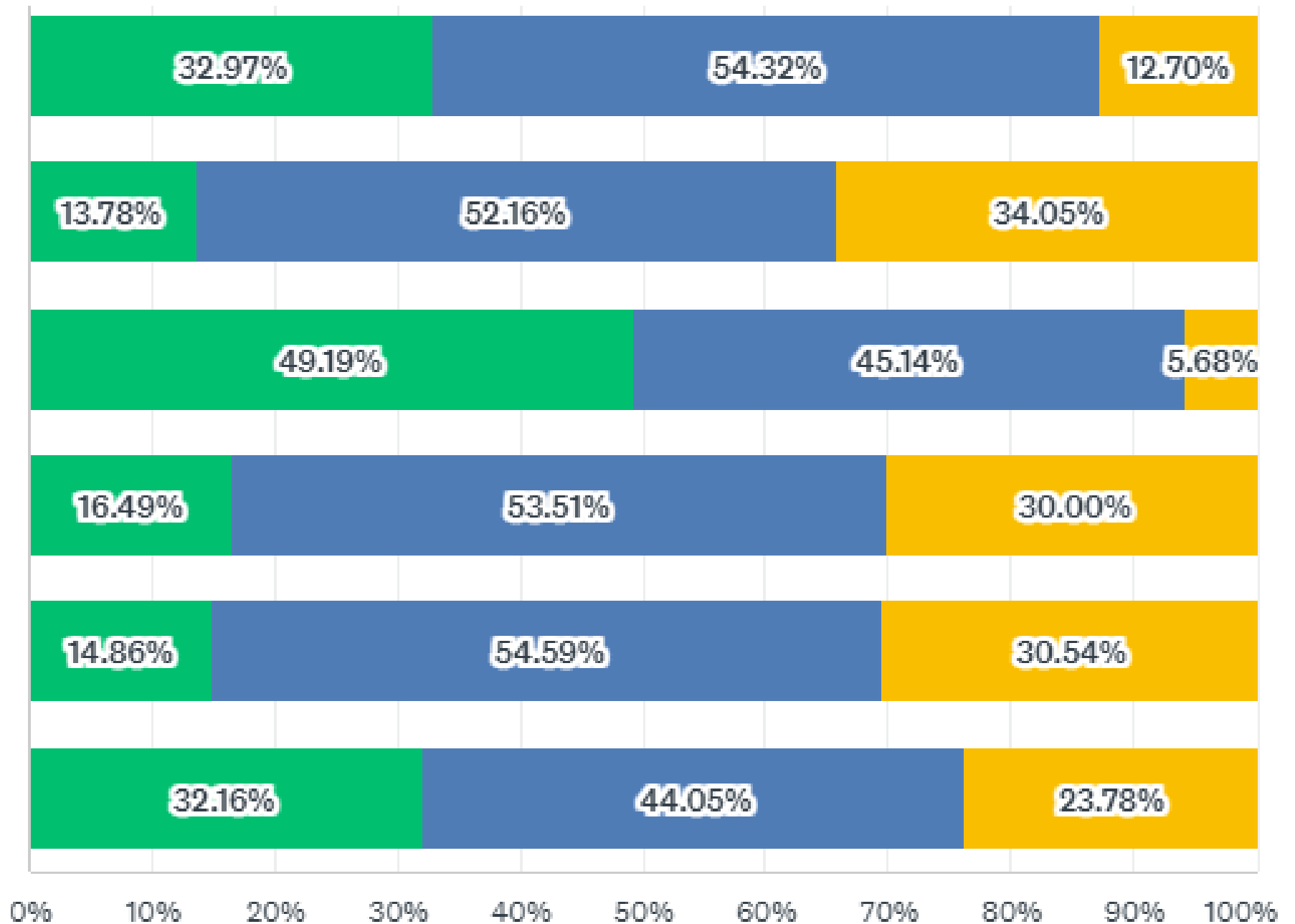
Word of Mouth from your friends and family (this does not include the use of Social Media)

What other brands and creators post on Social Media

Google and other search engines (includes Google Reviews)

