

# 2020 Global Tourism Watch Highlights Report

Ontario  
November 2020

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**CANADA**   
FOR  
GLOWING  
HEARTS

Canada

Toronto  
Ontario

 **DESTINATION  
CANADA**

# STUDY OVERVIEW

## Study Overview:

As a result of the COVID-19 pandemic in 2020 and the renewed focus on domestic travel, the Canada study was conducted among the general population (excluding residents of the Northern Territories). A total of 9,059 Canadians participated.



### GTW Provincial Sample Distribution:

British Columbia Residents:	1,500
Alberta Residents:	1,500
Saskatchewan Residents:	500
Manitoba Residents:	500
Ontario Residents:	2,101
Quebec Residents:	1,507
New Brunswick Residents:	400
Nova Scotia Residents:	400
Prince Edward Island Residents:	250
Newfoundland & Labrador Residents:	401

At the provincial level, respondents are split into two groups based on their travel behaviour:

**Domestic Out-of-Province Travellers:** Canadian residents aged 18 years and older, who have taken a pleasure trip in Canada beyond their own province where they had stayed at least 2 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next year. These respondents evaluated destinations outside of their province.

**In-Province:** Canadian residents aged 18 years and older, who evaluated destinations within their province of residence.

## Context:

It is important to consider the results based in light of the COVID-19 situation at the time of data collection. In November 2020, no vaccine was approved for use and Canada was at the start of its 2<sup>nd</sup> wave of COVID-19. Many provinces tightened restrictions in November in an effort to contain the pandemic. Non-essential travel within Canada and beyond the country was discouraged. The Canada/US border had been closed since March 2020.

For additional context around the current COVID-19 situation in Canada, please refer to Destination Canada's [COVID-19 Research page](#), which includes information on resident sentiment, travel related measures, impact and recovery, and forecasting.



**Timing of Fieldwork:** Nov 2020

This report contains a summary of key metrics about residents of Ontario.

Results are presented for three main groups:

- Total residents: Results among the total sample of Ontario residents (n=2,101)
- Out-of-province: Results among out-of-province travellers in Ontario who evaluated destinations outside of Ontario (n=1,050)
- In-province: Results among residents of Ontario who evaluated destinations within Ontario (n= 1,051)

Charts are colour coded to show the results among each group:

### Legend:

Total Residents

Out-of-Province Travellers

Residents evaluating in-province destinations

# KEY HIGHLIGHTS

## Key Highlights – Ontario Market

Insight	Implication
<b>There is pent up demand for travel</b> , but Ontarians also have concerns, primarily related to health and safety in a potential destination.	<i>Illustrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Ontarians to travel within the province and to other Canadian provinces and territories in 2021.</i>
<b>There is a small group of Ontarians that feel safe travelling now.</b> This group is more likely to have travelled since the start of the pandemic and is more likely to be comfortable flying domestically. The biggest barrier to travel within Canada for those who feel safe travelling is cost.	<i>Travel deals and illustrating the value of a vacation within Ontario or to other Canadian provinces and territories may motivate this group to travel more in 2021.</i>
<b>Leisure trips and visiting family and friends will drive Ontarians' travel in 2021.</b> There is little appetite for business or conference-related travel in 2021.	<i>Low interest in business travel is a challenge that the business events sector will need to address going forward.</i>
<b>Ontarians break with a Canada-wide trend of travelling closer to home by naming British Columbia as the top out-of-province destination under consideration.</b> Quebec is the second most popular out-of-province destination.	<i>British Columbia has the most to gain from the Ontario market, followed by Quebec.</i>
<b>There are mixed opinions on city travel.</b> For out-of-province travel, there is considerable interest in visiting major cities (e.g. Vancouver and Montréal). In contrast, for travel within Ontario, there is a greater appetite for trips to destinations outside of the major cities.	<i>There is an opportunity for cities outside of Ontario to attract visitors from Ontario, while more rural areas within Ontario may find a greater opportunity with the resident market.</i>
<b>Ontarians are the most likely of all Canadian residents to use a travel agent for domestic travel.</b> They use travel agents when seeking a good deal and expert destination knowledge, and to take the hassle out of booking.	<i>There is a greater opportunity for the travel trade in the Ontario market relative to other provinces.</i>
<b>Ontarians are somewhat divided about travelling to new or familiar places, with a slight preference for the familiar.</b> Like most Canadians, Ontarians are most interested in taking trips where activities and social interactions are limited.	<i>There is an opportunity to resonate with potential Ontario travellers by highlighting uncrowded yet familiar destinations, but there is also a considerable opportunity to promote new destinations.</i>
<b>Ontarians favour outdoor activities.</b> Like most Canadians, Ontarians are focused on outdoor vacation activities, particularly hiking/walking in nature and natural attractions such as mountains or waterfalls.	<i>Communicating the availability of popular outdoor activities in uncrowded settings, whether within Ontario or in other provinces or territories, will capture the attention of potential travellers in Ontario.</i>
<b>Younger Ontarians (under 35 years) are eager to resume travelling.</b> They are less concerned about health and safety and have the strongest intent to travel both within and outside of Ontario. This audience is also the most open to visiting larger Canadian cities such as Vancouver and Montréal.	<i>Younger Ontarians (under 35 years) represent the best immediate opportunity for Ontario-based operators as well as those in other provinces and territories, and in particular for larger cities.</i>
<b>Older Ontarians (55+ years) are more hesitant to travel in the near future.</b> Much of their hesitancy is related to health and safety concerns. Those aged 55+ are also less likely to be motivated by incentives to book.	<i>Clearly illustrating in communications that health and safety measures are being followed and that a destination is safe is particularly important for attracting older Ontarians (55+ years).</i>

