

RTO 9 Consumer Insights Survey

Summer Survey 2025



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

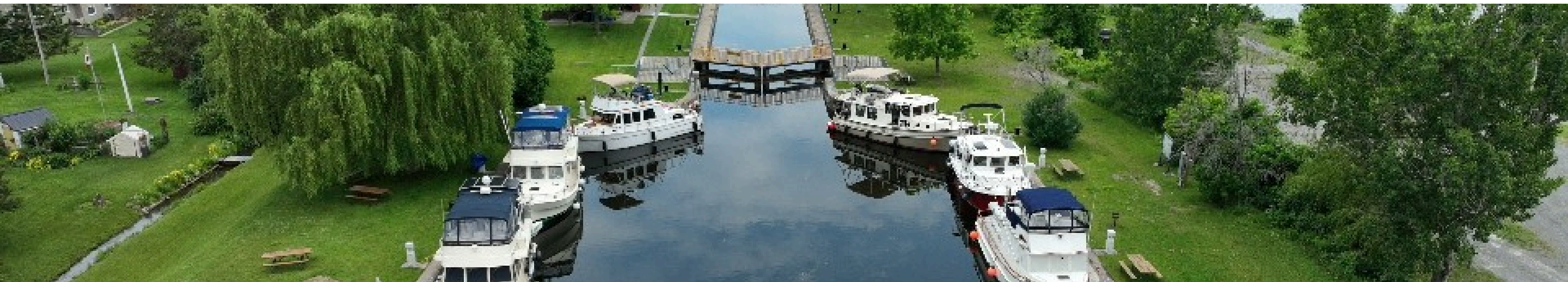
Sample location: Our consumer database (38,000 subscribers) and across Ontario