Destination websites & blogs

Online travel sites with packages and discounts - Expedia, Landsby

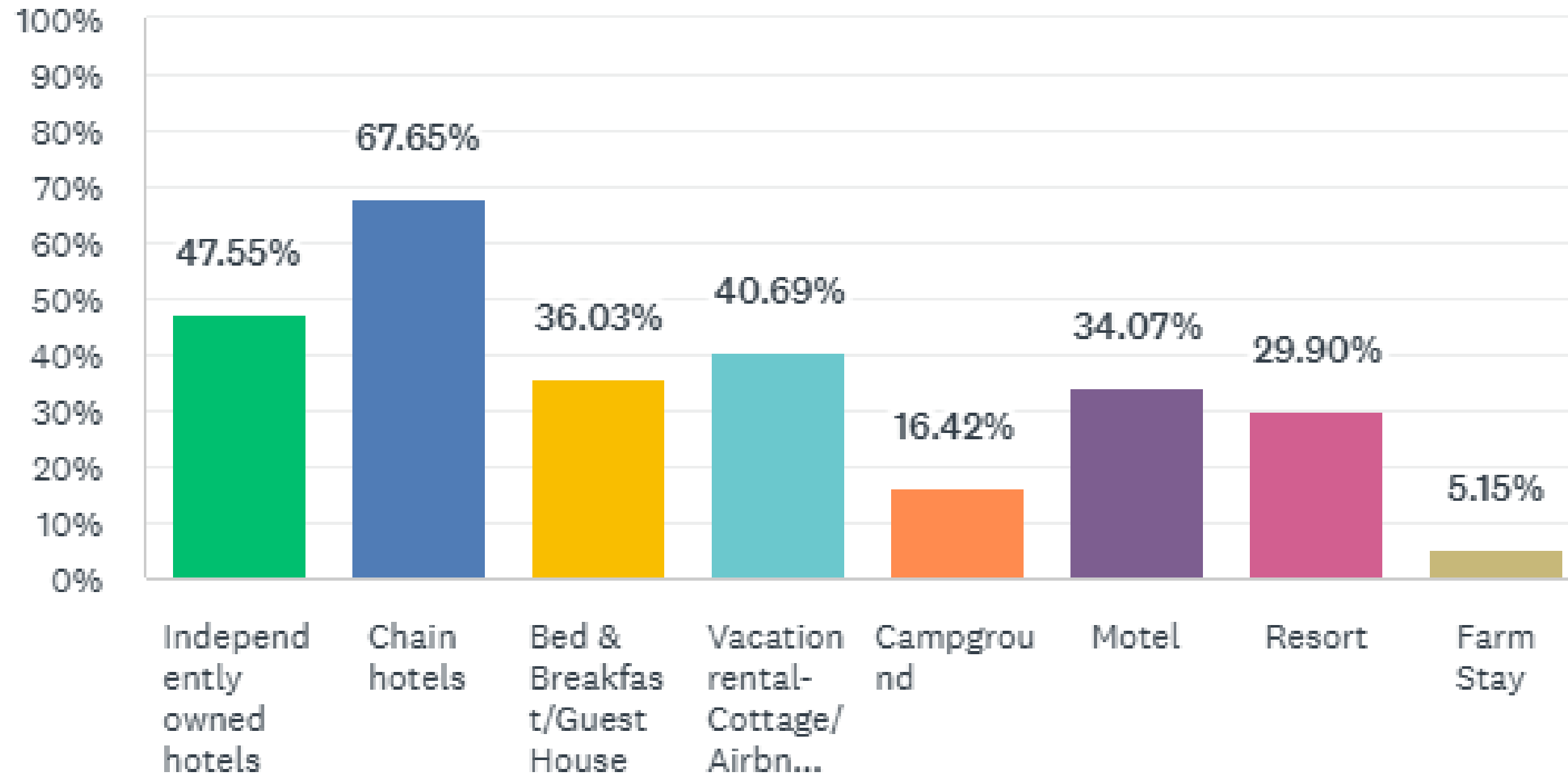


Unlikely Somewhat ... Very Likely

Perspectives On Leisure Travel To South Eastern Ontario

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

LODGING



Perspectives On Planning & Booking For Leisure Travel

PLANNING

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

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

31%
VERY LIKELY

56%
SOMEWHAT LIKELY

Stated they would use Destination websites & blogs to plan

33%
VERY LIKELY

54%
SOMEWHAT LIKELY

Stated other brands or Creators/Influence planning

6%
VERY LIKELY

43%
SOMEWHAT LIKELY

Perspectives On Planning & Booking For Leisure Travel

PLANNING

What your friends and family post on their Social Media accounts (includes posts sent to you from friends and family)

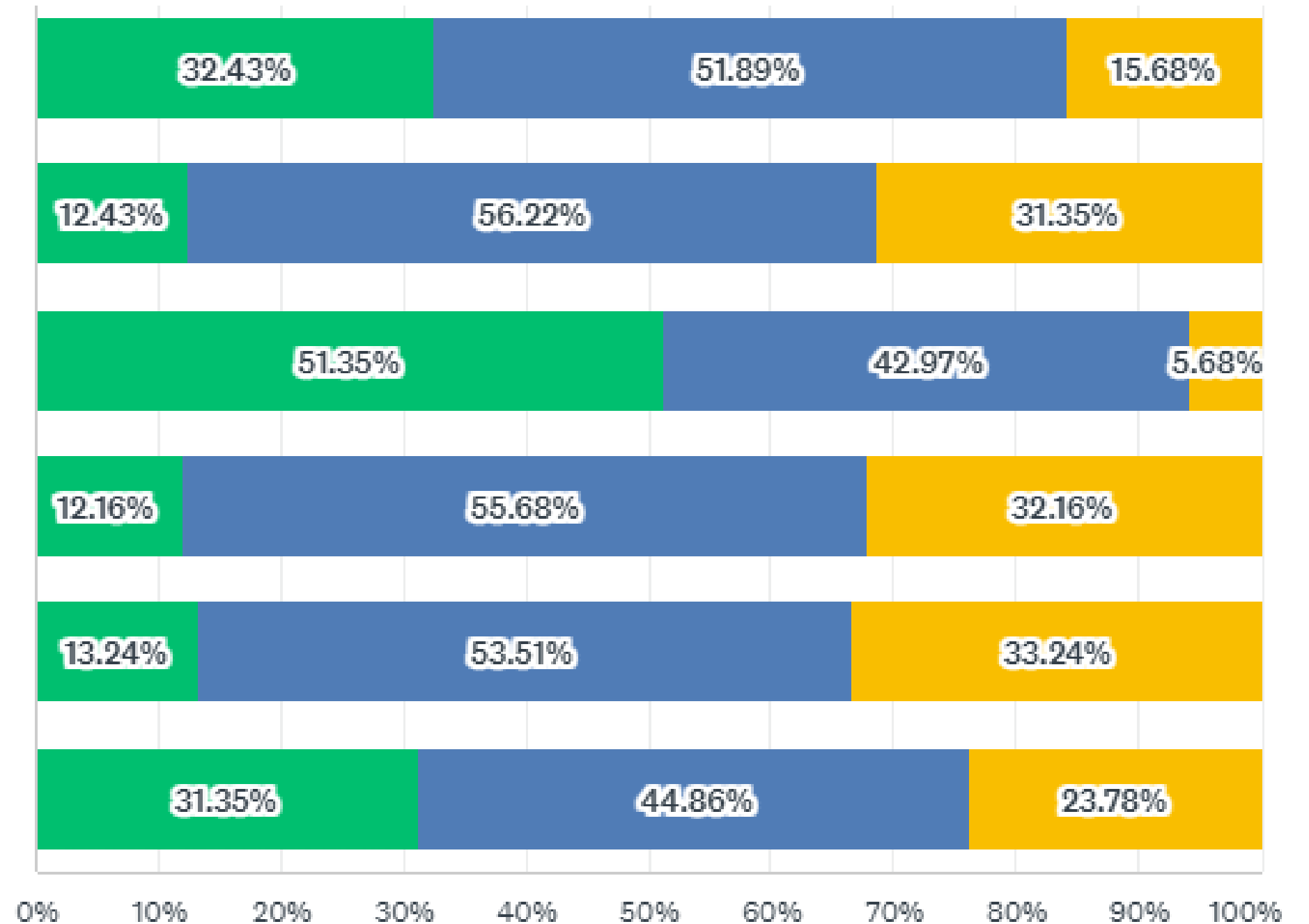
Word of Mouth from your friends and family (this does not include the use of Social Media)

