

SOUTH EASTERN ONTARIO

Insights and Trends Brief

Tourism Summit, 2018

Oliver Martin, Twenty31 Consulting Inc.
Erica D'souza, Twenty31 Consulting Inc.

September 7, 2018



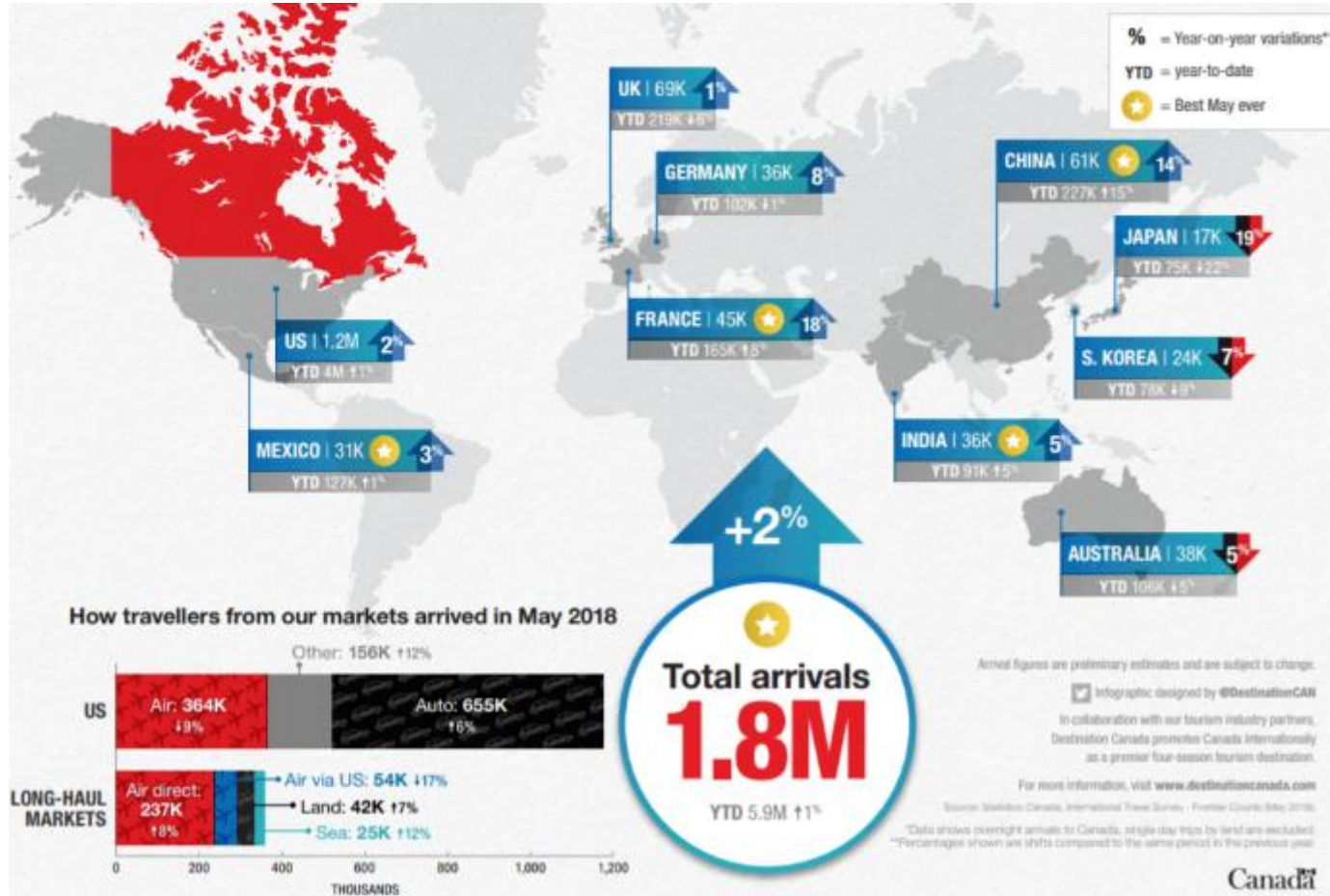
RTO9's Multi-year Research and Insights Plan



