# Research Study: Impact of the COVID-19 Pandemic on Tourism & Marketing Strategy

EXPLORERS' EDGE

# EXECUTIVE SUMMARY

The tourism industry has been greatly impacted by COVID-19. Globally, people are more resistant to travel and have constantly evolving expectations of what travel will look like in the months to come. Although this situation is a challenge to attracting visitors from outside of the province, when it comes to Ontarians, the results of our study suggest the near future provides opportunity for RTO 12.

1

**Desire to travel**

There are still many Ontarians who are planning to travel this year (20%) or next (28%). Combining this result with the finding that has been a net increase in interest in Ontario vacations suggests an opportunity to increase tourism in RTO 12 during the fall & winter season and into 2021

2

**Adaptive & agile solutions are essential**

Although there is still strong appetite for travelling, the way Ontarians travel has changed and destinations will need to adapt to traveller expectations for flexibility and new health and safety needs of visitors

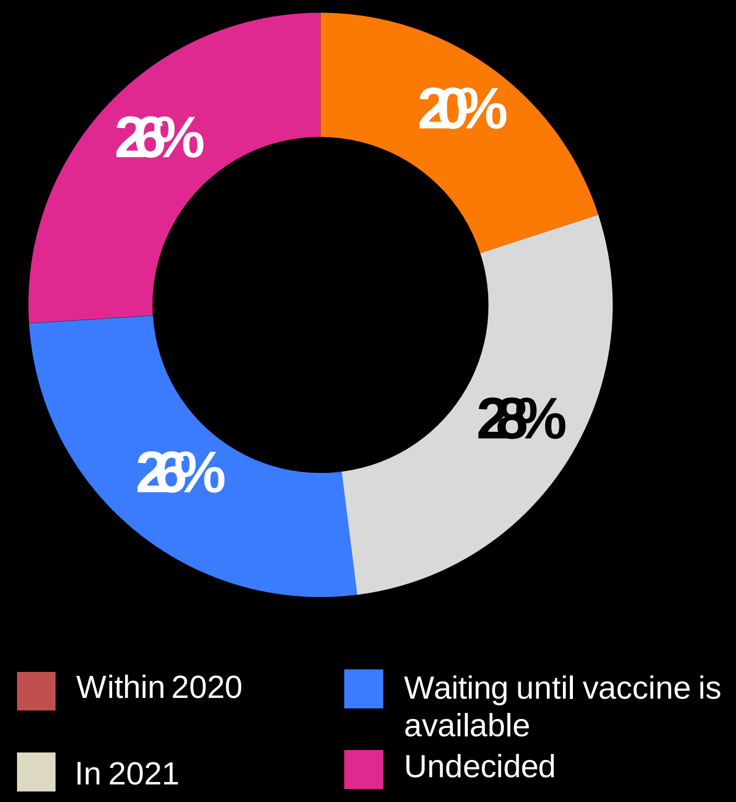
# 1 Desire to travel

While most Ontarians believe that COVID will impact their vacation plans until a vaccine becomes available (71%), nearly half of Ontarians are still planning to travel this year (20%) or the next (28%), regardless of a vaccine.

In fact, 8 in 10 Ontarians predict they will likely take a vacation in Ontario in 2020 and 2021 (81%), while 7 in 10 expect will likely take a vacation in Canada in the same period (72%).

Building interest in the winter is an opportunity as Ontarians are less interested in travelling elsewhere this winter (58%) and keener on staying close to home. The challenge will be reframing visitor perceptions of Ontario as a winter/shoulder season destination as it is typically associated with summer/fair weather activities. This is the same challenge we have faced for years

## When do you intend to travel for your next vacation?



# 2 Adaptive & agile products are essential

The overall appeal of the destination remains the most important factor when choosing a vacation destination (97%). This suggests that RTO 12's brand position as "The Great Canadian Wilderness" is fortuitous as it tighly aligns with visitor interests post-pandemic.

However, as Ontarians strongly associate travel with risk, and are very concerned with exposure to the virus (84%), sanitation and distancing protocols (95% and 91% respectively) as well as flexible billing options (94%) are just as important when it come to deciding where to go.

These new expectations create the need to ensure there is a safe structure and clear protocols waiting to receive travellers at the destination. It is also important that they are well and widely communicated to encourage Ontarians (particularly the ones sitting on the fence) to leave their comfort zone and explore beyond their immediate region.

## Top factors that will affect the vacation destination choice

Overall appeal to me & my family | 97%*

Flexibility to change days without penalty | 94%*

Sanitization protocols at the destination | 95%*


Ability to social distance at destination | 91%*

*% reflects top 2 box selected

# TRAVELLER EXPECTATIONS HAVE CHANGED

Our study found that there have been some significant changes in traveller expectations with respect to destination, activities and accommodation. It cannot be stressed enough that **these changes unanimously favour RTO 12.**

**LOCATION:** Compared to pre-COVID, there is now an increased interest in visiting more isolated areas, such as cottage areas and parks (e.g. Muskoka, Northern Ontario, Niagara, Algonquin Parks, Prince Edward County, etc.)

**ACTIVITIES:** The most notable change is an increased interest in fair season sports, including being lakeside, hiking, camping, paddling, and enjoying the local cuisine. This is in-line with the increased preference for more remote, outdoor, and isolated activities seen previously and aligns well with the shift toward supporting local business. There is opportunity for for RTO 12, as its product aligns with areas where interest is increasing (being lakeside 27%, hiking 27%, local cuisine 16%, camping 16%) – **the very activities that define "The Great Canadian Wilderness".**

**ACCOMODATION:** There is also an increased interest for isolated accommodations, including in nature, individual cottages and cottage resorts and decreased interest in shared accommodations such as Airbnb rentals, motels, and hotels.

# TRAVELLER DEMOGRAPHICS AND ATTITUDES

**YOUNGER PEOPLE TRAVEL FIRST, OLDER TRAVELLERS NEED MORE REASSURANCE**

Youngers respondents are more likely to say the pandemic affects only this year's plans, and are more interested in taking a vacation in Ontario after stay-at-home orders have been lifted**, including in the winter.** They are also less likely to say they will spend a lot less on travelling this year

**YOUNGER PEOPLE ARE ALSO MORE INTERESTED IN RTO12**

Millennials are the most interested in visiting RTO12, mentioning Muskoka more than Ottawa (2nd place, vs 3rd for general respondents). They also mention Algonquin Park more often. Theyt also report more interest in the activities on offer in RTO 12

**TORONTONIANS ARE MORE CONCERNED, BUT ALSO MORE INTERESTED IN TRAVEL**

Respondents from Toronto are more likely to wait for a vaccine than those from Niagara, and are more likely to say Ontario needs to do more about coronavirus than the average. They tend to be more concerned about exposure after stay-at-home orders are lifted. At the same time, they are also more interested in taking a vacation in Ontario and more likely to say they will spend more with travelling this year than in 2019.

**WOMEN ARE MORE CAUTIOUS THAN MEN**

They are more likely to choose words related to risk/safety/danger, and less likely to say the pandemic has no impact on their travel plans. They also attribute more importance to many of the listed factors in choosing a vacation destination. It must be noted that 80% women in our study say they are either jointly involved in the travel decision, or the primary decision maker

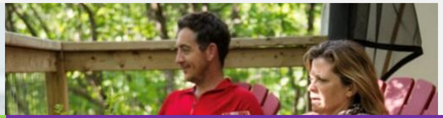
**RESPONDENTS FROM CENTRAL ONTARIO ARE THE MOST LIKELY TO VISIT RTO12**

Respondents from Central Ontario and the outer GTA mention Muskoka more than the average. Those from Eastern Ontario mention Algonquin Park more than the average. Curiously, respondents from Northern Ontario have lower interest levels in visiting RTO12 than those from other areas

# TRAVELLER SEGMENTATION

Using a statistical technique called factor analysis, data from the 1,502 respondents was used to develop an activity-based segmentation in which 4 key segments were identified. Two “Ontario Actives” and “Free but Fearful” have been identified as high priority for RTO’ 12’s marketing efforts over the next 24 months.



| | Ontario Actives | Anxious homebodies | Caution & Comfort | Free & FOMO |
|---|---|---|---|---|
| Priority | Top priority | Secondary | Secondary | Top priority |
| Segment size (%) | **43%** | **27%** | **25%** | **6%** |
| In a nutshell | Immersive & Active: want to be outside and occupied | Staycationers: looking for predictability and relaxation | Retirees: looking to escape in comfort | Experiential: looking for authentic experiences |
| Drivers to travelling in Ontario | Being active, escaping, relaxing | Relaxing, getting away from others, routine | Relaxing, going back to familiar and comfortable settings | Exploring, being out there, taking great pictures |
| Barriers to travelling in Ontario | Lack of flexibility, things to do, or clear safety protocols | Cost, fear of COVID, feeling overwhelmed | Fear of COVID, lack of clear safety protocols and lack of predictability | Not feeling excitement about what’s available |
| Product | Winter and Fair weather sports, culture, nature, relaxing | Biking, culture, nature, relaxing | Culture, relaxing | Wine/brews tours, culture, relaxing |
| Impact of COVID on travel | Cancelled plans in 2020 but likely to travel again next year | Cancelled plans until a vaccine is available | Cancelled plans in 2020; unlikely to travel in 2020/2021 | Cancelled plans in 2020, but likely to travel again ASAP |
| Focus | Appeal to their vitality and need for escape | Address their anxiety to stay top of mind for when vaccine is available | Establish a connection and give them piece of mind | Appeal to their need to explore and fear of missing out |

# IMPLICATIONS FOR RTO'S BUSINESS AND MARKETING STRATEGY

**GO ALL IN ON THE GREAT CANADIAN WILDERNESS (GCW)**
This positioning has always been strong, but it has taken on special resonance post-pandemic. Also, awareness of the brand "Explorers' Edge" has fallen to just 4% (from 9% in 2016) . **The time is right to rebrand RTO 12 and retire the "Explorers' Edge" name**

**FOCUS MARKETING ON "ONTARIO ACTIVES" AND THE "FREE BUT FEARFULS"**
These two audiences are the most interested in the GCW proposition, and they represent more than half of the Ontario traveller audience. **Appealing to these groups will mean a greater focus on outdoor activities in our content marketing**

**COMMUNICATIONS MUST RESONATE WITH WOMEN**
80% women in our study say they are either jointly involved in the travel decision, or the primary decision maker. **And they the group most likely to be worried about the virus when they travel**

**ADVERTISE TO DRIVE FALL/WINTER TRAVEL**
In a way, it's like we're going back to 2011. **But the "Fall Blue" and "Winter Turns up the Fun" campaigns of yesterday are once again highly compelling** and necessary to try to drive an increase in travel during those seasons

**BECOME AN ADVOCATE FOR SHAPING THE POST-PANDEMIC PRODUCT**
COVID is here to stay. Until a vaccine has been developed and seen to be effective, fear of COVID will shape traveller expectations. Not only will this impact how operators conduct their business, **it will also dictate which kind of operators will thrive**

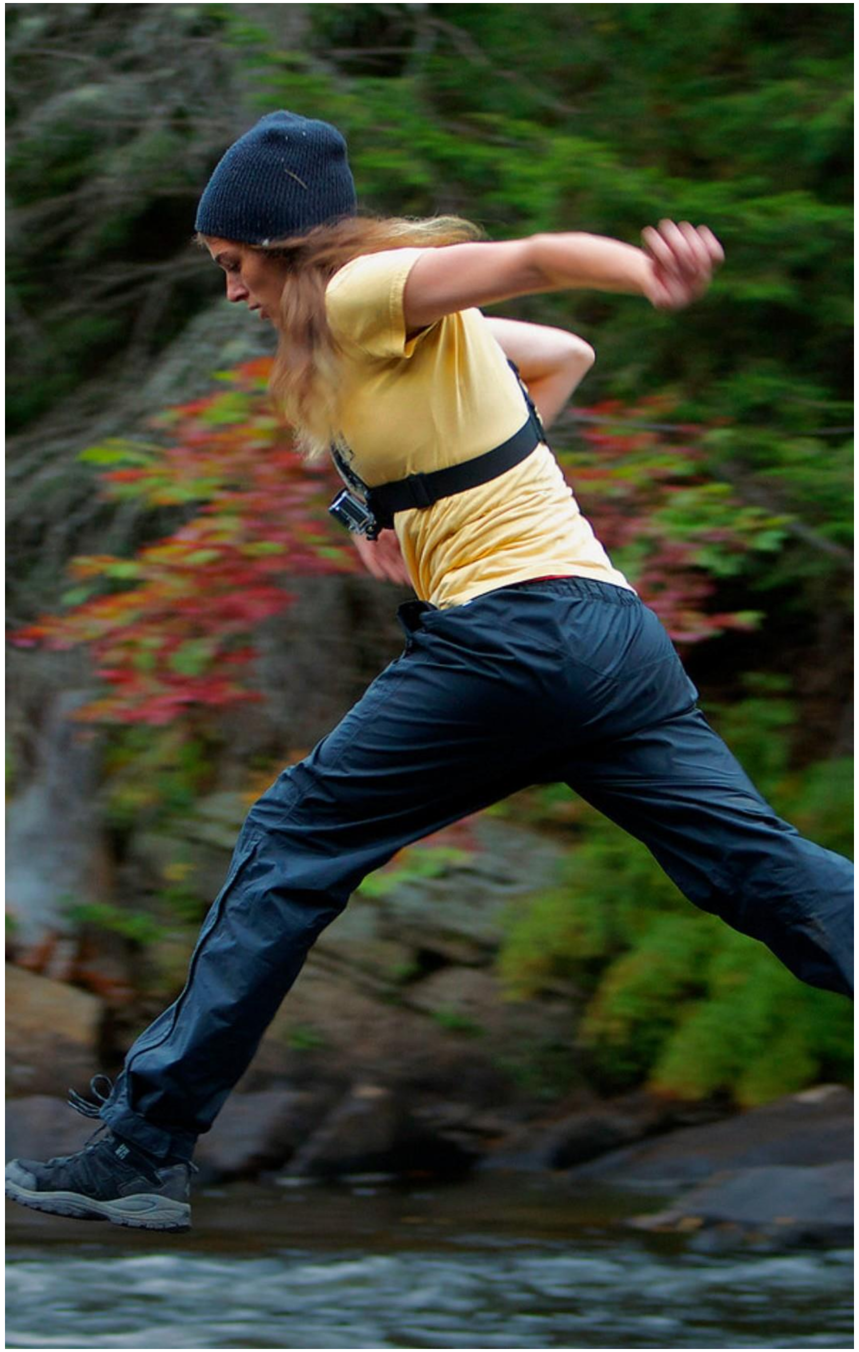

# DETAILED FINDINGS

# BACKGROUND & METHODOLOGY

In the wake of the global COVID-19 pandemic, RTO 12 is seeking to adapt its marketing strategy to attract local tourists and encourage Ontarians to explore new and different Ontario destinations. Lead by Kuration, Environics was commissioned to conduct a research with Ontario travellers between July 6 and 16, 2020, gauging interest in different activities and destinations and measuring the impact of COVID has on travel and vacation plans.

The resulting data was used to inform an activity-based segmentation in which 4 key segments were identified. This segmentation should be an integral component of the RTO's marketing efforts over the next 24 months. The first section of this report provides a summary of each of the 4 segments and strategic considerations for engagement, communication, and positioning.

The second section of the report provides detail on the survey responses and gives insight into the impact COVID has had on Ontario travellers.



# TRAVELLER SEGMENTATION

# ONTARIO ACTIVE & OUTDOORS (43%)

Youngish and active, this segment has a zest for life and is enthusiastic about travelling (and children are no barrier). Given the current situation, they are looking to relax and escape their daily lives and immerse themselves into an adventure in nature, off the beaten path, away form people, common areas, and large groups. They seek to be in control of their surroundings and with concern about COVID, are not overly interested in city travelling or crowds. Ontario has a lot to offer and now is a great time to go camping, explore the great outdoors and relax at a cottage. They are adaptive by nature and are equipped to navigate the complexities of life; they will travel in all seasons (there is always something to do!). Although COVID has impacted their travel plans this year, they are craving some time away of the stress of daily life (maybe even before a vaccine, as long as they feel safe and confident in the destination). They have money to spend and will spend on travelling.

**Engagement Strategy -** They are the low hanging fruit – looking for places to go and things to do that are safe and won't expose them or their family to COVID. Focus on the variety of activities (for adults and families), escaping daily life, immersion in nature, cottage life, and the thrill and adventure of travelling – but don't neglect safety and flexibility. They want the freedom to pick-up and go on the last minute, but also want to be able to cancel if the situation changes.

## Traveller Values

Escape / Relaxation Seekers

Indulgent Rejuvenators

Cultural Immersion Travellers

Luxury Travellers

Nature Lovers

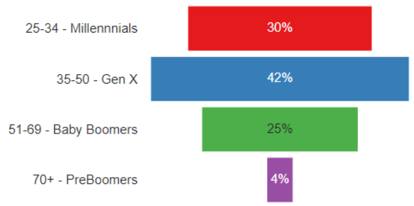
Picture Perfect Travellers

Live to Travel

Familiarity Seekers

## Demographics

53% 47%




Skews higher education

Most likely employed – average income

Married/ common law with kids

# ONTARIO ACTIVE & OUTDOORS (43%)

## Activity Score: all season sports, looking for something to do

**Winter Sports**

60%

**Biking**

48%

**Nature**

30%

**Fair Season Sports**

46%

**Culture**

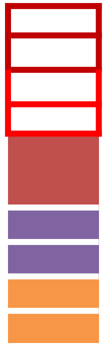
36%

**Relaxing**

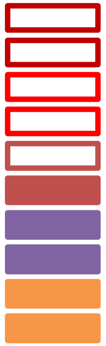
30%

## Impact of COVID on planning and spending: pause on planning and more caution about $$

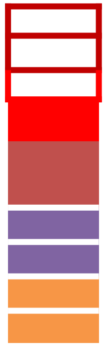
**Impact on vacation plans**




**Impact on spending**




**Agreement with COVID premium**




## Important factors when choosing a destination

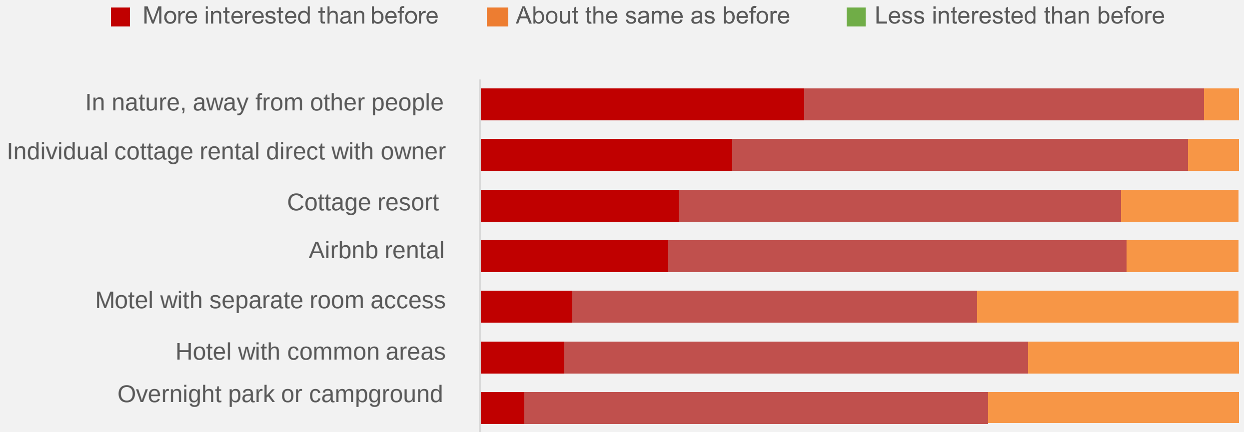
1. Overall appeal
2. Flexibility on dates
3. Sanitation Protocols
4. Ability to Social distance
5. Availability of COVID safe restrooms on the way

## More likely to be important among ME:

- Ability to book online
- Activities available at the destination
- Availability of packages
- Ability to book at the last minute

# ONTARIO ACTIVE & OUTDOORS (43%)

## Types of accommodation: more interest in private vs. shared




## Destinations with increased interest

1. Muskoka
2. Northern Ontario
3. Algonquin Park
4. Niagara (and peninsula)
5. Collingwood and Wasaga Beach
6. Parry Sound / Georgian Bay

## Impact of COVID on Travelling choices: increased interest in Ontario and family visits

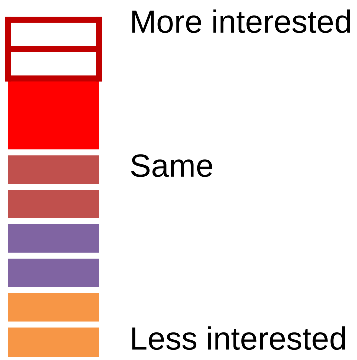
### Likely destinations

Ontario Yours to discover

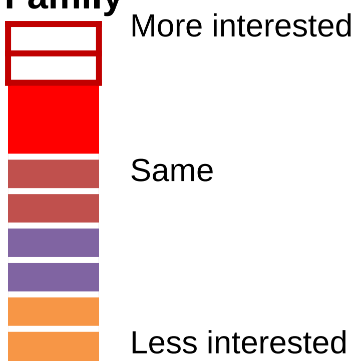
Canada keep exploring

Caribbean Plan your Caribbean vacation

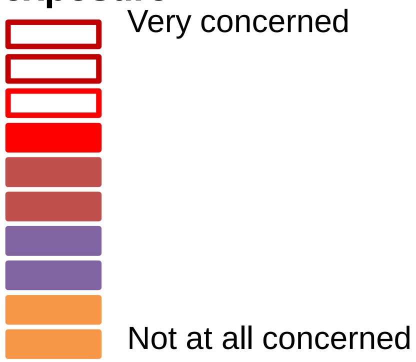
### Interest in Ontario




### Interest in visiting Family




### Concern about exposure




## Destinations with decreasing interest/would not consider

- Toronto
- Windsor/Essex
- Hamilton/Halton
- Port Loring-Restoule

**“Ontario Actives” differ from the “Ontario Explorers” segment identified in our research in 2012 in the following ways:**

**The biggest difference is this audience skews younger, with 30% 25-34 years old**

**More active  - greater interest in sports and active outdoor pursuits**

**While many are parents, there is also a significant portion who are child-less**

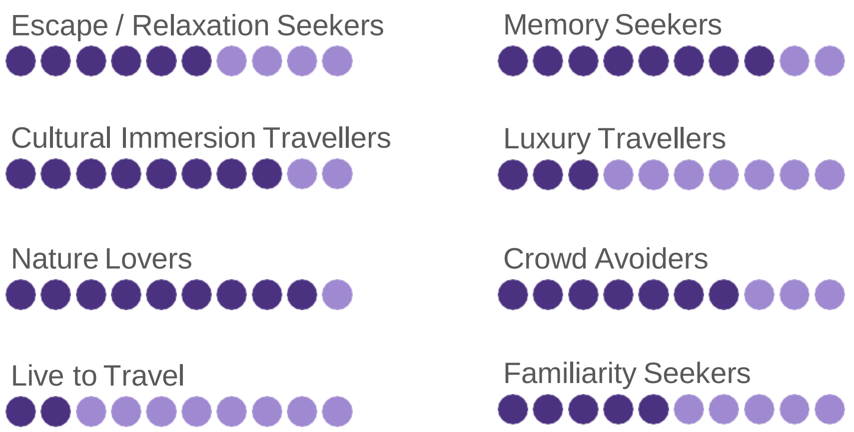
# ANXIOUS HOMEBODIES (27%)

These middle-aged Ontarians are staycationers and creatures of comfort. They like predictability, and seek out familiarity and comfort. Travelling can be a source of anxiety – now more than ever! When travelling, they enjoy familiar settings and avoid too much complexity, large crowds, and uncertainty. They are not looking to fill a busy schedule full of activities; they are simply looking to sit back, relax – a small, quaint resort where they have control of their surroundings is the perfect vacation!

COVID is a source or great concern and anxiety and has definitely put a halt to their travel plans. Until there is a vaccine, they will be reluctant to go anywhere or spend too much money on vacation. After all, they are boomers with limited incomes and uncertain times see them pulling back. In fact, even visiting their families is a source of anxiety at this point, and they may avoid seeing loved ones. They'll look for isolated places where they can relax and be close to nature (but that don't require too much effort and are not too expensive).

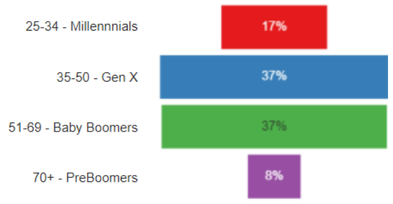
**Engagement Strategy –** Anxious Homebodies will be challenging to engage until there is a vaccine. Travelling can bring anxiety, even without COVID. Focus on staying top-of-mind (with familiar, local destinations/product) for when there is less uncertainty (or a vaccine) they will stay local. Tone should be empathetic but avoid overbearing: They need extra reassurance of cleanliness and safety protocols to know that they will be safe.