What other brands and creators post on Social Media

Google and other search engines (includes Google Reviews)

Destination websites & blogs

Online travel sites with packages and discounts - Expedia, Landsby



Perspectives On Planning & Booking For Leisure Travel

BOOKING

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

Stated they would use Google and other search engines to book

40%

VERY LIKELY

Stated they would use Destination websites to book

36%

VERY LIKELY

Stated they use hotel & resort website to book

42%

VERY LIKELY

44%

SOMEWHAT LIKELY

52%

SOMEWHAT LIKELY

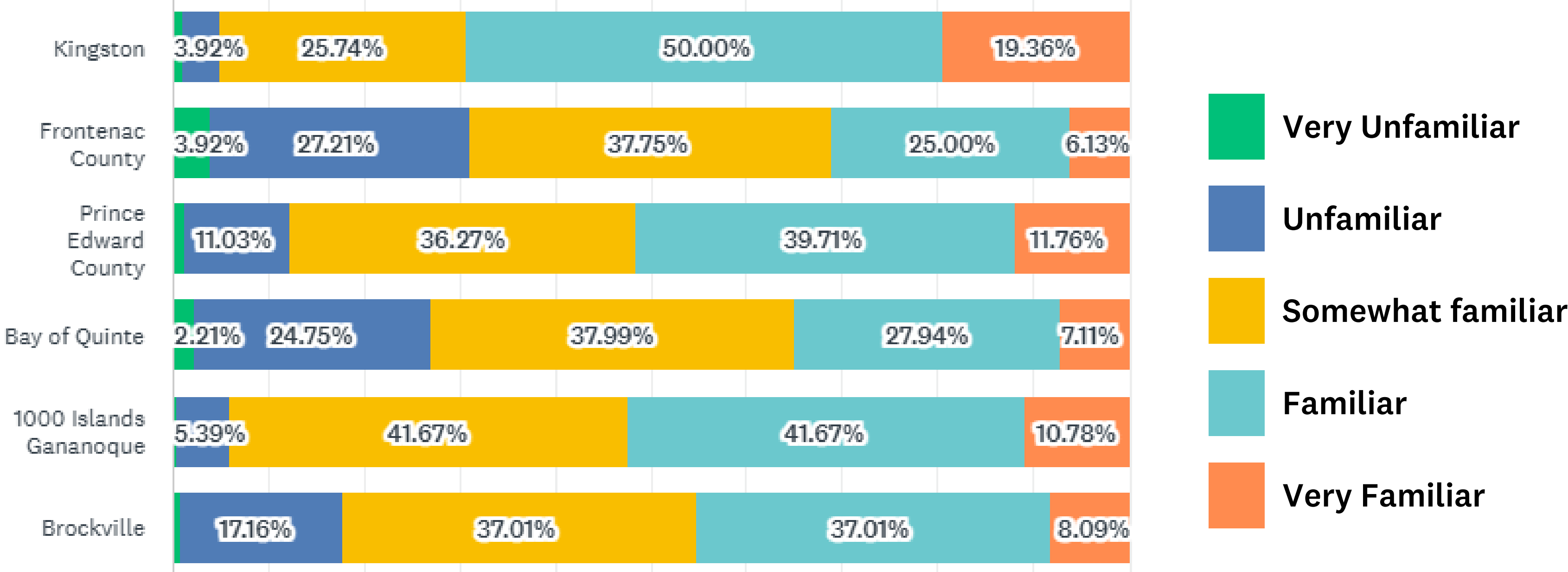
47%

SOMEWHAT LIKELY

Perspectives On Leisure Travel To South Eastern Ontario

FAMILIARITY

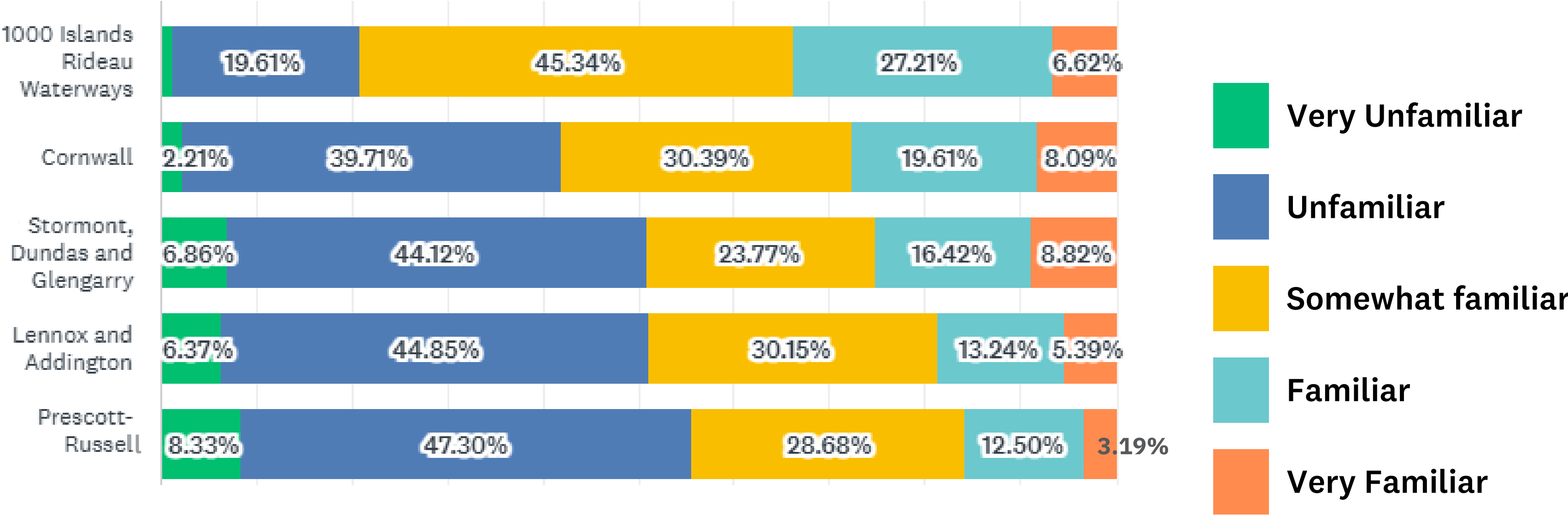
"For each destination, please indicate how familiar you are with what each destination has to offer for leisure travel."



Perspectives On Leisure Travel To South Eastern Ontario