	Year 1: April 1 2018 to March 31 2019	Year 2: April 1 2019 to March 31 2020	Year 3: April 1 2020 to March 31 2021
Primary Initiatives	<ol style="list-style-type: none"> 1. Consumer Insights Survey (1 wave - Pilot) 2. Industry Insights Survey (1 wave – Pilot) 	<ol style="list-style-type: none"> 1. Consumer Insights Survey (2 waves) 2. Industry Insights Survey (2 waves) 3. Brand Assessment Study 	<ol style="list-style-type: none"> 1. Consumer Insights Survey (4 waves) 2. Industry Insights Survey (2 waves) 3. Brand Assessment Study
Secondary Initiatives	<ol style="list-style-type: none"> 1. Visitor Statistics 2. Consumer Segmentation 	<ol style="list-style-type: none"> 1. Visitor Statistics 2. Consumer Segmentation 3. Visitor Attraction Tracking 	<ol style="list-style-type: none"> 1. Visitor Statistics 2. Consumer Segmentation 3. Visitor Attraction Tracking
Communication and Dissemination Initiatives	<ol style="list-style-type: none"> 1. Industry Newsletter (launch) 2. Industry Forum/Research Training Workshop 3. Set up of Web Portal 4. Set up of Standardized Metrics 	<ol style="list-style-type: none"> 1. Industry Newsletter 2. Refinement of Web Portal 3. Full Roll-Out of Standardized Metrics 	<ol style="list-style-type: none"> 1. Industry Newsletter 2. Industry Forum 3. Refinement of Web Portal 4. Full Roll-Out of Standardized Metrics



Tourism to Canada is Booming (May 2018), Yet Dispersal is a Real Challenge





- Personal Fulfillment is the new Ultimate Luxury
- Tours & Activities are finally coming into their own = i.e., the importance of curated experiences
- Video and user-generated content increasing influence travel decisions

Most Popular Experiences

Local flavors, rhythms - and wildlife - are travelers' top pastimes.

1 **Lisbon's Best Flavors**
Lisbon

2 **Secret Concert in a Treehouse!**
London

3 **Raise a Glass to Prohibition**
New York

4 **Brixton Hidden Jazz Club**
London

5 **Hollywood Sign Walk to the Top**
Los Angeles

Cultural, Culinary and Adventure Activities Appeal to Immersive Travellers



1. Historical and heritage tour

+98%



2. Sunset cruises

+89%



3. Private day trips

+74%



4. Snorkeling

+64%



5. Sailing trips

+55%



6. Catamaran trips

+52%



7. Cooking classes

+51%



8. Kayaking and canoeing

+49%



9. Food tours

+49%



10. Archaeology Tours

+49%



Speak to the Travellers and the Tourists will Follow

Free Spirits

12% of Canadian Market



Demographics

averages refer to market total



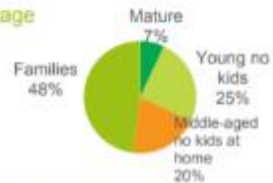
Education: Higher than average

Employment: FT, PT, above avg. # of students

Household Income: Higher than average



Lifestage



© 2012 Canadian Tourism Commission

Cultural Explorers

9% of Canadian Market



Demographics

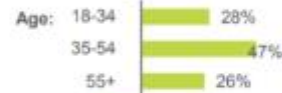
averages refer to market total



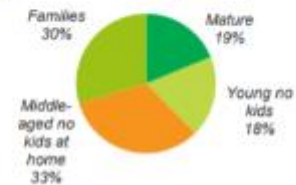
Education: Average

Employment: FT, slightly above avg. # of homemakers

Household Income: Average



Lifestage



Authentic Experiencers

12% of Canadian Market



Demographics

averages refer to market total



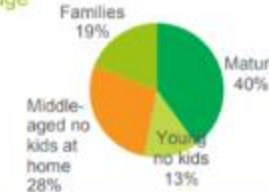
Education: Higher than average

Employment: FT, higher than avg. are retired

Household Income: Average



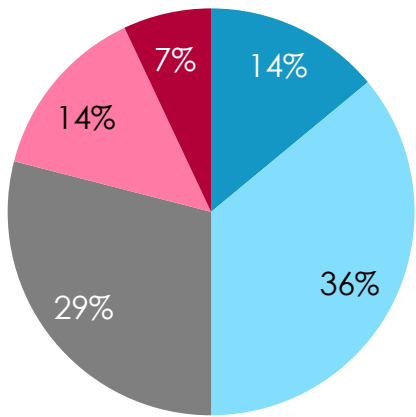
Lifestage



Understanding the Region's Brand Appeal: Awareness Drives Interest and Likelihood to Travel