## Traveller Values




## Demographics

45% 55%




Most years of education

Most employed, some retired – average income

Married/ common law, some with kids

# ANXIOUS HOMEBODIES (27%)

## Activity Score: just looking to relax

| | | | | | |
|---|---|---|---|---|---|
| Biking | 13% | | 11% | Winter Sports | 3% |
| Culture | 13% | Relaxing | 6% | Fair Season Sports | 1% |

| Temperature Index Scale | Very High | 200+ | Neutral | 85-115 |
|---|---|---|---|---|
| | High | 140-200 | Mod Low | 60-85 |
| | Mod High | 115-140 | Low | <60 |

## Important factors when choosing a destination

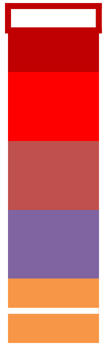
1. Sanitation Protocols
2. Overall appeal
3. Flexibility on dates
4. Ability to Social distance
5. Availability of COVID safe restrooms on the way

## More likely to be important among AH:

- Ability to bring my own food to my vacation destination

## Impact of COVID on planning and spending: pause on planning and spending

**Impact on vacation plans**

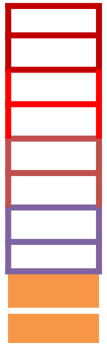


Until vaccine is available

Only this year's plans

No impact

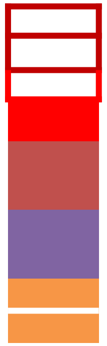
**Impact on spending**



Will spend more

Will spend less

**Agreement with COVID extra charges**

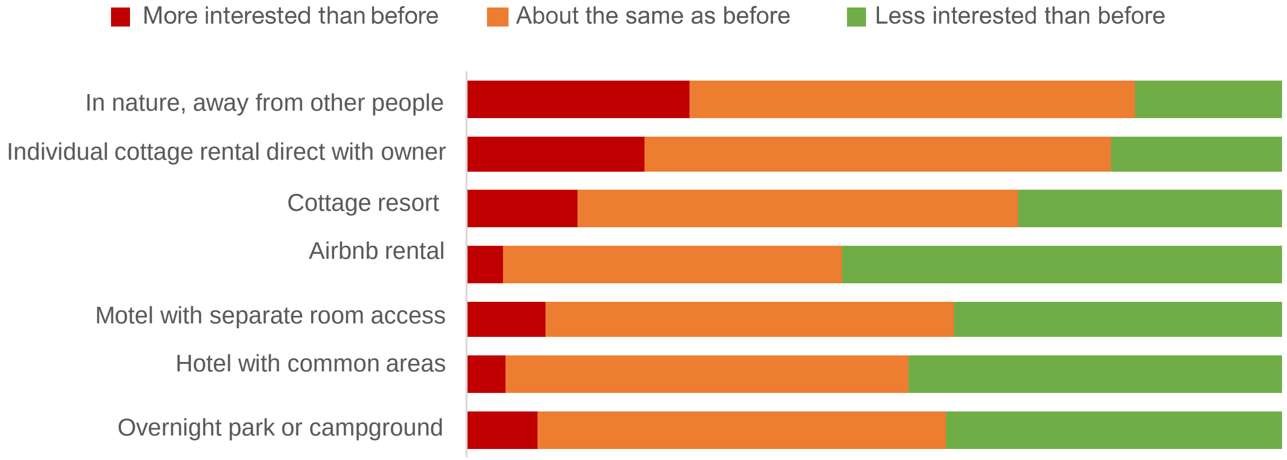


Strongly agree

Strongly disagree

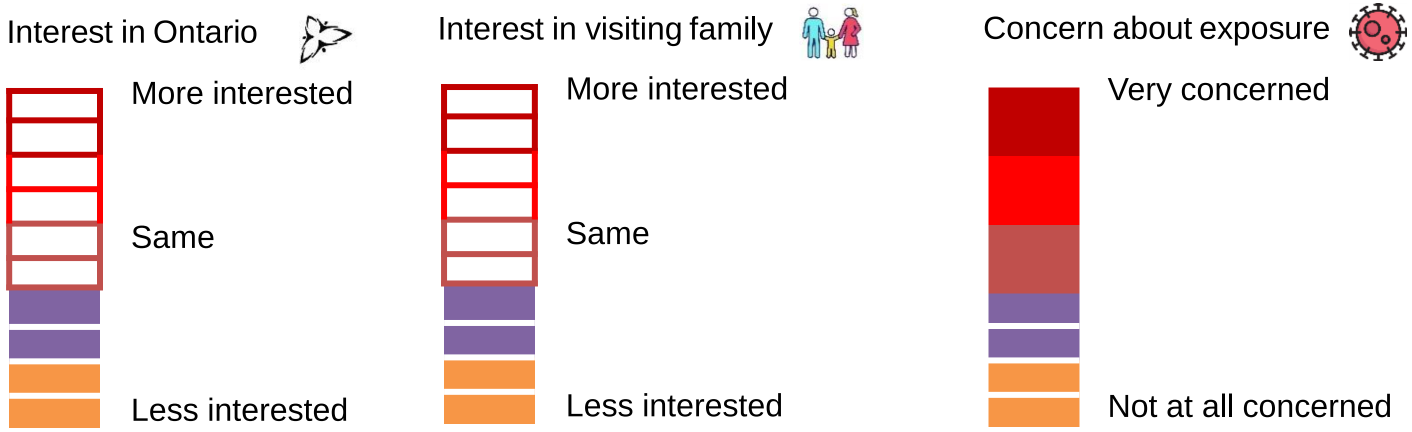
# ANXIOUS HOMEBODIES (27%)

## Types of accommodation: more interest in private vs. shared




## Impact of COVID on Travelling choices: fear of exposure and being in contact with others

Likely destinations




## Destinations with increased interest

1. Muskoka
2. Northern Ontario
3. Algonquin Park
4. Niagara (and peninsula)
5. Ottawa / National Capital Region

## Destinations with decreasing interest/would not consider

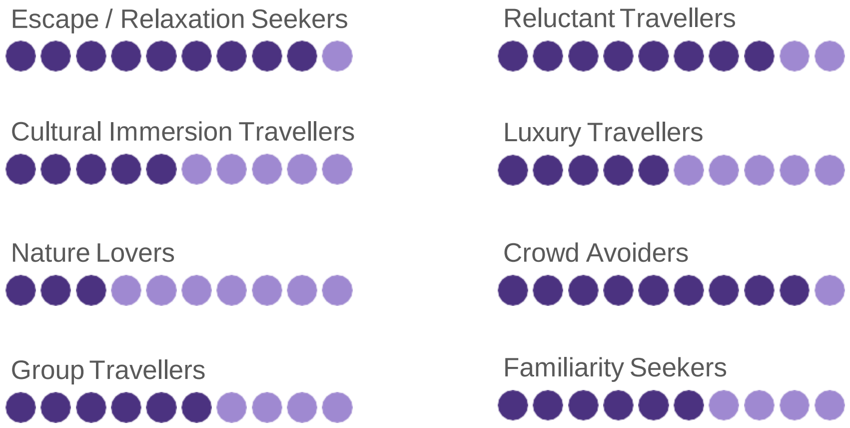
- Collingwood and Wasaga Beach
- Toronto
- Windsor/Essex
- Almaguin Highlands
- Hamilton/Halton
- Port Loring-Restoule
- Barrie / Orillia / Simcoe

# CAUTION & COMFORT (25%)

This older, retiree segment are light travellers, preferring close to home daytrips, perhaps with a small group of friends or family. They prefer experiencing culture over nature, and enjoy the odd wine tour here in there – Niagara and Prince Edward County are high on their list. They prefer being in control and predictability, and aren't afraid to splurge. Organized Group tours have appeal as they are pre-planned (no surprises), worry-free, and likely provide a sense of reassurance of safety (whether it be perceived or true). They are very concerned about COVID and the virus has affected their vacation plans: they are unlikely to travel in the near future, even within Canada; but will likely pick back up in 2021. They are still intending to spend about the same on travelling and are willing to accept the extra charges in the name of safety. Their main concern when choosing a destination is their sanitation protocols.

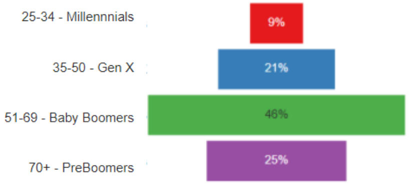
**Engagement Strategy** – Because they are comfort travellers, they are looking for an easy experience, relaxation, and away from crowds (but not immersed in nature). To engage them, focus on establishing clear sanitation protocols first. They need to be convinced that it is safe to go out and enjoy the province. They may be enticed by small, private or semi-private tours (that they can arrange with friends or people they know). Day trips in and around home can also be appealing.

## Traveller Values




## Demographics

53% 47%




Least years of education

Most likely retired – average income

Married/ common law, no kids at home

# CAUTION & COMFORT (25%)

## Activity Score: looking for cultural activities

Culture

**17%**

Nature

**4%**

Biking

**3%**

Wine/Brews

**8%**

Relaxing

**3%**

Winter Sports

**0%**

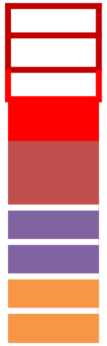
| Temperature Index Scale | | | | |
|---|---|---|---|---|
| | Very High | 200+ | Neutral | 85-115 |
| | High | 140-200 | Mod Low | 60-85 |
| | Mod High | 115-140 | Low | <60 |

## Important factors when choosing a destination

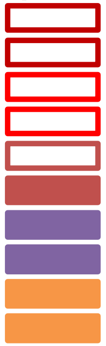
1. Sanitation Protocols
2. Overall appeal
3. Flexibility on dates
4. Ability to Social distance
5. Availability of COVID safe restrooms on the way

## Impact of COVID on planning and spending: pause on planning and more caution about $$

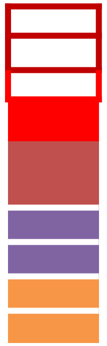
**Impact on vacation plans**




**Impact on spending**




**Agreement with COVID premium**

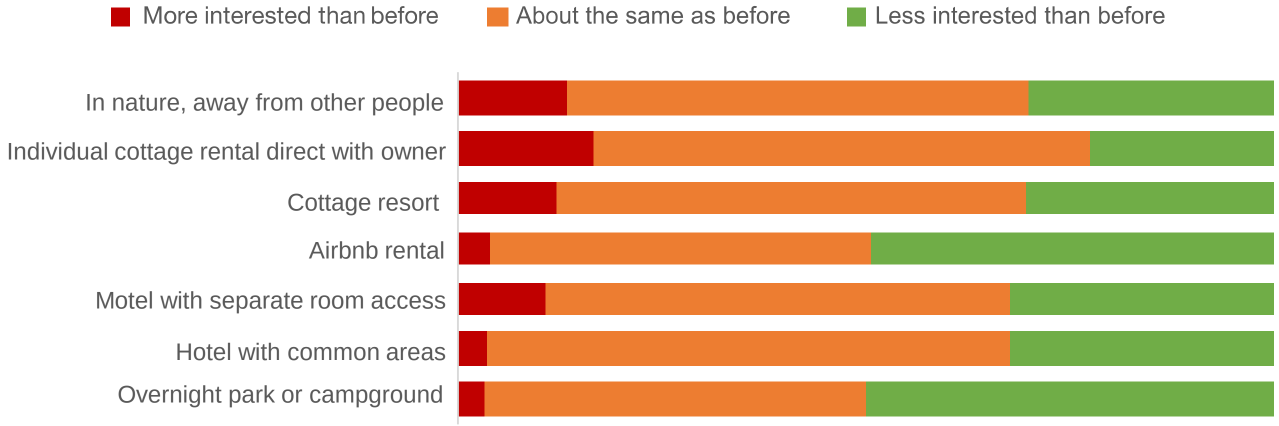



## Less likely to be important among AH:

- Discounts on stay
- Ability to book online
- Activities available at the destination
- Incentives on dining and other activities at the destination
- Overall appeal

# CAUTION & COMFORT (25%)

## Types of accommodation: more interest in private vs. shared




## Destinations with increased interest

- Niagara (and peninsula)
- Ottawa / National Capital Region
- Muskoka
- Prince Edward County

## Destinations with decreasing interest/would not consider

- Toronto
- Almaguin Highlands
- Port Loring-Restoule
- Hamilton/Halton
- Windsor/Essex

## Impact of COVID on Travelling choices: concern for COVID leading to resistance to travel

**Likely destinations**

ONTARIO Yours to discover

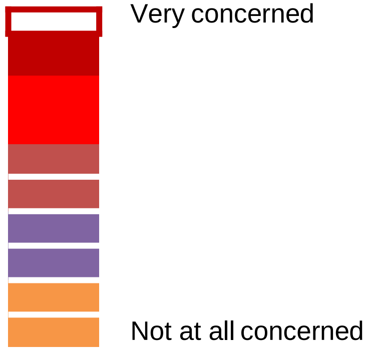
Canada keep exploring

But least likely to vacation in 2020/2021

**Interest in Ontario**


**Interest in visiting family**


**Concern about exposure**



# FREE & FOMO (6%)

Young, educated and experiential, they love to travel and are looking for immersive experiences. Free & FOMOs are open minded and expertly navigate the complexities of travelling - they enjoy the discovery process that comes with it. They are looking for relaxing, authentic, experiences and trying the local cuisine, going on a wine tour or visiting historical sites/local museums will appeal to their explorer side. And if these destinations can yield great pictures, even better.

Like everyone else, they are concerned about COVID, but that won't stop them from exploring - they'll just have to make some adjustments. Their travel budget hasn't changed and now seems like the perfect time to explore their own province and country. Maybe next year they'll visit a warm destination or maybe even visit Europe. For now, they'll spend time with family and discover what Ontario has to offer.

**Engagement Strategy** – Free & FOMOs need less of a push to travel, but may need reminders of what Ontario has to offer (especially cultural experiences). Now is a great time to go camping (or glamping), rent a cottage by the lake (with a great view) and discover different microbrewers/wineries (you can always get great pictures), and local towns and restaurants along the way. Highlight the excitement of discovery and exploration, the pleasure of little pampers and the awe of amazing views.

## Traveller Values

Escape / Relaxation Seekers
●●●●●●●●●○

Indulgent Hedonists
●●●●●●●●●○

Cultural Immersion Travellers
●●●●●●●●●●

Luxury Travellers
●●●●●●●●○○

Nature Lovers
●●●●●●●●●●

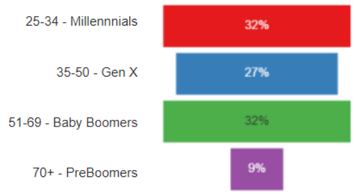
Safety & Security Concerned
●●●●●●●○○○

Live to Travel
●●●●●●●○○○

Familiarity Seekers
●●●●●●○○○○

## Demographics

43% 56%




Average to high education

Very likely employed – average to high income

Married/ common law, some with kids at home

# FREE & FOMO (6%)

## Activity Score: looking immersive and relaxing activities

Wine/Brews Tours

75%

Relaxing

47%

Biking

23%

Culture

54%

Nature

40%

Winter Sports

16%

| Temperature Index Scale | | | | |
|---|---|---|---|---|
| | Very High | 200+ | Neutral | 85-115 |
| | High | 140-200 | Mod Low | 60-85 |
| | Mod High | 115-140 | Low | <60 |

## Important factors when choosing a destination

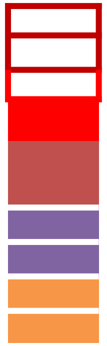
1. Overall appeal
2. Sanitation Protocols
3. Flexibility on dates
4. Ability to Social distance
5. Availability of COVID safe restrooms on the way
6. Ability to book online
7. Ability to book itinerary in advance

## More likely to be important among FF:

- Incentives on dining and other activities at the destination

## Impact of COVID on planning and spending: pause on planning and more caution about $$

Impact on vacation plans

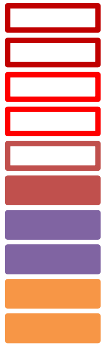


Until vaccine is available

Only this year's plans

No impact

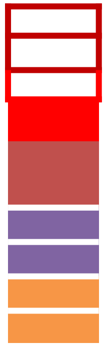
Impact on spending



Will spend more

Will spend less

Agreement with COVID extra charges

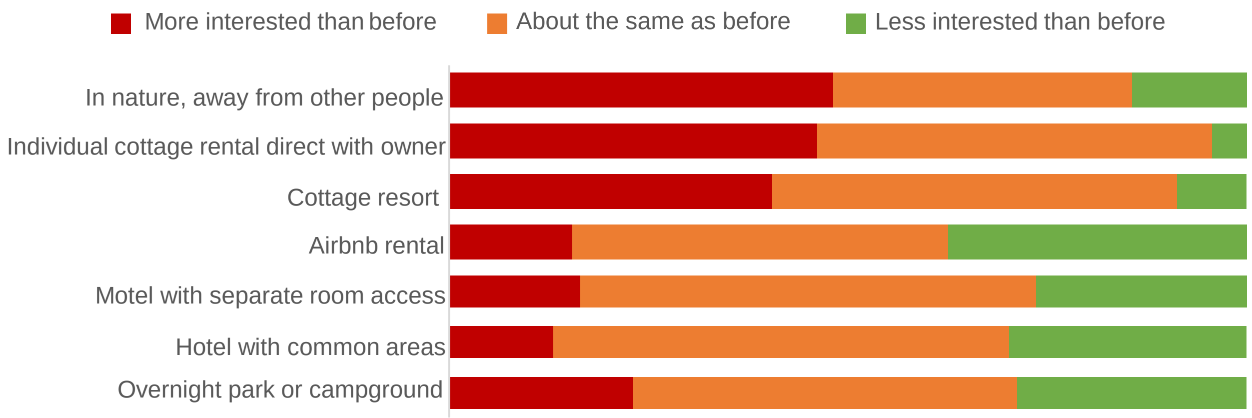


Strongly agree

Strongly disagree

# FREE & FOMO (6%)

## Types of accommodation: more interest in private vs. shared




## Destinations with increased interest

1. Muskoka
2. Northern Ontario
3. Niagara (and peninsula)
4. Prince Edward County

## Destinations with decreasing interest/would not consider:

- Toronto
- Almaguin Highlands
- Port Loring-Restoule
- Hamilton/Halton
- Windsor/Essex

## Impact of COVID on Travelling choices: concern for COVID leading to resistance to travel

### Likely destinations

ONTARIO Yours to discover

Canada keep exploring

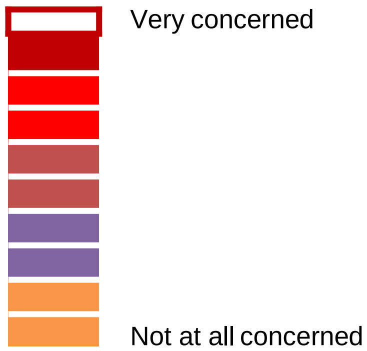
CARIBBEAN Plan your Caribbean vacation

EUROPE WHENEVER YOU'RE READY

### Interest in Ontario


### Interest in visiting family


### Concern about exposure

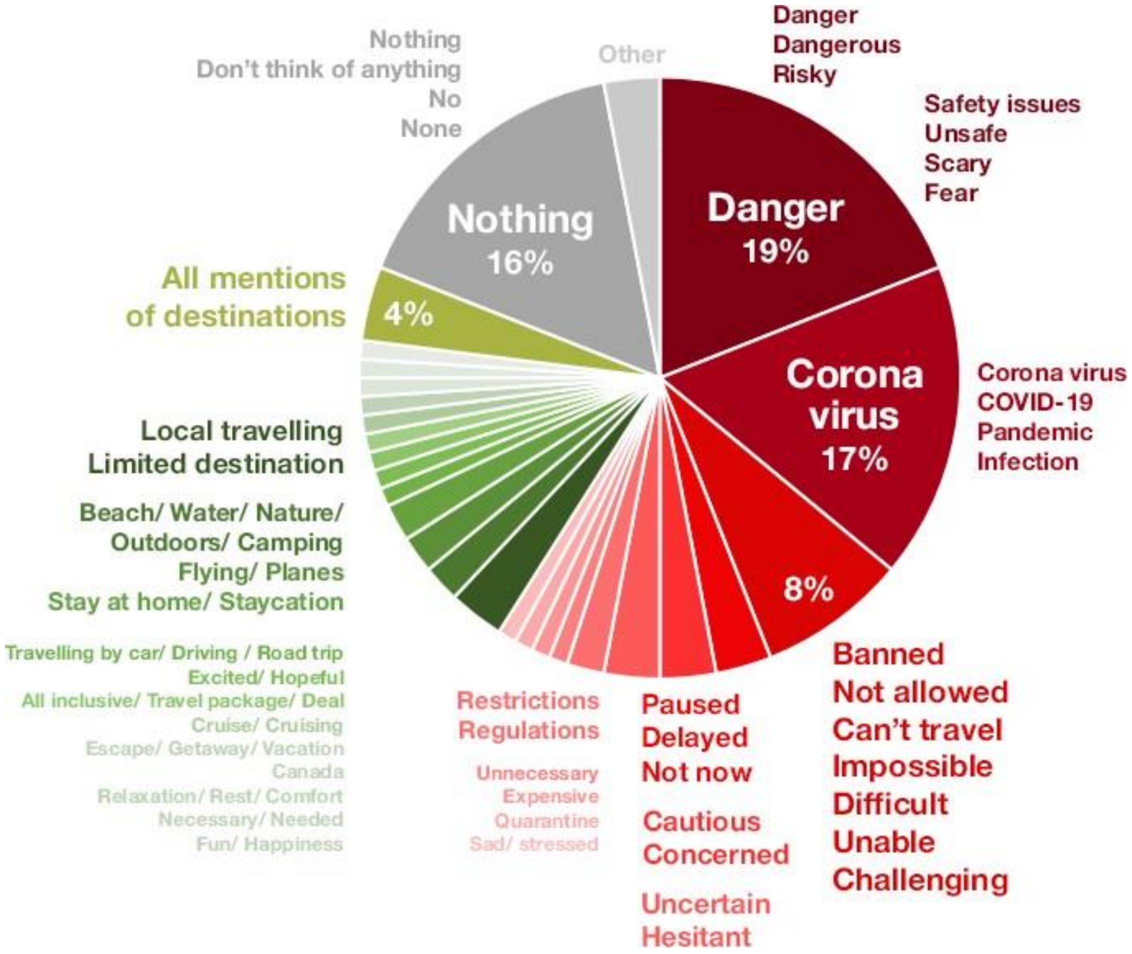


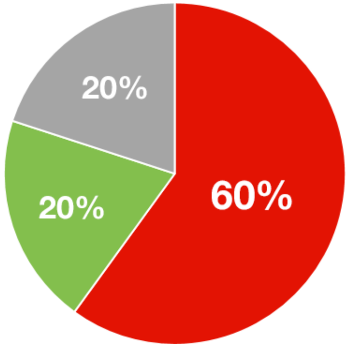
# SURVEY TABULATION

**When asked to think of travel, the first words that come to mind for most relate to COVID-related dangers**

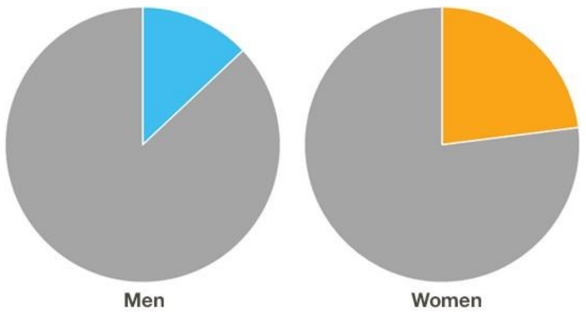

Covid
COVID-19
Safety
safety
Unsafe
Scary
Pandemic
Nope
Impossible
impossible
Dangerous
Risky
Coronavirus
Local
Canada
Cautious
Europe
Postpone
Postponed
Restrictions
Quarantine
Beach
Home
home
local
none
nope
safe
unsafe
dangerous
Difficult
Unnecessary
risky
scary
Caution
caution
cruise
virus
travel
restrictions
restricted
staycation
coronavirus
uncertainty
Corona
None

Q1. What is the **first word** that you think of when considering **travel** right now?