FAMILIARITY

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



Perspectives On Leisure Travel To South Eastern Ontario

FAMILIARITY

42%

Somewhat Familiar with 1000
Islands Gananoque

36%

Somewhat Familiar with
Prince Edward County

37%

Somewhat Familiar with Brockville

27%

Unfamiliar with Frontenac County

25%

Unfamiliar with Bay of Quinte

40%

Unfamiliar with Cornwall

44%

Unfamiliar with SDG Counties

45%

Somewhat Familiar with 1000
Islands & Rideau Waterways

**Destinations ranked in order of most recognizable:
based on combined scores of familiar and very familiar.**

FAMILIARITY

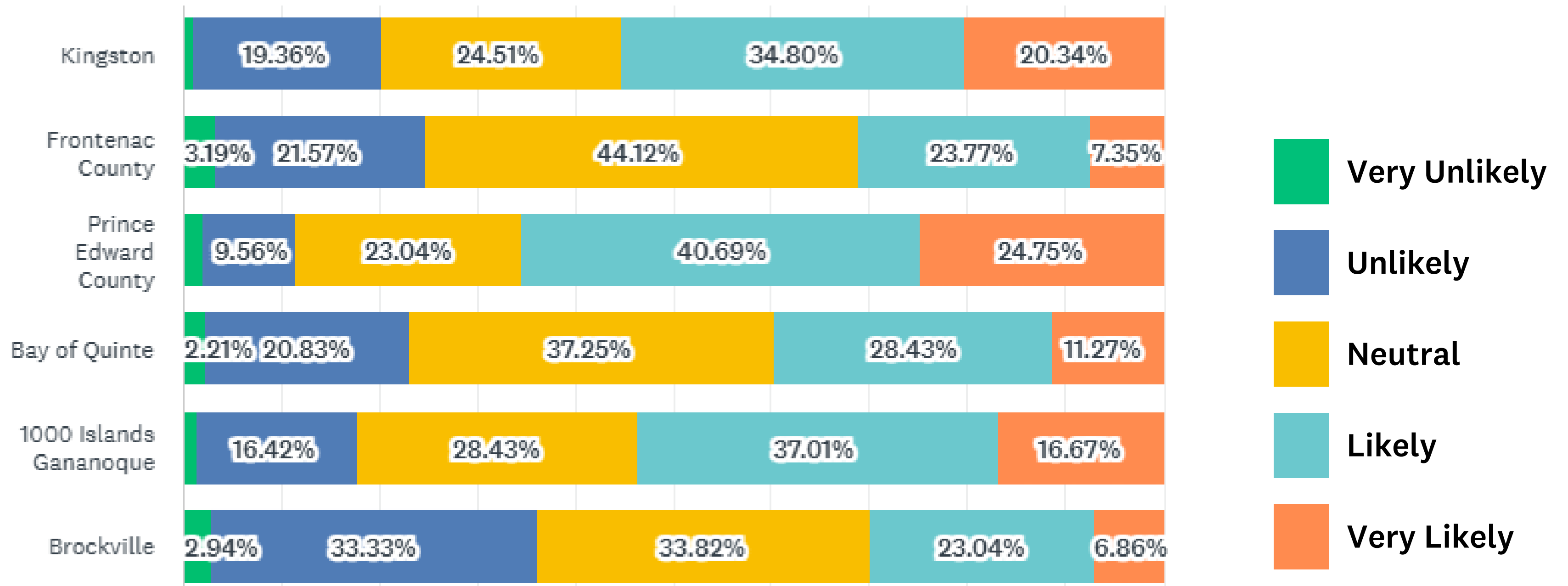
Kingston	69.36%
1000 Islands Gananoque	52.45
Prince Edward County	51.47
Brockville	45.01
Bay of Quinte	35.05
1000 Islands Rideau Canal Waterways	33.83
Frontenac	31.13
Cornwall	27.07
SDG Counties	25.24
Lennox and Addington	18.63
Prescott & Russell	15.69



