



Travel Industry Council of Ontario

Survey of Ontario consumers' perceptions & sentiments around travel

Methodology

The following research employed a quantitative research model with an online market survey via PMG's Research-Go platform.

The **sampling for the research included 1,209 Ontario residents** (MOE +/- 2.81% at 95% confidence interval). All findings are shown on an unweighted basis. Fieldwork was executed between January 20 and January 23, 2023.

The entire research process was executed by PMG Intelligence, an Ontario-based market research and data intelligence company.

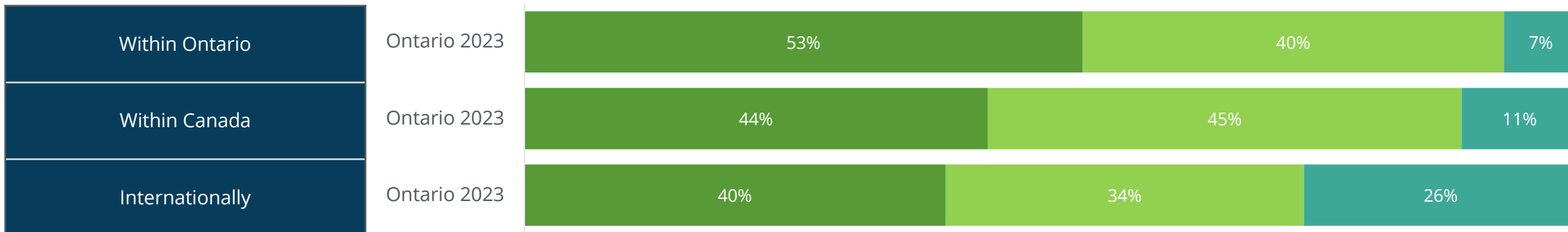




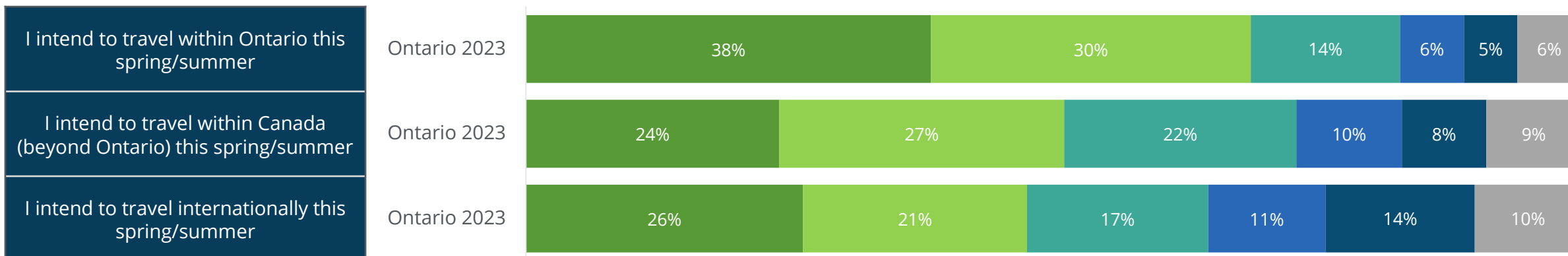
Attitudes towards travel industry

Changes in and intentions for travel

We would like to understand how your travel preferences may have changed over the last 5 years. Please indicate whether you are more likely, less likely, or as likely to travel to (or within) the following destinations...

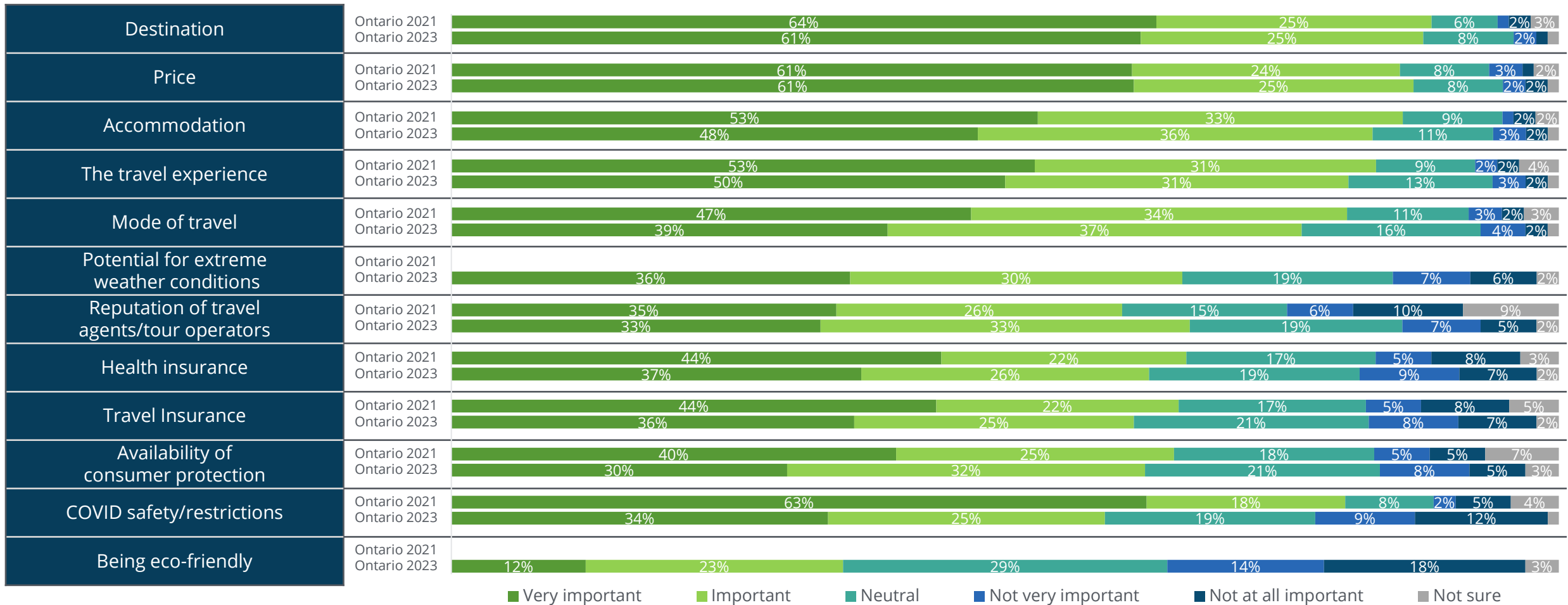


Considering your potential for travel this spring or summer, how much do you agree or disagree with the following statements...?



Factors driving travel purchase decision

People consider different things when making travel plans. To what extent do you consider the following when making travel purchases? (0-10 scale)



Although many elements measured have decreased in being 'very important' from 2021, most still received a high rating for importance overall.