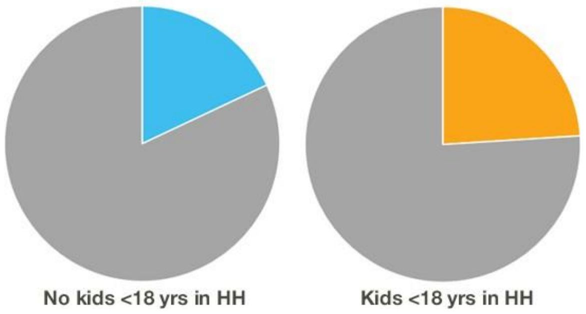


**Women** are more likely to choose words related to **danger/risk/safety** than men (23% vs 18%).



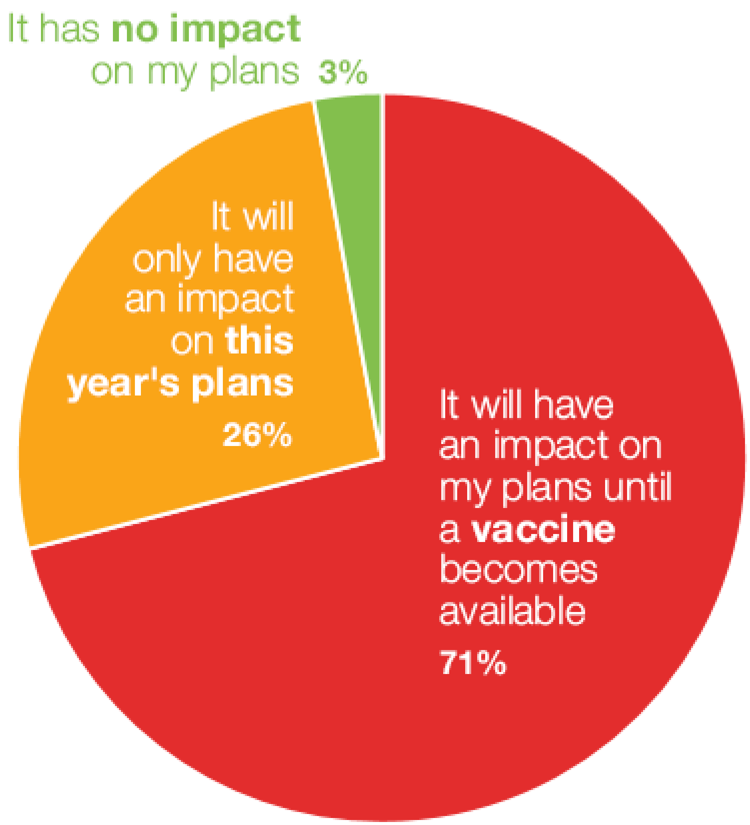

A larger proportion of respondents with **kids under 18 years old** (24%) chose words related to **danger/risk/safety** than of those who don't have <18 kids (18%).




Q1. What is the first word that you think of when considering travel right now?

**Have vaccine, will travel.**

Q2. Which statement best describes how you feel about **how corona virus affects your vacation plans.**



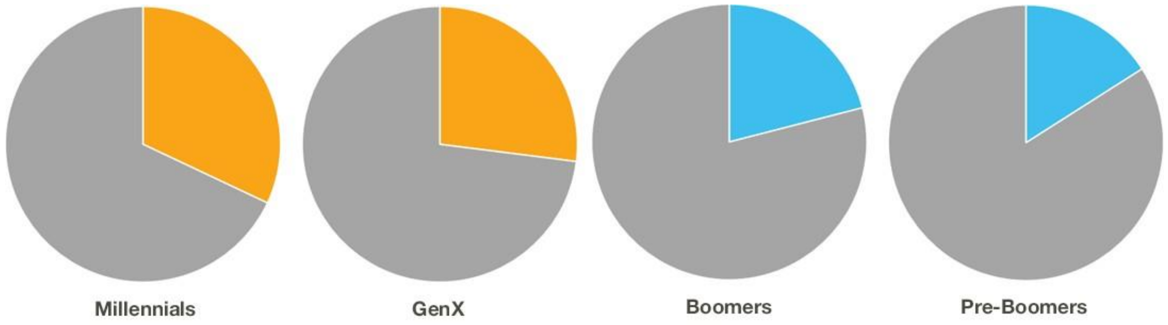
**Men** are more likely than women to say coronavirus has **no impact on their plans** (5% vs 2%).

Respondents who say **Ontario overreacted to the coronavirus threat** are almost 10% more likely to say the pandemic will **only affect this year's travel plans** and more than 15% more likely to say it'll **not affect their travel plans** than the average respondent.

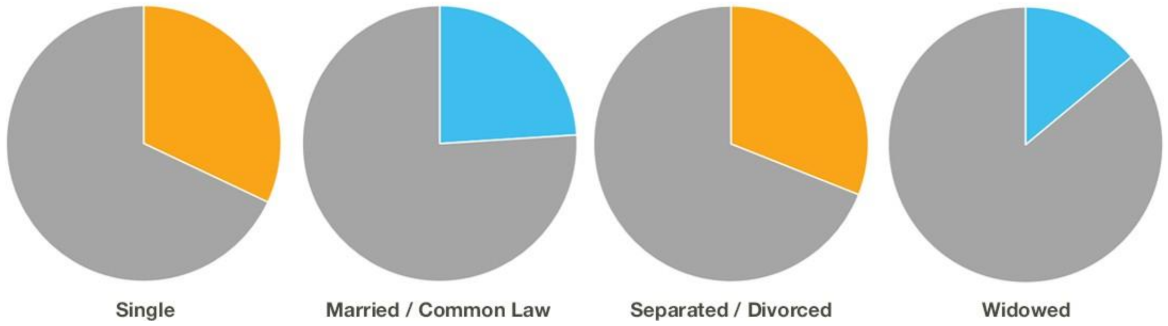
**Residents of Toronto and the outer GTA** are more likely to believe their plans will be affected **until the vaccine** (73% and 72%) than those of **Hamilton/Niagara** (62%).

Q2. Which statement best describes how you feel about how corona virus affects your vacation plans:

**Younger respondents** are more likely to say coronavirus will only impact **this year's travel plans**

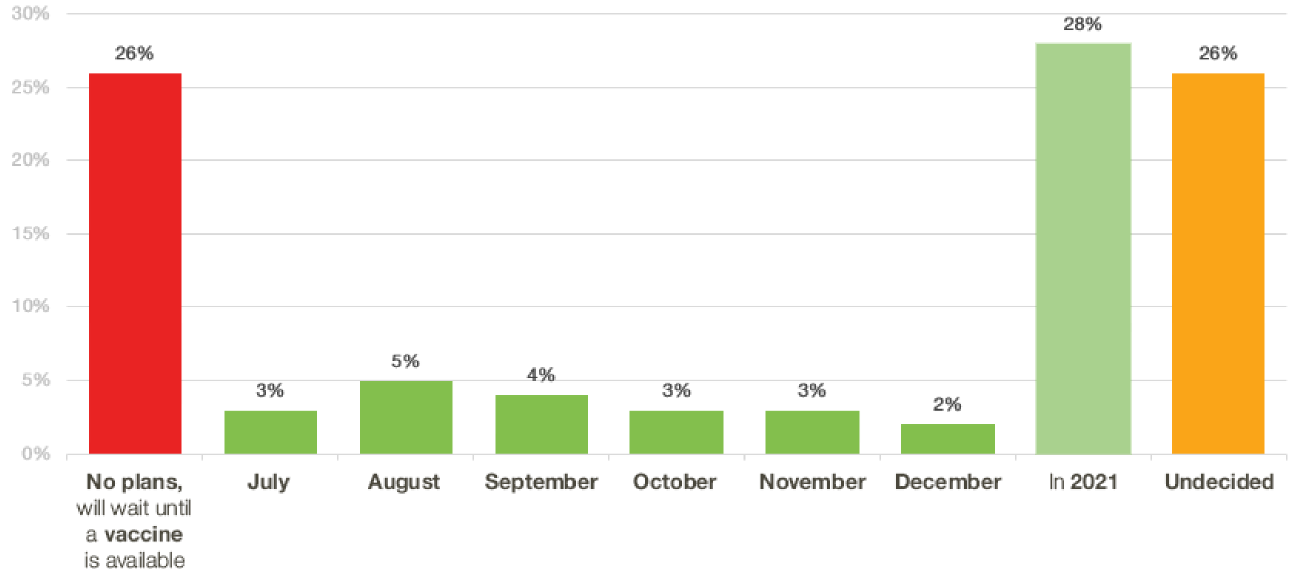


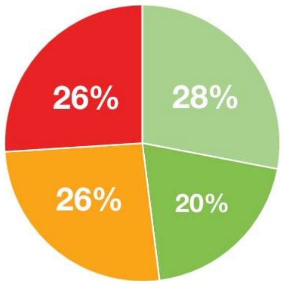

**Single and divorced** respondents are more likely to say their travel plans will **only be affected this year** than married and widowed ones.




Q2. Which statement best describes how you feel about how corona virus affects your vacation plans:

# Q4. **When** do you intend to travel for your next vacation?



**Married** respondents are **6% more likely to wait for a vaccine** than **single** ones.

**Retired** respondents are **5% more likely to wait for a vaccine** than general respondents.

Respondents from the **lowest income group** are **8% more likely to be undecided** than those from the **highest income group.**

Respondents from **Central Ontario** are **8% more likely to wait for a vaccine** than those from the city of **Toronto.**

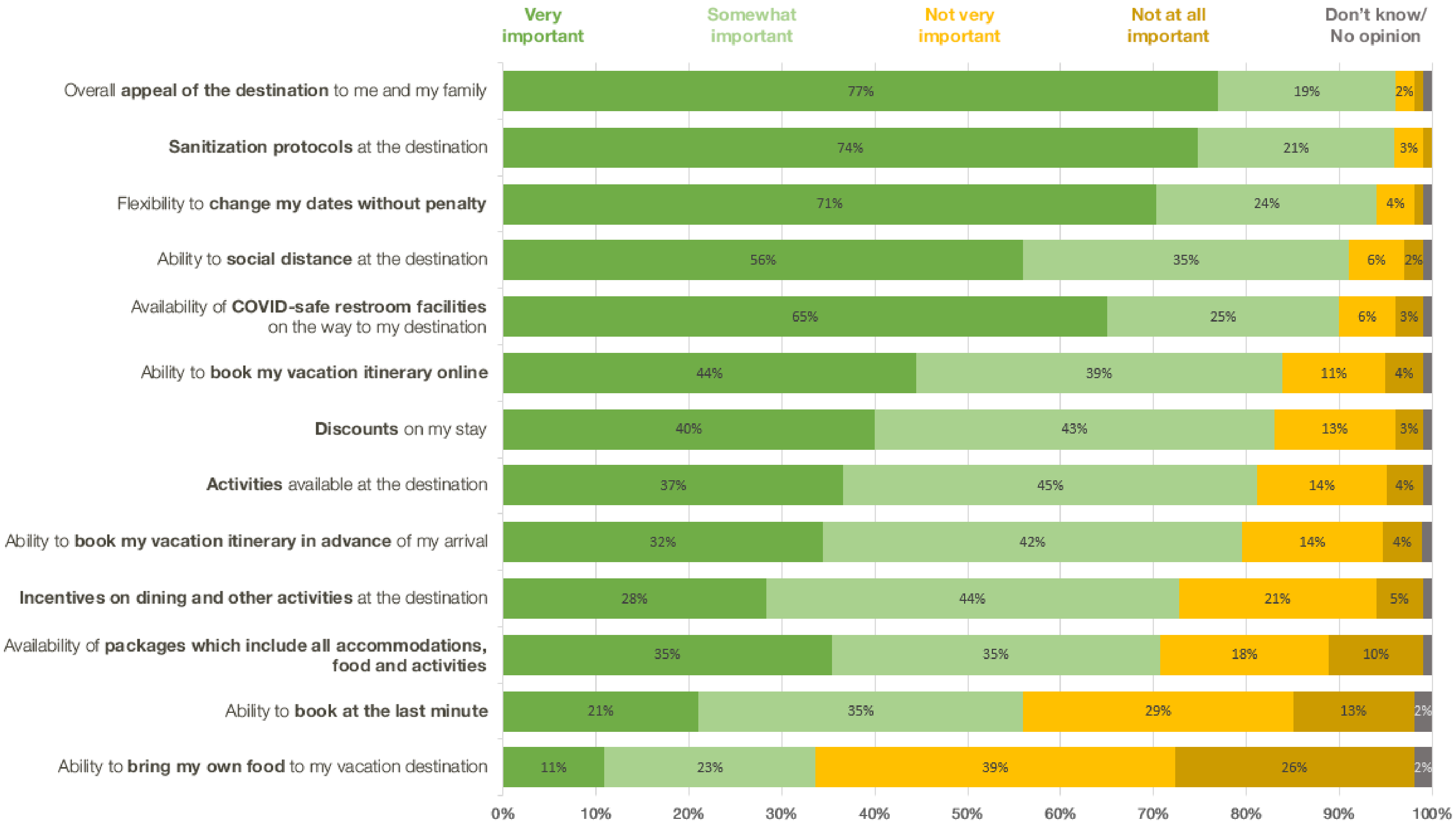
Participants who are **not familiar with Explorer's Edge** are about **10% more likely to wait for a vaccine** or be **undecided** than those who are **familiar with EE.**

Respondents who **are familiar with EE** are **15% more likely to intend to travel in 2021** than general respondents.

Q4. When do you intend to travel for your next vacation?

**Safety concerns are important, but they are "table stakes". The appeal of the destination is still the most important deciding factor.**

Q3. How important do you feel the following factors will be in **choosing a vacation destination** once the stay-at-home orders have been lifted?

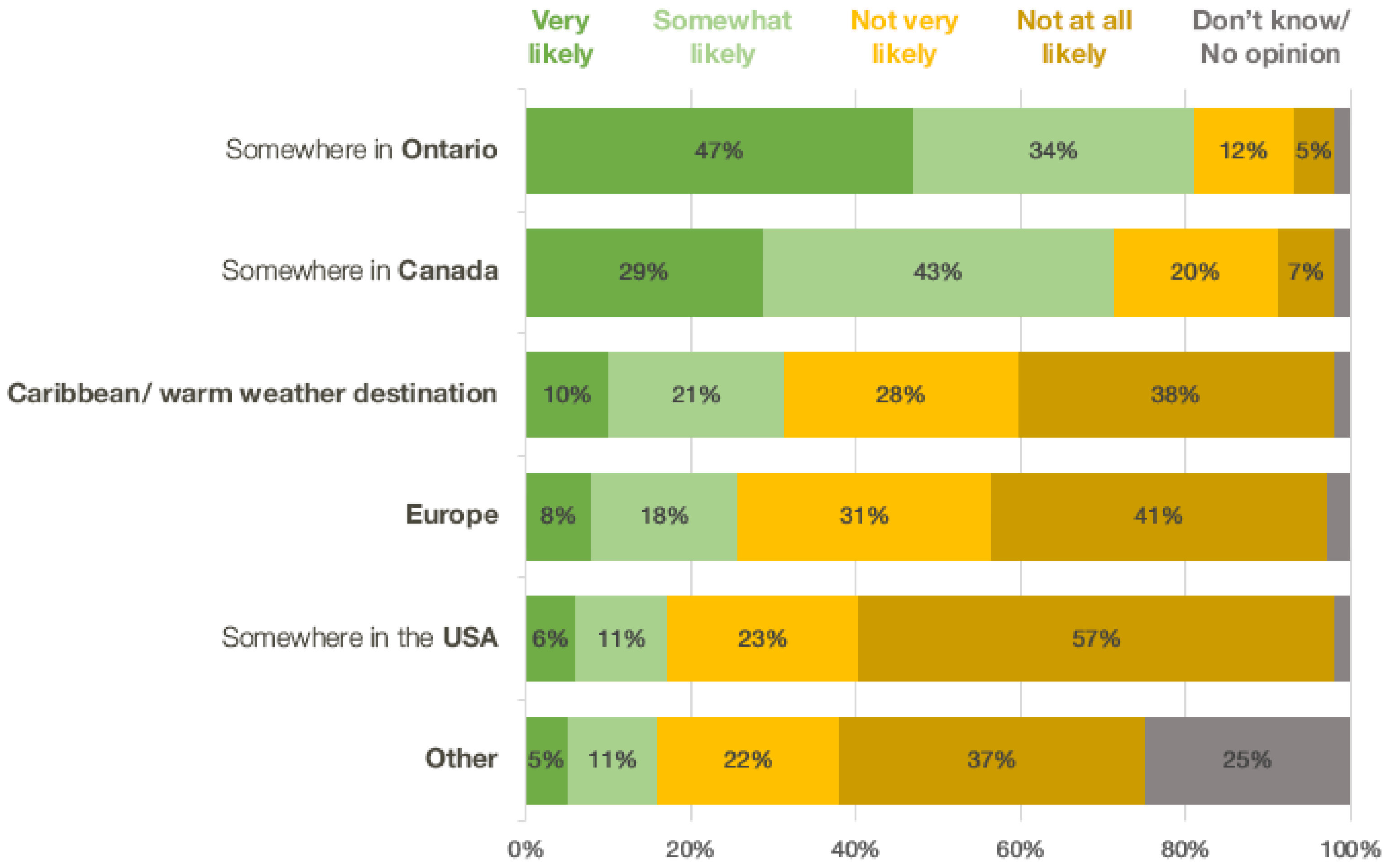


| More likely to choose the **bottom 2** options than the average | **Factor** | More likely to choose the **top 2** options than the average |
|---|---|---|
| Men | Overall **appeal of the destination** to me and my family | Women Widowed High Schl Employed Top 3 EE |
| University Single Gen X Men | **Sanitization protocols** at the destination | Women Boomers Married Widowed Employed Retired |
| Men | Flexibility to **change my dates without penalty** | Women Widowed |
| Millennials Men | Ability to **social distance** at the destination | Women Boomers Pre-Boomers Married Widowed Retired Top 3 |
| Bottom 3 EE Employed Divorced Men | Availability of **COVID-safe restroom facilities** on the way to my destination | Women Boomers Married Widowed Retired Top 3 |
| Retired Boomers | Ability to **book my vacation itinerary online** | Millennials University Employed Executive Top 3 EE |
| Retired University No <18 kids Widowed Toronto Pre-Boomers Men | **Discounts** on my stay | Women Gen X Central ON Married <18 kids Employed |
| Bottom 3 Retired No <18 kids Divorced Pre-Boomers Boomers | **Activities** available at the destination | Women Millennials Western ON <18 kids Employed |
| $50K-<$75K | Ability to **book my vacation itinerary in advance** of my arrival | No <18 yrs kids |
| University No <18 kids Single Toronto | **Incentives on dining and other activities** at the destination | Married <18 kids High Schl College $76K-<$100K Familiar EE |
| Retired University No <18 kids Widowed Eastern ON Toronto Boomers | Availability of **packages which include all accommodations, food and activities** | Gen X Outer GTA Married <18 kids High Schl College $50K-<$75K |
| Retired University Pre-Boomers Men | Ability to **book at the last minute** | Women Gen X Single Divorced College Top 3 |
| More than $100K No <18 kids Widowed Men | Ability to **bring my own food** to my vacation destination | Millennials Western ON <18 kids Familiar EE |

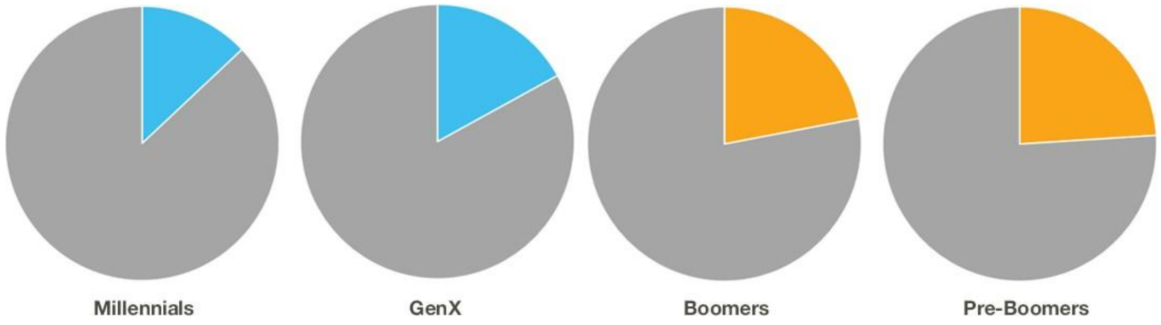
Q3. How important do you feel the following factors will be in choosing a vacation destination once the stay-at-home orders have been lifted?

**Ontario is the most popular travel destination this year and next...**
**and likely will continue to be as long as the virus is perceived to be a threat**

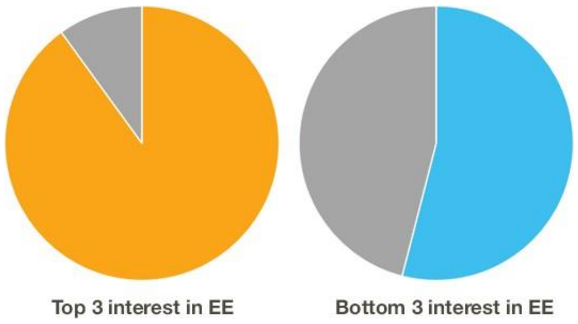
Q5. How likely are you to take a vacation to **the following destinations in 2020 and 2021**?



**Older respondents** are more inclined to rate Ontario as a **not very or not at all likely** vacation destination in 2020 and 2021.




Participants who chose the **top 3 levels of interest in visiting Explorer's Edge** are almost 10% **more inclined** to rate Ontario as a **likely** vacation destination than general respondents (and **36% more** than those who chose the **bottom 3 levels**).




Q5. How likely are you to take a vacation to the following destinations in 2020 and 2021?

**Millennials**, respondents from **Central Ontario**, **employed** respondents and those who say Ontario **reacted appropriately** to coronavirus are all slightly **more likely to consider somewhere in Ontario as a likely destination** than general respondents.

Respondents from **Eastern Ontario, Central Ontario and Hamilton/Niagara** are **more than 10% more inclined** to consider **somewhere in Canada a likely option** than those from the **outer GTA.**

Participants from the **city of Toronto** are 9% **more likely to rate Europe** and 6% **more likely to rate other destinations as likely options** than general respondents.

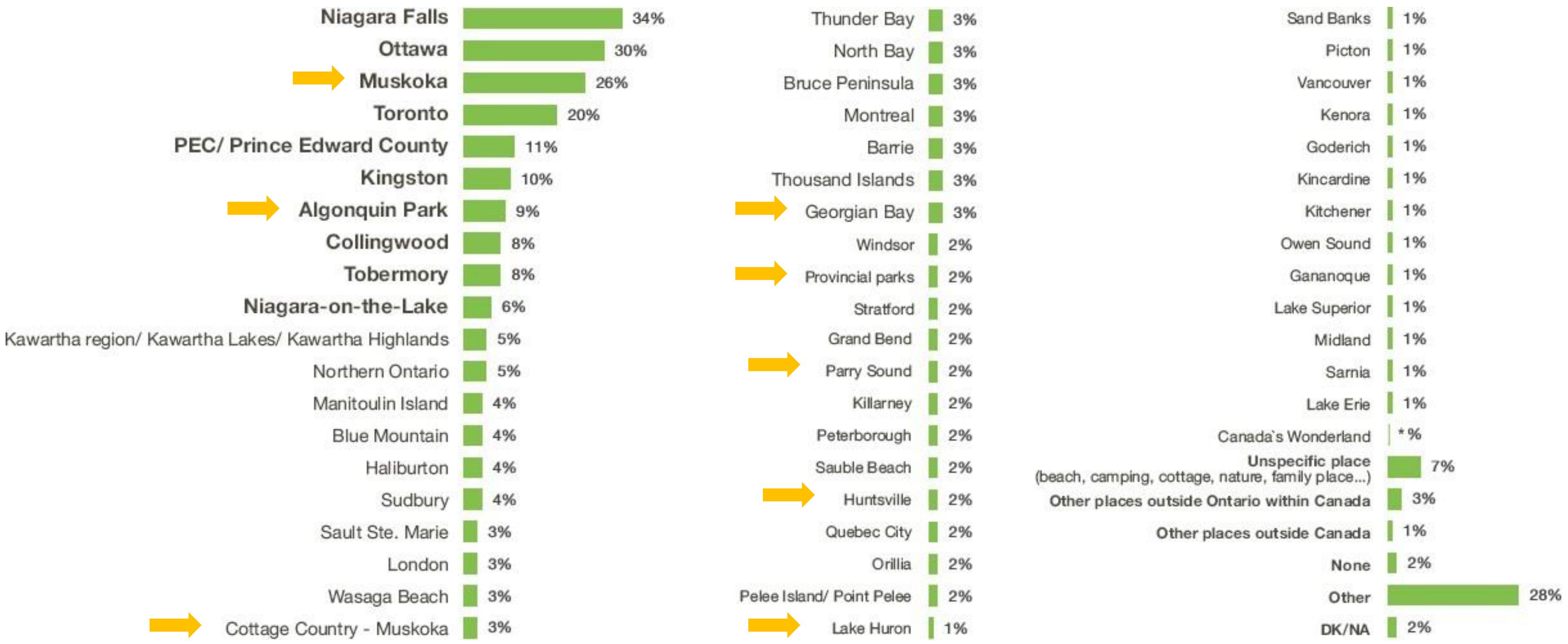
**Divorced** respondents are more than 10% **more prone to rate "Caribbean/ warm weather destination" as likely** than general respondents (and 25% more than **widowed ones)**.