Perspectives On Leisure Travel To South Eastern Ontario

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

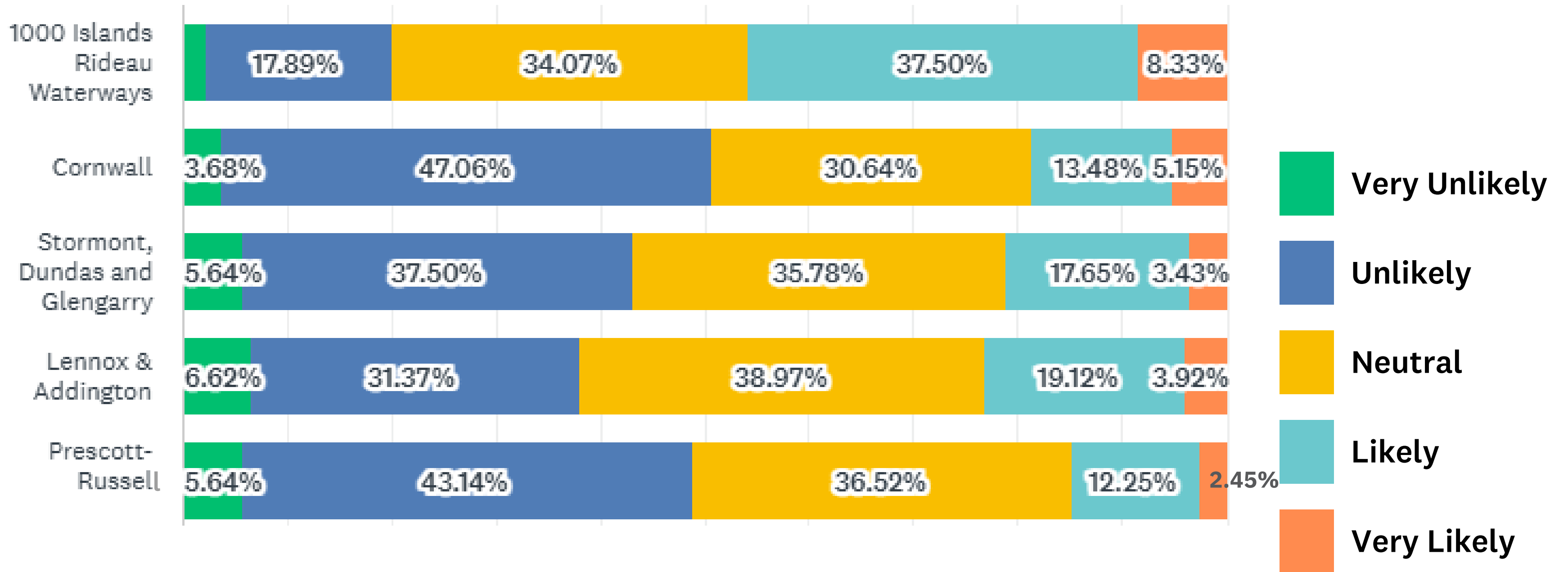
INTEREST



Perspectives On Leisure Travel To South Eastern Ontario

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

INTEREST



Based on combined scores of likely and very likely, rank of most likely to book an overnight trip.

FAMILIARITY

Prince Edward County	65.44%
Kingston	55.14
1000 Islands Gananoque	53.68
1000 Islands Rideau Canal Waterways	45.83
Bay of Quinte	39.07
Frontenac	31.12
Brockville	29.09
Lennox and Addington	23.04
SDG Counties	21.08
Cornwall	18.63
Prescott & Russell	14.07