Factors driving travel purchase decision – by age

% “Very important” and “Important” shown

	Age						2021	2023
	<25	25 - 34	35 - 44	45 - 54	55 - 64	65+		
Destination	85%	81%	86%	89%	96%	95%	89%	86%
Price	79%	83%	87%	92%	92%	91%	85%	86%
Accommodation	77%	79%	84%	87%	87%	92%	86%	84%
The travel experience	76%	77%	81%	86%	85%	83%	84%	81%
Mode of travel	70%	70%	77%	80%	82%	89%	81%	76%
Potential for extreme weather conditions	61%	60%	66%	71%	73%	73%	N/A	66%
Reputation of travel agents/tour operators	57%	57%	70%	68%	78%	75%	61%	66%
Health insurance	54%	58%	57%	69%	73%	82%	66%	63%
Travel Insurance	52%	54%	53%	69%	75%	79%	66%	61%
Availability of consumer protection	54%	56%	64%	67%	66%	78%	65%	62%
COVID safety/restrictions	51%	52%	57%	62%	68%	78%	81%	59%
Being eco-friendly	36%	33%	34%	32%	41%	48%	N/A	35%

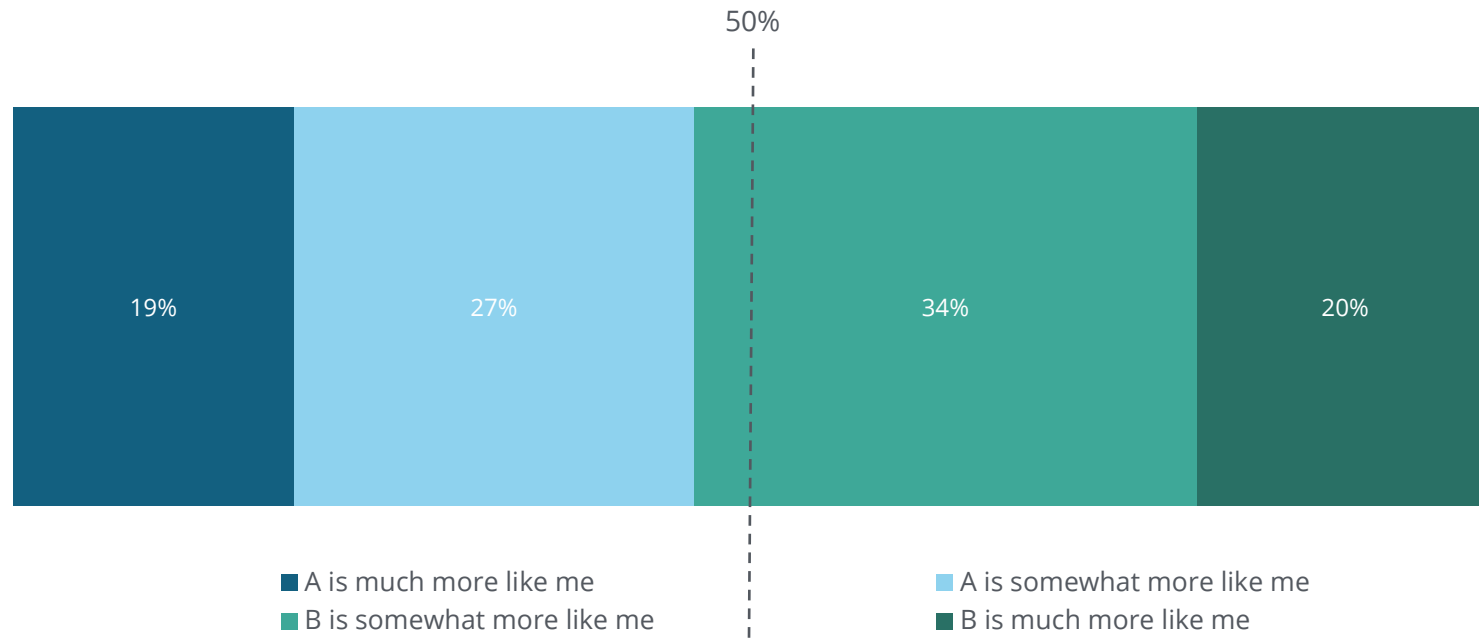


When booking travel there is a relatively equal divide in how consumers are influenced in their travel decisions regarding cost and experience

For the following, please indicate if option A or Option B best describes you?

A: When I book travel, I am more influenced by the financial investment

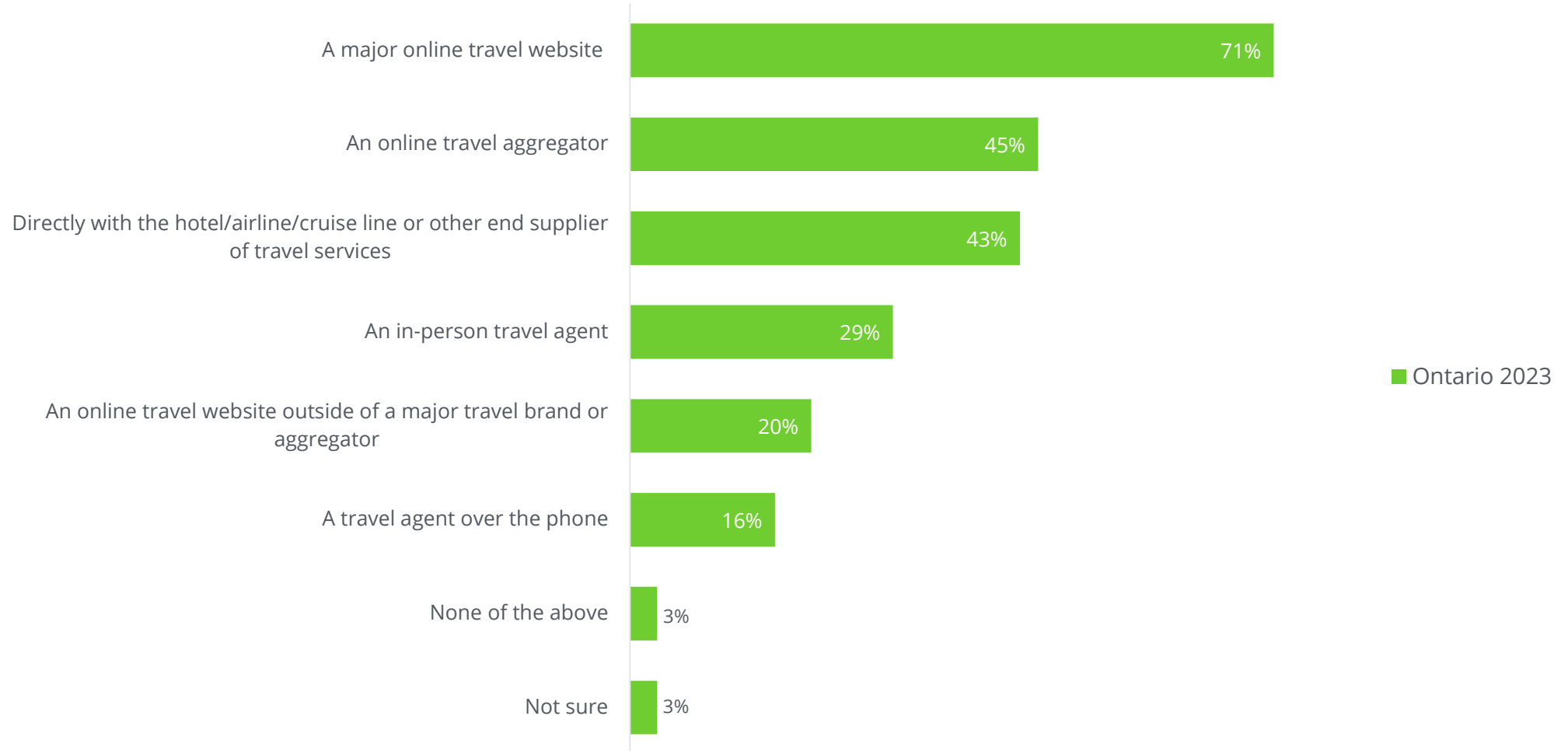
B: When I book travel, I am more influenced by the experience/emotional investment



	Age						Total
	<25	25-34	35-44	45-54	55-64	65+	
Influenced by financial investment (much more/somewhat more)	48%	48%	49%	47%	40%	41%	46%
Influenced by experience/emotional investment (much more/somewhat more)	52%	52%	51%	53%	60%	59%	54%