**Men** are 5% **more likely to consider USA** than women.

Q5. How likely are you to take a vacation to the following destinations in 2020 and 2021?

**Muskoka continues to be cited as one the most popular travel destinations in Ontario (though it has fallen to third place from second in our 2016 survey)**

Q6. When it comes to going on a vacation in Ontario or nearby, what are the **first places that come to mind**? Name up to five places.



# Muskoka citations are highest in Central Ontario, lowest in Northern Ontario

| | TOTAL | EASTERN ON | CENTRAL ON | OUTER GTA | TORONTO | HAM/NIA | WESTERN ON | NORTHERN ON |
|---|---|---|---|---|---|---|---|---|
| 1st | Niagara Falls (34%) | Toronto (51%) | Niagara Falls (39%) | Niagara Falls (39%) | Niagara Falls (35%) | Niagara Falls (27%) | Niagara Falls (30%) | Toronto (54%) |
| 2nd | Ottawa (30%) | Niagara Falls (28%) | **Muskoka (33%)** | Ottawa (33%) | Ottawa (32%) | Ottawa (26%) | Ottawa (28%) | Ottawa (40%) |
| 3rd | **Muskoka (26%)** | Kingston (27%) | Otawa (23%) | **Muskoka (31%)** | **Muskoka (31%)** | **Muskoka (22%)** | **Muskoka (24%)** | Niagara Falls (34%) |
| 4th | Toronto (20%) | Ottawa (23%) | Toronto (21%) | Prince Edward County (10%) | Prince Edward County (21%) | Toronto (22%) | Toronto (24%) | **Muskoka (12%)** |
| 5th | Prince Edward County (11%) | **Algonquin Park (16%)** | Collingwood (11%) | Kingston (9%) | Kingston (13%) | **Algonquin Park (10%)** | Tobermory (14%) | Manitoulin Island (12%) |
| 6th | Kingston (10%) | **Muskoka (15%)** | **Algonquin Park (10%)** | Toronto (8%) | **Algonquin Park 11%** | Collingwood (9%) | **Algonquin Park (9%)** | Sudbury (11%) |
| 7th | **Algonquin Park (9%)** | Prince Edward County (15%) | Tobermory (10%) | Niagara-on-the-Lake (8%) | Collingwood (10%) | Kingston (8%) | Kingston (9%) | Sault Ste. Marie (11%) |
| 8th | Collingwood (8%) | Montreal (7%) | Prince Edward County (7%) | **Algonquin Park (8%)** | Tobermory (9%) | Northern Ontario (8%) | Bruce Peninsula (6%) | North Bay (11%) |
| 9th | Tobermory (8%) | Niagara-on-the-Lake (5%) | Kingston (5%) | Collingwood (8%) | Niagara-on-the-Lake (8%) | Prince Edward County (7%) | Niagara-on-the-Lake (6%) | Barrie (8%) |
| 10th | Niagara-on-the-Lake (6%) | Peterborough and Quebec City (5%) | Sudbury (5%) | Kawartha region (8%) | Kawartha region (7%) | Tobermory (6%) | Manitoulin Island and Grand Bend (6%) | London (8%) |

Q6. When it comes to going on a vacation in Ontario or nearby, what are the first places that come to mind? Name up to five places.

Among **Millennials, Muskoka** was the **second most mentioned** place (31%), 5% more than Ottawa (26%).

**Women, Millennials** and residents of **Central Ontario, Toronto** and the **outer GTA** are about 6% **more likely to mention Muskoka** than general respondents. Participants with **university level education** and those with a **family income of more than $100K** are also **slightly more likely to say Muskoka** than the other groups in their categories.

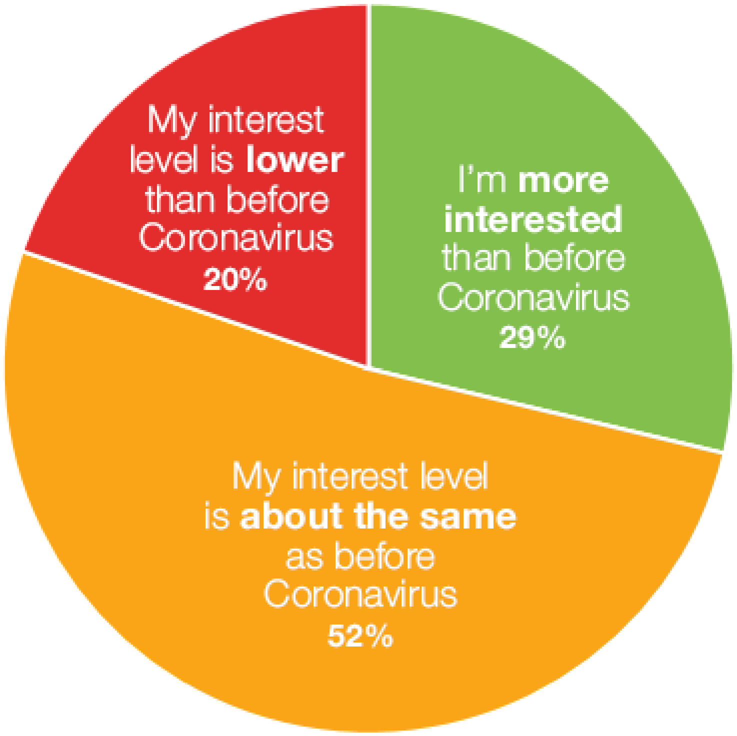
**Millennials** and respondents from **Eastern Ontario** are **more likely** (4% and 7%, respectively) to mention **Algonquin Park** than general respondents.

As expected, those who chose the **top 3 levels of interest in Explorer's Edge** (or in the regions of RTO12) are **considerably more likely to mention Muskoka and Algonquin Park** than those who chose the bottom 3 levels.

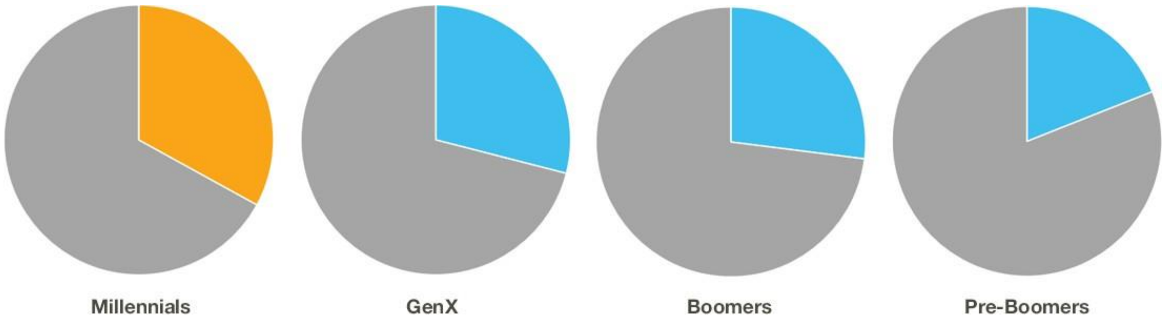
Q6. When it comes to going on a vacation in Ontario or nearby, what are the first places that come to mind? Name up to five places.

**Almost 30% of the population is now more interested in an Ontario vacation while 20% are less interested, for a net gain of 9%**

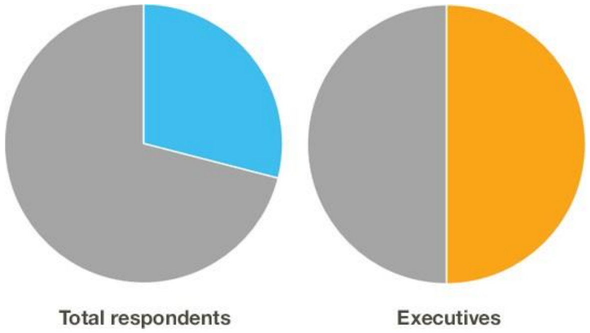
Q7. Describe how you feel about **taking a vacation in Ontario** (other than the city/town you reside in) after the stay-at-home orders have been lifted.



The proportion of respondents who say they're **more interested** now than before the pandemic **decreases as their age advances.** **Millennials** are 4% **more likely to say they're more interested now** than general respondents.




**Executives** are **21% more likely** to say they're **more interested now** than general respondents.




Q7. Describe how you feel about taking a vacation in Ontario (other than the city/town you reside in) after the stay-at-home orders have been lifted.

Participants from the **city of Toronto** are 6% more likely to say **they're more interested now** than general respondents.

Respondents who chose the **top 3 levels of interest in RTO12's regions** are **18% more likely** to say they're **more interested now** than those who chose the **bottom 3 levels.**

Respondents from **Northern Ontario** are **almost 10% more likely** to say their interest level is **lower now** than those from **Toronto.** **Married** participants are 5% more likely to say their **interest is lower** than **single** respondents.

Groups where a larger percentage of respondents chose the **"less interested"** option than the "more interested" one:

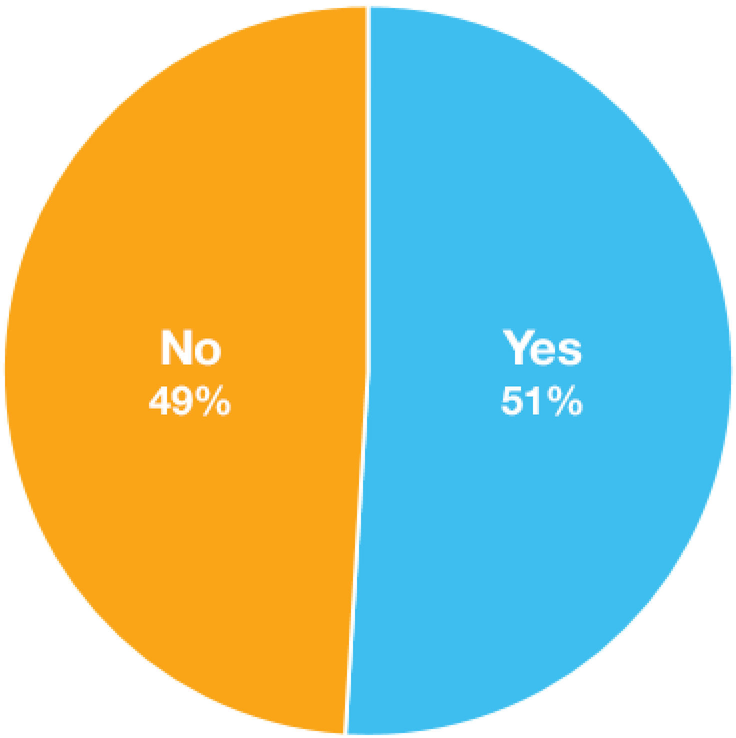
- **Pre-Boomers** (1% difference)
- Respondents from **Western Ontario** (1%) and **Northern Ontario** (2%)
- Participants with **high school level education** (8%)
- **Full-time students** (4%)
- Those who chose the **bottom 3 interest levels in RTO12's regions** (5%)
- Those who feel **Ontario needs to do more** about the Coronavirus threat (6%).

Q7. Describe how you feel about taking a vacation in Ontario (other than the city/town you reside in) after the stay-at-home orders have been lifted.

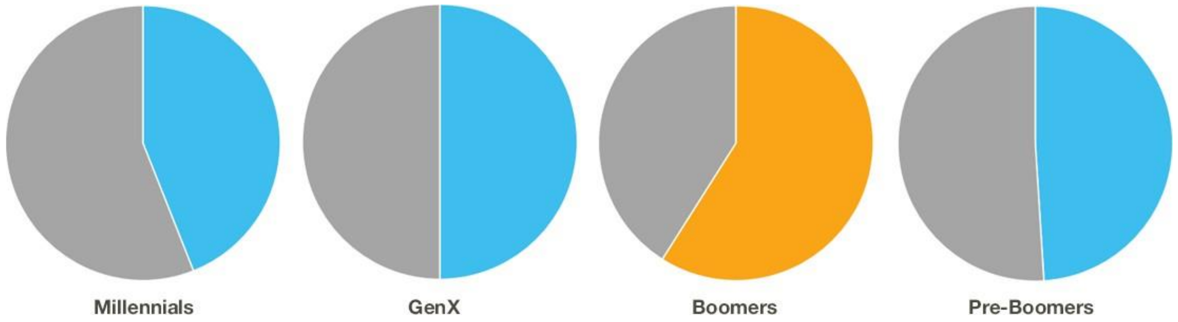
**More than half of the population takes warm weather vacations.**

**Will they replace them with staycations?**

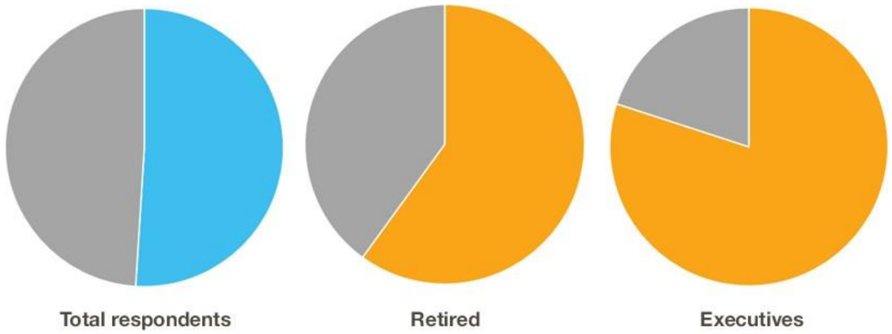
Q8. Do you usually **travel to a warm weather destination in the winter**?



**Boomers** are at least 9% **more likely** to say **yes** than other generations.




**Retired** respondents and **executives** are **more likely** to **travel to a warm weather destination in the winter** than general respondents (about **10%** and **30%** more, respectively).




Q8. Do you usually travel to a warm weather destination in the winter?

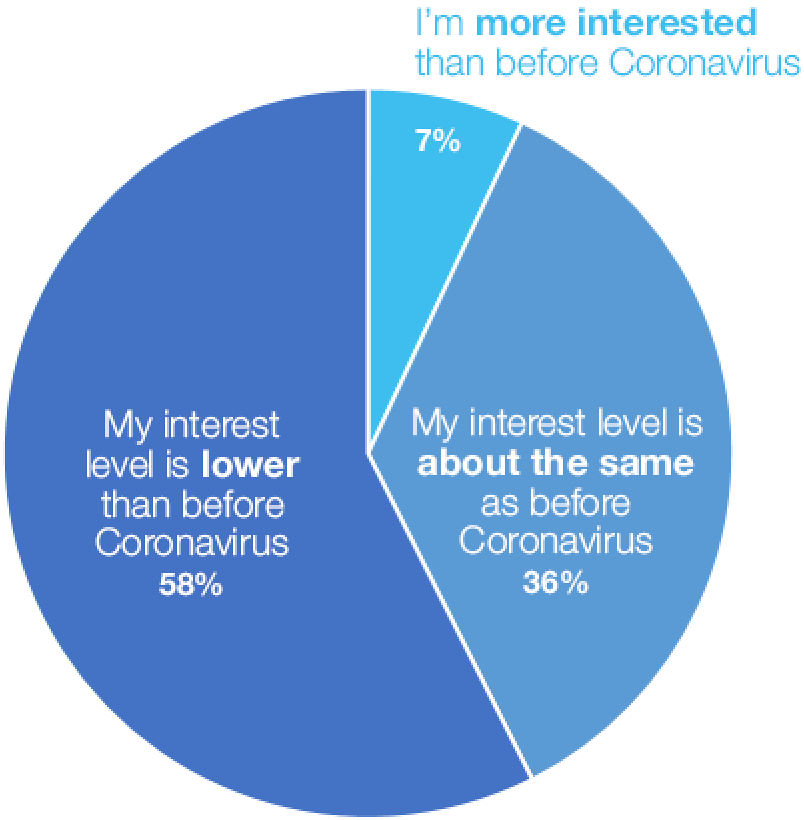
**Single** respondents are 7% **more likely to say no** than general and **married** respondents.

**Employed** respondents are **more likely to say no than yes** (53% vs 47%).

Respondents who say **Ontario needs to do more** about the Coronavirus threat **are more likely to say no than yes** (56% vs 44%).

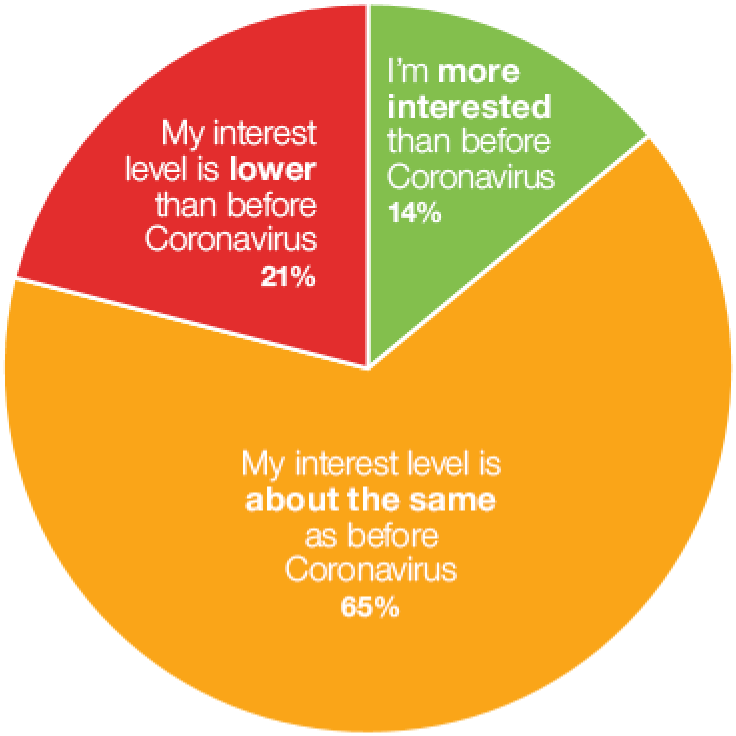
Q8. Do you usually travel to a warm weather destination in the winter?

Q8A. How do you feel about travelling to a warm weather destination in the winter of 2021?
(Subsample: if "yes" at Q8)




51% of the Ontario population usually travels to a warm weather destination. But this year 58% are less interested in going south next year. So that implies the portion of the population who will stay in Canada to vacation will grow to 79%. **However…**

Q9. How do you feel about travelling to an **Ontario destination** in the **winter of 2021**?




This finding suggests overall interest in an Ontario Winter vacation is **lower** that before the pandemic. Work will need to be done to convince the traveller to take a winter vacation here.

**Men** are 6% more likely to say their **interest level** **has not changed** than **women**.

**Millennials** are 6% more likely to say they are **more interested now** than general respondents. **Gen X** is 4% more likely to have more interest now than **Boomers**.

Respondents who have **kids under 18 years old** are 5% more likely to be **more interested now** than the ones who **don't**. These, in turn, are 6% more likely to say **their interest is the same** as it was before Coronavirus than the ones with <18 years old kids.

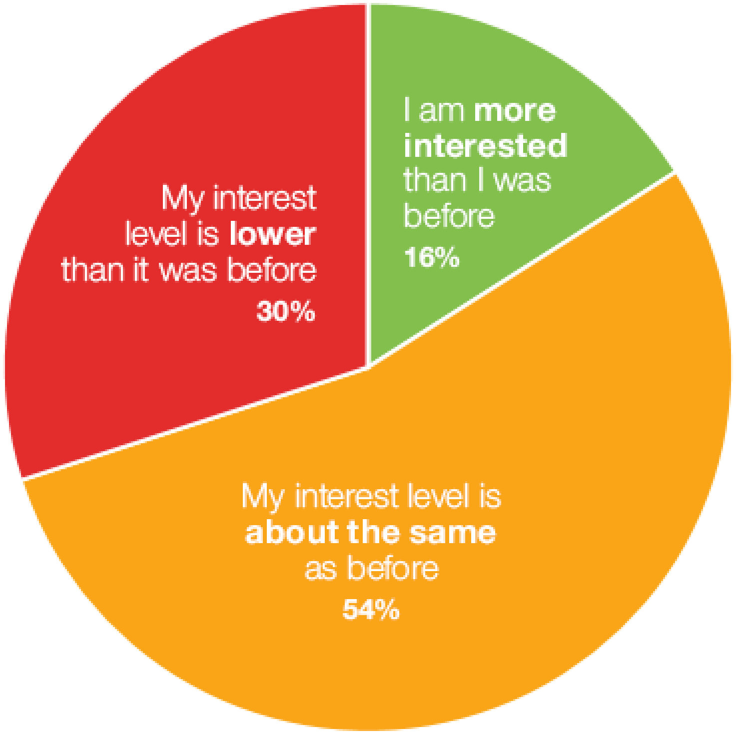
Participants who chose the **top 3 levels of interest in the RTO12 regions** are 17% more likely to be **more interested** in traveling to an Ontario destination in the winter of 2021 than those who chose the **bottom 3 levels.**

Respondents who think Ontario **overreacted to Coronavirus** are 18% more likely to say their **interest has not changed** than general respondents, while those who say Ontario **needs to do more about the pandemic** are 15% more likely than the average respondent to say their **interest is lower now.**

Q9. How do you feel about travelling to an Ontario destination in the winter of 2021?

# Will Ontarians turn to VFR travel?

Q10A. How do you feel about **you/your family visiting friends and relatives** this year?




This finding suggests interest in an VFR travel is **lower** that before the pandemic.

**Women** are 8% more likely to say they're **less interested now** than **men,** who in turn are 6% more inclined than them to say their interest level is **about the same** as before.

Respondents from **Eastern Ontario** and **Toronto** are at least **10% more likely** to say their interest level is **lower** now than those from **Western** and **Northern Ontario.**

Respondents from **Toronto**, **Western Ontario** and **Northern Ontario** are at least 7% more likely to say they are **more interested** now than those from **Hamilton/Niagara**.

Respondents from **Hamilton/Niagara** are **11% more likely** to say their interest level is **about the same** as before than general respondents.

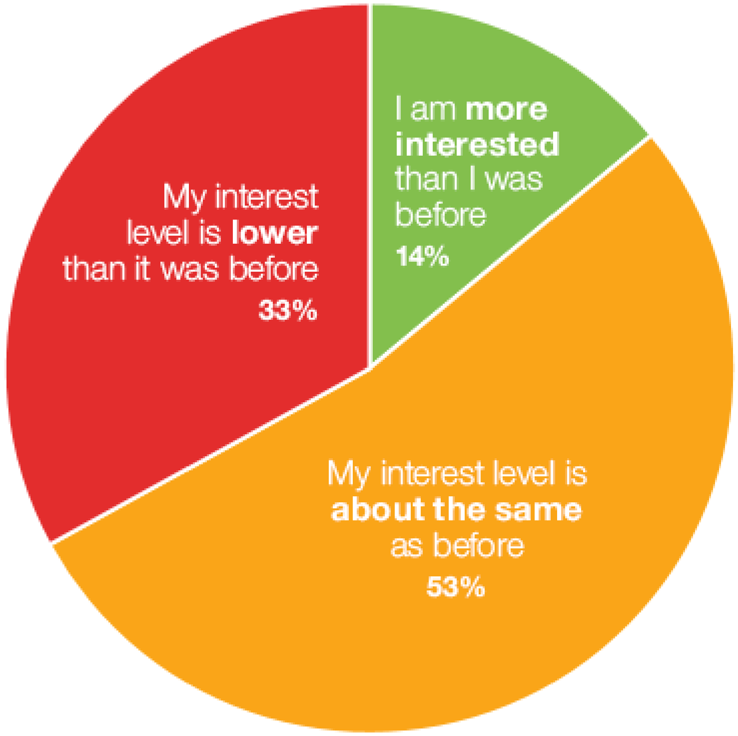
**Full-time homeowners/parents** are **14% more likely** to say their interest level is **about the same** as before than general respondents.

Respondents who say they're **familiar with Explorer's Edge** are **12% more likely** to say they're **more interested now** than the average respondent.

Participants who think **Ontario overreacted** to the Coronavirus threat are **25% more likely** to say that their interest level is the **same as before** than general respondents, while those who say Ontario **needs to do more** are **17% more likely** to be **less interested** now than the average respondent.

Q10A. How do you feel about you/your family visiting friends and relatives this year?

Q11. How do you feel about **friends and relatives visiting you/your family** this year?