Perspectives On Leisure Travel To South Eastern Ontario



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

INTEREST

40%

Interested in Wineries, breweries, cideries

49%

Interested in River Cruising

47%

Interested in Viewing Wildlife

52%

Interested in Festivals and events

30%

Interested in Indigenous Experiences

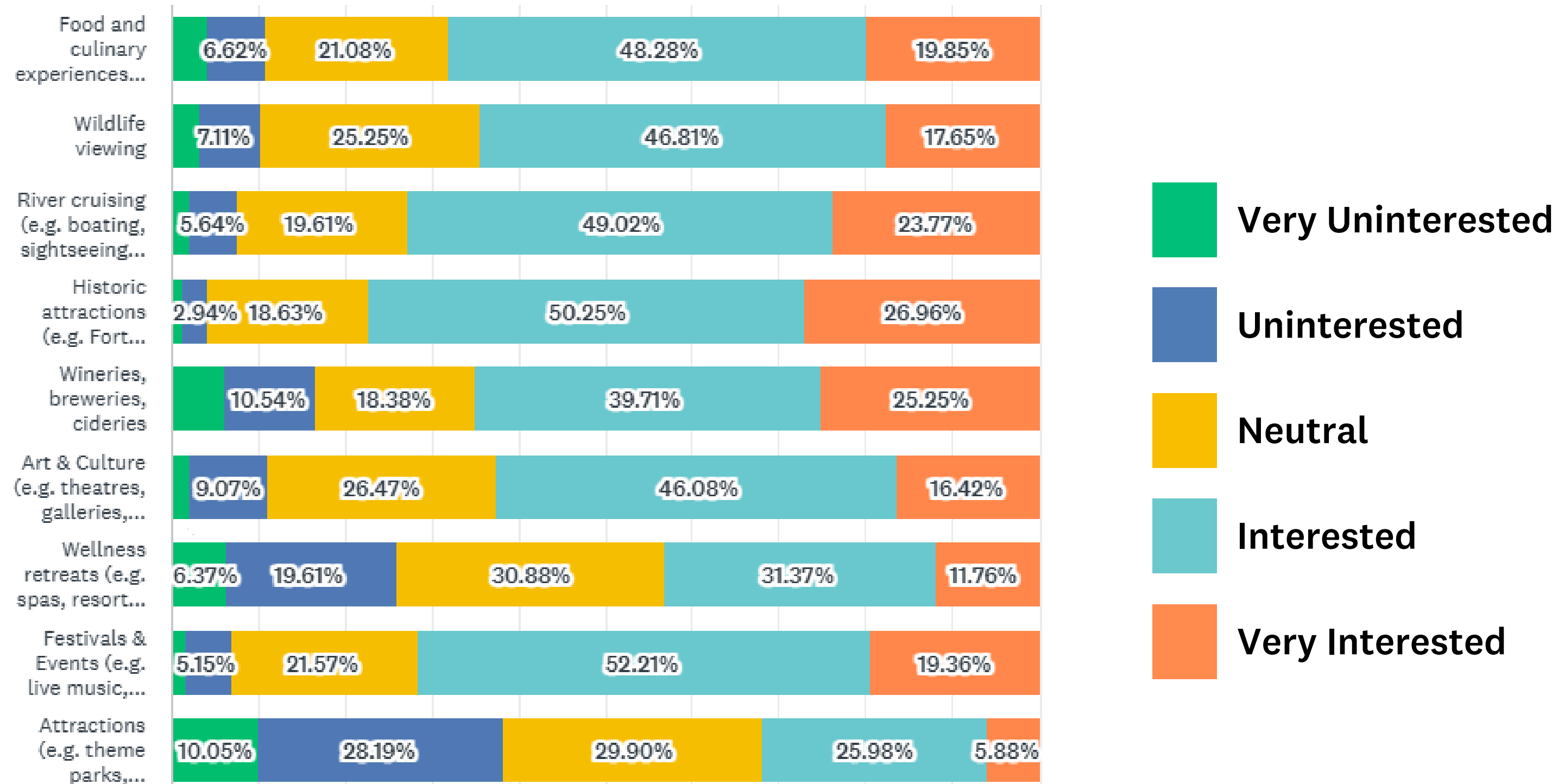
50%

Interested in Historic Attractions

Perspectives On Leisure Travel To South Eastern Ontario