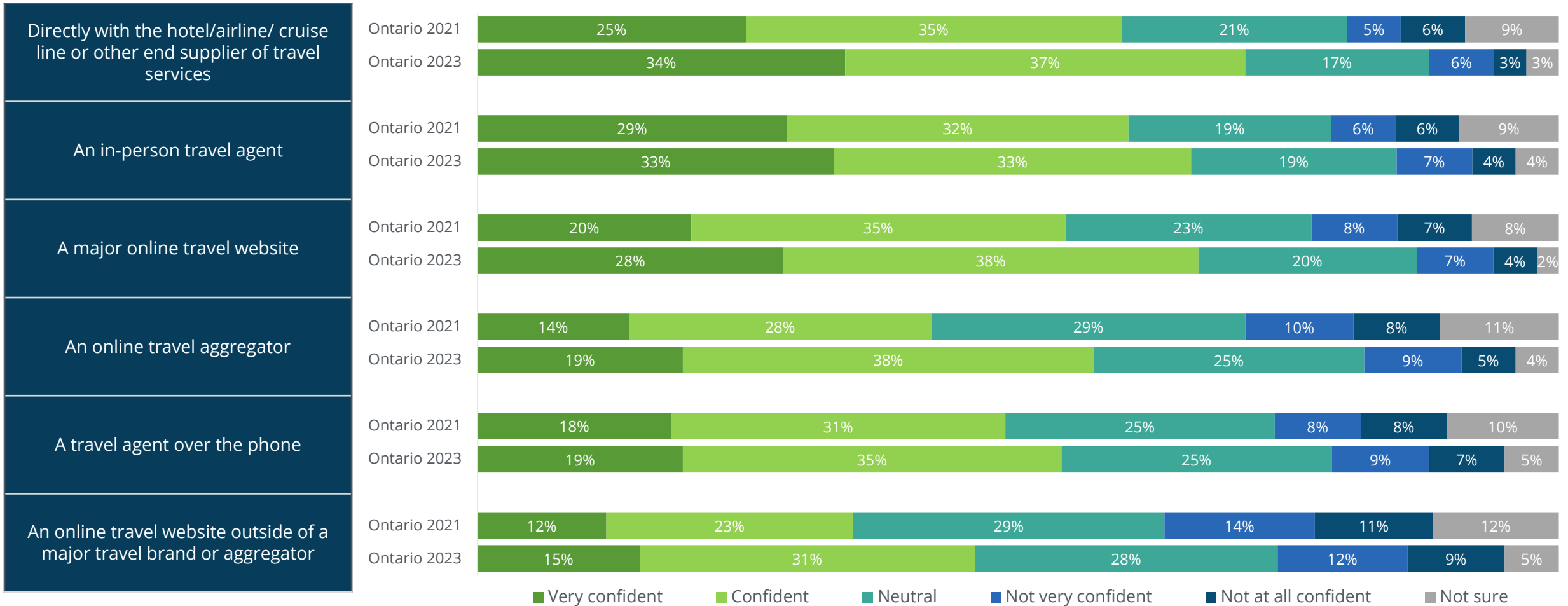
Methods of booking travel

Which of the following, if any, would you consider booking travel with? [CHECK ALL THAT APPLY]



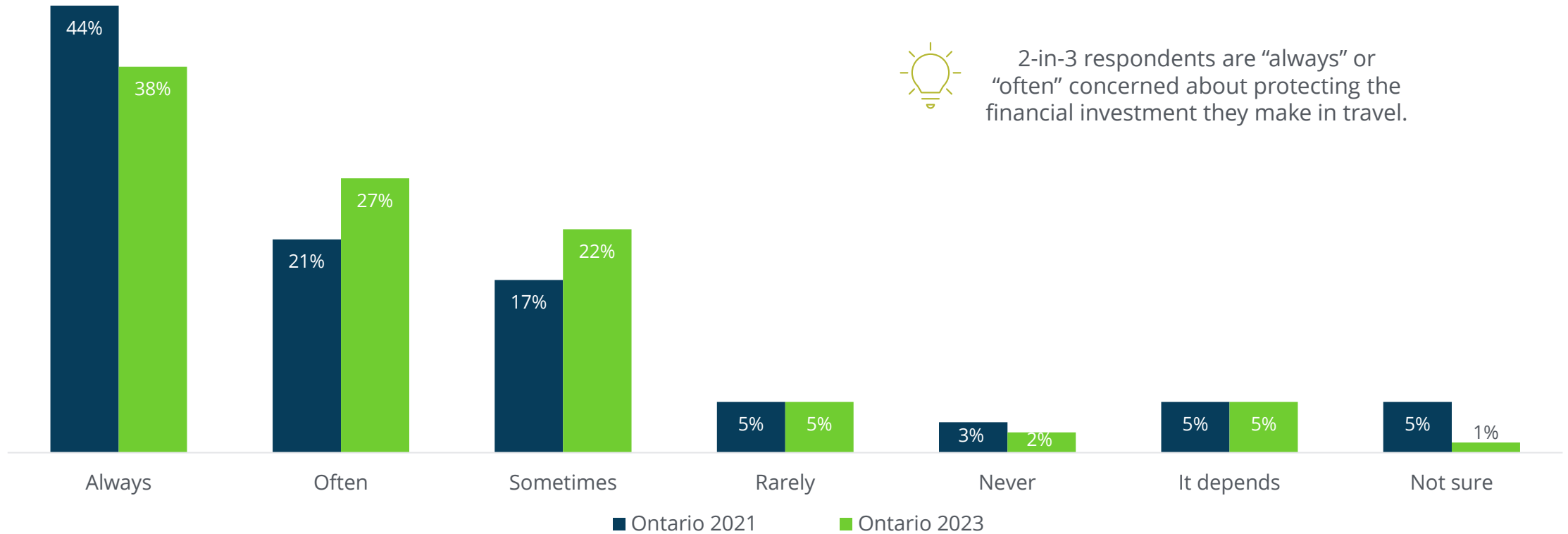
Confidence in travel arrangement information

How confident are you that you are getting accurate and up-to-date information when making travel arrangements through the following...? (0-10 scale)



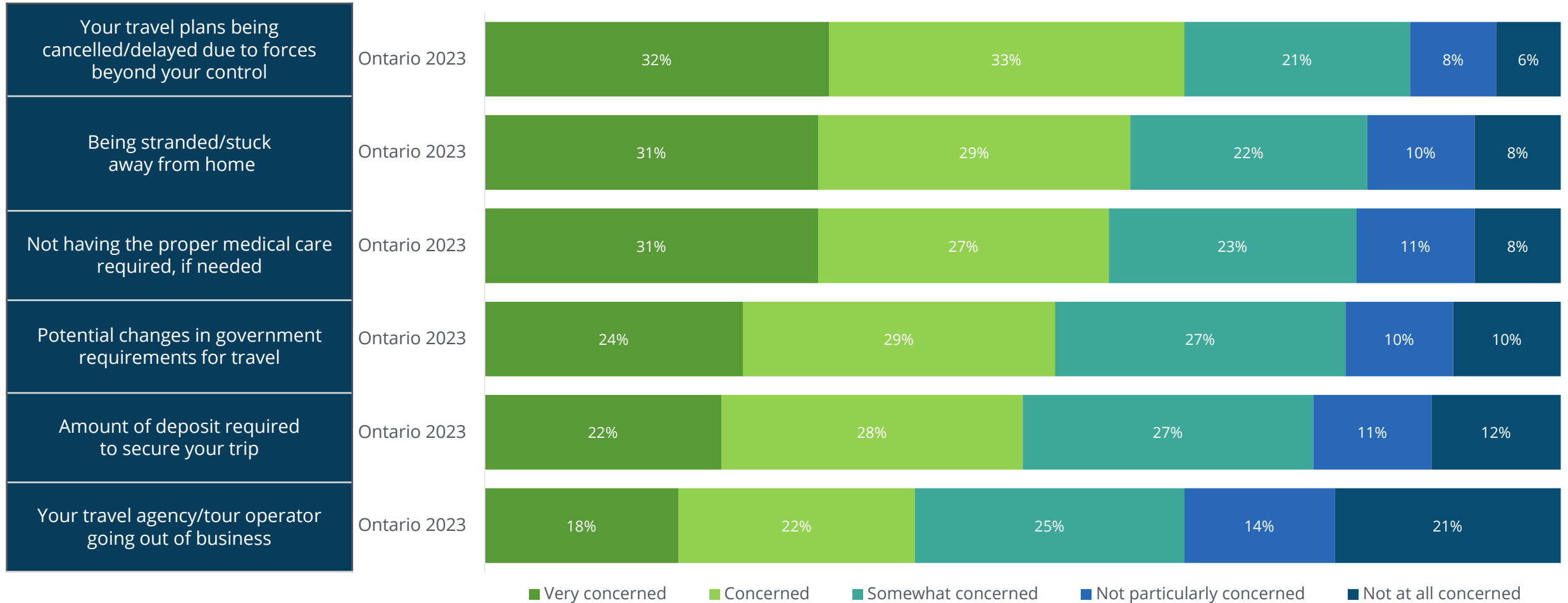
Concern with protecting travel financial investment