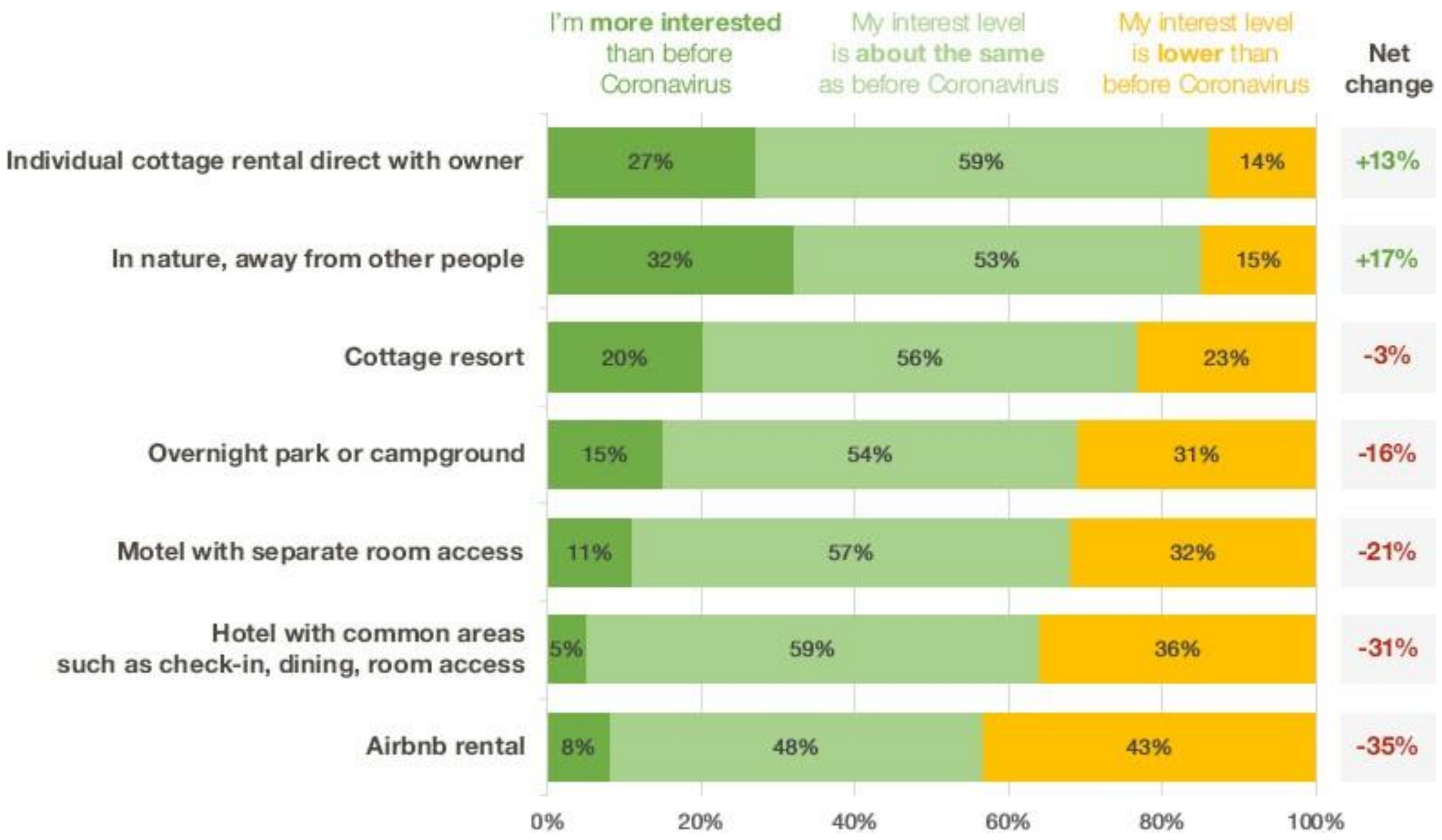


**We asked Ontarians where they want to stay when they travel**

**Their answers align with previous studies we have seen which show travellers prefer accommodations where they can be isolated**

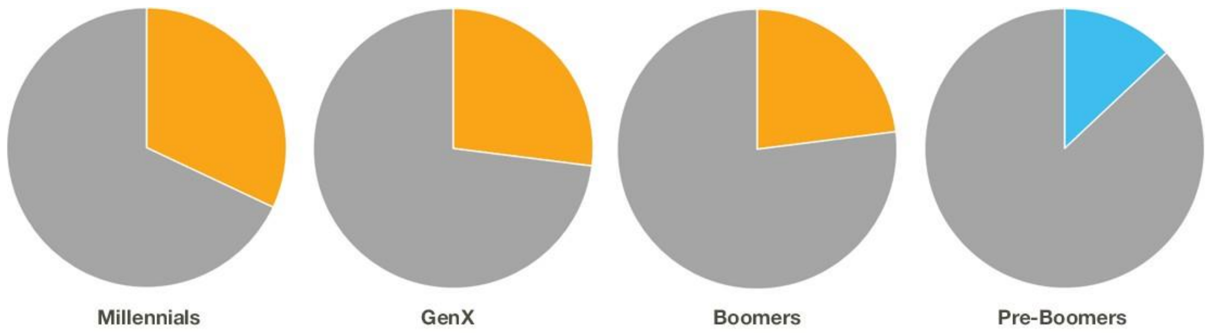
**This also aligns with much of the product on offer in RTO 12**

Q12. How do you feel about the following types of **vacation accommodations** once the stay-at-home orders have been lifted?

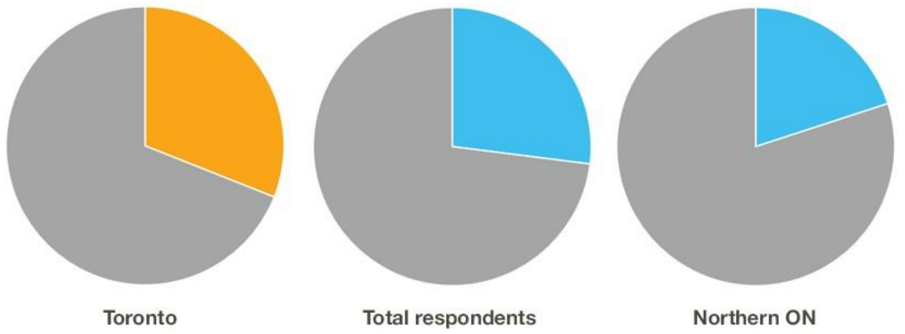


# Individual cottage rental direct with owner

**Millennials**, **Gen X** and **Boomers** are significantly more likely to be **more interested** than before (32%, 27% and 23%, respectively) than **Pre-Boomers** (13%).



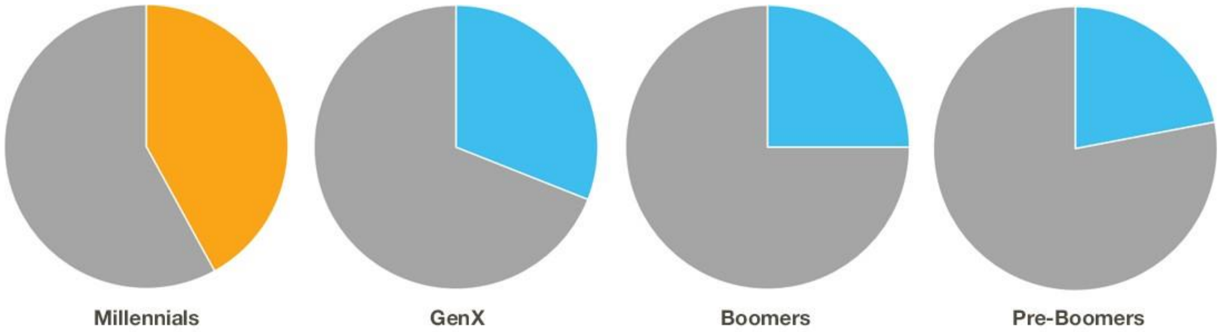

Respondents from **Toronto** are 4% more likely to be **more interested** now than general respondents, and 11% more likely than respondents from **Northern Ontario**.



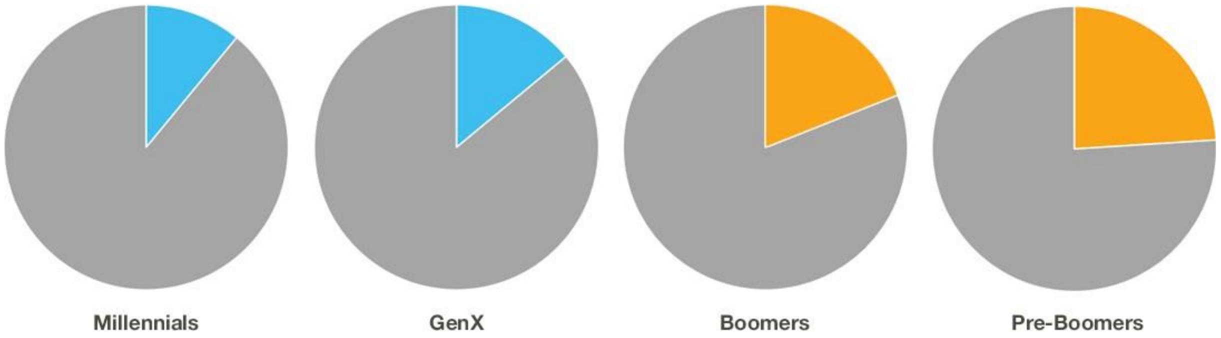

Q12. How do you feel about the following types of vacation accommodations once the stay-at-home orders have been lifted?

# In nature, away from other people

**Millennials** are more likely to be **more interested** than before than all other age groups (10% more than the average respondent)




**Boomers** and **Pre-Boomers** are 5%-13% more likely than Millennials and Gen X to be **less interested** than before.




Q12. How do you feel about the following types of vacation accommodations once the stay-at-home orders have been lifted?

# Cottage resort

**Millennials** are 4% more likely than the average respondent to be **more interested** than before.

Respondents who say they are **familiar with Explorer's Edge** are 14% more likely than general respondents to be **more interested** than before.

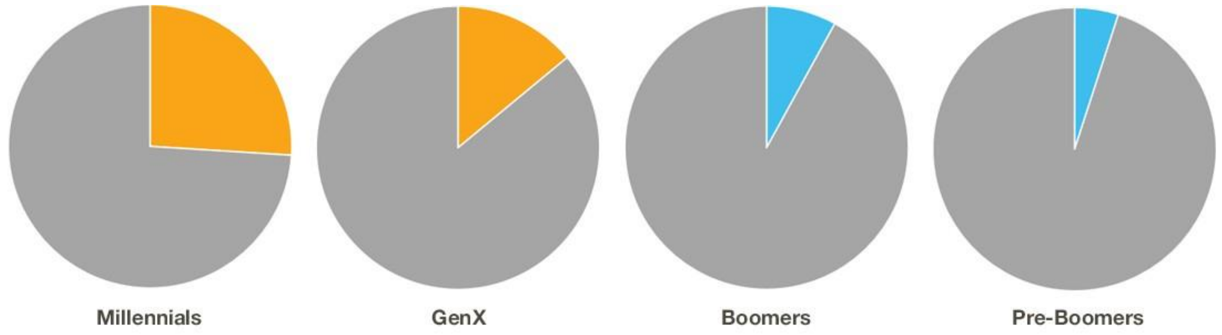
Those who chose the **top 3 levels of interest in visiting RTO12** are 9% more likely than the average respondent to be **more interested** now, whereas those who chose the **bottom 3 levels** are 18% more likely than general respondents to be **less interested** than before.

Respondents who think **Ontario needs to do more** about Coronavirus are 9% more likely than the average respondent to be **less interested** than before.

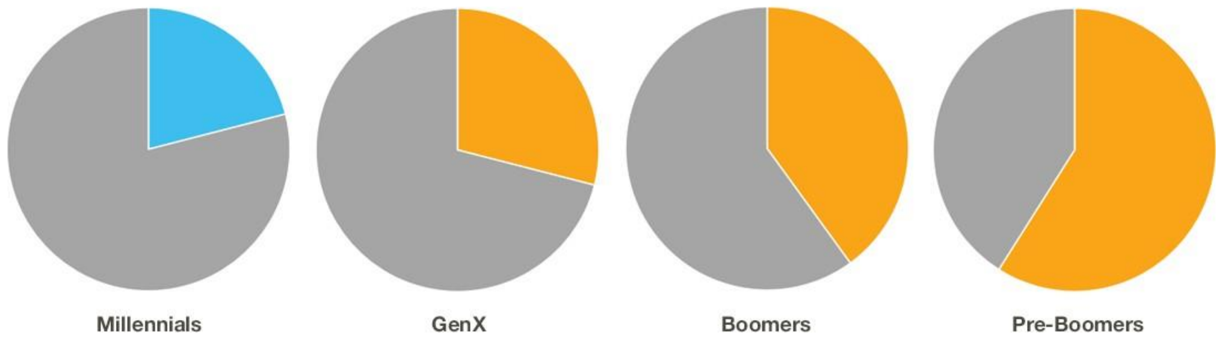
Q12. How do you feel about the following types of vacation accommodations once the stay-at-home orders have been lifted?

# Overnight park or campground

26% of **Millennials** are **more interested** now (11% more than the average respondent), along with 14% of **Gen X**, but only 8% of Boomers and 5% of Pre-Boomers



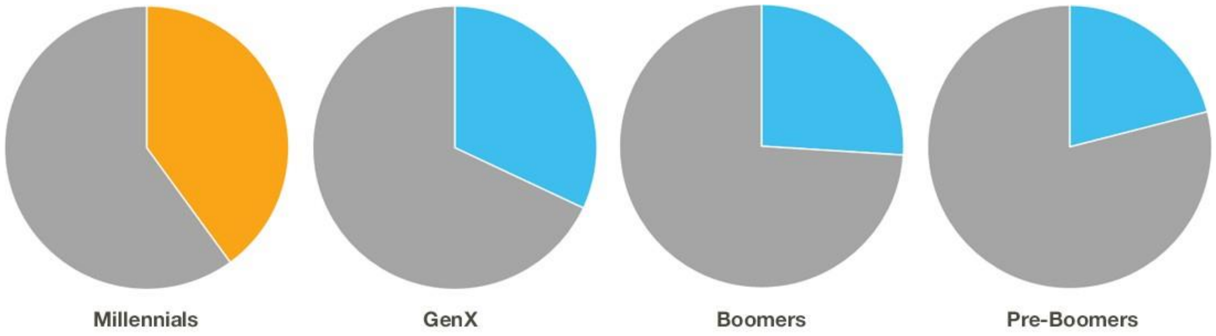

**Pre-Boomers/Boomers** are also **more likely to be less interested** than other age groups



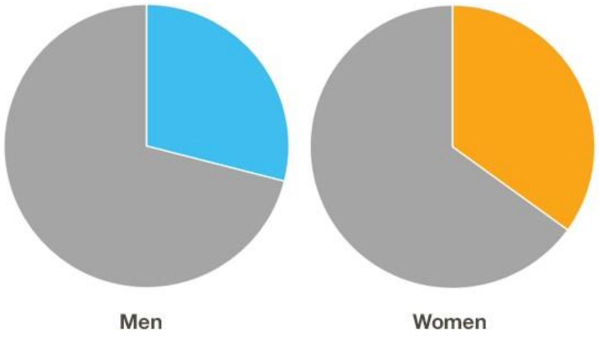

Q12. How do you feel about the following types of vacation accommodations once the stay-at-home orders have been lifted?

## Motel with separate room access

**Millennials** are more likely to be less interested in this type of accommodations



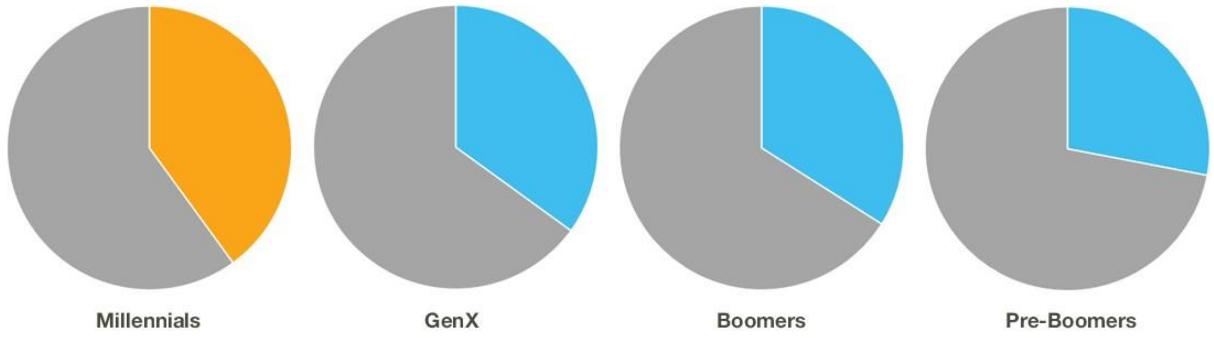

**Women** are 9% more likely than men to be **less interested** than before.



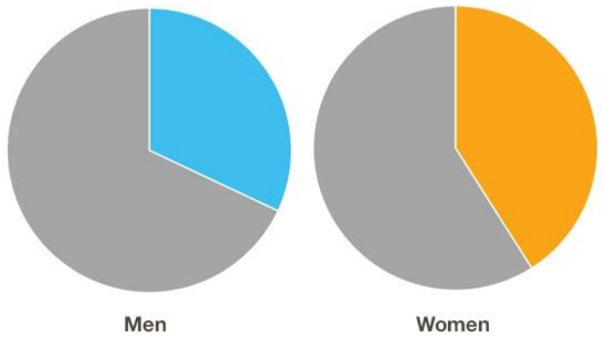

Q12. How do you feel about the following types of vacation accommodations once the stay-at-home orders have been lifted?

## Hotel with common areas such as check-in, dining, room access

**Millennials** are 4% more likely than general respondents and 12% more likely than **Pre-Boomers** to be **less interested** than before.



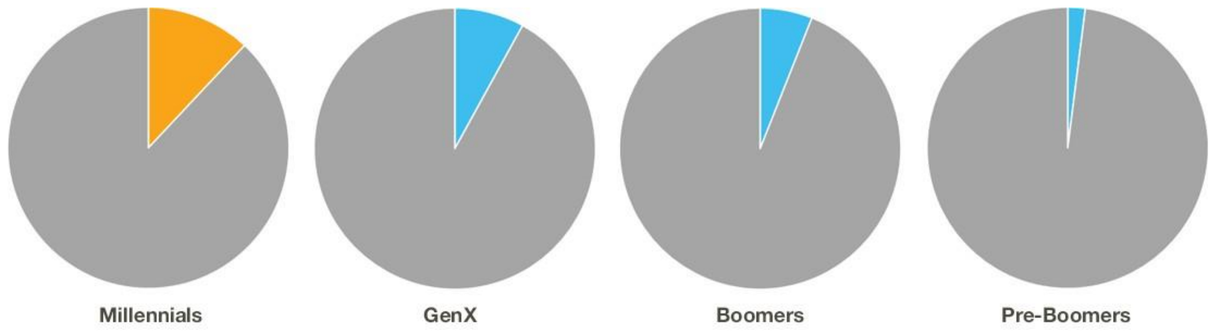

**Women** are 9% more likely than men to be **less interested** than before.



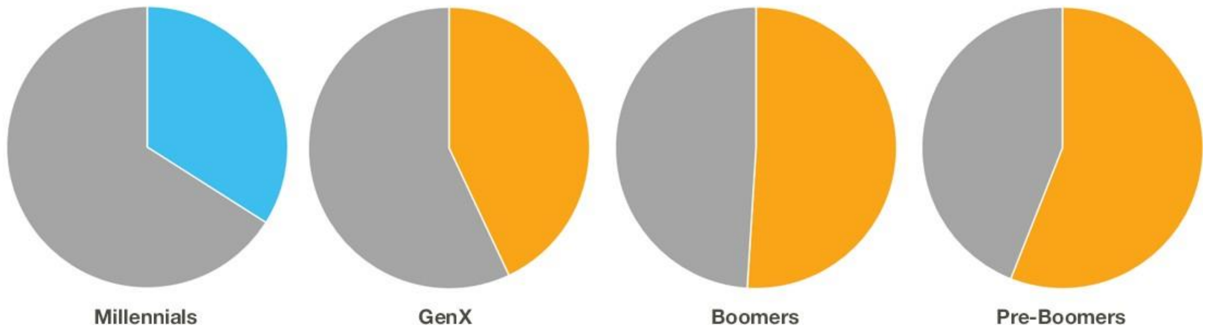

Q12. How do you feel about the following types of vacation accommodations once the stay-at-home orders have been lifted?

# Airbnb rental

**Millennials** are 4%-10% more likely than other generations to be **more interested** than before...




...and 9%-12% **less likely** than them to say they are **less interested** than before.

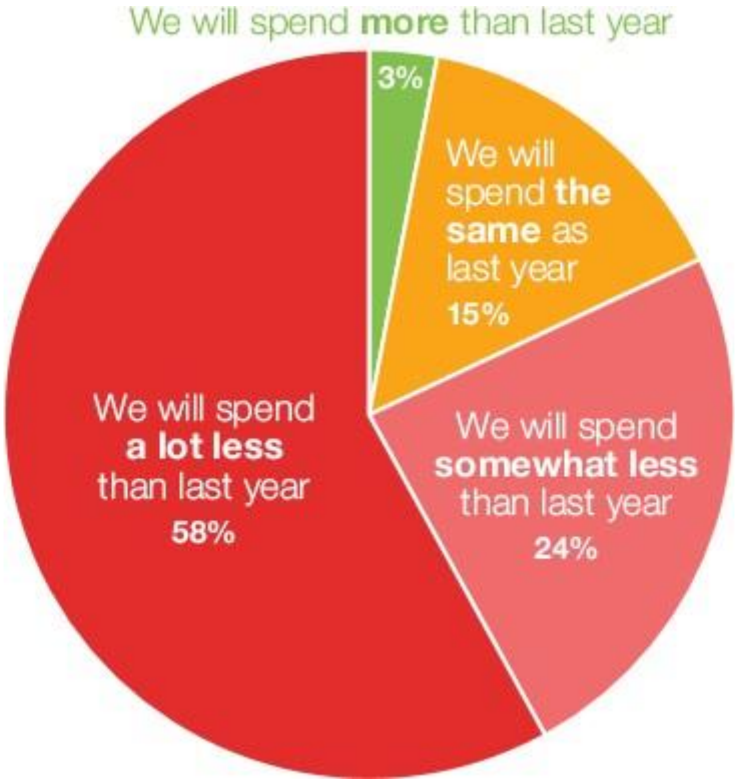



Q12. How do you feel about the following types of vacation accommodations once the stay-at-home orders have been lifted?

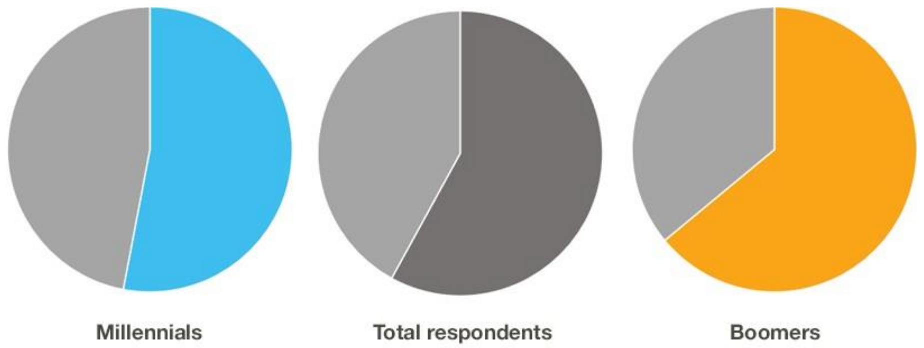
**The pandemic will have a significant impact on vacation travel spending with 82% saying they will spend less**

**Almost 60% say they will spend a LOT less**

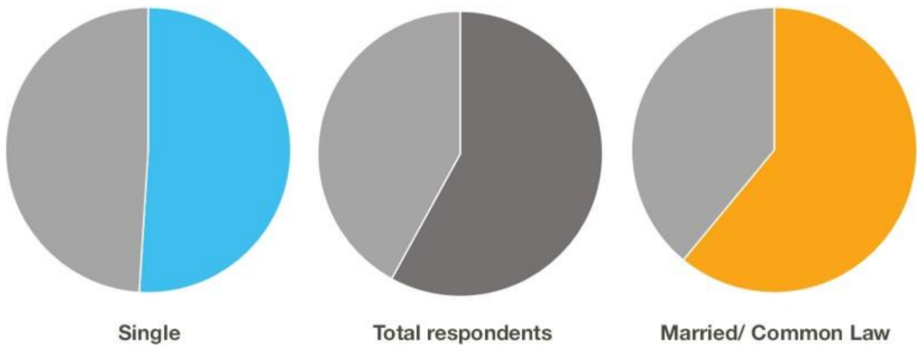
Q13. How has the corona virus impacted your **spending on vacation travel** this year?



**Millennials** are 5% **less likely** than the average to say they will **spend a lot less** than last year, while **Boomers** are 6% **more likely** than the average to choose this option.




**Single** respondents are 7% **less likely** than the average to say they will **spend a lot less** than last year, while **married** respondents are 3% **more likely** than general respondents to choose this option.




Q13. How has the corona virus impacted your spending on vacation travel this year?