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

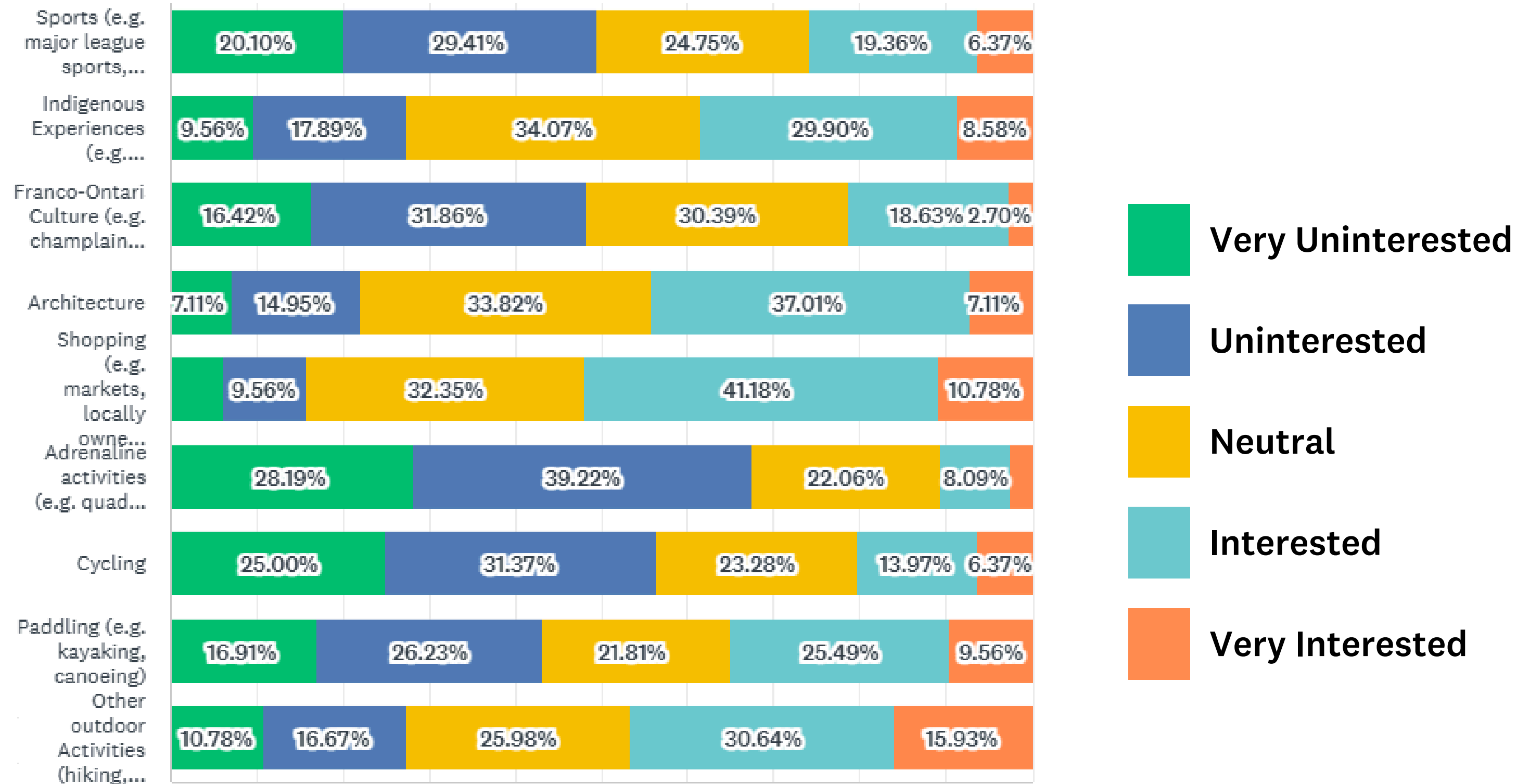
INTEREST



Perspectives On Leisure Travel To South Eastern Ontario

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

INTEREST

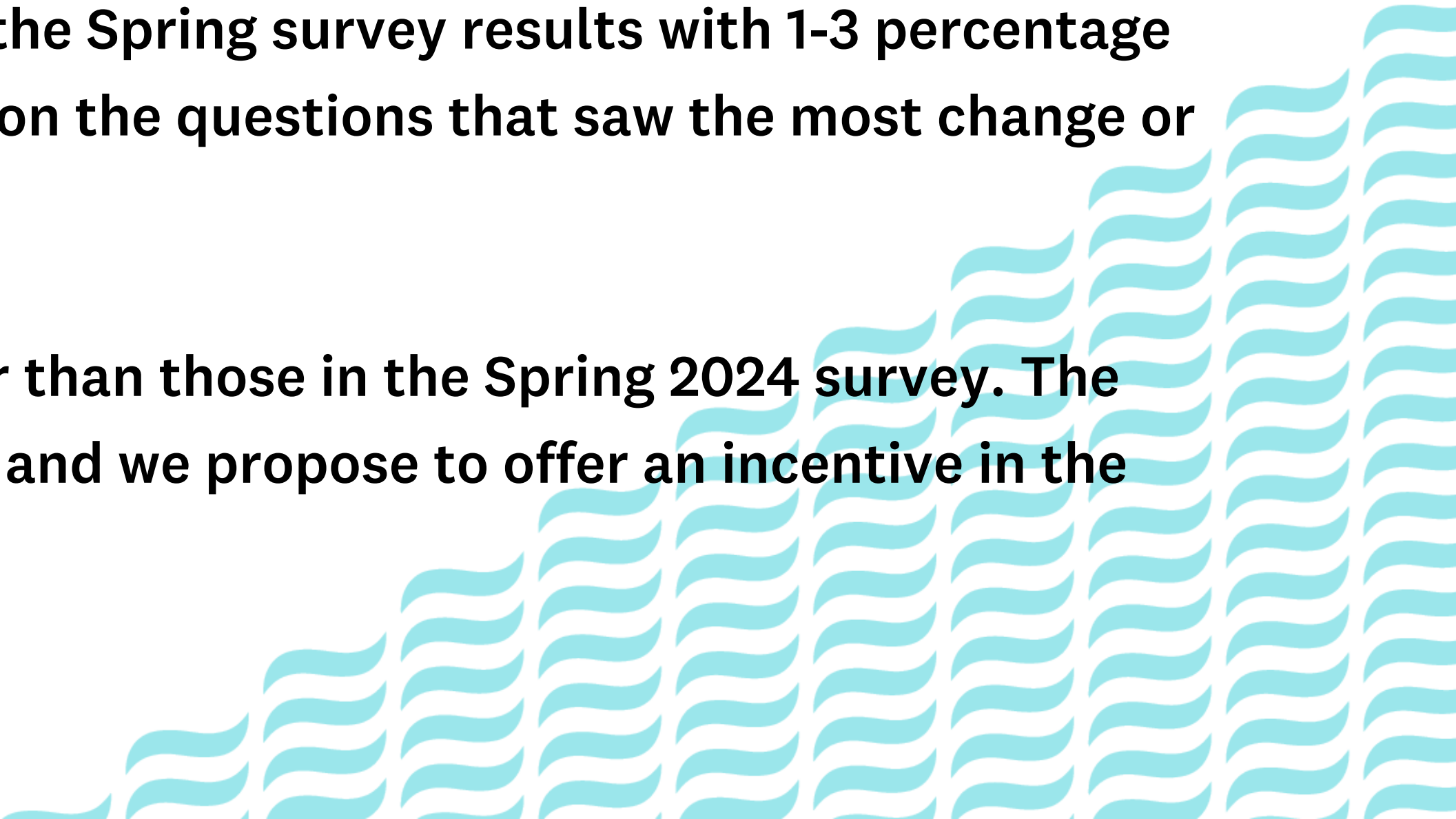


Insights & Opportunities:

The majority of respondents (47%) are in the 65+ demographic, and therefore, the data may not entirely represent the sentiment of travellers in and to the region but highly represents those who are retired.