When you book travel, how often are you concerned about protecting the financial investment you made?



Concern for potential travel issues

How concerned are you about the potential for the following when making your travel decisions...? (0-10 scale)



% “Very concerned” and “Concerned” shown

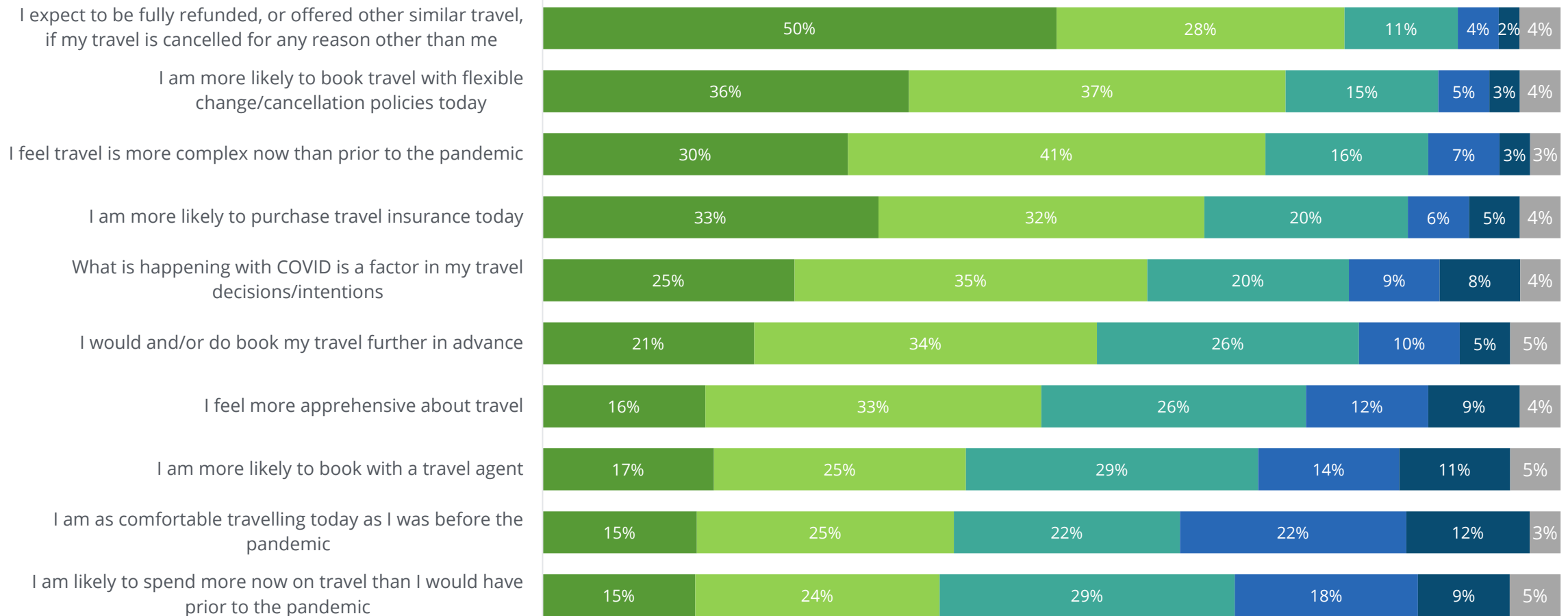
	Age						2023
	<25	25 - 34	35 - 44	45 - 54	55 - 64	65+	
Your travel plans being cancelled/delayed due to forces beyond your control	56%	62%	61%	71%	72%	71%	65%
Being stranded/stuck away from home	53%	60%	58%	64%	61%	68%	60%
Not having the proper medical care required, if needed	49%	49%	57%	62%	70%	73%	58%
Potential changes in government requirements for travel	45%	51%	53%	58%	55%	64%	53%
Amount of deposit required to secure your trip	51%	47%	48%	55%	48%	55%	50%
Your travel agency/tour operator going out of business	36%	36%	34%	44%	53%	50%	40%



COVID and the impact on travel preferences today

We would like to understand how the COVID pandemic may have altered your travel preferences and behaviours. How much do you agree or disagree with the following statements...?

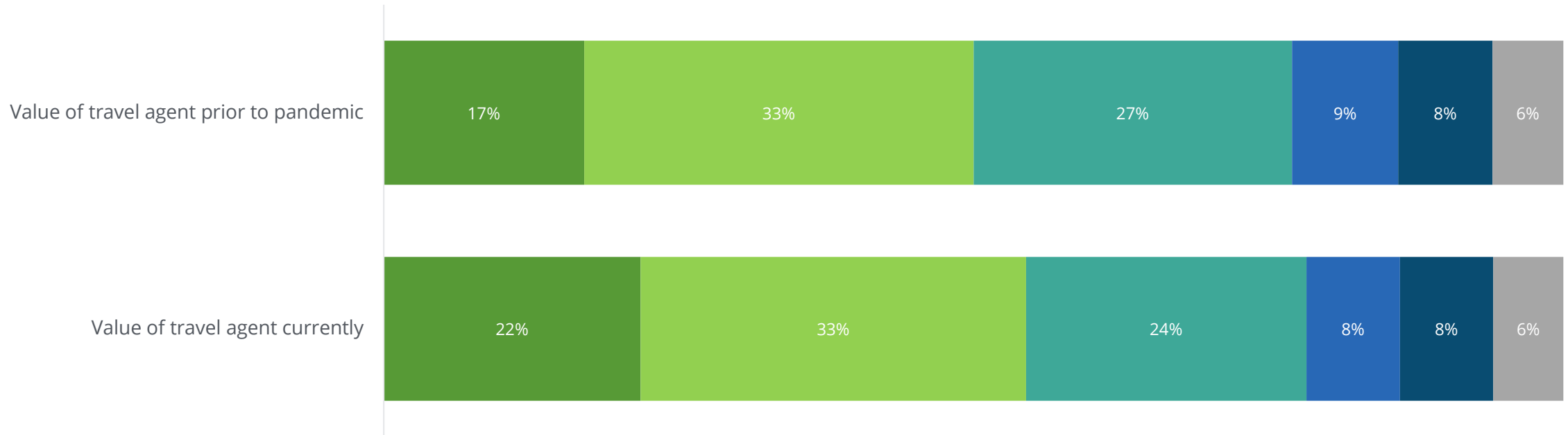
■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Not sure



Value of travel agent

How would you rate the value of a travel agent to you...?