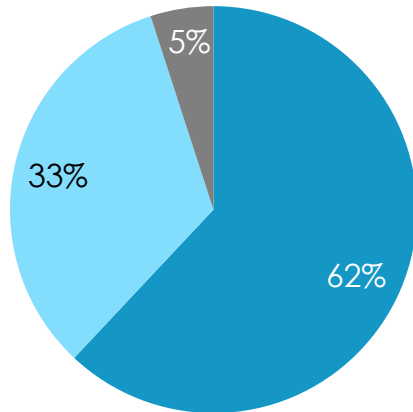
Familiarity

- Extremely familiar
- Moderately familiar
- Somewhat familiar
- Slightly familiar
- Not at all familiar



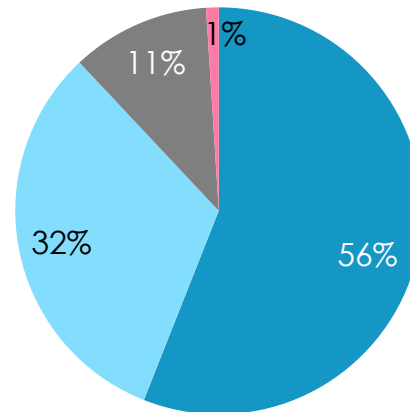
Interest

- Very interested
- Fairly interested
- Not sure
- Not very interested
- No interest at all

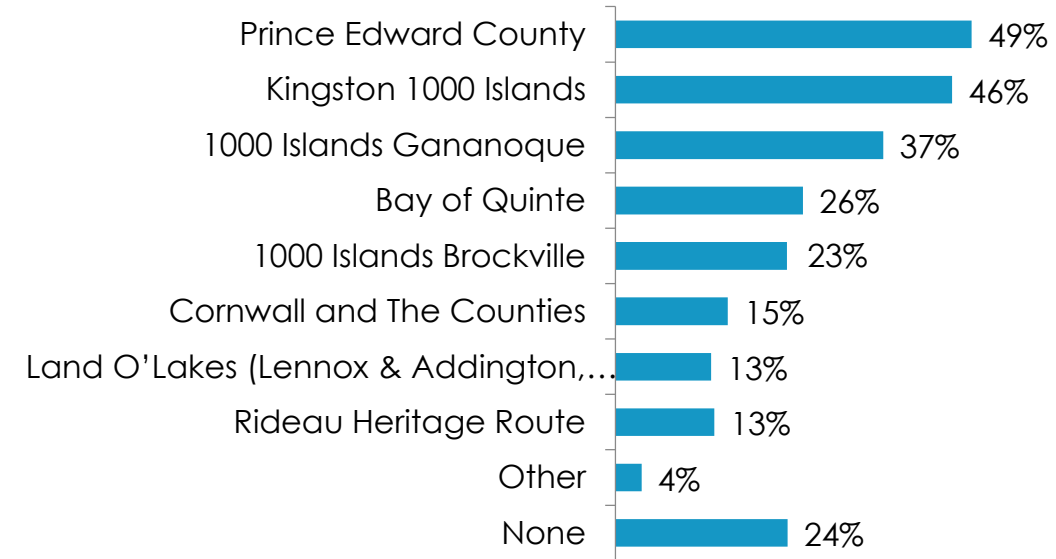


Likelihood

- Extremely likely
- Likely
- Not sure
- Unlikely
- Extremely unlikely



Actual Visitation



Research Question?



Erica D'souza: ericaf@twenty31.org

Oliver Martin: oliverm@twenty31.org

[Return to AGM Presentation](#)