**Men** are 6% more likely than women to say they will **spend the same** as last year.

Respondents from **Toronto** are slightly (2%) more likely than the average to say they will **spend more** this year.

Respondents who say **Ontario overreacted** to Coronavirus are only 4% more likely than the average to say they will **spend more** this year, but 10% more likely to say they will spend **the same as last year** and 24% **less likely** to say they will **spend a lot less**.

Respondents from the **lowest family income group** are 5% more likely than the average to say they will **spend the same** as last year, and 6% **less likely** to say they will **spend a lot less**.

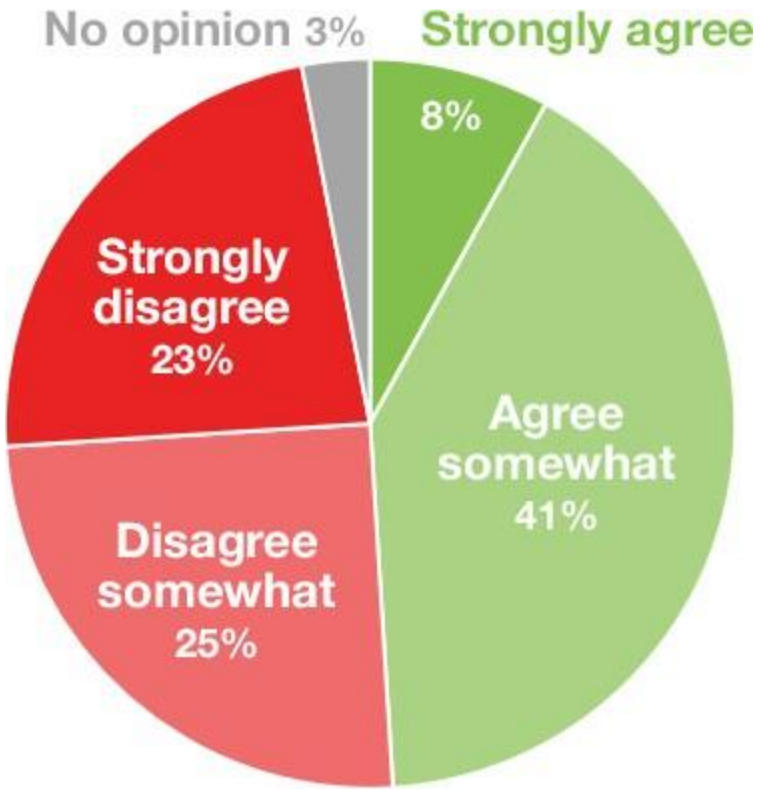
Respondents with **university education** are 4% more likely than the average respondent to say they will **spend a lot less** this year.

**Executives** are 19% more likely than the average to say they will spend **somewhat less** this year, and **retired** respondents are 10% more likely than the average to say they will spend **a lot less**.

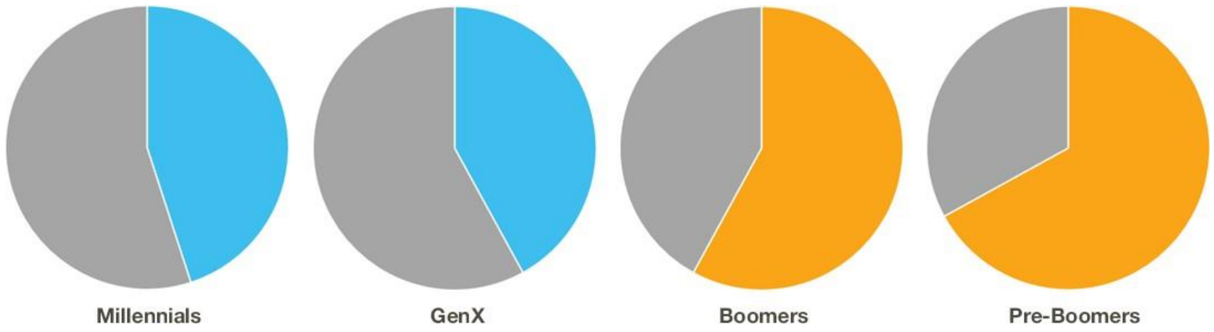
Q13. How has the corona virus impacted your spending on vacation travel this year?

# Respondents are evenly divided on whether they are willing to pay a “Coronavirus premium”

Q14. How do you feel about the following statement: It's okay for a tourism business to **charge extra** as long as they can assure me that **proper corona virus protocols are in place**.



The more affluent **Boomers and Pre-Boomers** are considerably more likely to **agree** (both somewhat and strongly) than Millennials and Gen X (13%-25% difference).

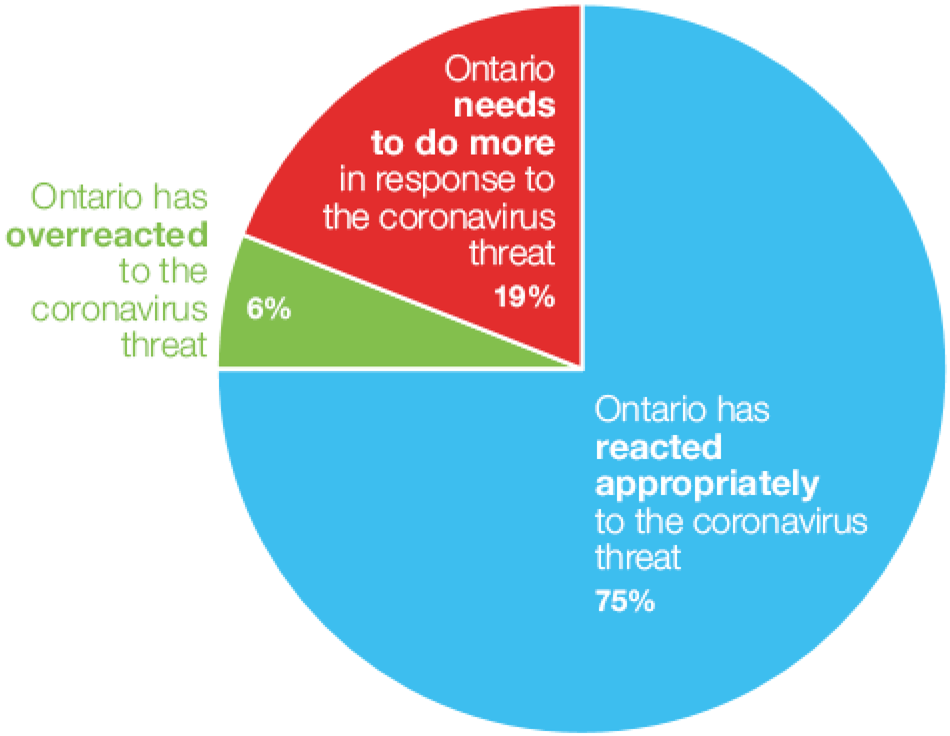



Q14. How do you feel about the following statement:
It's okay for a tourism business to charge extra as long as they can assure me that proper corona virus protocols are in place.

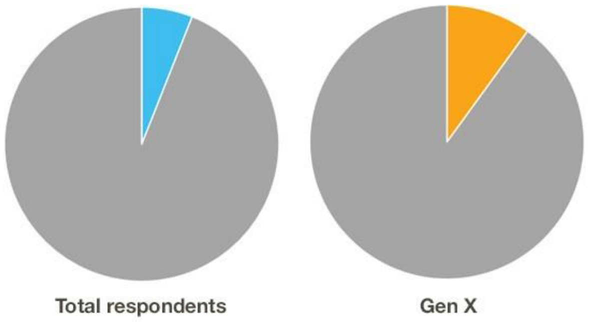
**Generally, Ontarians feel the province has handled the crisis well**

**But when the stay-at-home orders are lifted, fear of Coronavirus will remain a big worry...and travel inhibitor**

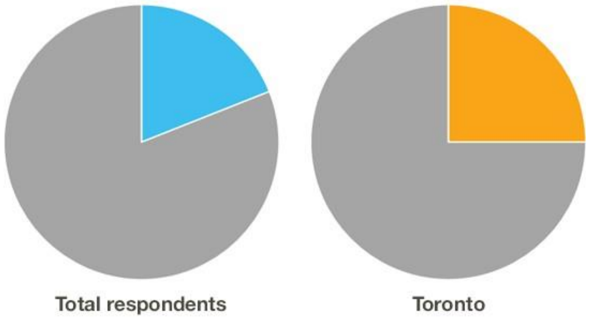
Q16. Which of the following best describes **how you feel about coronavirus**?



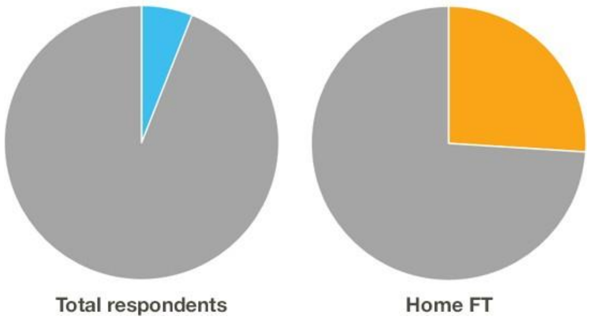
**Gen X** is 4% more likely than the average to say **Ontario has overreacted**.




Respondents from **Toronto** are 6% more likely than the average to say **Ontario needs to do more.**

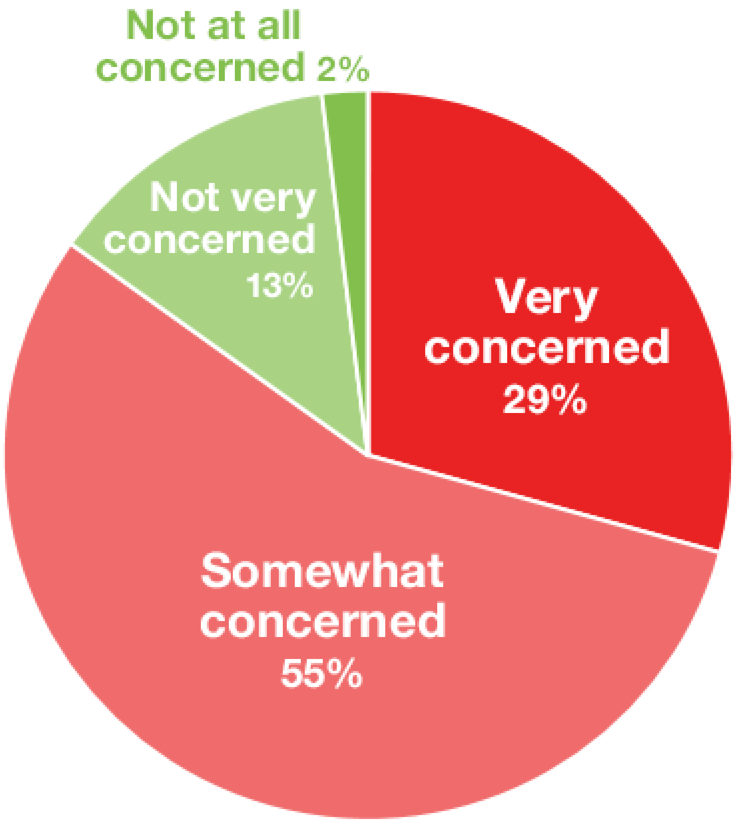



**Full-time homemakers/parents** are 20% more likely than the average to say **Ontario has overreacted.**

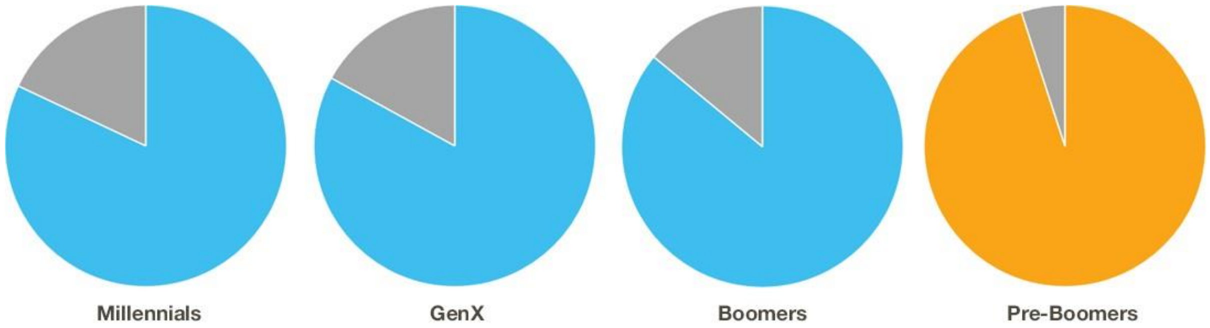



Q16. Which of the following best describes how you feel about coronavirus?

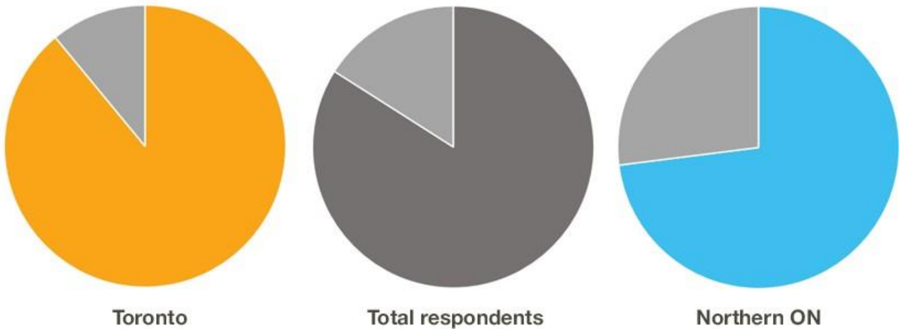
Q15. When stay-at-home orders are lifted in your area, how concerned will you be about **you or your loved one's risk of being exposed to coronavirus when you leave your home**?



**Pre-Boomers** are
are the most
concerned




Respondents from **Toronto** are 5% more likely than the average to be **concerned**, while those from **Northern Ontario** are 11% **less likely**.




Q15. When stay-at-home orders are lifted in your area, how concerned will you be about you or your loved one's risk of being exposed to coronavirus when you leave your home?

**Married** respondents are 7% more likely to be **concerned** than **single** ones. Those who have **kids under 18 years old** are more likely than the average to say the same.

Respondents who chose **the top 3 levels of interest in visiting Explorer's Edge** are 12% more likely to say they will be **concerned** than those who chose the **bottom 3 levels**.

As expected, respondents who think **Ontario needs to do more** about the Coronavirus threat are 12% more likely than the average to be **concerned**, while those who think the province **overreacted** are **40% more likely than the average to say they will not be concerned.**

Q15. When stay-at-home orders are lifted in your area, how concerned will you be about you or your loved one's risk of being exposed to coronavirus when you leave your home?

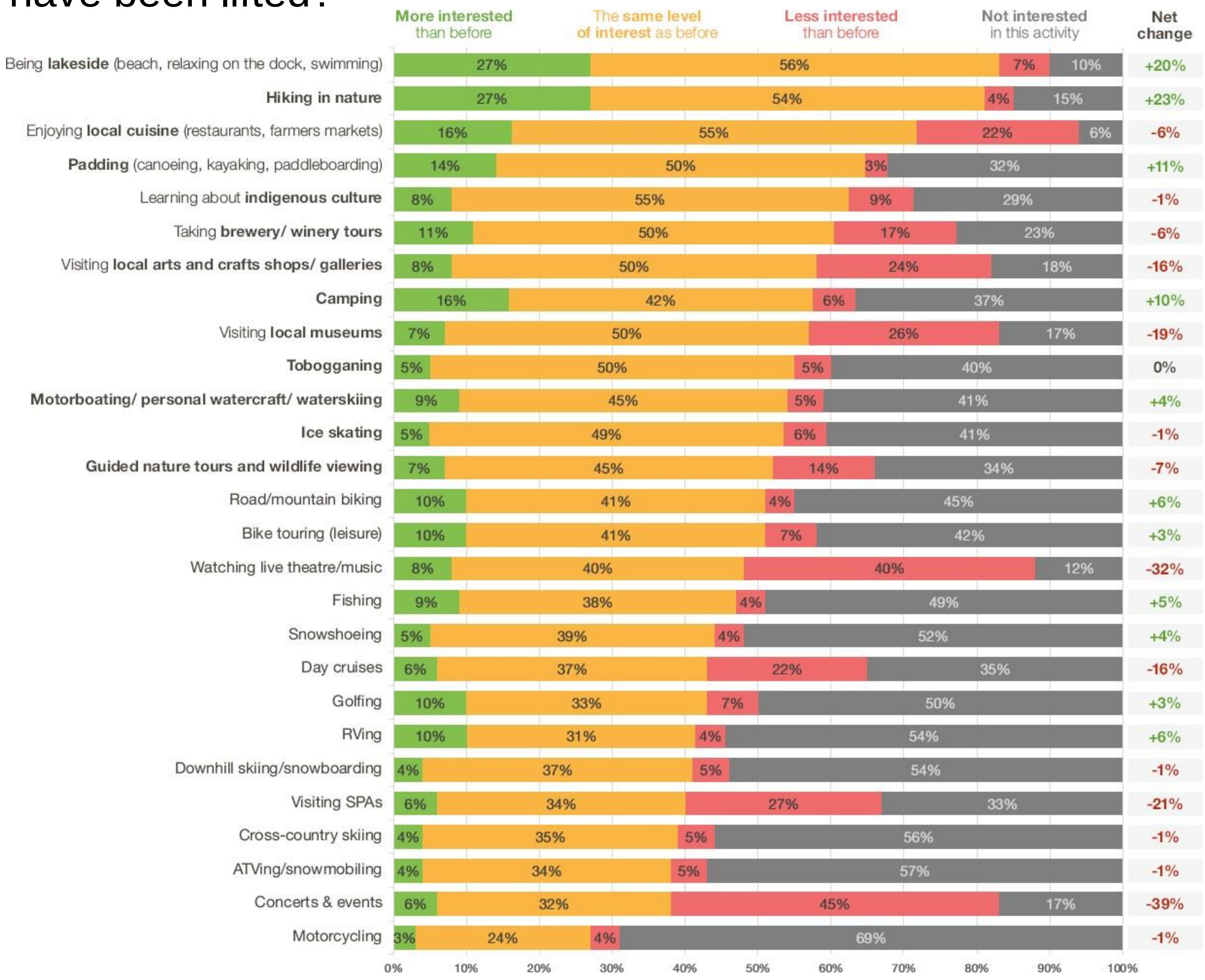
**Vacation activities that allow travellers to distance are more appealing now**

**Those that do not – dining, visiting museums, concerts, etc. are less appealing now**

**In fact, when we calculate a "net appeal" score for each activity (% More Interested minus % Less Interested), the opportunity for RTO 12 comes clearly into focus**

**Almost every single activity with a positive score is one that is on offer in the region**

QA3: What will be your level of interest in each of the following **vacation activities**, once the stay-at-home orders have been lifted?



| More likely than the average to be **less interested** than before | **Activity** | More likely than the average to be **more interested** than before |
|---|---|---|
| Familiar EE Employed PT | Being **lakeside** (beach, relaxing on the dock, swimming) | Women Millennials Western ON Kids <18 University Employed Top 3 EE Top 3 |
| $50K-<$75K Men | **Hiking in nature** | Women Millennials Western ON University Employed Top 3 EE Top 3 |
| University Women | Enjoying **local cuisine** (restaurants, farmers markets) | Kids <18 Familiar EE Top 3 EE |
| Gen X | **Padding** (canoeing, kayaking, paddleboarding) | Women Millennials Eastern ON University Employed Familiar EE Top 3 EE Top 3 |
| More than $100K Men | Learning about **indigenous culture** | Woman Millennials University $75K-<$100K Familiar EE Top 3 |
| University | Taking **brewery/winery tours** | Millennials |
| Top 3 Student FT University Millennials Women | Visiting **local arts and crafts shops/galleries** | Western ON |
| | **Camping** | Millennials Single Employed Top 3 EE Top 3 |
| Top 3 Student FT University Millennials Women | Visiting **local museums** | Western ON Top 3 |
| Familiar EE Employed PT Toronto Men | **Tobogganing** | Millennials Kids <18 Employed Familiar EE Top 3 |
| Men | **Motorboating/personal watercraft/waterskiing** | Millennials Eastern ON Kids <18 Familiar EE Top 3 |
| Student FT | **Ice skating** | Millennials University Employed Top 3 |
| Familiar EE | **Guided nature tours and wildlife viewing** | Millennials Single University Familiar EE Top 3 |
| $50K-<$75K Toronto Men | Road/mountain biking | Millennials Kids <18 University Employed Top 3 |
| | Bike touring (leisure) | Millennials Toronto University Employed More than $100K Top 3 |
| Top 3 More than $100K University Women | Watching live theatre/music | Men Pre-Boomers |
| Familiar EE Men | Fishing | Men Millennials Kids <18 Employed Familiar EE Top 3 |
| Student FT Men | Snowshoeing | Millennials University Employed FT Top 3 |
| Top 3 | Day cruises | Men $76K-<$100K Familiar EE Top 3 |
| Men | Golfing | Men Top 3 |
| Men | RVing | Western ON Kids <18 College Familiar EE |
| Men | Downhill skiing/snowboarding | Millennials University Employed Top 3 |
| Toronto Women | Visiting SPAs | Millennials Kids <18 Employed More than $100K Familiar EE Top 3 |
| Student FT Men | Cross-country skiing | Women Millennials University Top 3 |
| Married Men | ATVing/snowmobiling | Millennials Employed Familiar EE Top 3 |
| Top 3 Employed University Millennials Women | Concerts & events | Men Familiar EE |
| Familiar EE Men | Motorcycling | Men Divorced Kids <18 |

QA3: What will be your level of interest in each of the following vacation activities, once the stay-at-home order have been lifted?

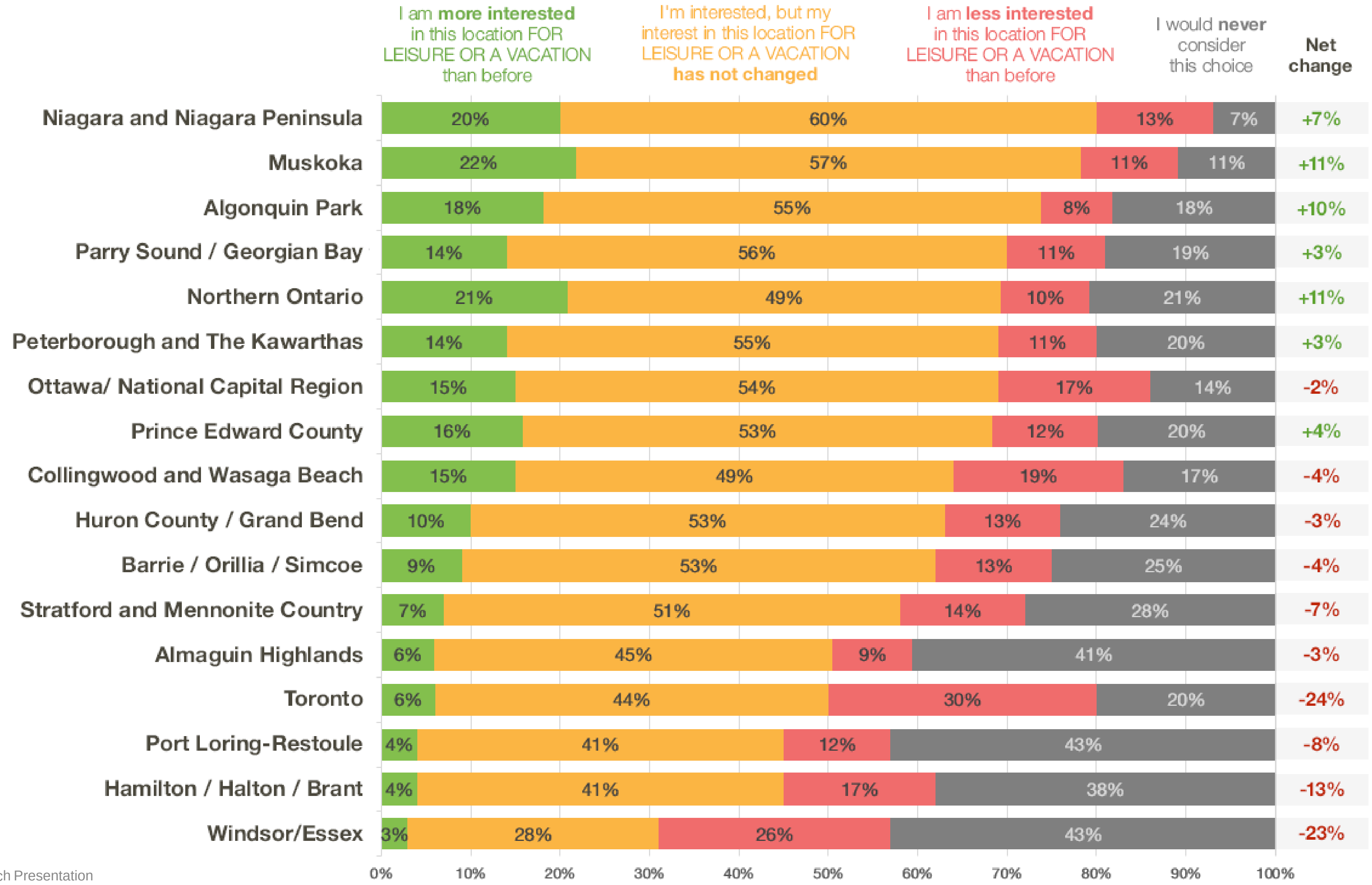
**Related to our findings about vacation activities is that Ontario destinations that offer these activities are now more appealing**

**Those that do not are less appealing now**

**In fact, when we calculate a "net appeal" score for each destination (% More Interested minus % Less Interested), the opportunity for RTO 12 again comes clearly into focus**

**Of the 7 destinations (out of 17) with a positive net appeal score, 3 are in RTO 12!**

Q10B. Which statement best describes how you feel about **each region for leisure or a vacation** once stay-at-home orders have been lifted.