■ Extremely valuable
 ■ Valuable
 ■ Somewhat valuable
 ■ Not particularly valuable
 ■ Not at all valuable
 ■ Not sure



Top 2 Box	Age						Total
	<25	25-34	35-44	45-54	55-64	65+	
Value prior to pandemic	49%	43%	52%	53%	56%	55%	50%
Value currently	49%	54%	51%	58%	64%	59%	55%

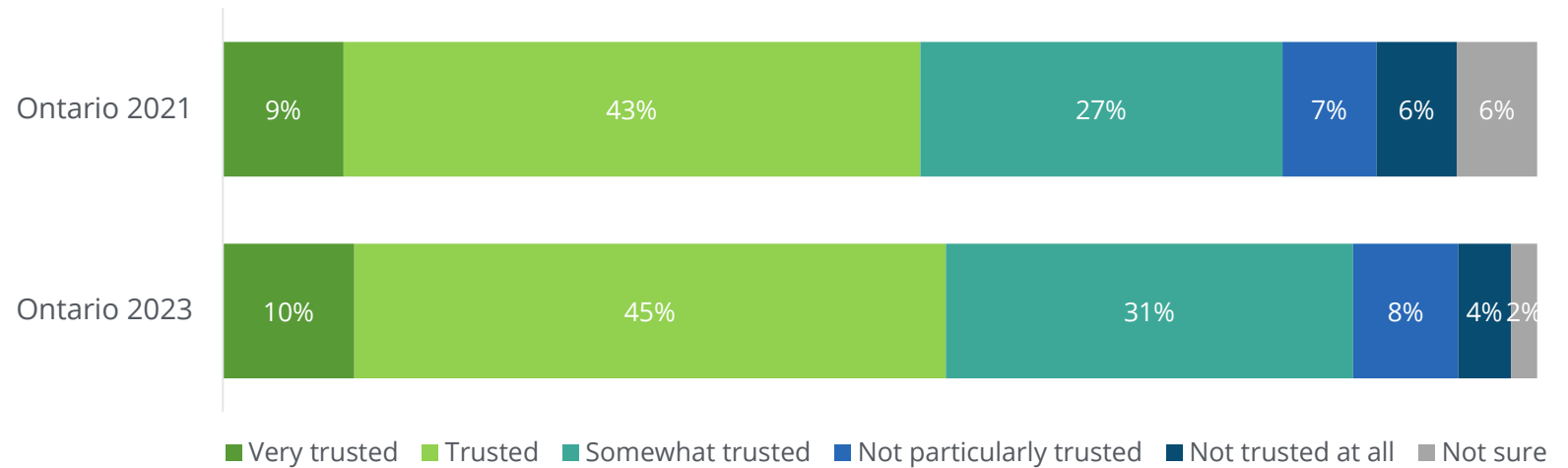
Trust in travel industry

More than half

of Ontario respondents trust the travel industry overall.

This is similar to results from 2021.

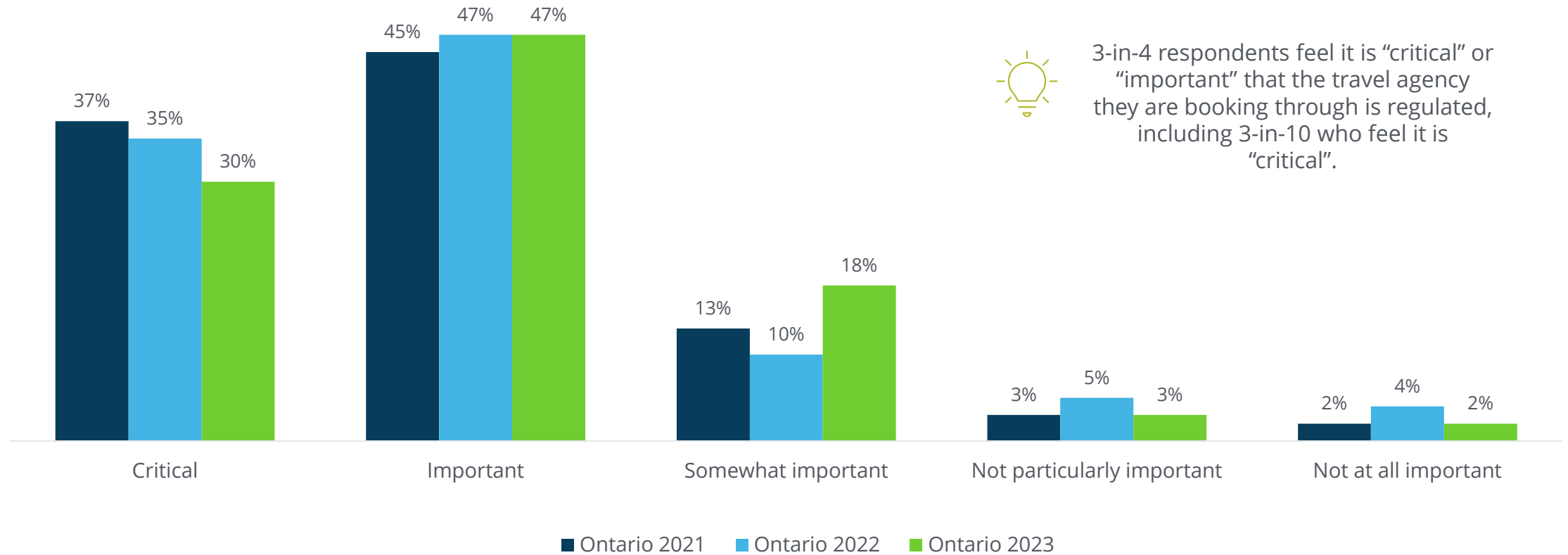
How much trust do you have in the travel industry overall? (0-10 scale)



Top 2 Box	Age						Total
	<25	25-34	35-44	45-54	55-64	65+	
2021	58%	47%	56%	54%	51%	52%	
2023	56%	55%	51%	57%	58%	60%	55%

Importance that travel agency is regulated

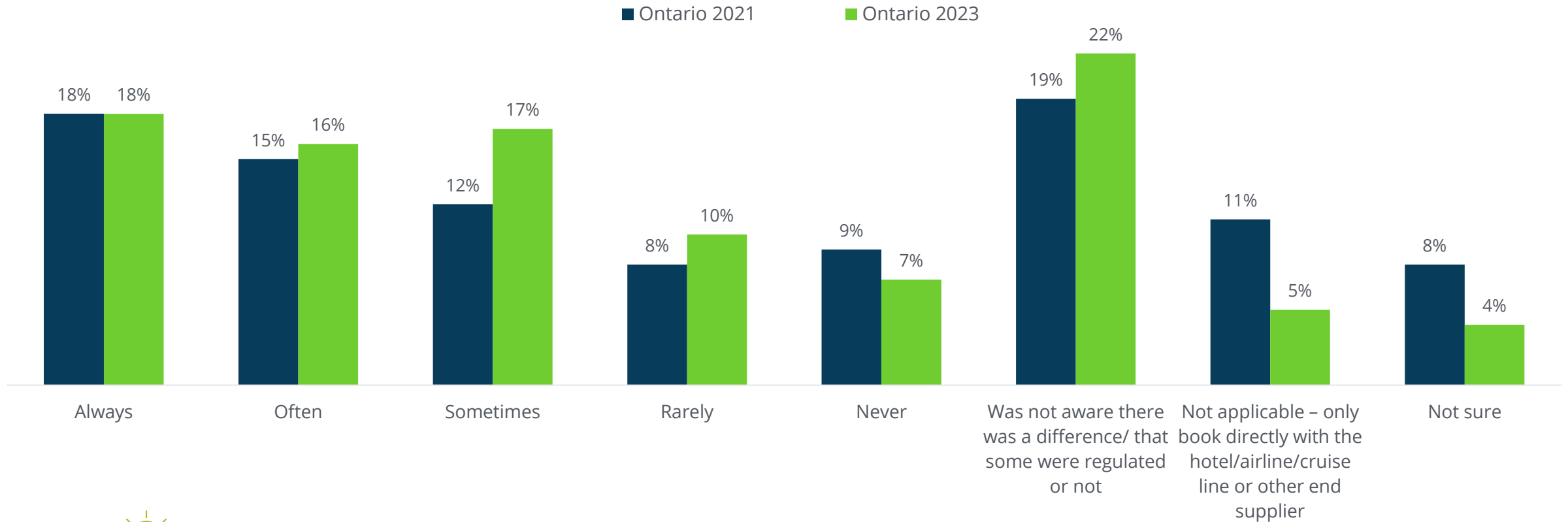
How important to you is it that the travel agency (whether online or in-person) you are booking through is regulated?