# DOMESTIC TRAVEL INTENT AND CONSIDERATION

## Key Insights:

- As seen with residents across Canada, the COVID-19 pandemic has severely impacted Ontarians' plans to travel in 2021.
- Relative to the Canadian average, the outlook for in-province travel in Ontario is below average, while the out-of-province outlook is in line with the Canadian average.
- With Ontario residents breaking with a Canada-wide trend of staying closer to home, **British Columbia is the province that stands to benefit the most from the Ontario outbound market. There is also a strong opportunity for Quebec and for the Atlantic region to attract visitors from Ontario.**

## Vacation Outlook – Next Year vs. Past Year (% spending more time minus % spending less time)

Staying at home	<b>+37</b>
Travelling within Ontario	<b>-13</b>
Travelling outside of Ontario, but within Canada	<b>-37</b>
Travelling outside of Canada	<b>-59</b>



Total Residents (n=2101)

## Likelihood of Travelling within Canada – Next Year

### Out-of-Province Travel

Immediate Potential  
(Any trip length within Canada  
outside of own province)



Out-of-Province Travellers (n=1050)

Market Size Potential  
(Out-of-Province Travellers  
considering visiting each region)



British Columbia	<b>2.85 M</b>
Alberta	<b>2.07 M</b>
Saskatchewan/Manitoba	<b>892,500</b>
Quebec	<b>2.53 M</b>
Atlantic	<b>4.62 M</b>
North	<b>899,500</b>

### In-Province Travel

Immediate Potential  
(Any trip length within province)



Residents evaluating in-province destinations (n=1051)

# DOMESTIC TRAVEL INTENT AND CONSIDERATION (CONT.)

## Key Insights:

- British Columbia is the province most likely to be under consideration for a visit in the next year, and Vancouver is the top destination. Closer to home, the province of Quebec, and in particular Montréal, are the next most popular. **British Columbia stands to benefit the most from the Ontario outbound market.**
- Major Canadian cities (Vancouver and Montréal) are of interest to Ontarians, as are more nature-oriented destinations such as Banff & Lake Louise and mid-size cities (Québec City & Victoria). **There are opportunities to attract Ontarians to a variety of destinations outside of their own province.**
- Within Ontario, the large cities, Toronto and Ottawa, are still a draw, but it is more rural areas that are most popular (Niagara region and Muskoka). **There is an opportunity for smaller destinations in Ontario to capitalize on the in-province market.**

## Destinations Seriously Considering – Next Year

### Out-of-Province Travel – Top 3 Provinces

<b>43%</b>	<b>38%</b>	<b>31%</b>
British Columbia	Quebec	Alberta

### Top 5 Destinations

<b>41%</b>	<b>31%</b>	<b>29%</b>	<b>27%</b>	<b>25%</b>
Vancouver	Montréal	Banff & Lake Louise	Québec City	Victoria

Out-of-Province Travellers (n=1050)

### In-Province Travel – Top 5 Destinations

Niagara region	<b>42%</b>
Muskoka	<b>31%</b>
Toronto	<b>25%</b>
South Eastern Ontario	<b>21%</b>
Ottawa	<b>20%</b>