Sample size: 1180 survey responses

Completion: 69%

Time spent: 6m 58 seconds

In-market dates: July 28 - August 11th, 2025



Respondent Locations

PROFILE



Profile of Survey Responses

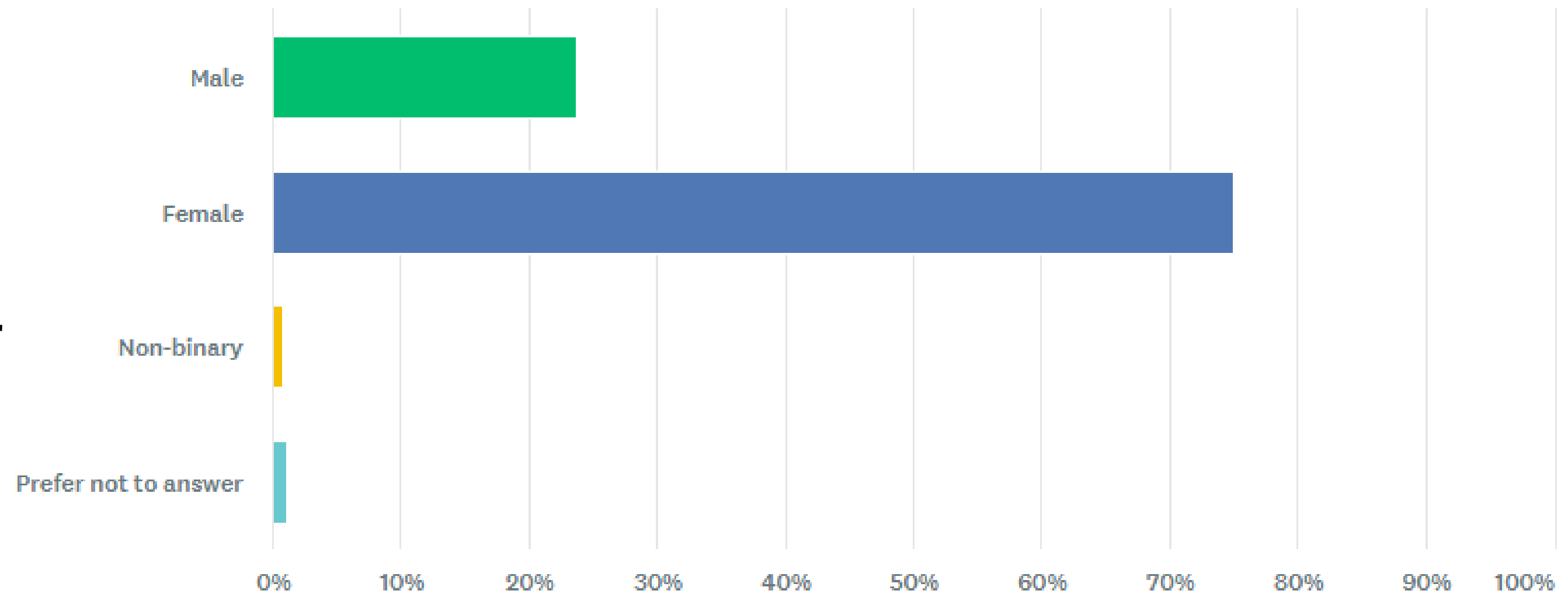
PROFILE

75% Female

24% Male

0% Non-binary

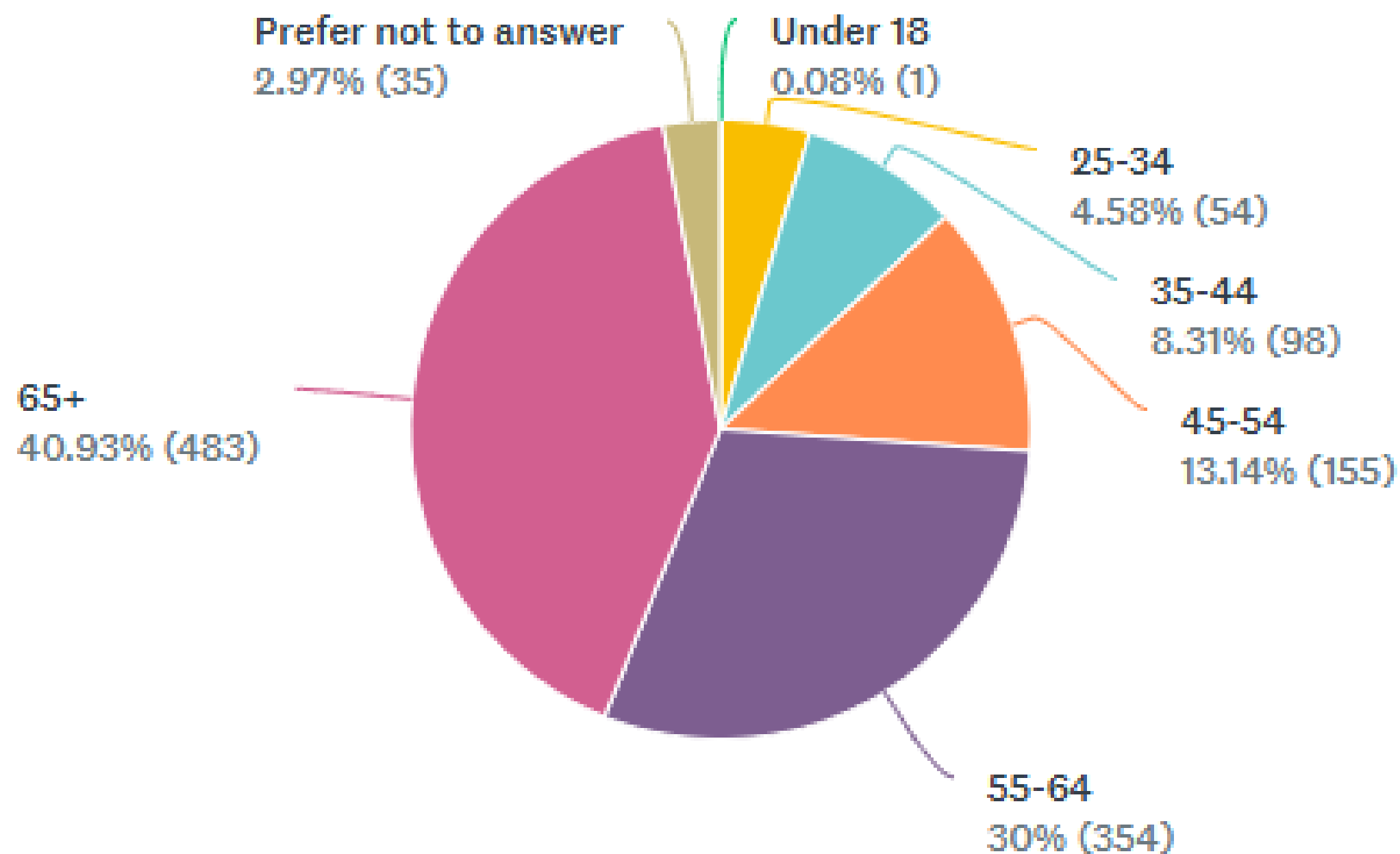
1% Prefer not to answer



Profile of Survey Responses

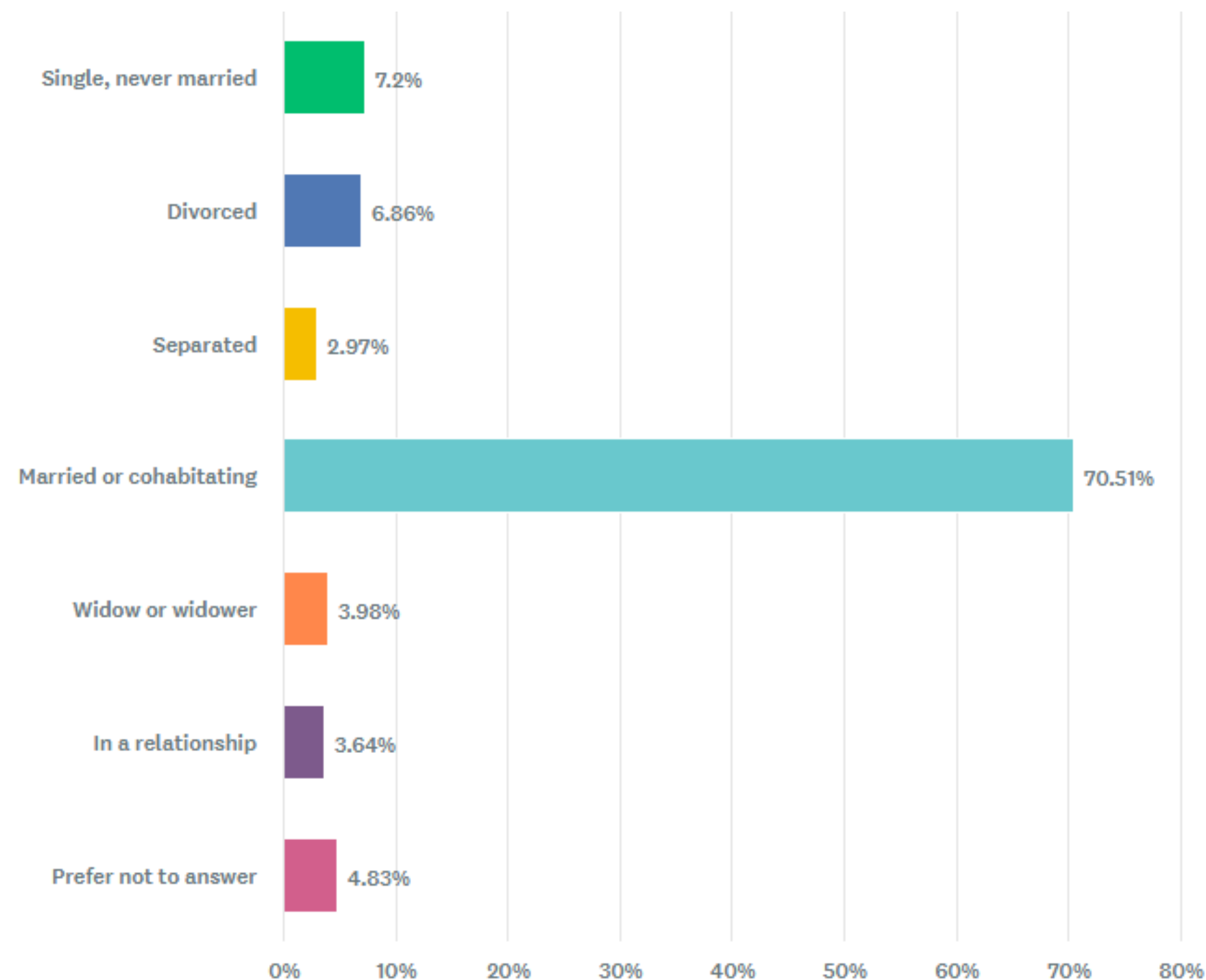
Age Ranges

PROFILE

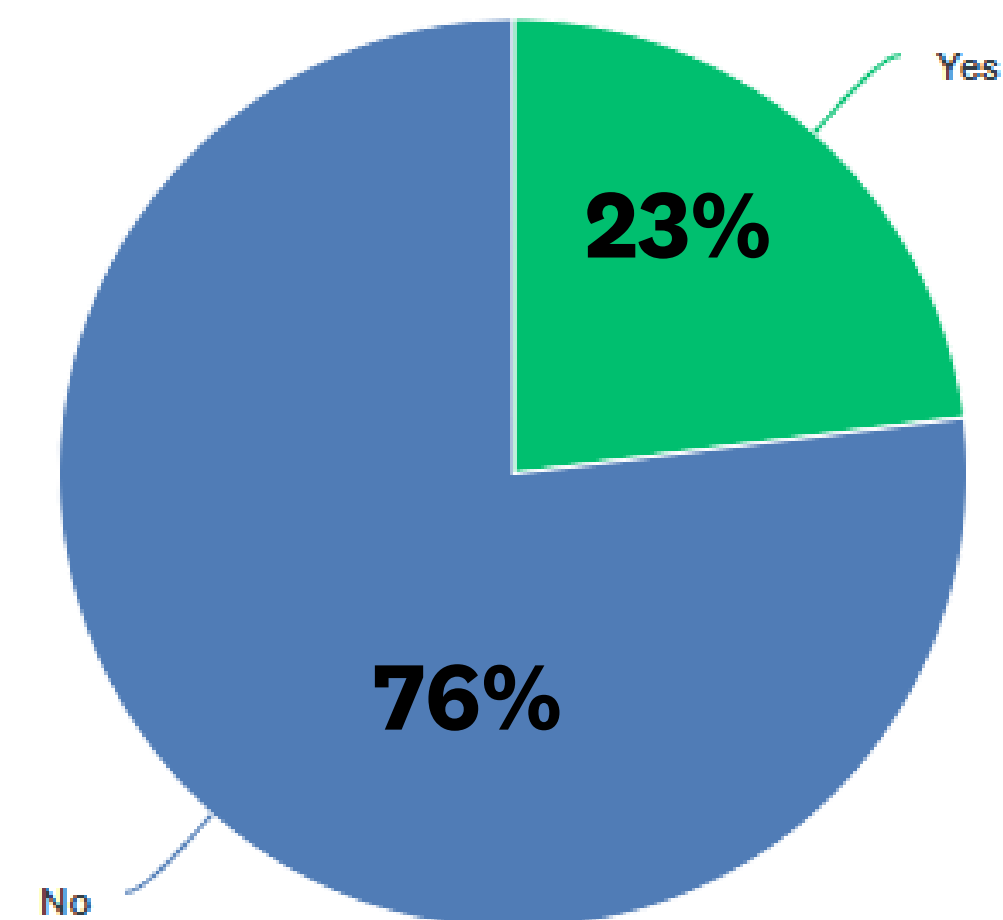


Profile of Survey Responses

Marital Status



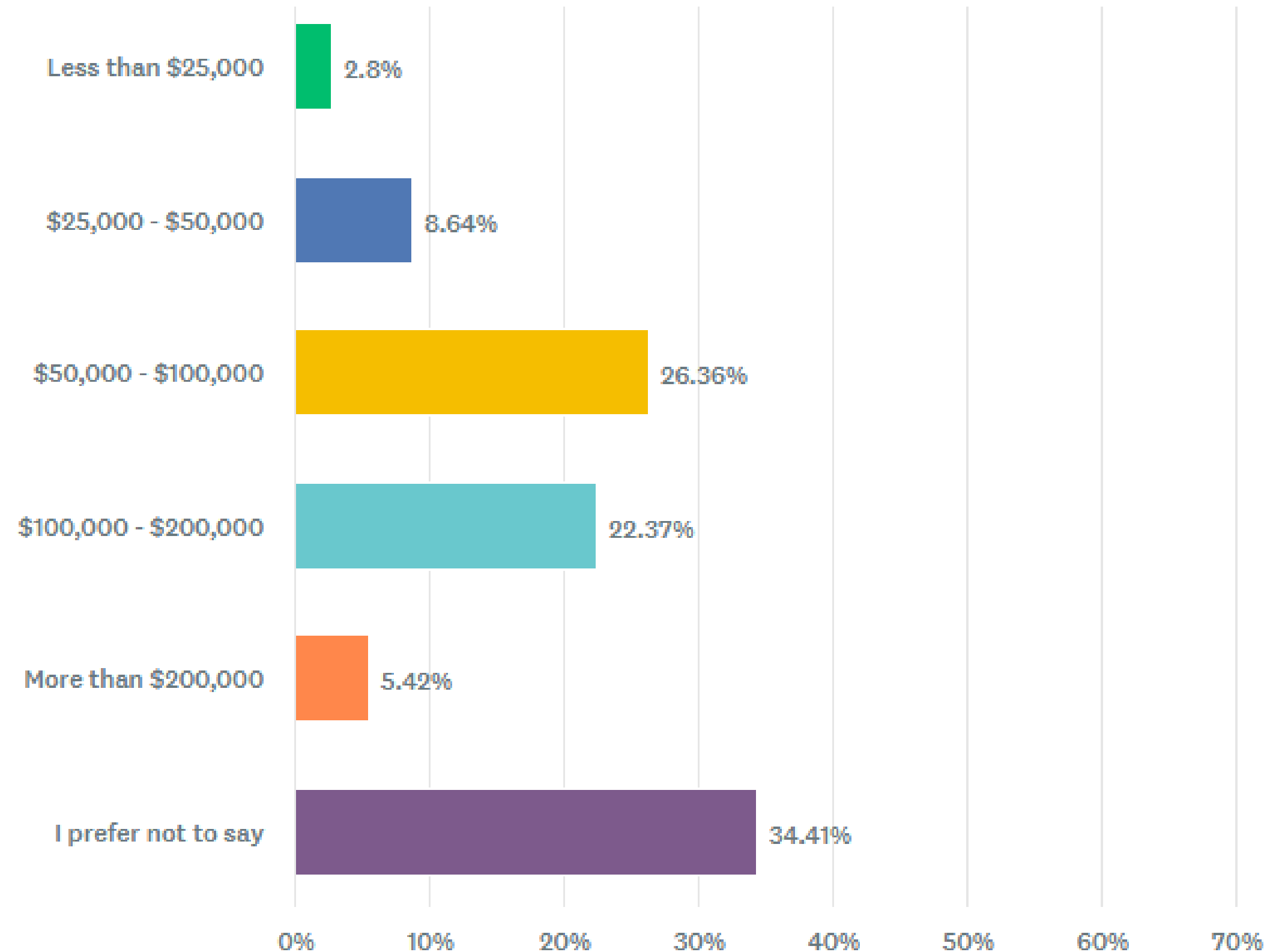
Children in household



Profile of Survey Responses

Level of annual household income

PROFILE



Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES



36%

Would make it a 3-nights + trip

47%

Would make it a 2-night trip

16%

Would make it a 1-night

91%

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

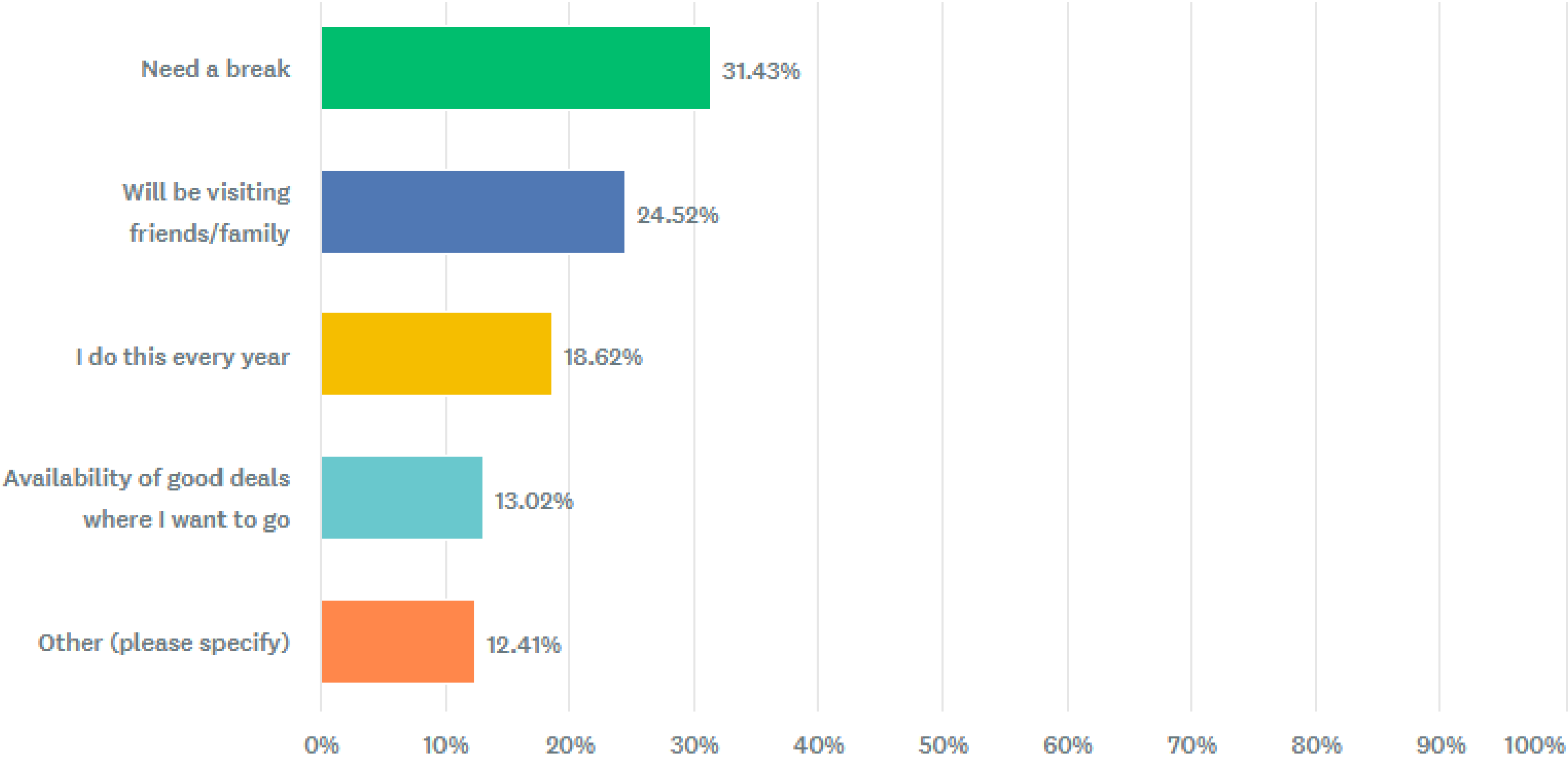


Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES

31%

*Stated the reason for a trip would be “Need a Break”



Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES

Barriers to Travel

33%

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.

Down 3% from spring survey.

Can't afford it	33%
Nowhere I want to visit at the moment	14%
Too busy	6%
Household/family commitments	19%
Prefer to travel in Canada, but outside Ontario	2%
Prefer to travel outside of Canada	2%
Unable to take a vacation	5%
Other	17%