3-in-4 respondents feel it is “critical” or “important” that the travel agency they are booking through is regulated, including 3-in-10 who feel it is “critical”.

Frequency of verifying that travel agency is regulated

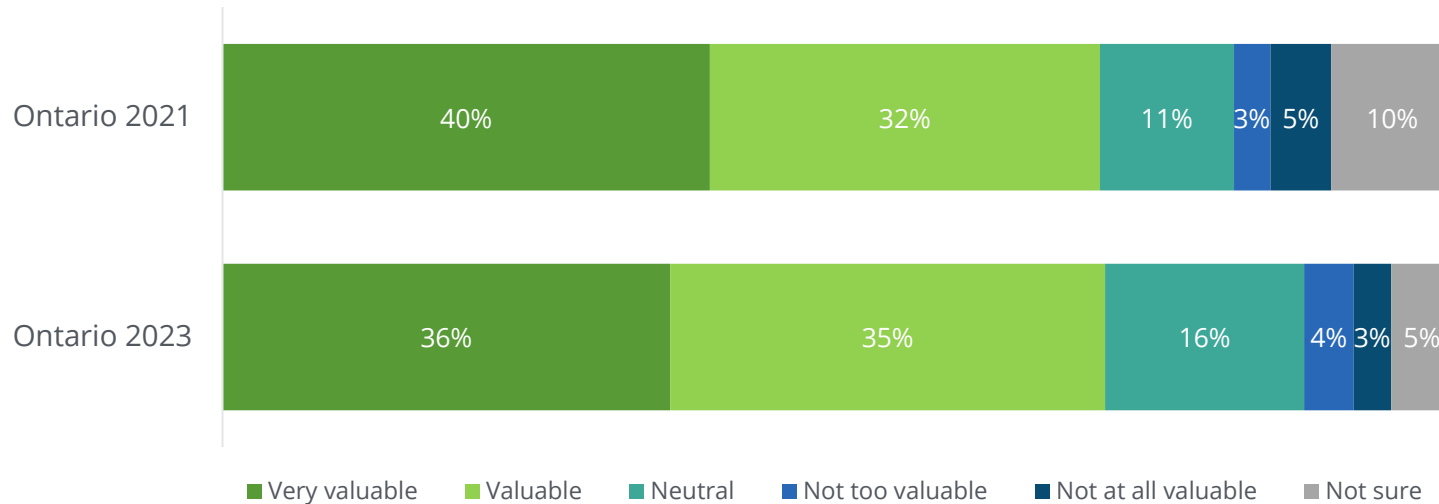
How frequently do you verify that the travel agency (whether online or in-person) you are booking through is regulated?



1-in-3 respondents “always” or “often” verify that the travel agency they book through is regulated.

Value of Travel Compensation Fund

Based on what you know/just read about the Travel Compensation Fund, how valuable is it to you as a travel consumer? (0-10 scale)

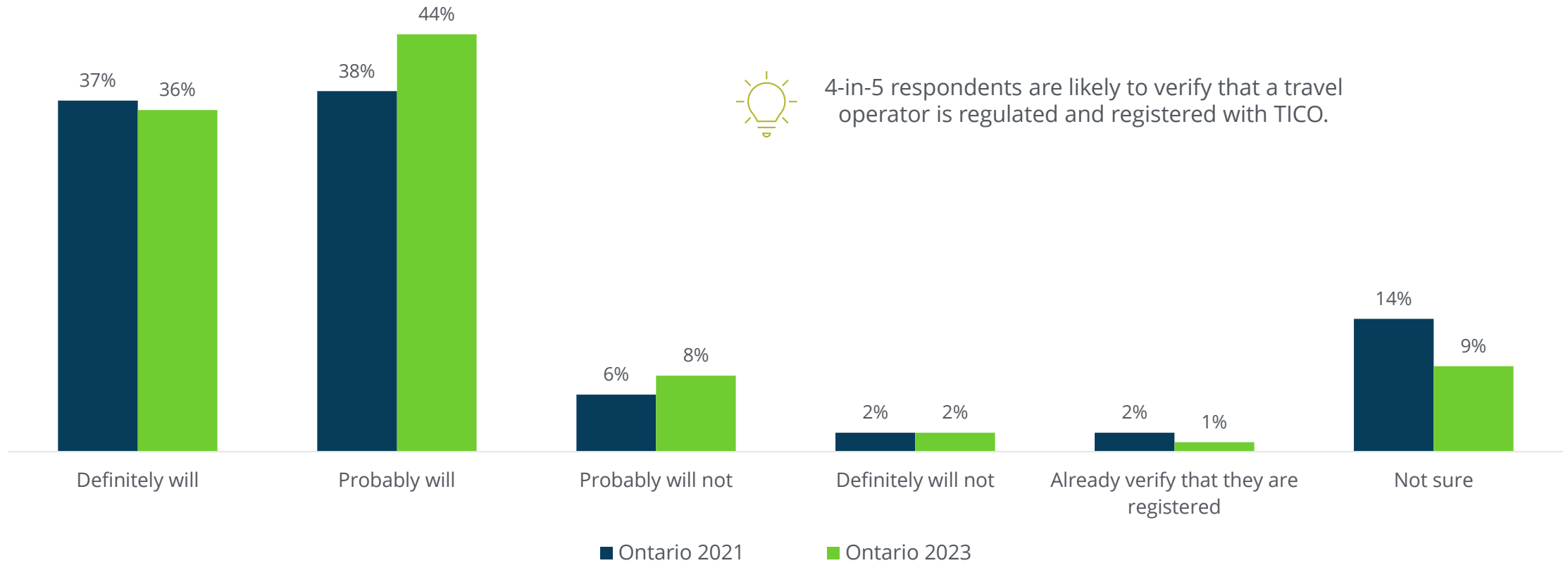


7-in-10
respondents feel the Travel Compensation Fund is valuable.