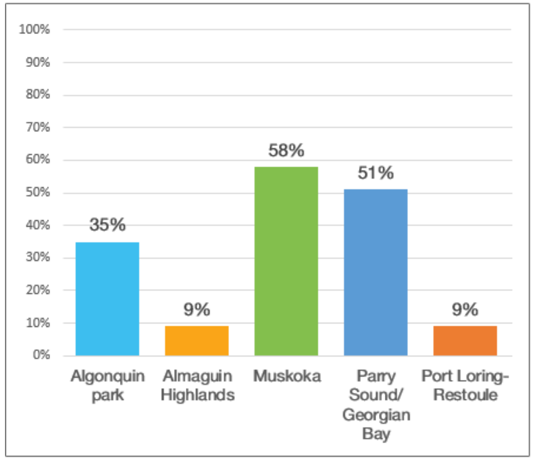


| More likely than the average to be **less interested** than before | **Regions** | More likely than the average to be **more interested** than before |
|---|---|---|
| Northern ON Boomers | **Muskoka** | Millennials Toronto University Top 3 EE Top 3 |
| Boomers | Northern Ontario | Millennials Northern ON Employed Familiar EE Top 3 EE Top 3 |
| Northern ON Central ON | Niagara and Niagara Peninsula | Millennials Toronto Top 3 EE Top 3 |
| Married Boomers | **Algonquin Park** | Millennials Toronto Single University Employed Top 3 EE Top 3 |
| Married Northern ON Boomers | Prince Edward County | Millennials Eastern ON Toronto University Employed FT Top 3 EE Top 3 |
| | Collingwood and Wasaga Beach | Millennials Toronto Top 3 EE Top 3 |
| Top 3 Married Northern ON Gen X | Ottawa/National Capital Region | Eastern ON Top 3 EE |
| Top 3 Retired Married | **Parry Sound/ Georgian Bay** | Millennials Toronto Single Top 3 EE Top 3 |
| Top 3 Married Men | Peterborough and The Kawarthas | Millennials Toronto Familiar EE Top 3 EE Top 3 |
| Northern ON | Huron County/ Grand Bend | Millennials Western ON Top 3 EE Top 3 |
| Married Northern ON Western ON | Barrie/ Orilia/ Simcoe | Millennials Toronto Top 3 EE Top 3 |
| Student FT | Stratford and Mennonite Country | Boomers Familiar EE Top 3 EE |
| Top 3 Married Western ON Central ON Millennials | Toronto | Toronto Familiar EE |
| Retired Married Boomers | **Almaguin Highlands** | Millennials Toronto University Employed Familiar EE Top 3 EE Top 3 |
| Familiar EE $76K-<$100K Married Central ON | Hamilton/ Halton/ Brant | Millennials Single University Employed FT Familiar EE |
| Familiar EE Retired Boomers Men | **Port Loring-Restoule** | Millennials Employed $50K-<$75K Familiar with EE Top 3 |
| Top 3 Familiar EE Kids <18 Married Western ON | Windsor/Essex | Single Top 3 |

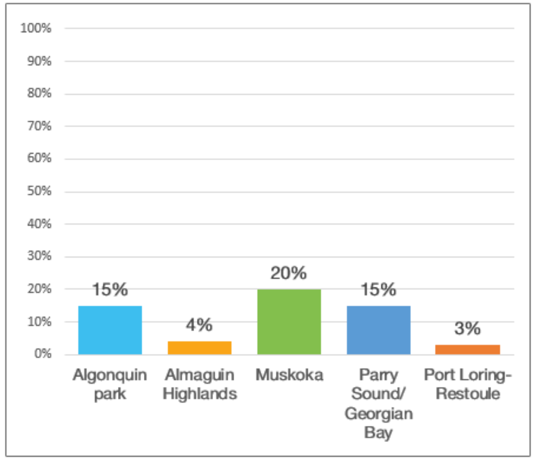
Q10B. Which statement best describes how you feel about each region for leisure or a vacation once stay-at-home orders have been lifted.

Q3P. During what **season(s)** have you visited each of the following regions for leisure or a vacation in the past two years?

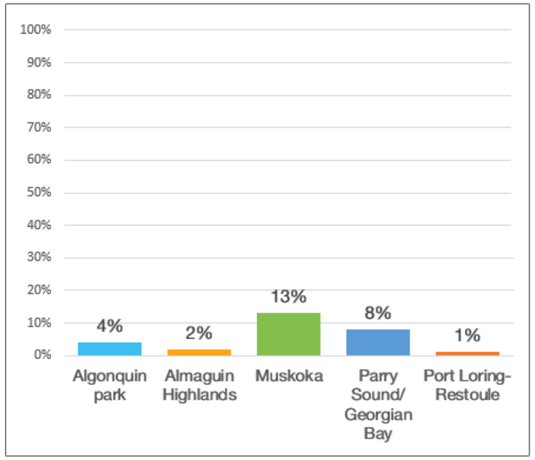
## Summer



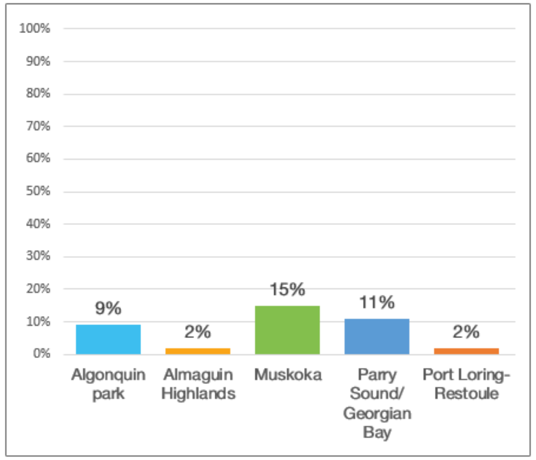

## Fall



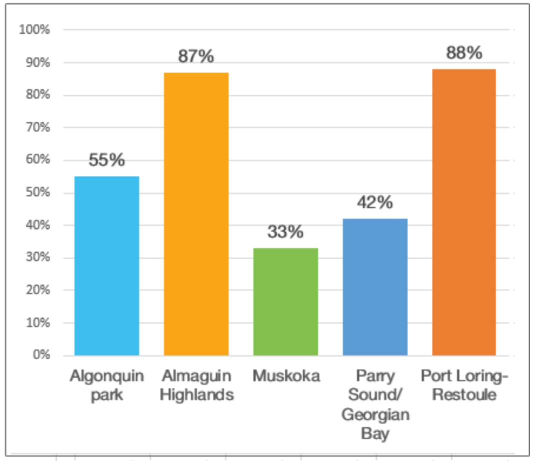

## Winter




## Spring



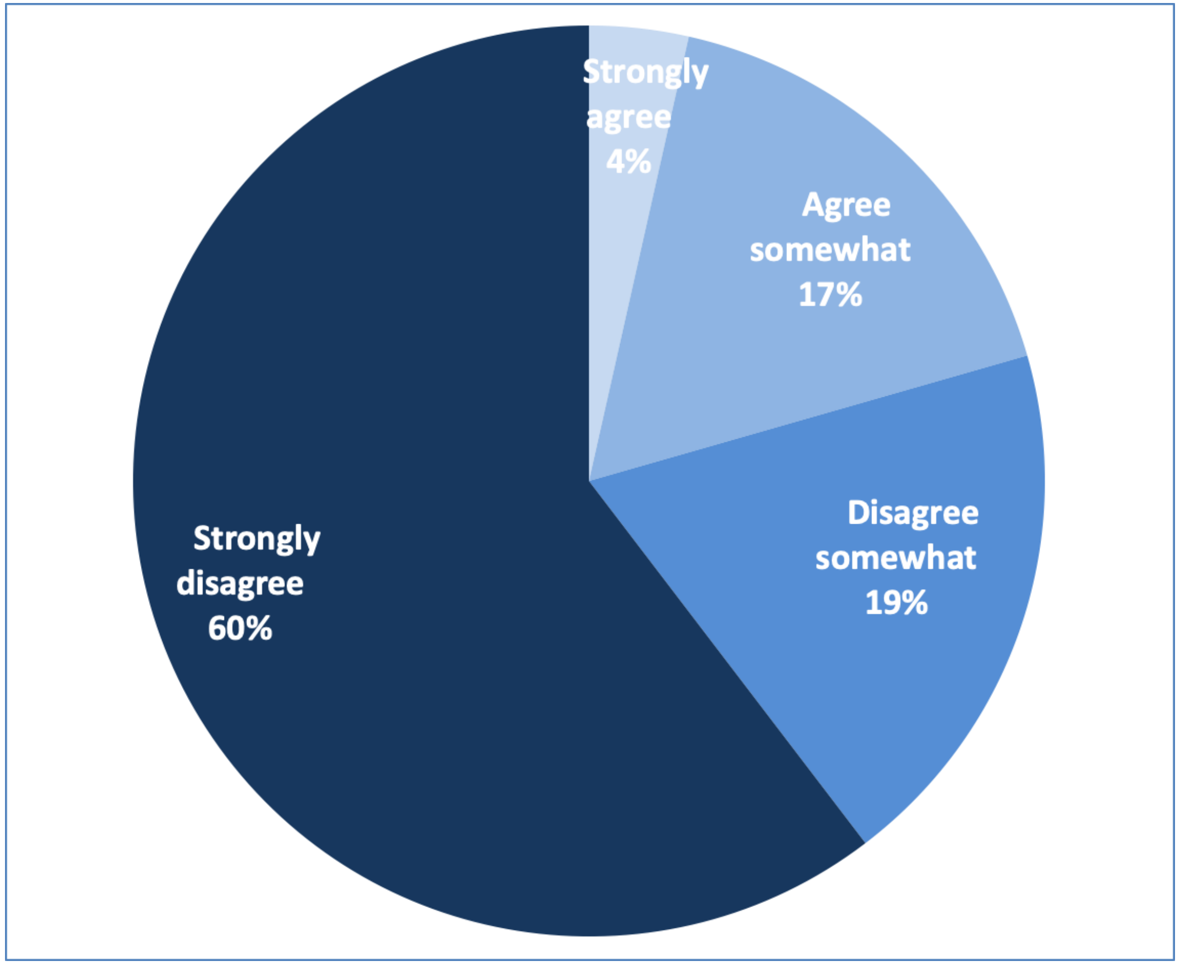

## Never visited for leisure



**Interest in flying to Muskoka from Toronto seems to have decreased from our survey in 2017. 72% of respondentes in the GTA expressed an interest in arriving by air**

**This year, only 21% said they would consider the option**

Q17. How do you feel about the following statement: I would be willing to book a commercial flight to Muskoka once the stay-at-home orders have been lifted (Toronto/GTA respondents only)?

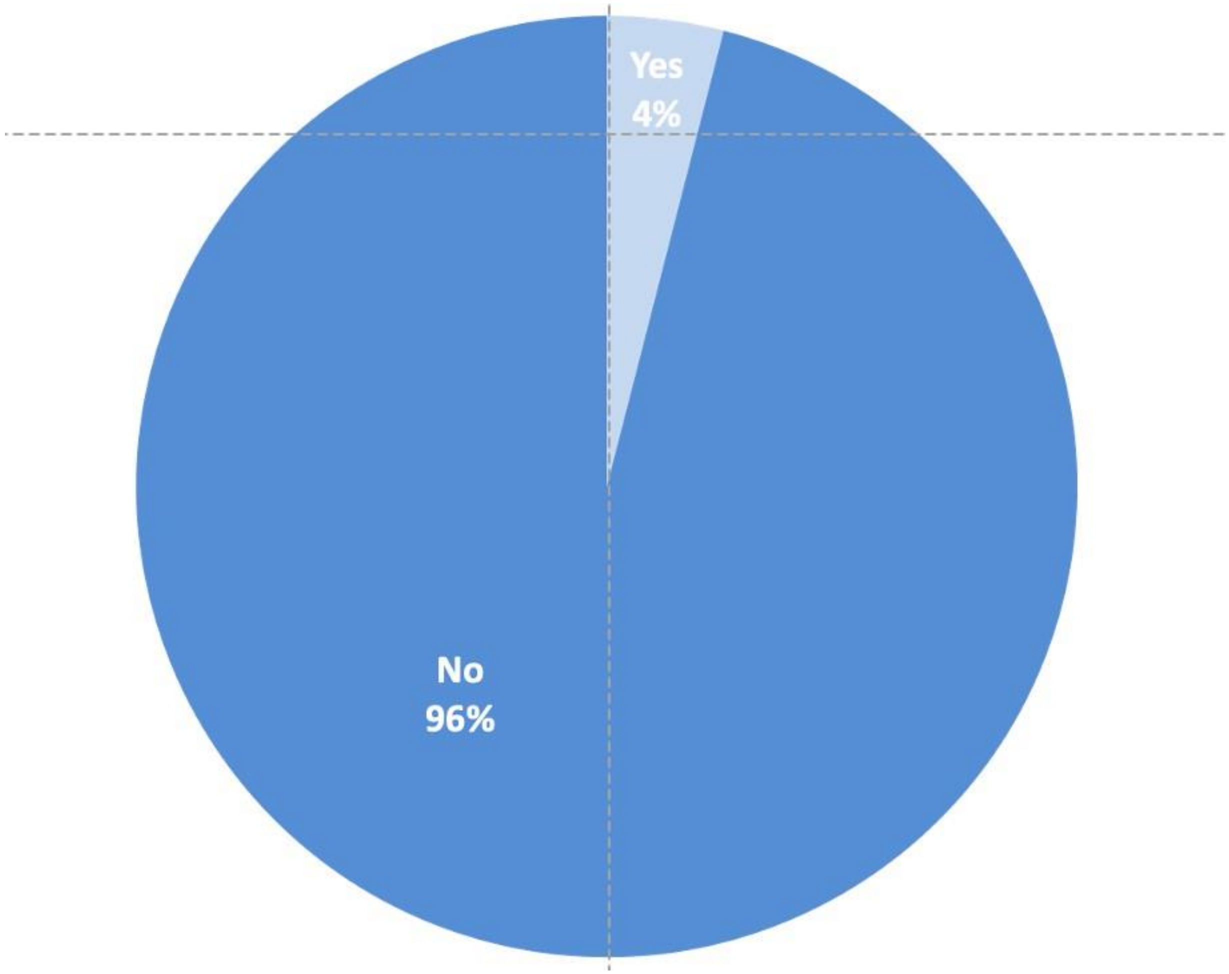


**Familiarity with “Explorers’ Edge” as a brand has slipped since  2016. In our last survey, aided awareness stood at 9%**

**It’s now at just 4%, which no doubt reflect the fact that our advertising efforts in 2018 and 2019 were not focused on building awareness of the region**

**This suggests there is little risk in rebranding the region as ”The Great Canadian Wilderness”**

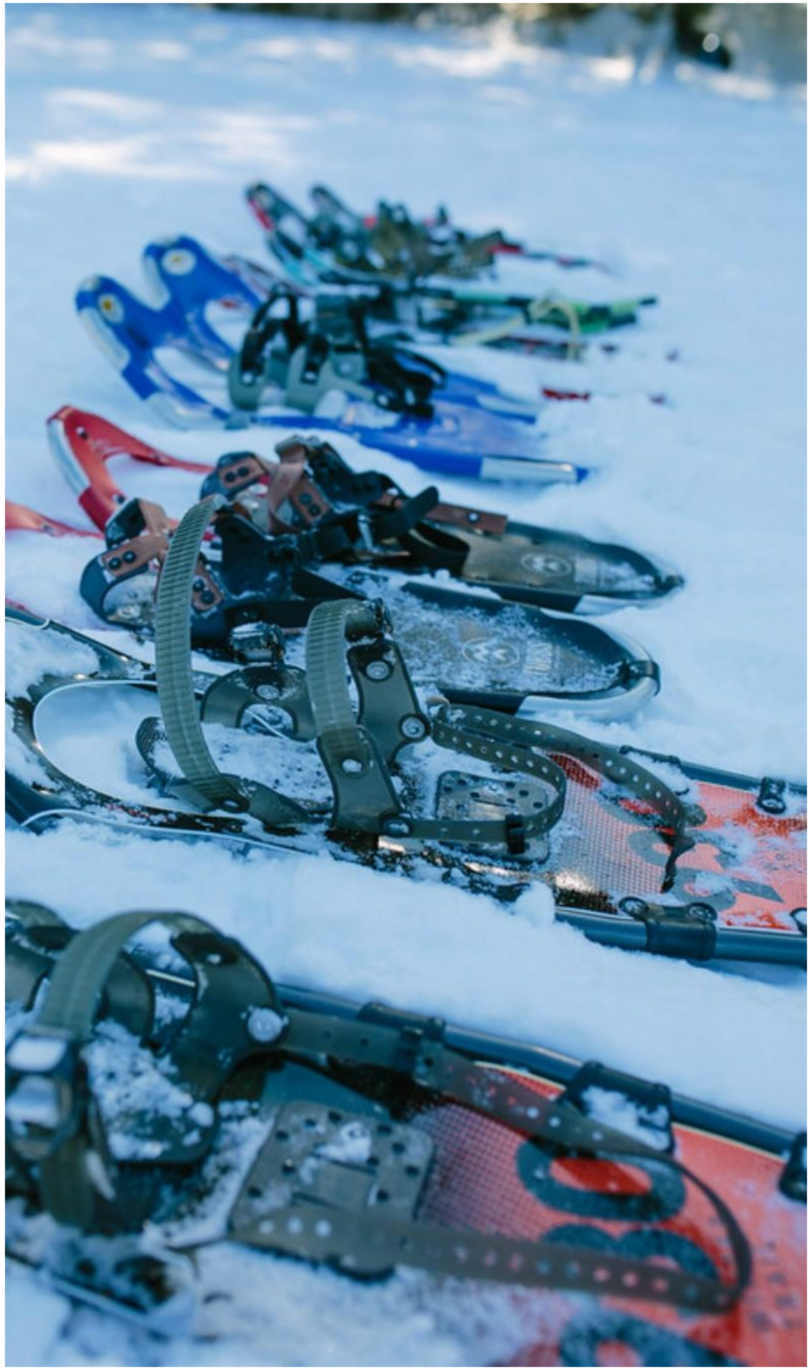
Q37A. Are you familiar with the Ontario tourism region called Explorer's Edge?



**While travellers are not familiar with “Explorers’ Edge” as a brand they are nonetheless interested in what the region has to offer with 56% of respondents scoring their level of interest 8 out of 10 or higher, with an encouraging 22% giving it a 10/10!**

**In 2016, 47% of respondents scored their level of interest 8 out of 10 or higher, with just 10% giving it a 10/10**

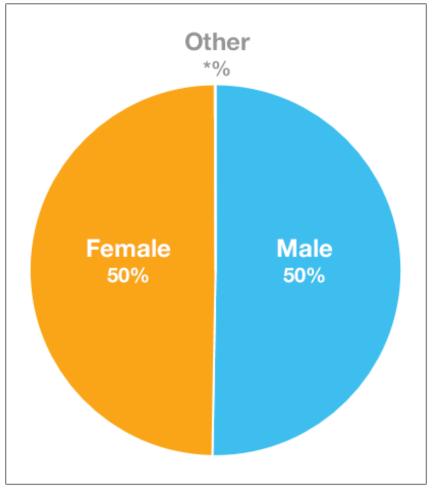
Q38B. **Muskoka, Algonquin Park, Parry Sound / Georgian Bay, Port Loring-Restoule and Almaguin Highlands** are regions in Ontario that offer several incredible outdoor activities. On a scale of 1 to 10, with 10 being the highest, **how interested are you in visiting these regions in the future?**