Travel Priorities for Leisure Travel in the Next 12 Months

PRIORITIES

Other main reasons specified as barriers to travel

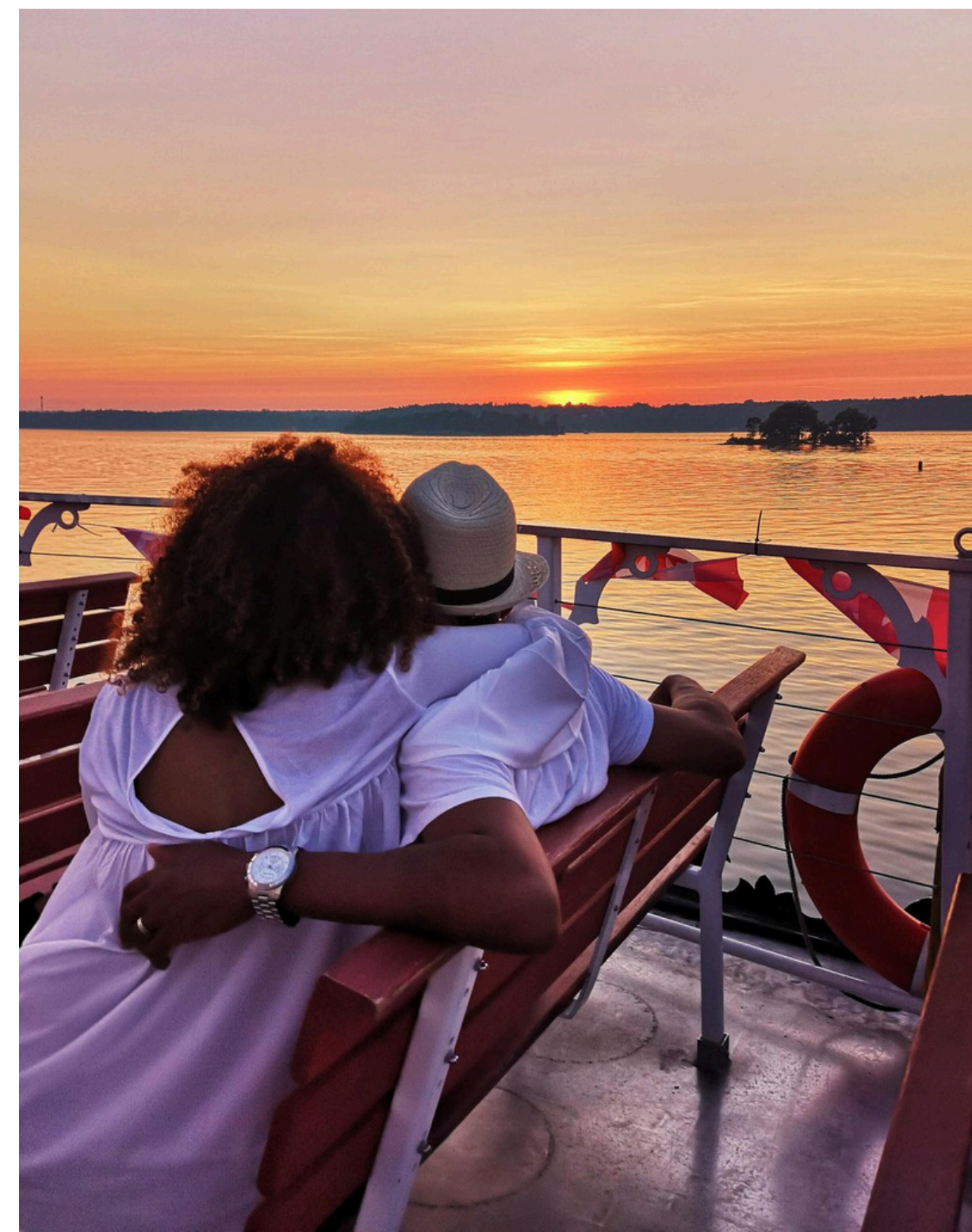
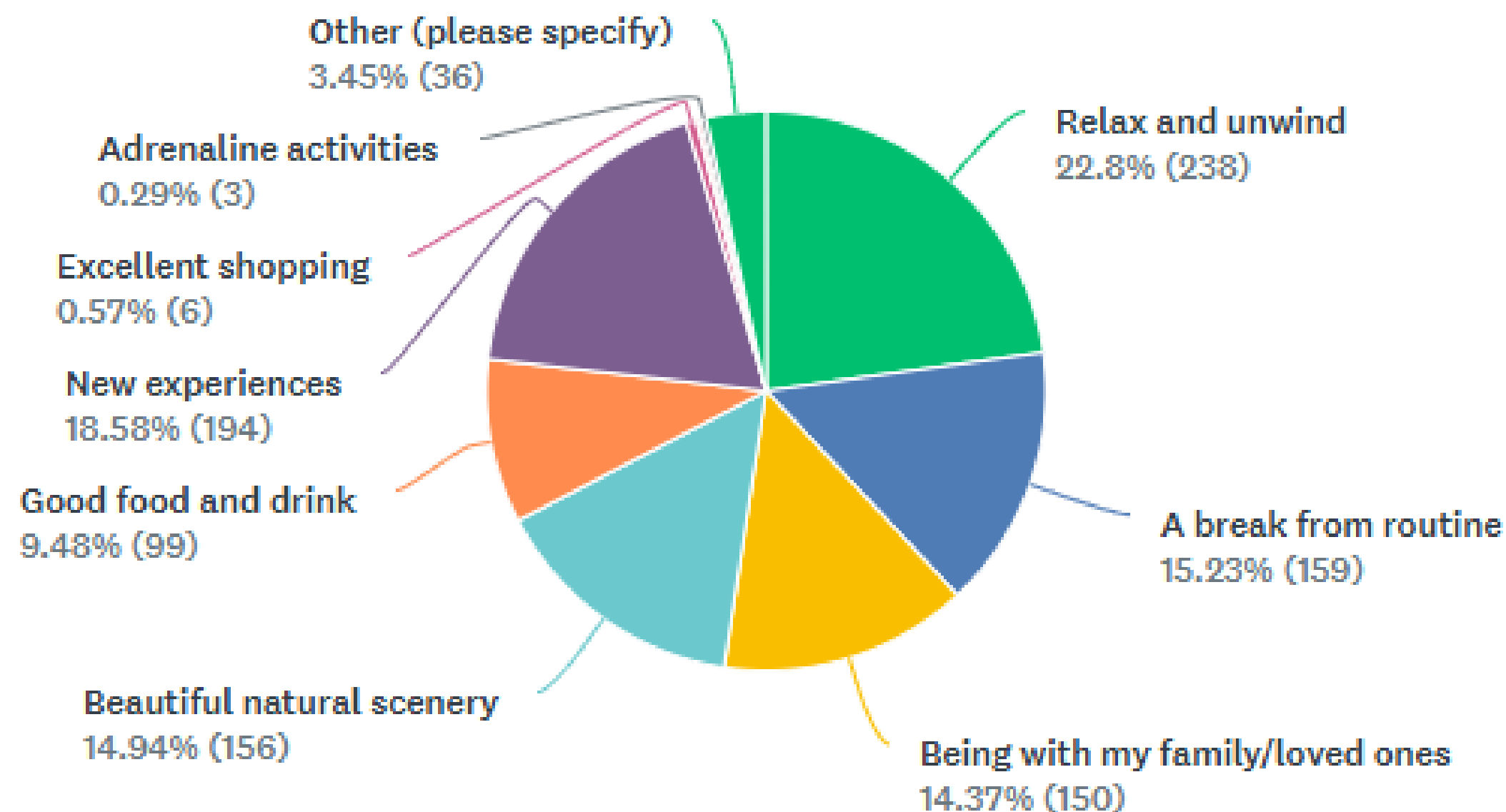


- Mobility challenged & Health issues
- Lack of pet-friendly options
- Accommodations are too expensive

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)

36%

VERY LIKELY

53%

SOMEWHAT LIKELY

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

15%

VERY LIKELY

53%

SOMEWHAT LIKELY

Online travel sites with packages and discounts - Expedia, Landsby

20%

VERY LIKELY

45%

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)



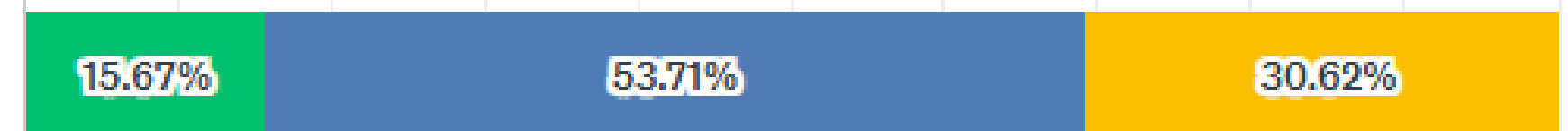
Word of Mouth from your friends and family (this does not include the use of Social Media)



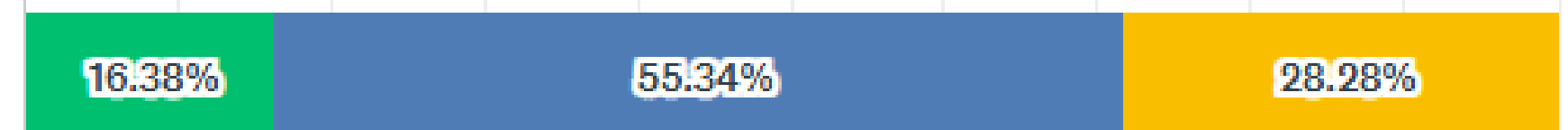
What other brands and creators post on Social Media