Overall most stats remained similar to the Spring survey results with 1-3 percentage points. The information below is based on the questions that saw the most change or insights.

Page 3: Survey respondents were higher than those in the Spring 2024 survey. The survey offered no incentive to respond, and we propose to offer an incentive in the future to gain more responses.



Insights & Opportunities:

Page 11. Barriers to travel- can't afford a trip increased 6% over the spring survey. A reflection of the state of the economy. Notably those who can afford to travel- the % has increased from 8% to 16% (double) to travel outside of Canada.

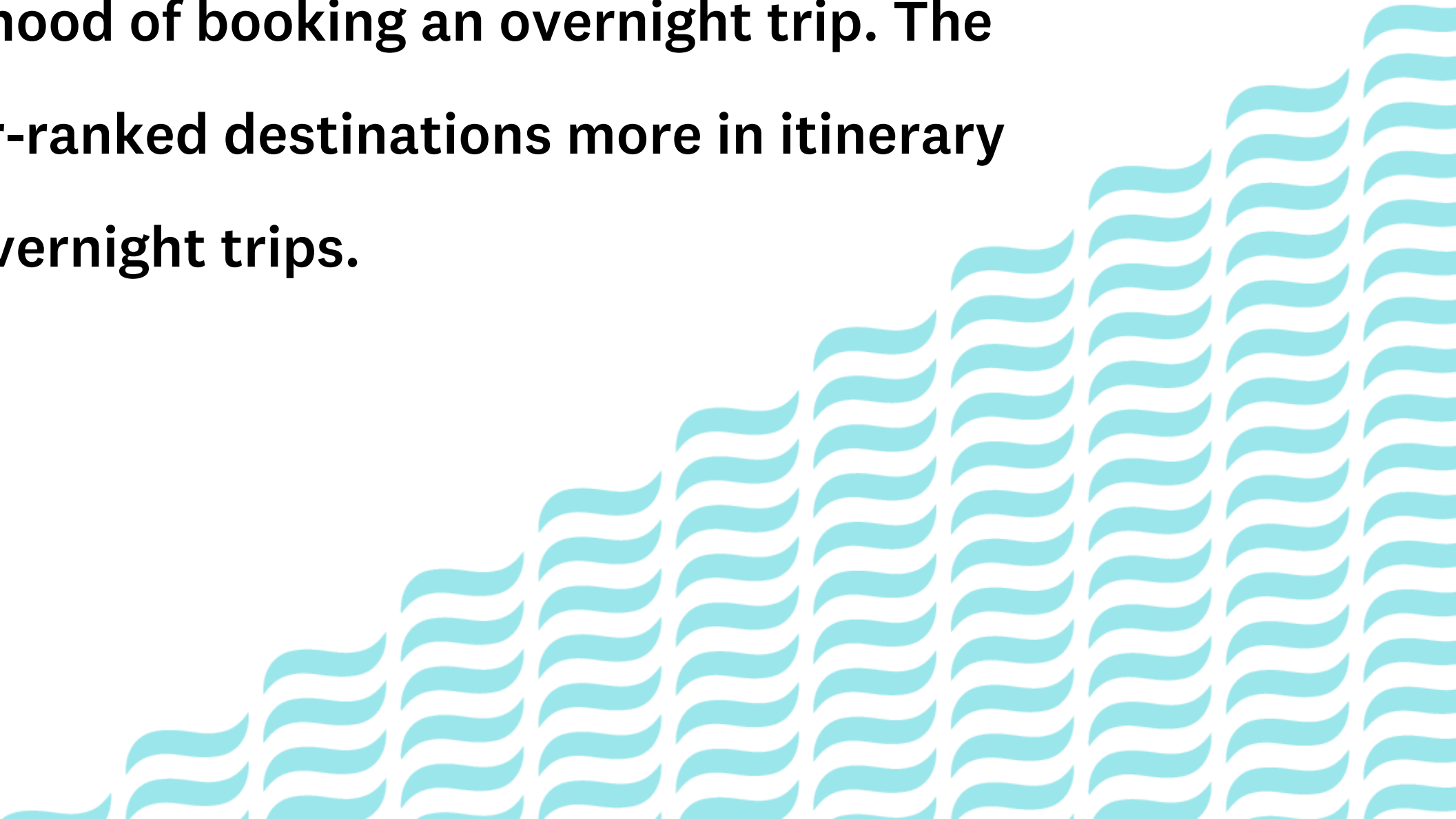
Page 12. Barriers to travel mentions not being able to bring a pet. Recommendation- focus on some pet-friendly content for 2025.

Page 16. The largest increase in accommodation type was for Airbnb/cottage rental, which increased 6% from the spring survey. Recommendation: Include short-term rentals and independent cottages/rentals when publishing itineraries and blogs as these are gaining popularity.

Page 17. For planning a trip, influence from brands or creators remains low as very likely to influence their decision.

Insights & Opportunities:

Pages to reflect rankings 23 and 26 are new. This shows at a glance those destinations most familiar within South Eastern Ontario and those where people are most likely to book an overnight. Interestingly, some of the destinations that were ranked most familiar don't rank as high for the likelihood of booking an overnight trip. The recommendation is to include the lower-ranked destinations more in itinerary development and content suggesting overnight trips.

A decorative graphic in the bottom right corner consisting of several vertical columns of light blue, wavy, horizontal lines that increase in height from left to right, resembling a stylized staircase or a series of waves.