Top 2 Box	Age						Total
	<25	25-34	35-44	45-54	55-64	65+	
2021	64%	68%	79%	75%	70%	72%	
2023	67%	70%	70%	73%	74%	78%	71%

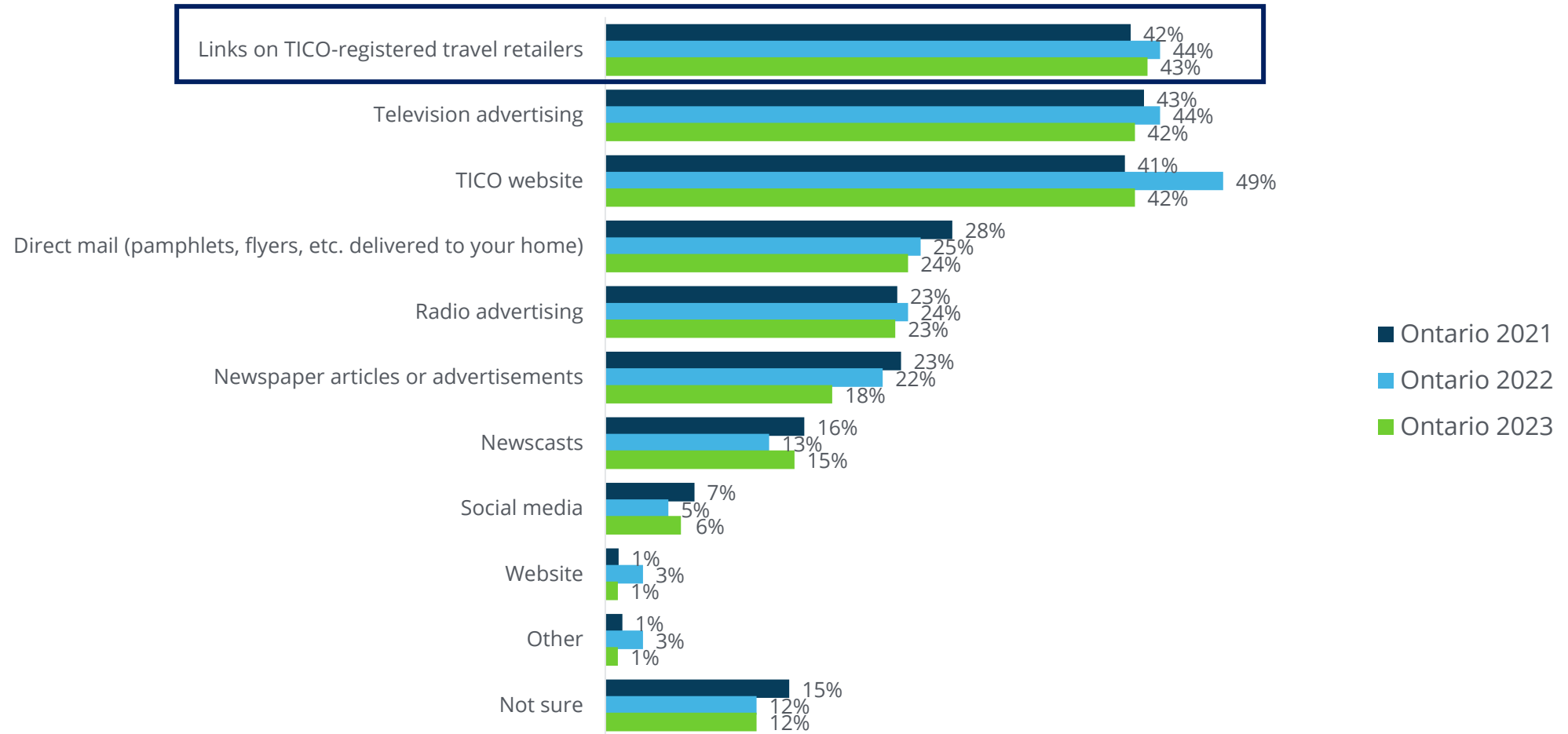
Verifying that travel operator is registered with TICO

Now that you have reviewed the questions about TICO and the consumer protection available overall, how likely are you to verify that the travel agency, tour operator or travel website that you book your travel with is regulated and registered with TICO?



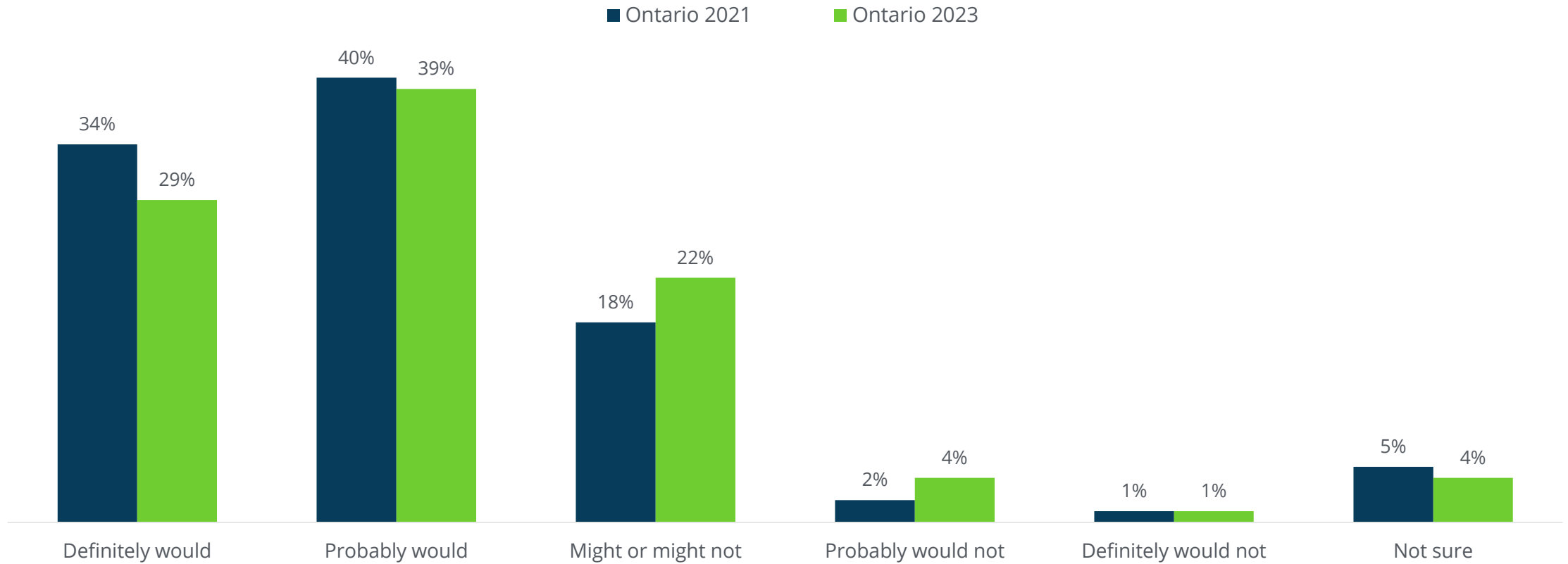
Preferred methods of communication

In your view, what would be the best way(s) for TICO to communicate with consumers like you? [CHECK ALL THAT APPLY]



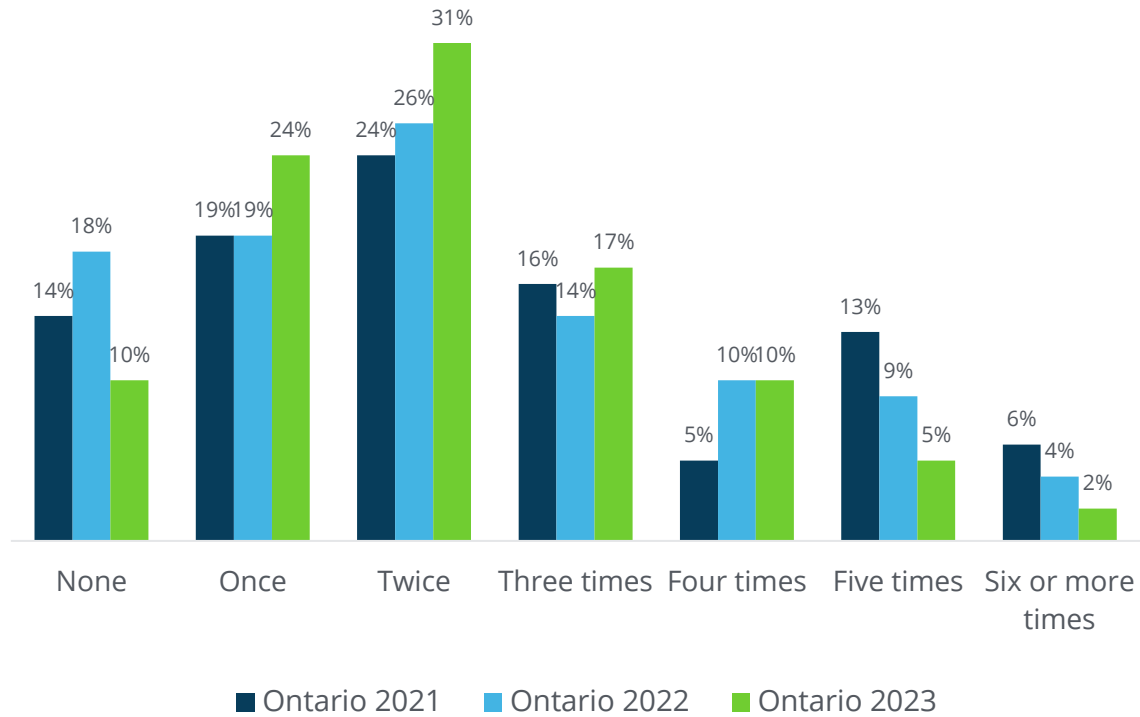
Likelihood of following information on travel consumer protection laws