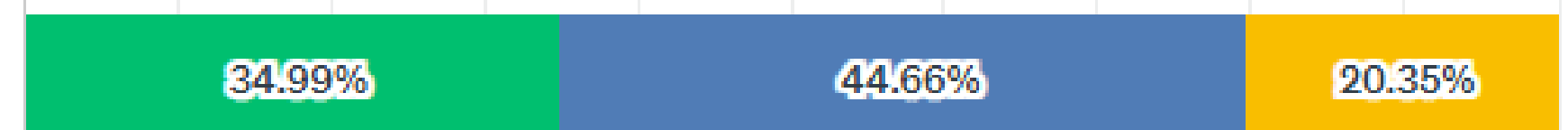
Google and other search engines (includes Google Reviews)



Destination websites & blogs



Online travel sites with packages and discounts - Expedia, Landsby



0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

 Unlikely

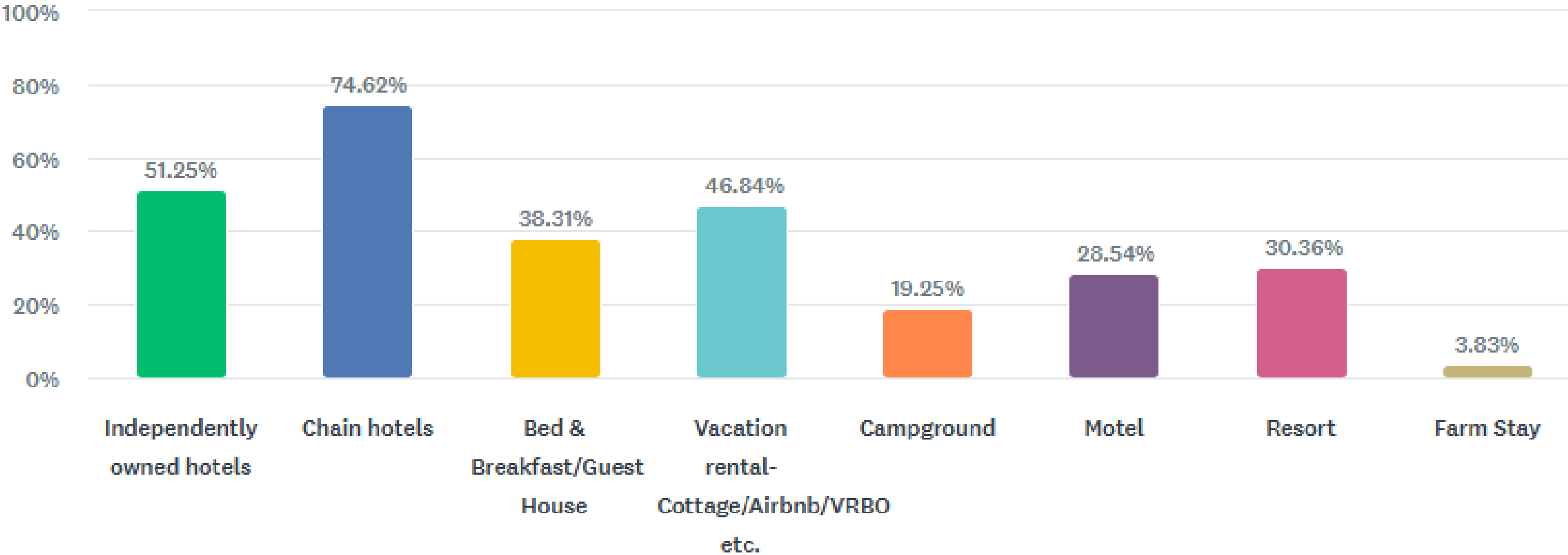
 Somewhat ...

 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

33%

VERY LIKELY

54%

SOMEWHAT LIKELY

Stated they would use Destination websites & blogs to plan

30%

VERY LIKELY

55%

SOMEWHAT LIKELY

Stated other brands or Creators/Influence planning

7%

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)

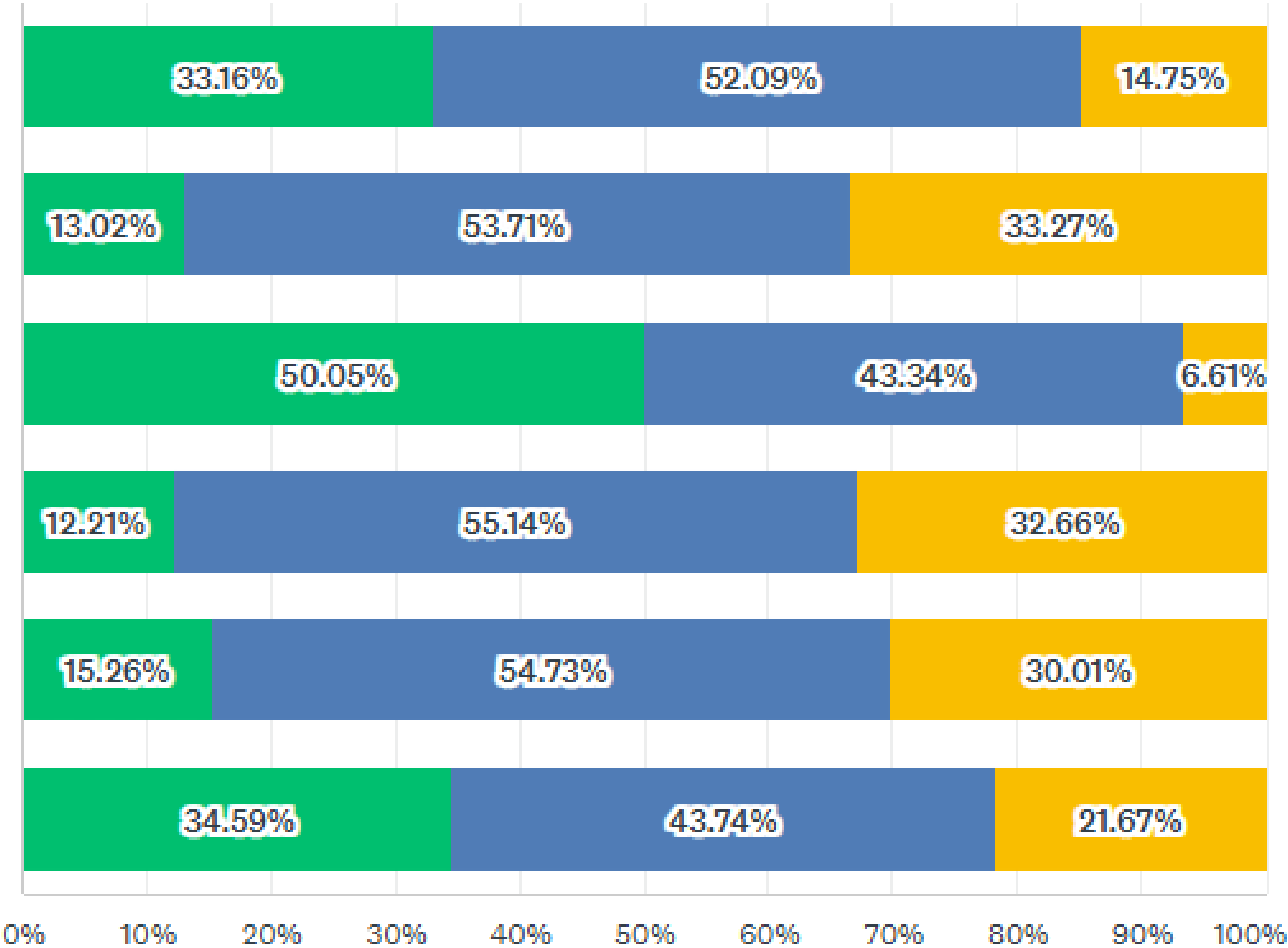
Word of Mouth from your friends and family (this does not include the use of Social Media)