Residents evaluating in-province destinations (n=1051)

## Most Appealing Destinations / Destination Knowledge

### Out-of-Province Travel – Top 3 Appealing Provinces

	British Columbia	Quebec	Alberta
Most Appealing	<b>29%</b>	<b>22%</b>	<b>15%</b>
Knowledge (excellent/very good)	<b>42%</b>	<b>42%</b>	<b>32%</b>

### Top 3 Appealing Destinations

	Vancouver	Banff & Lake Louise	Montréal
Most Appealing	<b>19%</b>	<b>11%</b>	<b>9%</b>
Knowledge (excellent/very good)	<b>48%</b>	<b>43%</b>	<b>42%</b>

Out-of-Province Travellers planning to travel within Canada in next year (n=863/n=860)

### In-Province Travel – Top 3 Appealing Destinations

	Most Appealing	Knowledge (excellent/very good)
Niagara region	<b>28%</b>	<b>42%</b>
Muskoka	<b>23%</b>	<b>28%</b>
Toronto	<b>14%</b>	<b>47%</b>



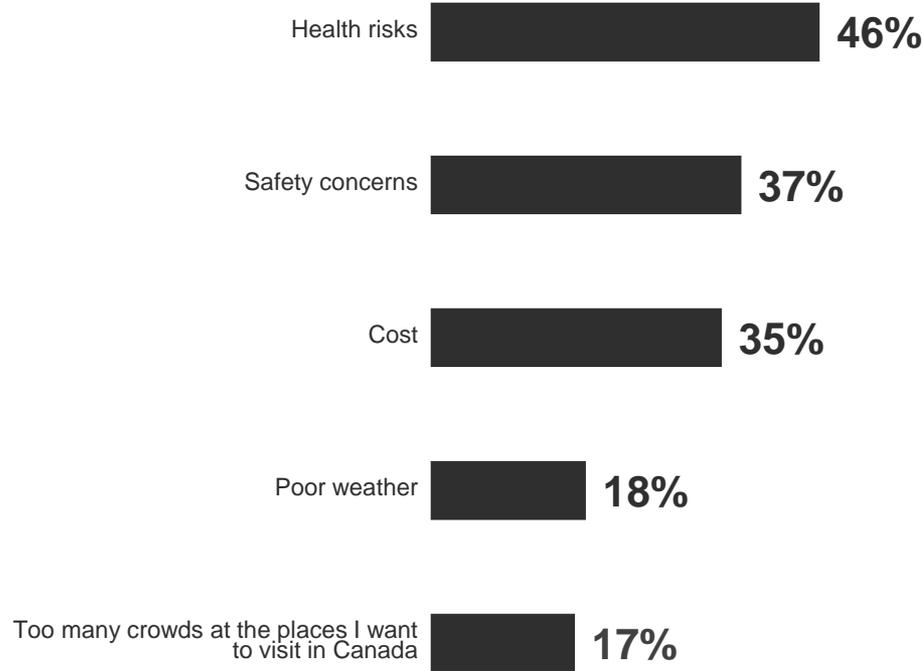
Residents evaluating in-province destinations planning to travel within Canada in next year (n=762)

# BARRIERS TO TRAVEL WITHIN CANADA

## Key Insights:

- Health risks are the top barrier to travel within Canada. Concerns about health risks increase with age and may be linked to the availability of a vaccine for COVID-19 (as this study was fielded in November 2020). As more Ontario residents are vaccinated, health risks may decline as a barrier to travel; meanwhile, **demonstrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Ontarians to travel within the province and to other Canadian provinces and territories.**
- Just 16% of Ontarians feel safe travelling now. This group is more likely to have travelled during the pandemic and more likely to say they are comfortable flying domestically. The top barrier for this group is cost, so **travel deals could motivate those already comfortable with travelling to take more trips.**

## Top 5 Barriers to Travel



Total Residents (n=2101)

# COVID-19 CONSIDERATIONS

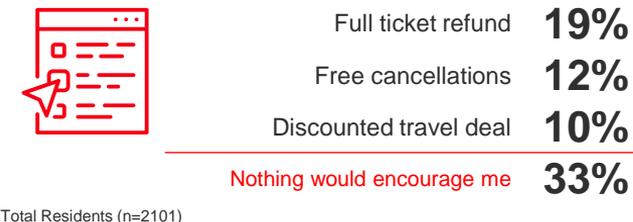
## Key Insights:

- There is pent up demand for travel, with 60% of Ontarians indicating that they are eager to travel again.
- Ontarians are most interested in taking trips where activities and social interactions are limited, and with more outdoor-based activities and attractions. They are somewhat divided on re-visiting familiar destinations versus going somewhere new, although there is a slight preference for familiar destinations. **There is a greater opportunity to resonate with potential Ontario travellers by highlighting outdoor activities in uncrowded settings.**
- While one-third of Ontarians say nothing could encourage them to book a trip in the near future (increasing to half among those 55+ years), the other two-thirds are open to a variety of booking incentives. **Flexible options and travel deals may encourage some Ontarians to book sooner.**
- When choosing a destination, health and safety measures and COVID-19 case counts are the most important considerations for potential Ontario travellers. **To reassure potential visitors, it is important to communicate that health and safety protocols are in place.**

## Transportation Mode Likely to Use – Top 3



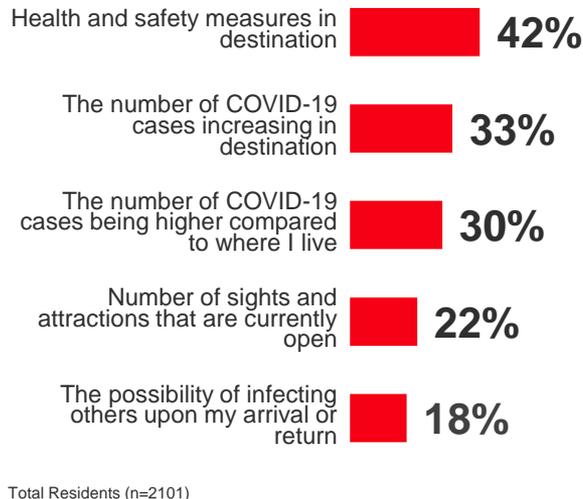
## Incentives to Book in the Near Future – Top 3



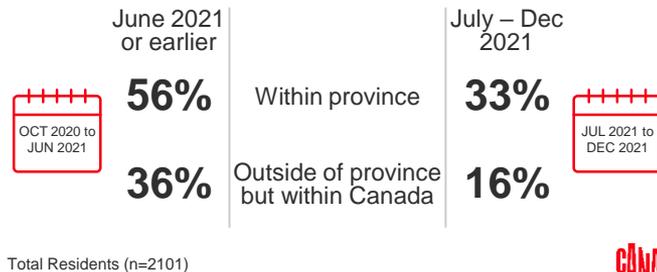
## Attitudes Towards Travel – Top2Box



## COVID Specific Factors to Consider when Selecting Destination – Top 5



## First Time Comfortable Travelling



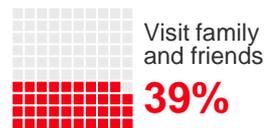
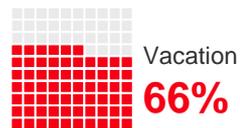
# KEY CHARACTERISTICS OF NEXT CANADA TRIP

## Key Insights:

- Travelling for vacation purposes and visiting family and friends will drive travel in 2021. There is little interest in business or conference-related travel in 2021, **which is a challenge that the business events sector will need to address going forward.**
- In the next year, domestic travel parties will largely be made up of immediate family, with friends being more likely to travel together within Ontario. **Couples and families represent the greatest potential markets for travel within and outside of Ontario.**

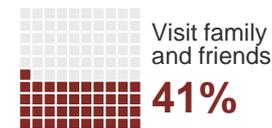
## Trip Purpose

### Out-of-Province Travel



Out-of-Province Travellers answering (n=897)

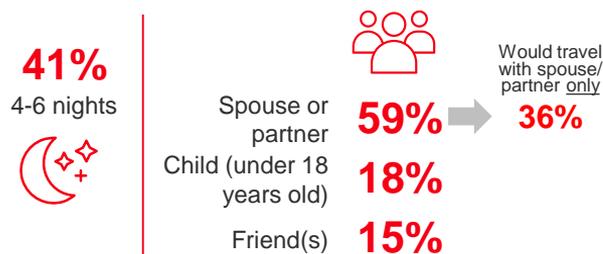
### In-Province Travel



Residents evaluating in-province destinations answering (n=769)

## Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

### Out-of-Province Travel



Out-of-Province Travellers answering (n=897)

### In-Province Travel



Residents evaluating in-province destinations answering (n=769)

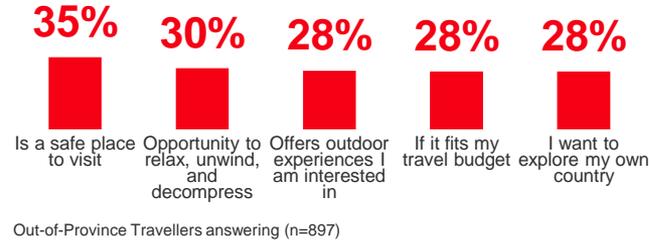
# KEY CHARACTERISTICS OF NEXT CANADA TRIP (CONT.)

## Key Insights:

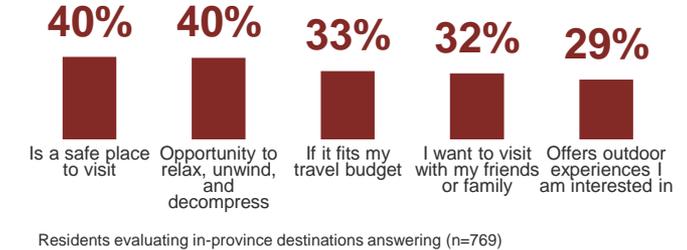
- Destination safety and relaxation opportunities are the top factors Ontarians consider when choosing a destination. **Communicating that health and safety measures are in place will help to reassure potential visitors.**
- Ontarians are interested in a variety of outdoor activities. Their vacation activity interests are consistent with the Canadian average. **Ontario represents a good potential market for operators offering outdoor-based itineraries.**

## Destination Selection Factors – Top 5

### Out-of-Province Travel

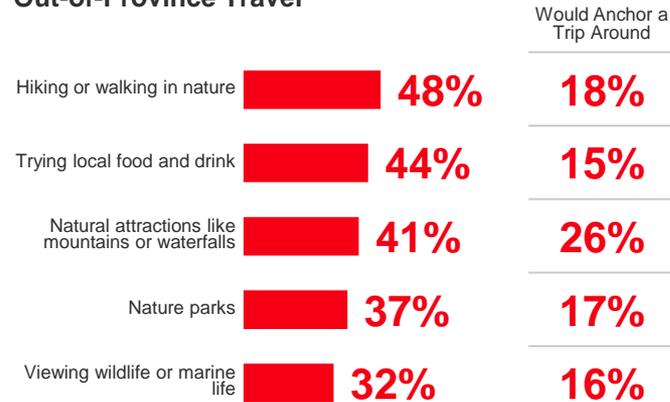


### In-Province Travel

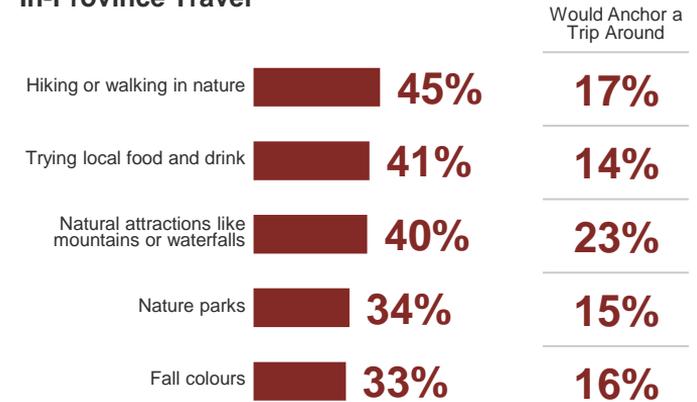


## Vacation Activities – Top 5

### Out-of-Province Travel



### In-Province Travel



# BOOKING

## Key Insights:

- Ontarians are the most likely of all Canadian residents to use a travel agent for domestic travel.
- When deciding to work with a travel agent for any part of the trip planning process, Ontarians are typically looking for a good deal, expert destination knowledge, and to take the hassle out of booking. **The greatest opportunity for travel agents to engage with potential travellers in Ontario is by highlighting these services at the booking stage.**

## Accommodation Booking – Top 3

### Out-of-Province Travel



Out-of-Province Travellers answering (n=897)