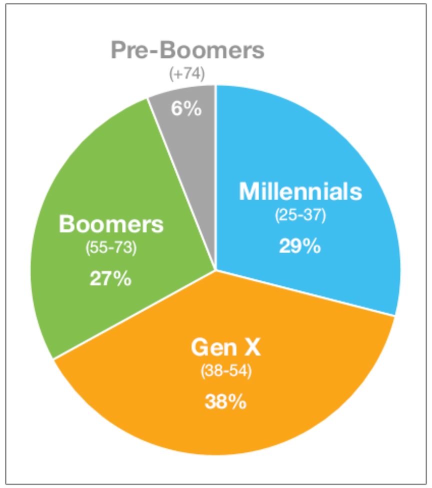
# RESPONDENT PROFILE

# N=1,502

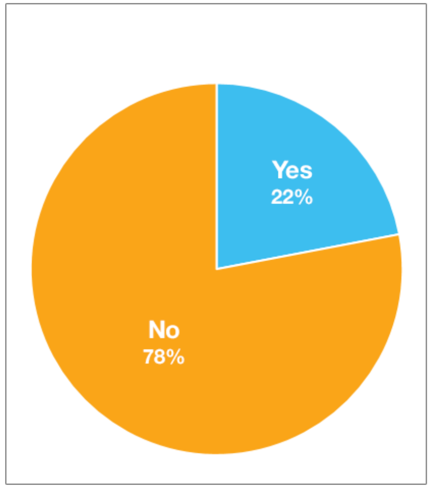
Gender



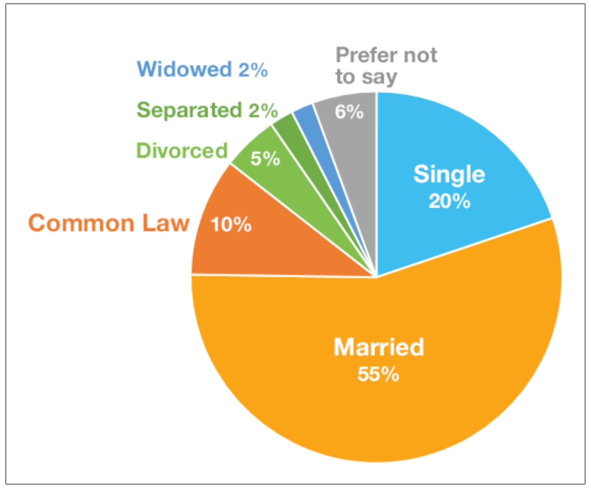

Age



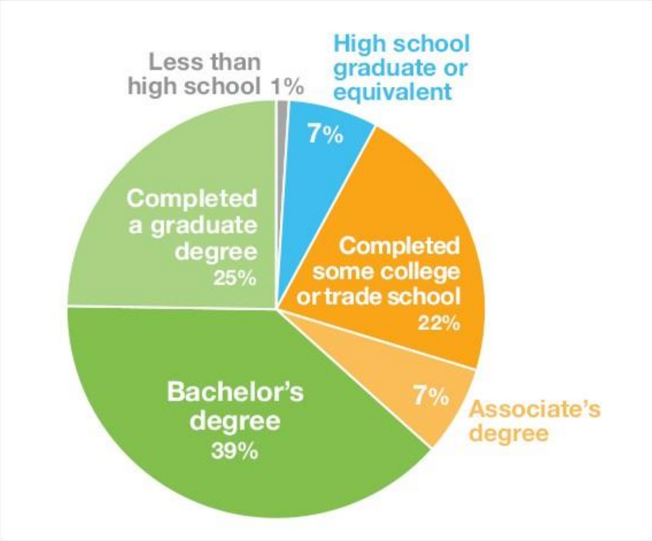

Kids under 18 years old



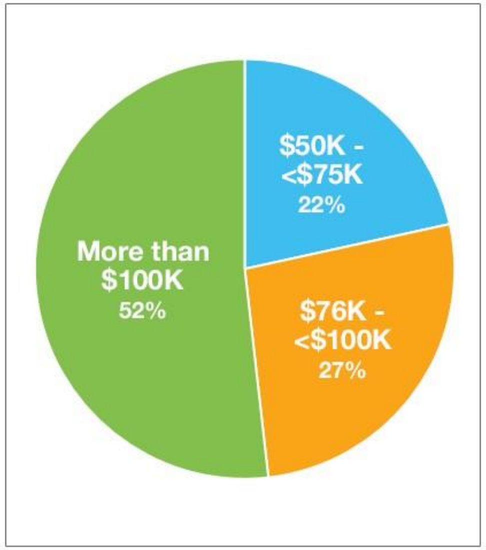

Relationship Status



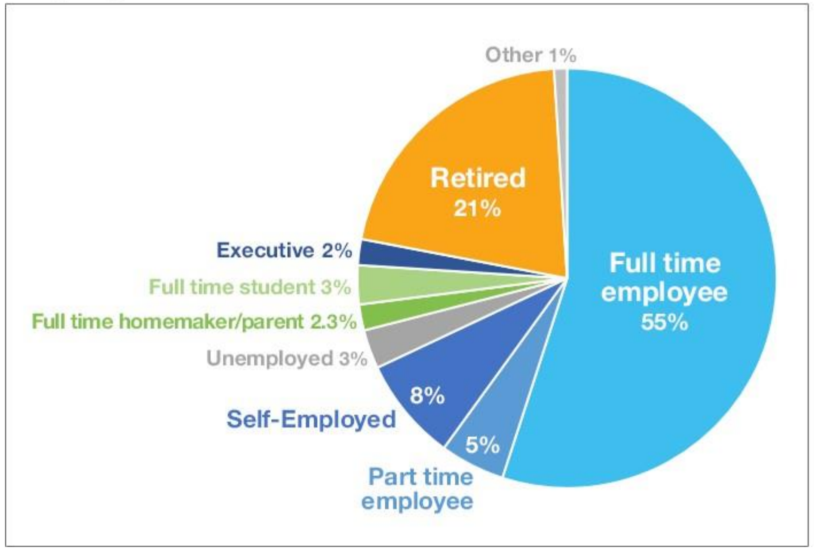
## Education



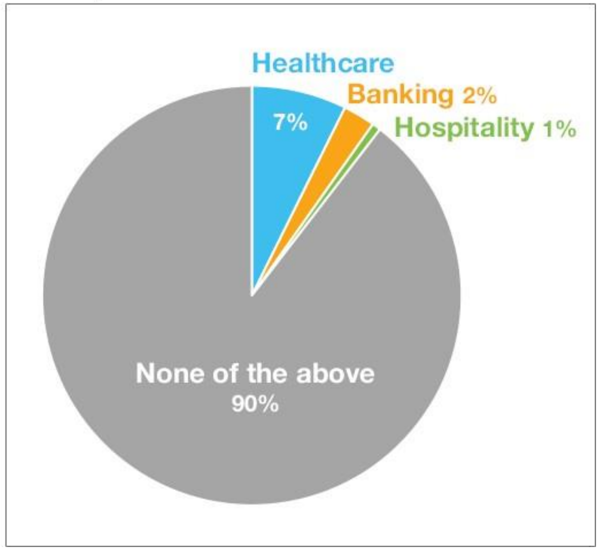

## Family Income



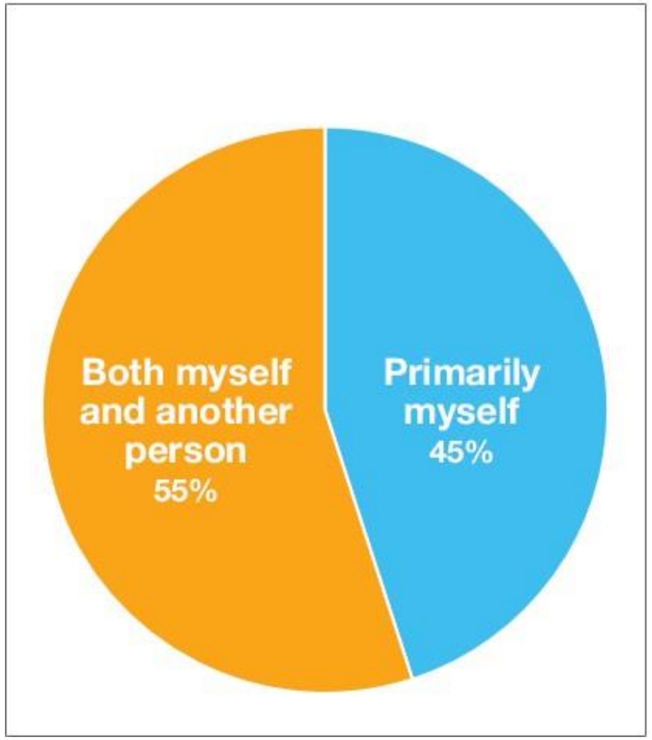

## Employment Status



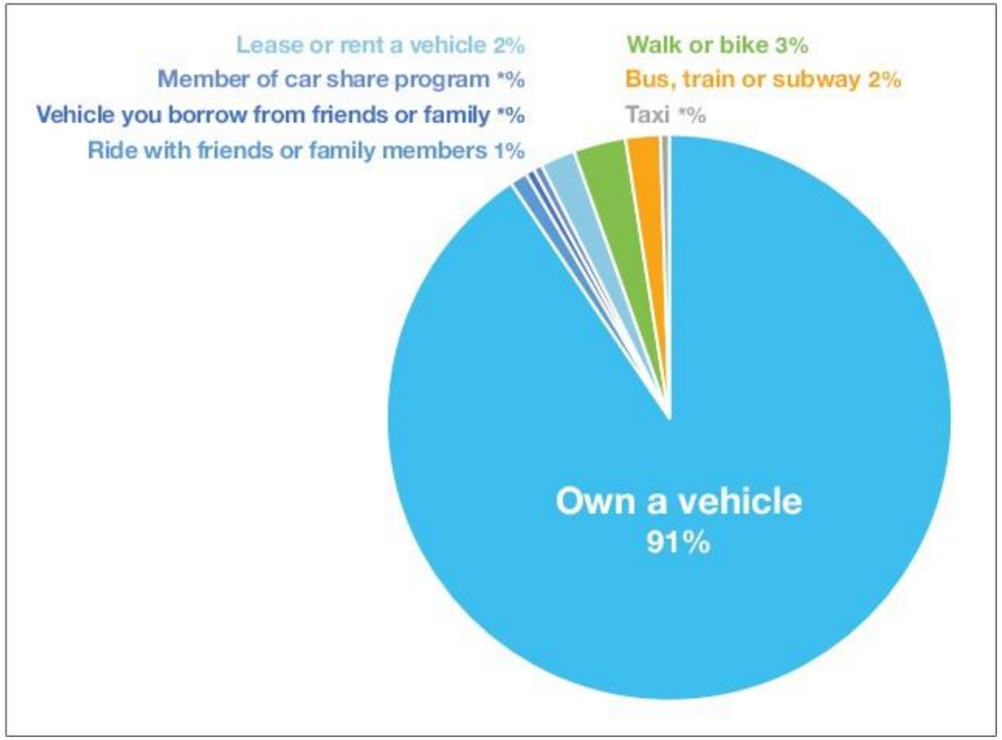

## Occupation



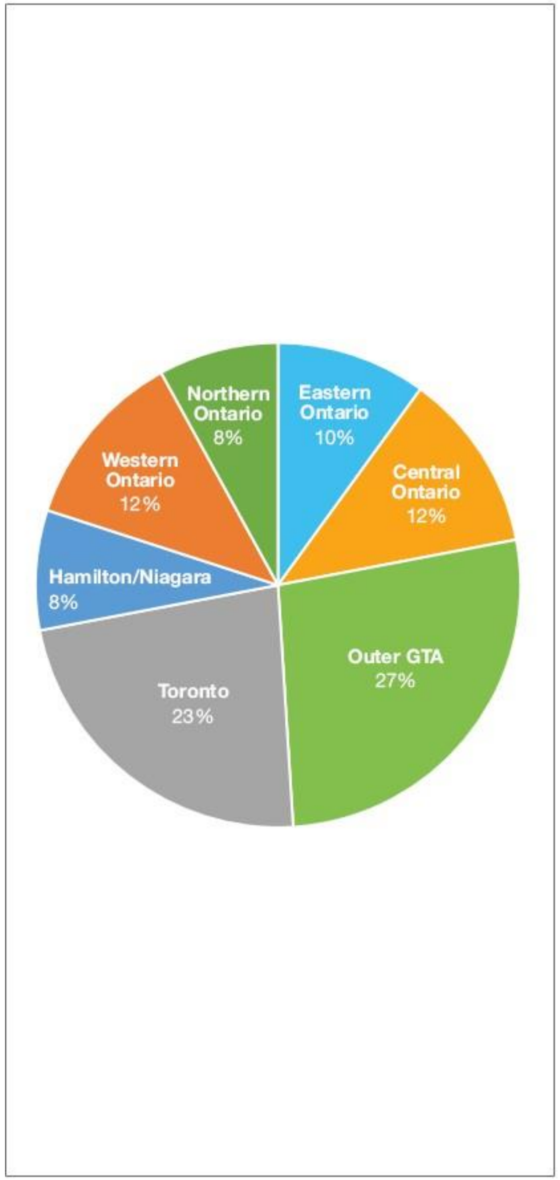
## Travel decision making in HH



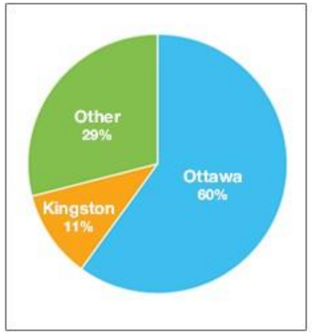

## Household`s main source of transportation



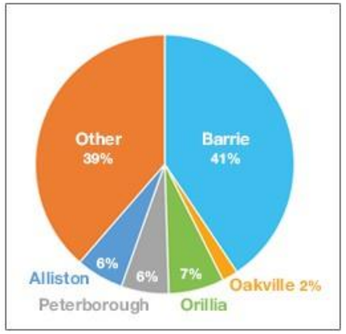
## Region



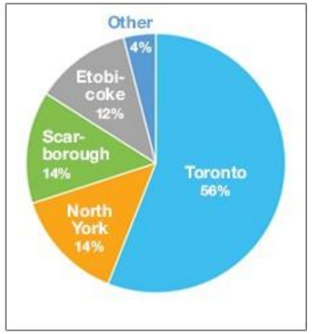

## Eastern ON



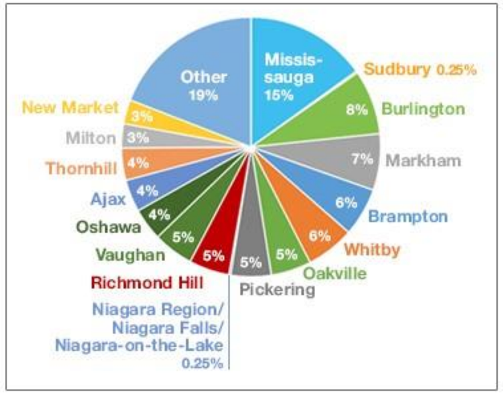

## Central ON



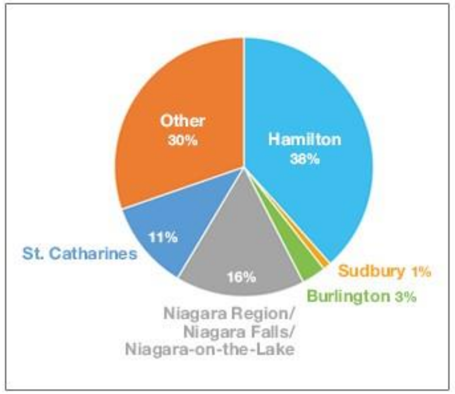

## Toronto



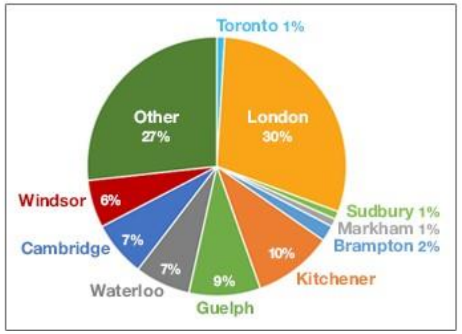

## Outer GTA



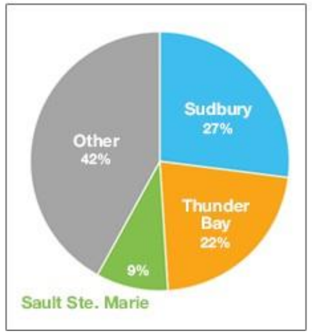

## Hamilton/Niagara



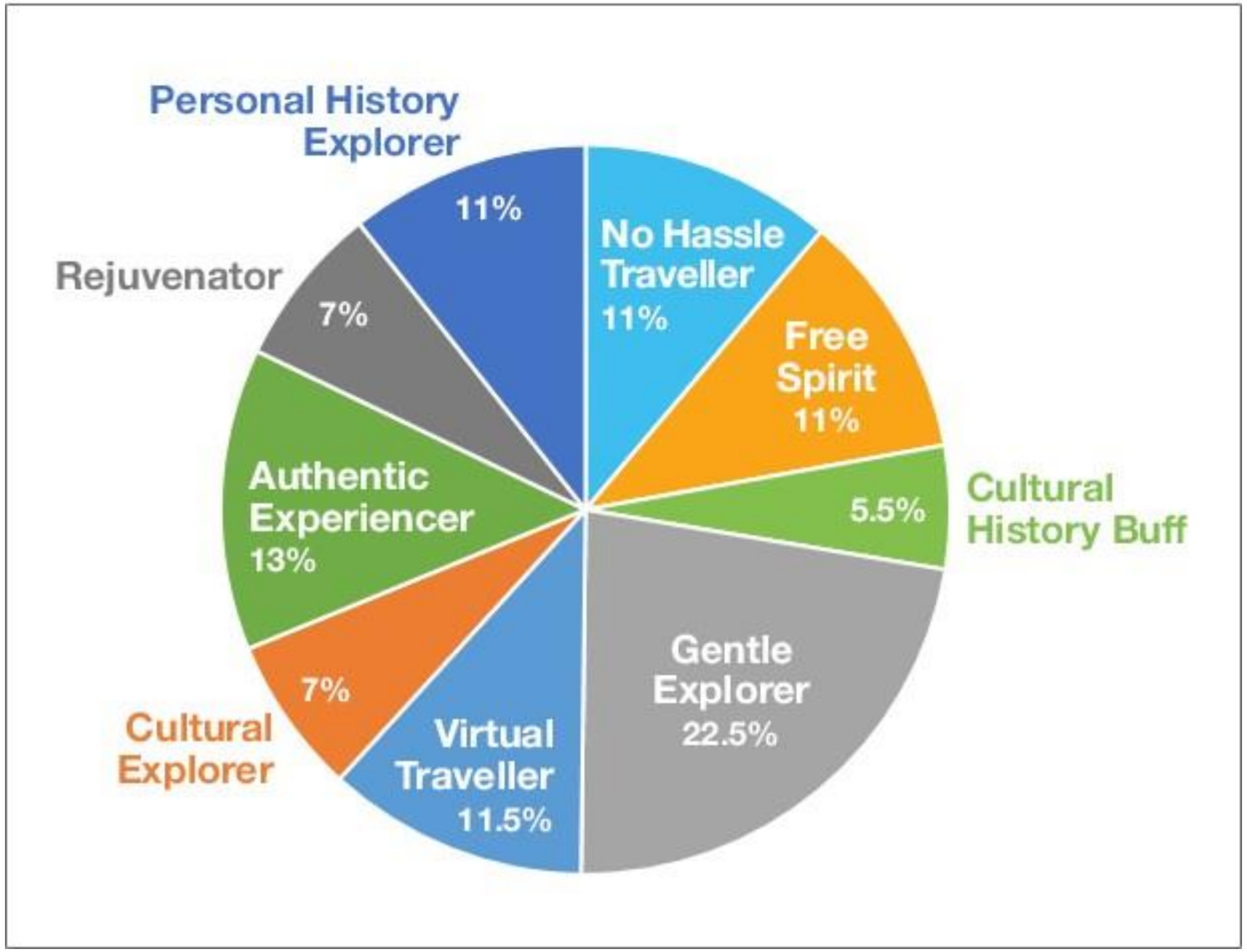

## Western ON



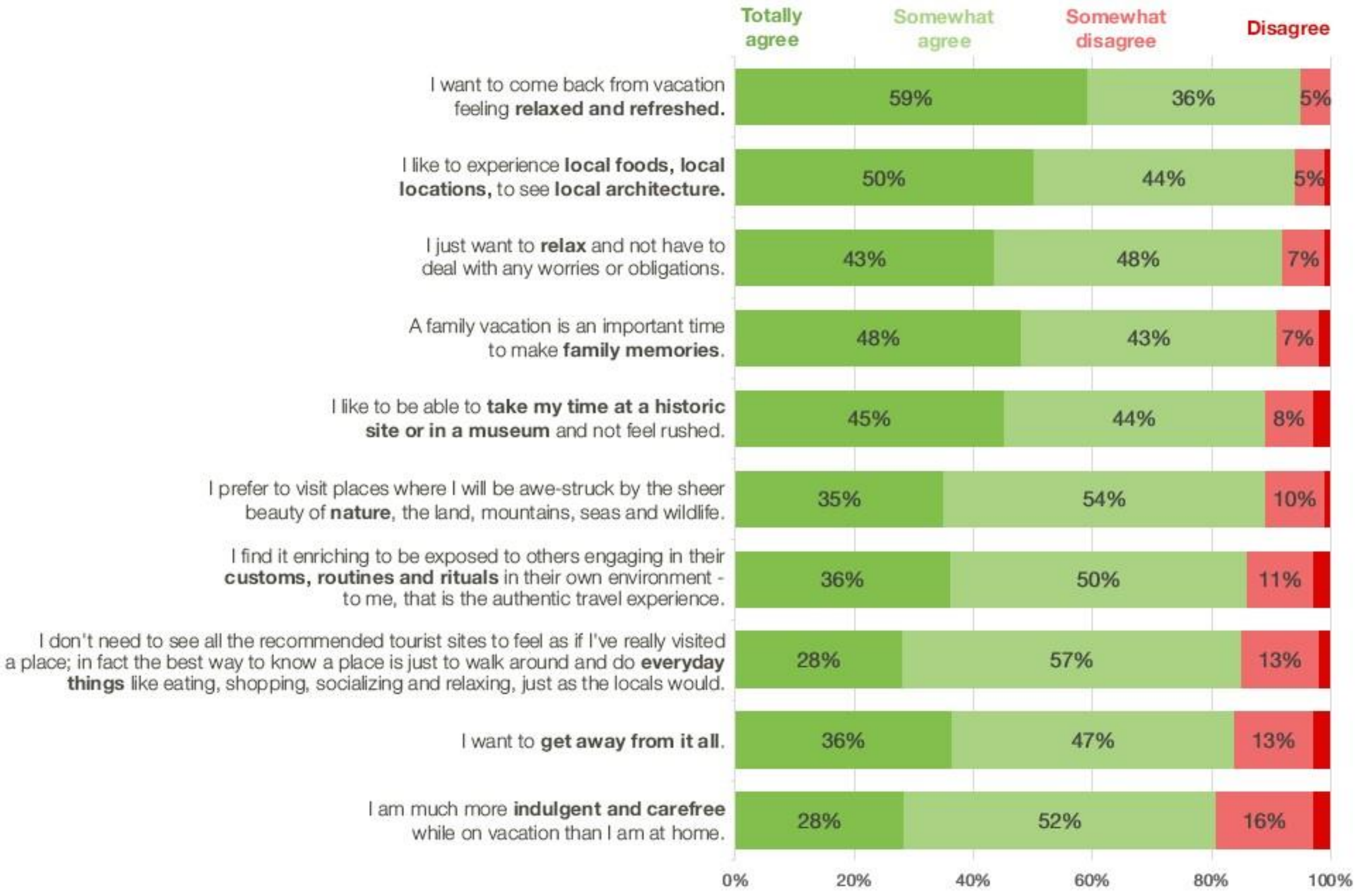

## Northern ON

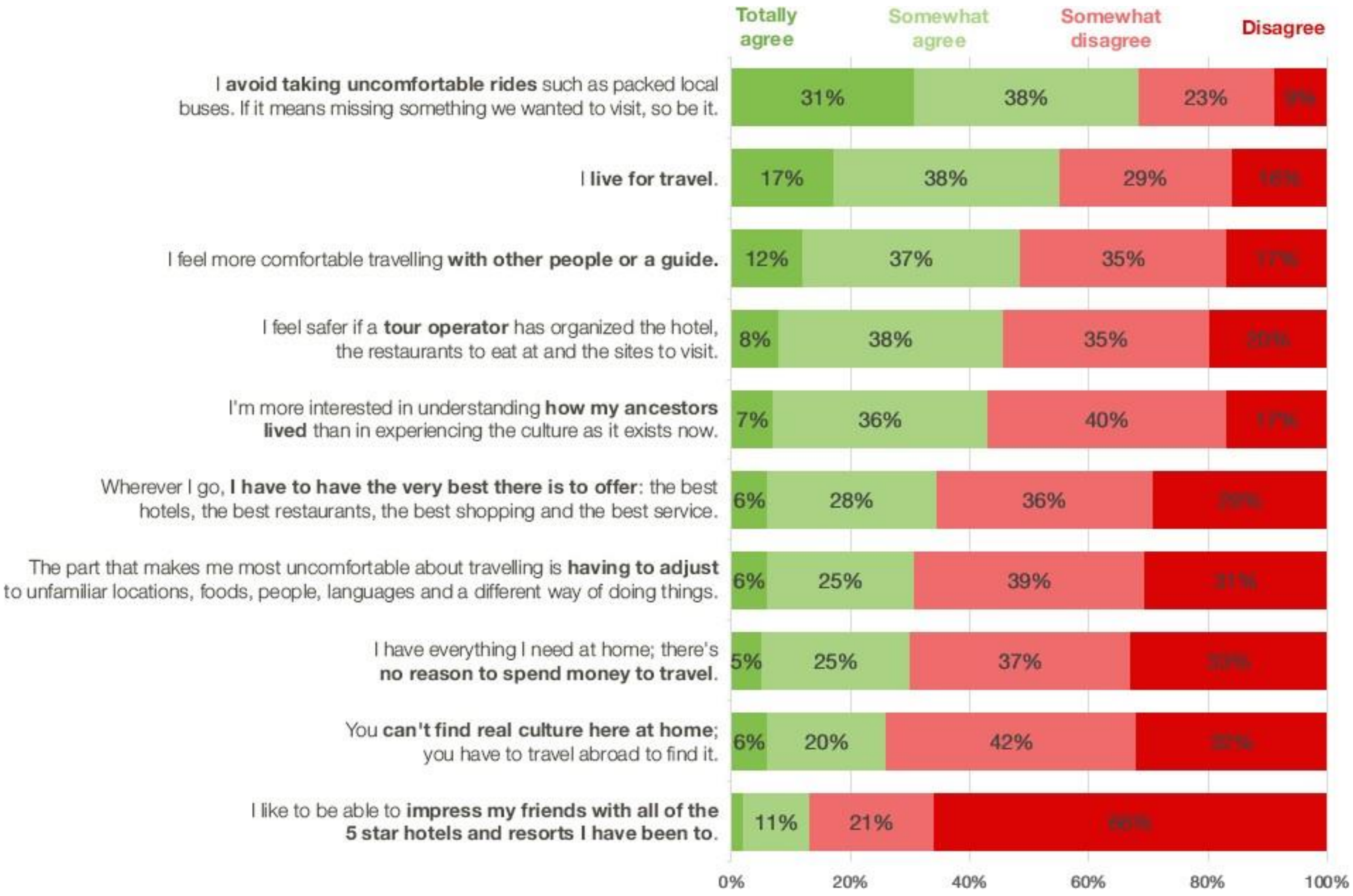


## Explorer Quotient Profiles



## QEQ. How much do you agree or disagree with each of the following statements?




Totally agree
Somewhat agree
Somewhat disagree
Disagree
I avoid taking uncomfortable rides such as packed local buses. If it means missing something we wanted to visit, so be it.
31% 38% 23%
I live for travel.
17% 38% 29%
I feel more comfortable travelling with other people or a guide.
12% 37% 35%
I feel safer if a tour operator has organized the hotel, the restaurants to eat at and the sites to visit.
8% 38% 35%
I'm more interested in understanding how my ancestors lived than in experiencing the culture as it exists now.
7% 36% 40%
Wherever I go, I have to have the very best there is to offer: the best hotels, the best restaurants, the best shopping and the best service.
6% 28% 36%
The part that makes me most uncomfortable about travelling is having to adjust to unfamiliar locations, foods, people, languages and a different way of doing things.
6% 25% 39% 31%
I have everything I need at home; there's no reason to spend money to travel.
5% 25% 37%
You can't find real culture here at home; you have to travel abroad to find it.
6% 20% 42%
I like to be able to impress my friends with all of the 5 star hotels and resorts I have been to.
11% 21%
0% 20% 40% 60% 80% 100%