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

47%

VERY LIKELY

Stated they would use Destination websites to book

35%

VERY LIKELY

Stated they use hotel & resort website to book

42%

VERY LIKELY

41%

SOMEWHAT LIKELY

51%

SOMEWHAT LIKELY

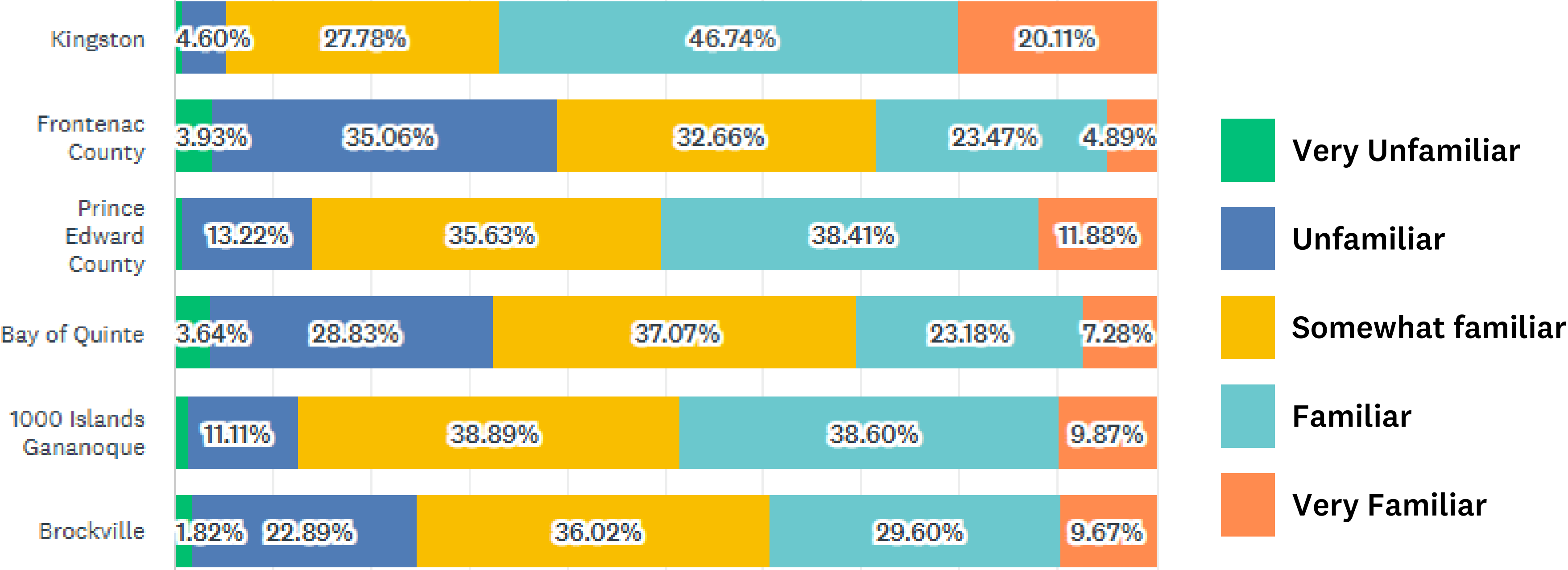
47%

SOMEWHAT LIKELY

Perspectives On Leisure Travel To South Eastern Ontario

FAMILIARITY

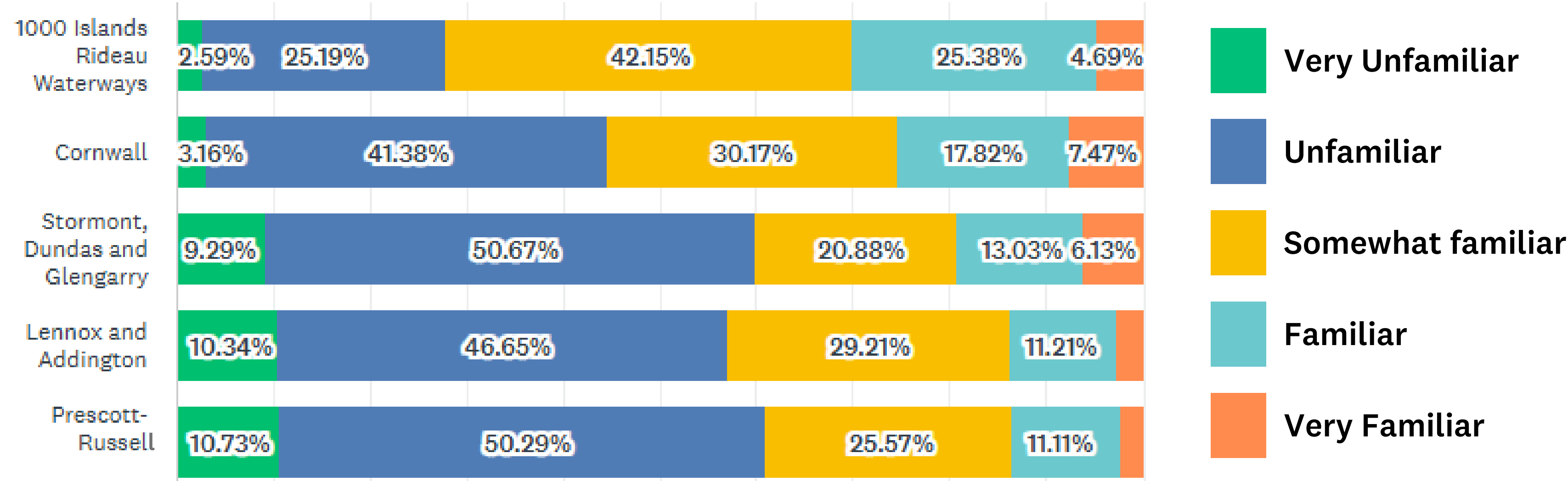
"For each destination, please indicate how familiar you are with what each destination has to offer for leisure travel."



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

39%

Somewhat Familiar with 1000 Islands Gananoque

36%

Somewhat Familiar with Prince Edward County

36%

Somewhat Familiar with Brockville

35%

Unfamiliar with Frontenac County

29%

Unfamiliar with Bay of Quinte

41%

Unfamiliar with Cornwall

41%

Unfamiliar with SDG Counties

42%

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	66.85%
Prince Edward County	50.29
1000 Islands Gananoque	48.47
Brockville	39.27
Bay of Quinte	30.46
1000 Islands Rideau Canal Waterways	30.07
Frontenac	28.36
Cornwall	25.29
SDG Counties	19.16
Lennox and Addington	13.80
Prescott & Russell	13.41