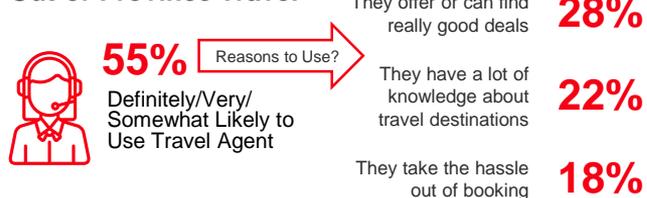
### In-Province Travel



Residents evaluating in-province destinations answering (n=769)

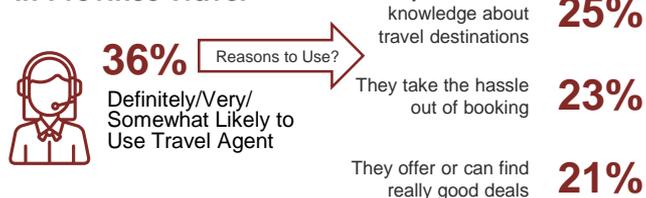
## Likelihood to Use Travel Agents/Reasons to Use Agent – Top 3

### Out-of-Province Travel



Out-of-Province Travellers answering (n=897)  
Out-of-Province Travellers likely to use agent (n=553)

### In-Province Travel



Residents evaluating in-province destinations answering (n=769)  
Residents evaluating in-province destinations likely to use agent (n=364)

## Travel Agent Tasks – Top 3

### Out-of-Province Travel



Out-of-Province Travellers likely to use agent (n=499)

### In-Province Travel



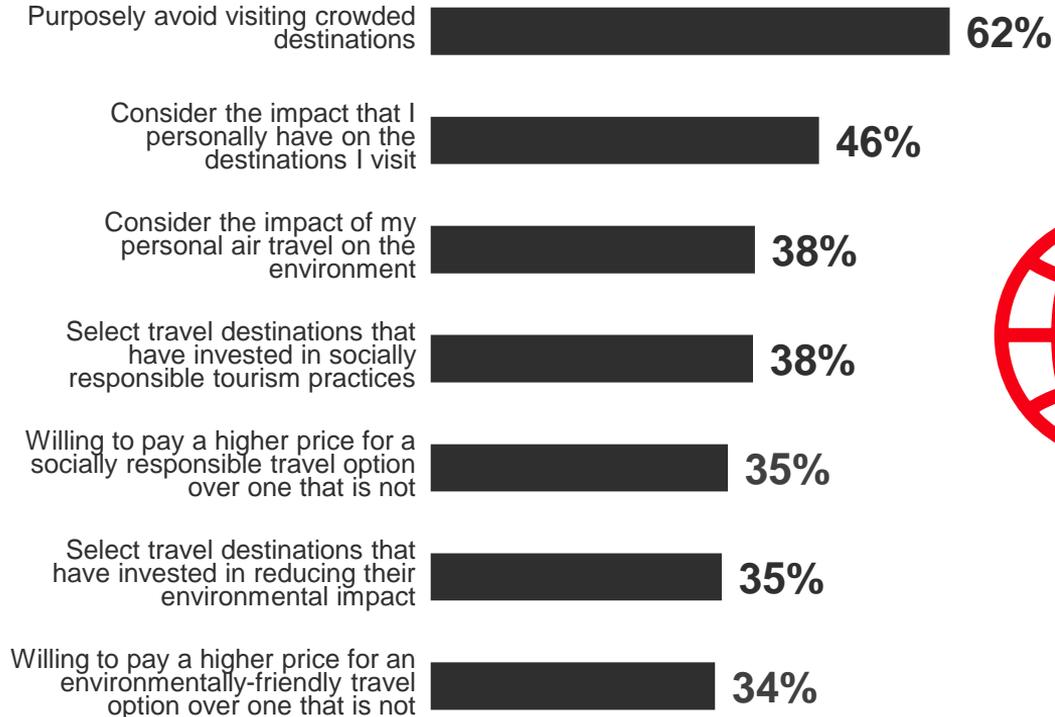
Residents evaluating in-province destinations likely to use agent (n=279)

# SUSTAINABLE TRAVEL

## Key Insights:

- Ontarians are intentionally seeking out less crowded destinations, which may be related to concerns about COVID-19.
- At least one-third of Ontarians say they consider various aspects of sustainability when selecting travel destinations, and they may be willing to pay for more responsible options. However, only a handful mention the availability of eco-friendly travel activities as a top factor influencing their destination choice, whether for out-of-province (8%) or in-province (9%) trips. ***This suggests that while sustainability is a consideration for potential Ontario travellers, there are other factors that play a greater role in destination selection.***

## Attitudes About Sustainable Travel



Total Residents (n=2101)

## DOMESTIC TRAVEL INTENT AND CONSIDERATION

### Vacation Outlook – Next Year vs. Past Year

**S2.** How do you plan to spend your vacation time in the next 12 months compared to the last 12 months? Will you spend your vacation time ...

### Likelihood of Traveling Within Canada – Next Year

**MP6.** Realistically, how likely are you to take a vacation trip outside of your own province, but within Canada in the next year?

Market Potential – Calculated value: Total out of province travellers (S3, S5) seriously considering visiting a province (BVC1a)

### Destinations Seriously Considering – Next Year

**BVC1a.** You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

**BVC1b.** You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

### Most Appealing Destinations – Top 3 / Destination Knowledge

**MP8a.** Earlier, you mentioned you would seriously consider visiting the following provinces in the next year. Which place most appeals to you? (Select one)

**MP8b.** Earlier, you mentioned you would seriously consider visiting the following destinations in the next year. Which place most appeals to you? (Select one)

**MP3.** How would you rate your level of knowledge of vacation opportunities in each of the following destinations? (Select one for each)

## BARRIERS TO TRAVEL WITHIN CANADA

### Top 5 Barriers to Travel

**MP9.** Which of the following reasons might prevent you from travelling within Canada? (Select all that apply)

## COVID-19 CONSIDERATIONS

### Transportation Mode Likely to Use – Top 3

**COV16.** As government restrictions related to COVID-19 are relaxed, how likely are you to use the following modes of transportation?

### Incentives to Book in the Near Future – Top 3

**COV17.** Which one of the following offerings would most encourage you to make a travel booking in the near future? (Select one)

### Attitudes Toward Travel – Top2Box

**COV13.** Thinking of your next vacation, as government restrictions related to COVID-19 are relaxed, how much do you agree or disagree with the following statements?

### Factors to Consider when Selecting Destination (COVID Specific) – Top 5

**NEWQ4.** When thinking about taking a vacation trip to [within province / outside your own province, but within Canada], which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

### First Time Comfortable Travelling

**COV5.** Given the current situation with COVID-19, when is the first month that you would feel comfortable travelling to the following destinations?

## KEY CHARACTERISTICS OF NEXT CANADA TRIP

### Trip Purpose

**FT2.** Thinking of your next trip to [within province / outside your own province, but within Canada], what would be the main purpose of this trip?

### Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

**FT4.** Thinking of your next trip to [within province / outside your own province, but within Canada], how many nights do you think you would spend?

**FT5.** Thinking of your next trip to [within province / outside your own province, but within Canada], who would you travel with? (Select all that apply)

**FT10.** Thinking of your next trip to [within province / outside your own province, but within Canada], which types of accommodation would you consider staying at? (Select all that apply)

### Destination Selection Factors – Top 5

**FT3.** Thinking of your next trip to [within province / outside your own province, but within Canada], which of the following would factor into your choice to travel to that destination? (Select all that apply)

### Vacation Activities – Top 5

**FT11.** Thinking of your next trip to [within province / outside your own province, but within Canada], what activities would you be interested in participating in? (Select all that apply)

**MP12.** Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

## BOOKING

### Accommodation Booking – Top 3

**FT8.** Thinking of your next trip to [within province / outside your own province, but within Canada], which methods would you be likely to use to book your accommodation? (Select all that apply)

### Likelihood to Use Travel Agents / Travel Agent Tasks – Top 3

**FT6.** Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Transat Travel, they do not include online booking engines like Expedia or Travelocity. Thinking of your next trip to [within province / outside your own province, but within Canada], how likely are you to use a travel agent or tour operator to help you research or book your trip?

**NEWQ2.** Which of the following reasons is the most important consideration for using a travel agent to book your next vacation trip?

### Travel Agent Tasks – Top 3

**FT7.** Which of the following would you have a travel agent or tour operator help you with? (Select all that apply)

## SUSTAINABLE TRAVEL

### Agreement with Statements – Top2Box (Strongly/Somewhat Agree)

**PC31.** Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”. Please indicate your level of agreement with each of the following statements ...