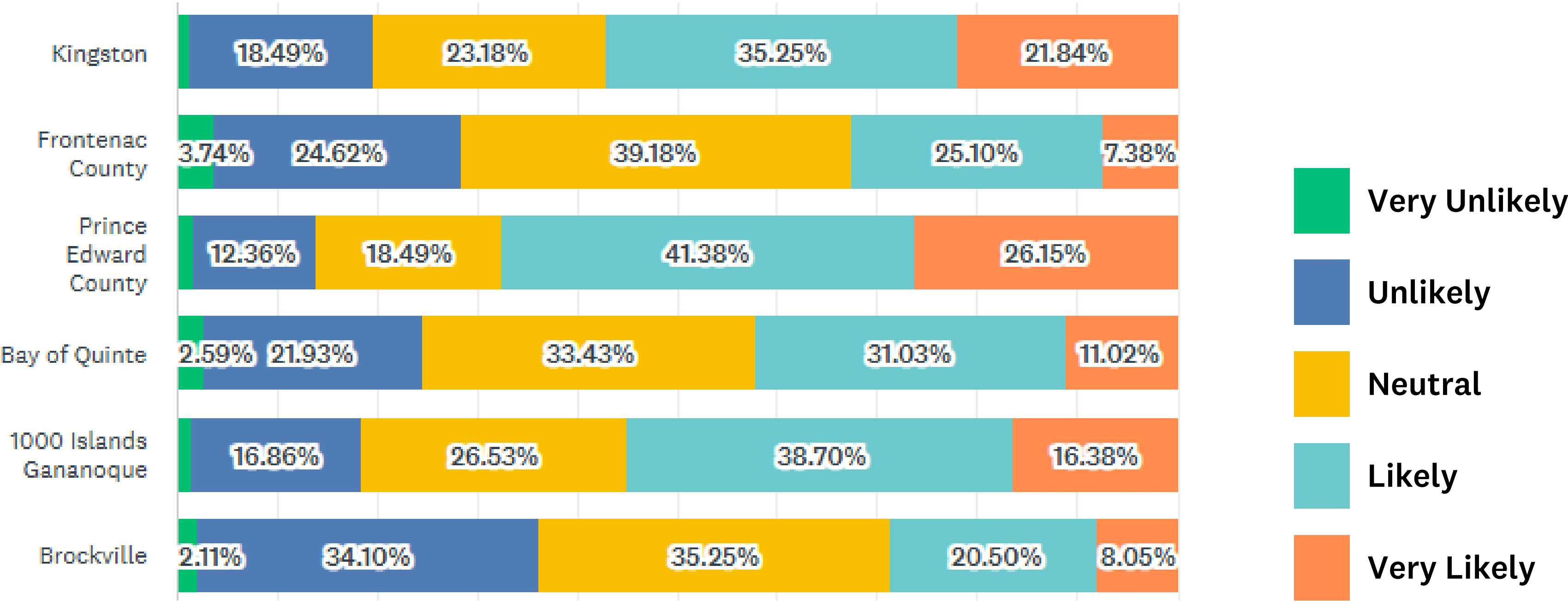


Perspectives On Leisure Travel To South Eastern Ontario



“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

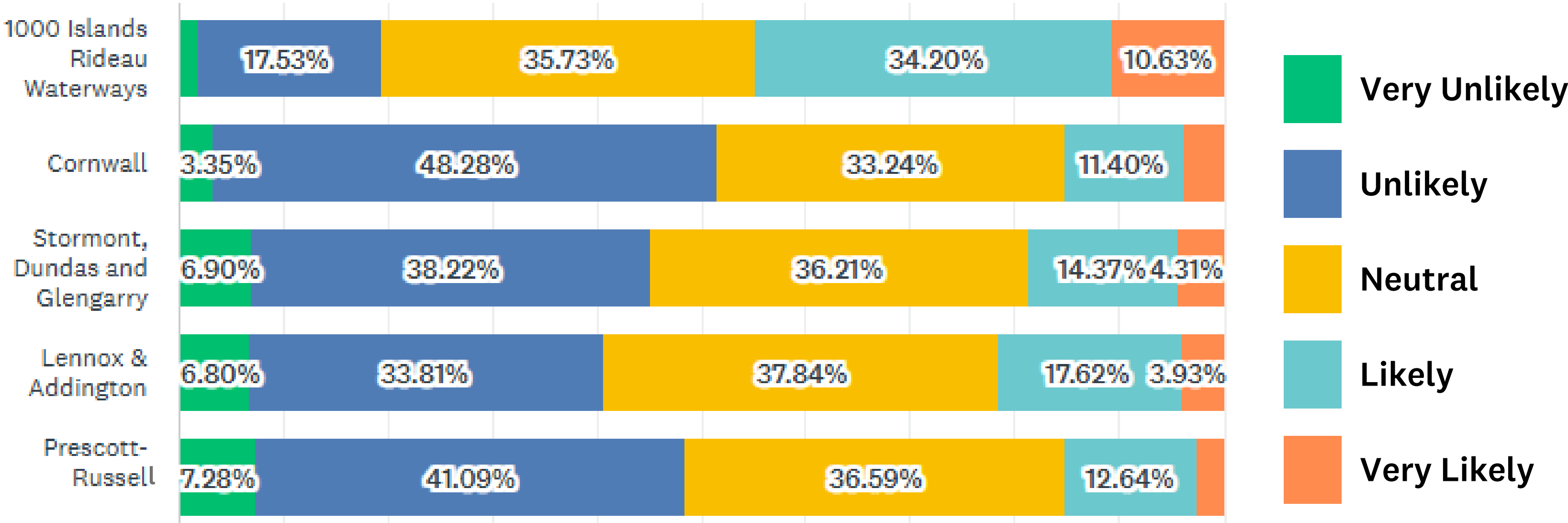


Perspectives On Leisure Travel To South Eastern Ontario



“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.

INTEREST

Prince Edward County	67.53%
Kingston	57.09
1000 Islands Gananoque	55.08
1000 Islands Rideau Canal Waterways	44.83
Bay of Quinte	42.05
Frontenac	32.48
Brockville	28.55
Lennox and Addington	21.55
SDG Counties	18.68
Cornwall	15.14
Prescott & Russell	15.03



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

65%

Interested & very interested in
Wineries, breweries, cideries

74%

Interested & very interested in
River Cruising

63%

Interested & very interested in
Viewing Wildlife

68%

Interested & very interested in
Festivals and events

40%

Interested & very interested in
Indigenous Experiences

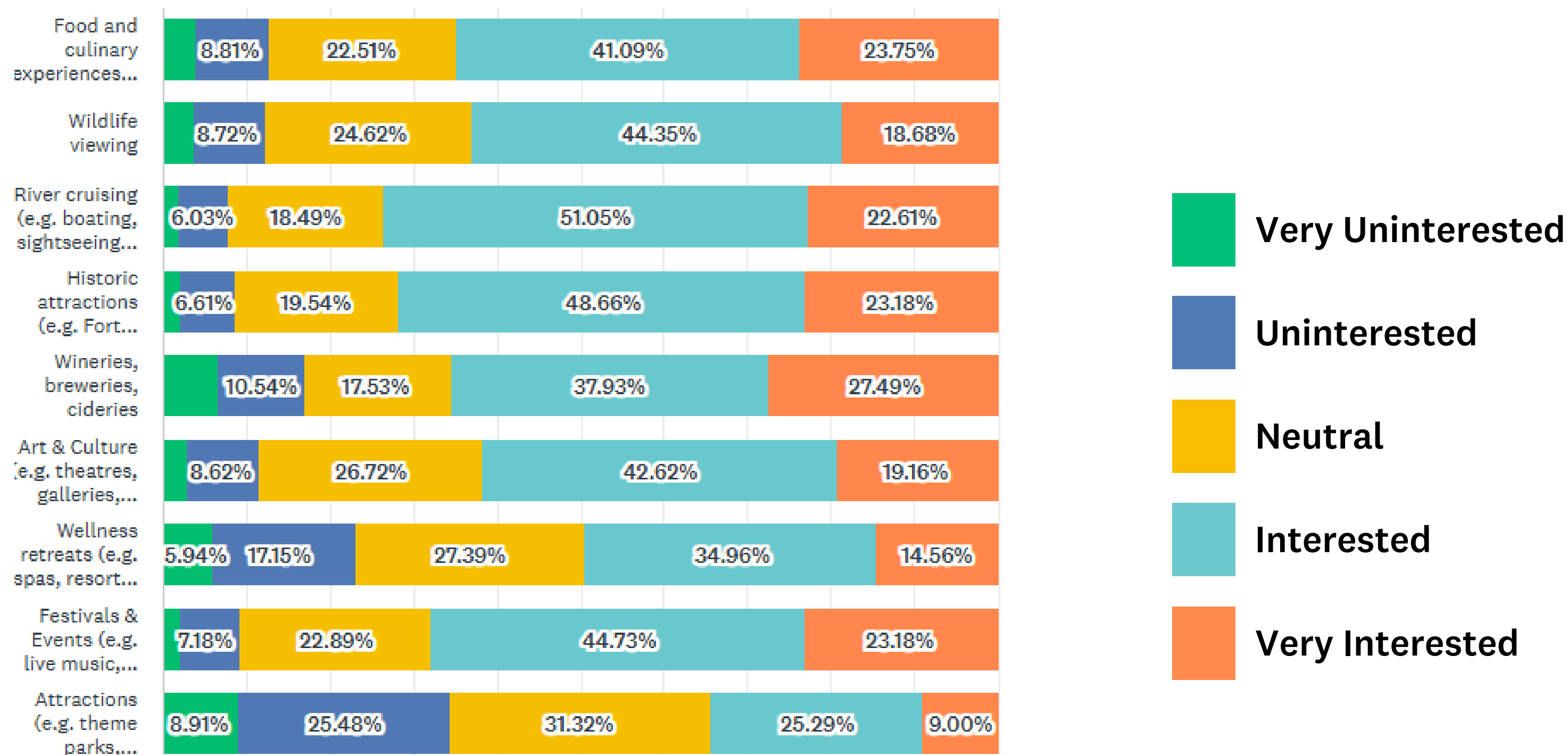
72%

Interested & very 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?”

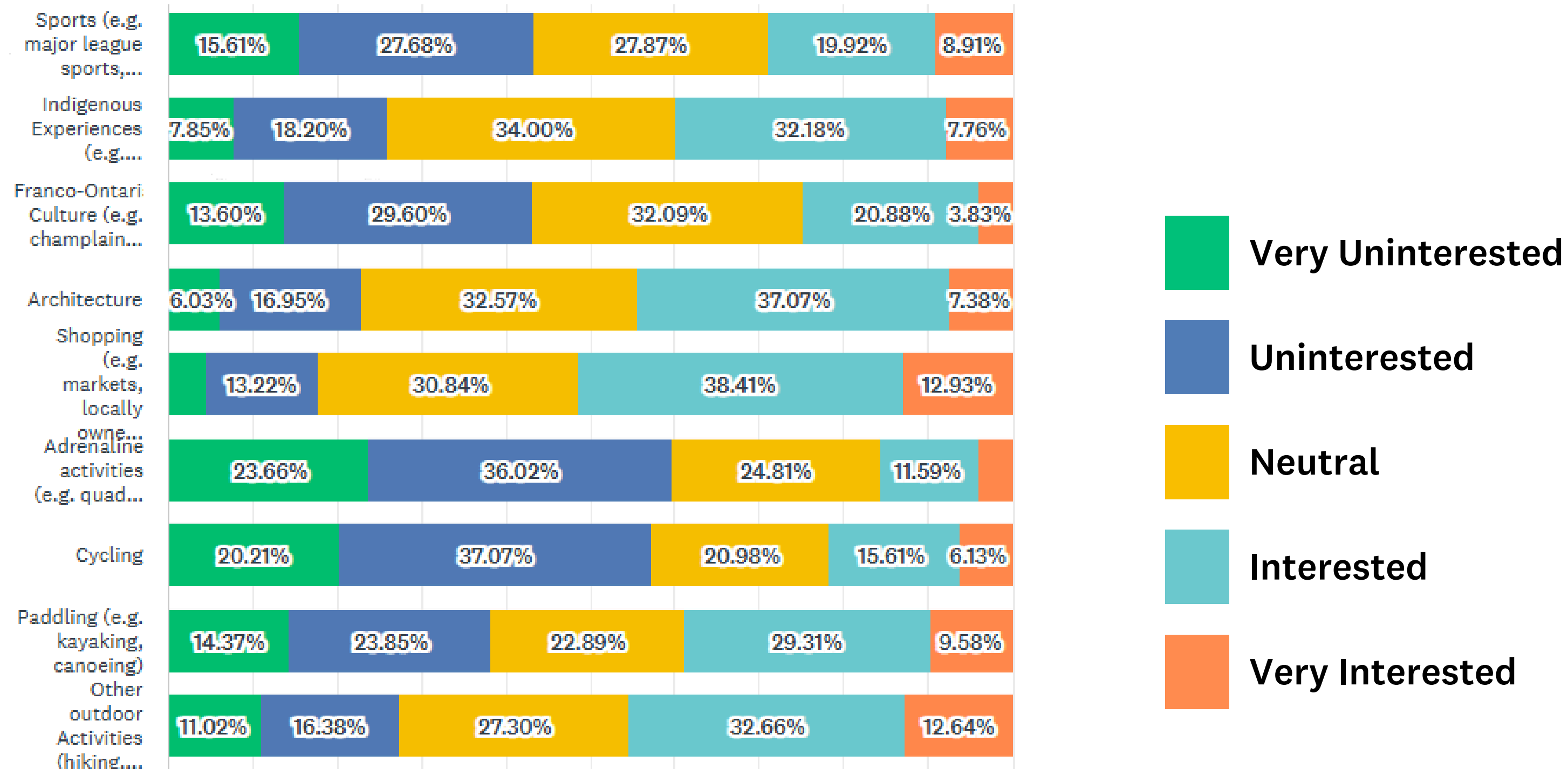
INTEREST



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:

To encourage participation, this survey included an incentive of a random draw for a \$250 rail pass. Response levels increased significantly, with 1,180 participants compared to 774 in Fall 2024—representing a 52.5% increase.

Overall, results remained largely consistent with the Spring survey, with most measures varying by only 1–3 percentage points. The following section highlights the areas where the most notable shifts or new insights were observed.

Page 6: We saw an increase in respondents aged 54 and under, rising from 16.04% to 26.11%. This shift gives us a broader perspective that is less skewed by older demographics and provides a more balanced view of the responses.

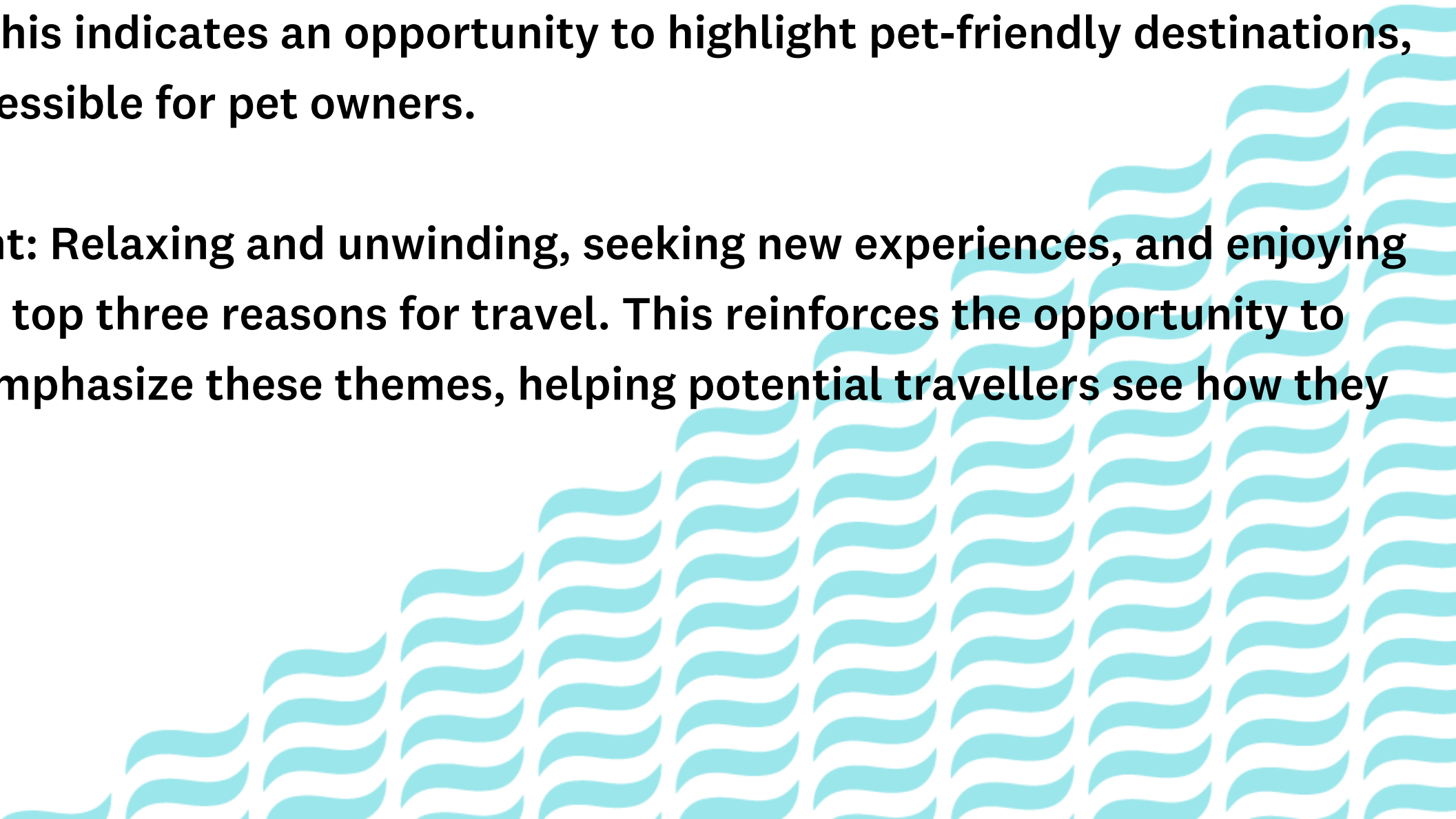
Page 9. Increased interest in longer trips: There was a 5% increase in respondents interested in taking trips of three nights or more. This highlights an opportunity to develop and share content such as sample itineraries that can inspire and support travellers in planning extended adventures.

Insights & Opportunities:

Page 11. Shifts in travel barriers: The share of respondents citing affordability as a barrier decreased by 3% compared to the previous survey, while those pointing to household or family commitments rose by 6%. This suggests an opportunity to highlight options such as day trips that can be more easily accommodated within busy schedules.

Page 12. Pet-related travel barriers: A recurring theme in the feedback was the challenge of limited pet-friendly options or concerns about leaving pets behind. This indicates an opportunity to highlight pet-friendly destinations, services, or resources that make travel more accessible for pet owners.

Page 13. Top travel motivations remain consistent: Relaxing and unwinding, seeking new experiences, and enjoying beautiful natural scenery continue to rank as the top three reasons for travel. This reinforces the opportunity to showcase stories, imagery, and itineraries that emphasize these themes, helping potential travellers see how they can achieve these experiences in our region.



Insights & Opportunities:

Pages 27-29. Growing interest in specific activities: Interest in wineries, breweries and cideries, river cruising, wildlife, festivals and events, Indigenous experiences, and historic attractions increased significantly from the previous survey. This may reflect the broader age range of respondents and the engagement generated by our content, highlighting an opportunity to continue showcasing these experiences.