How likely are you to follow/listen to information about consumer protection laws related to travel that you may see or receive?

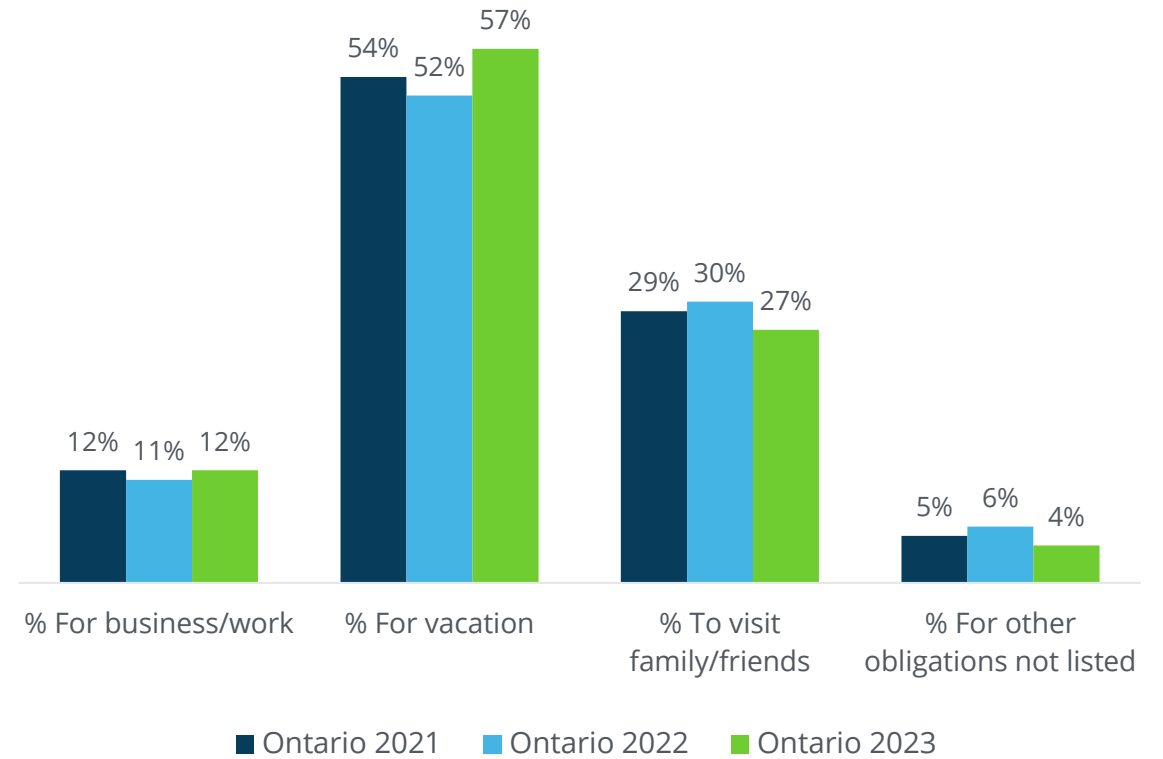


Travel profile

In an average/typical year, approximately how many times do/did you travel for work and/or for pleasure purposes?

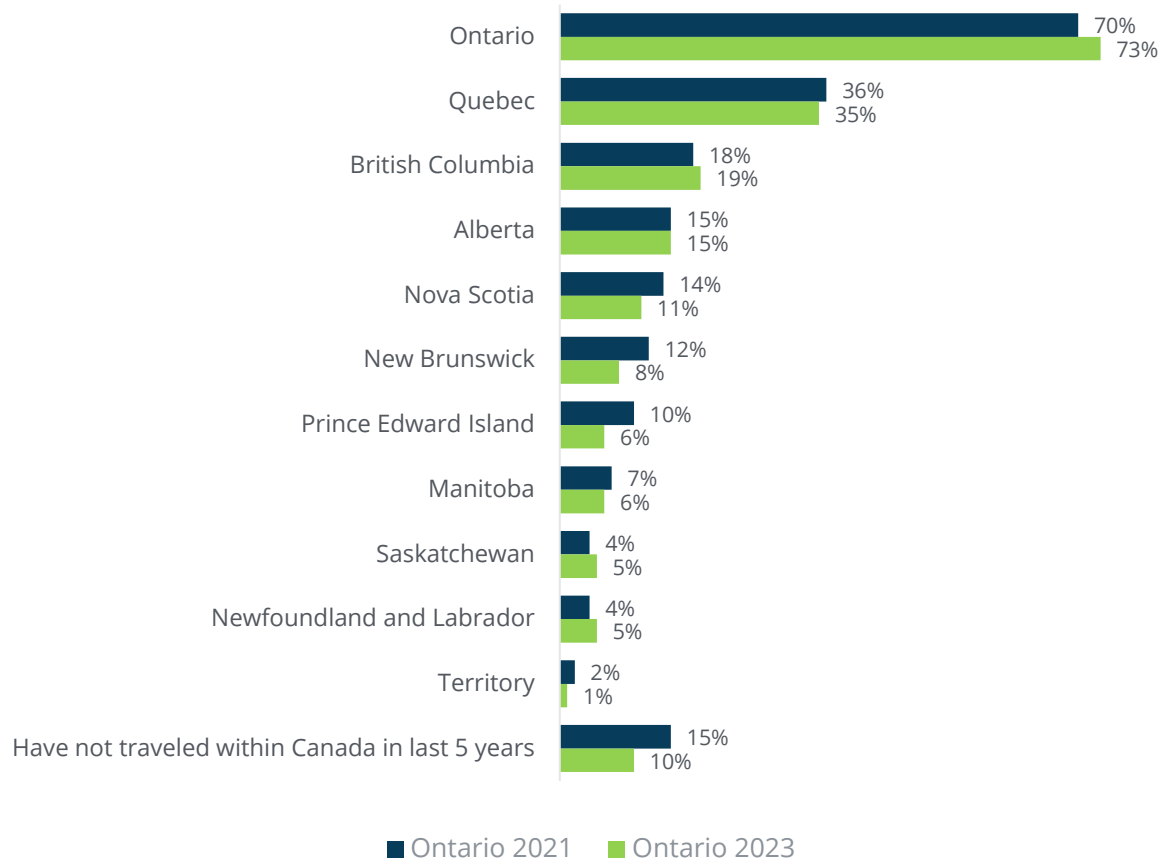


In a typical year, approximately what percentage of the time you travel is for business/work versus for pleasure?

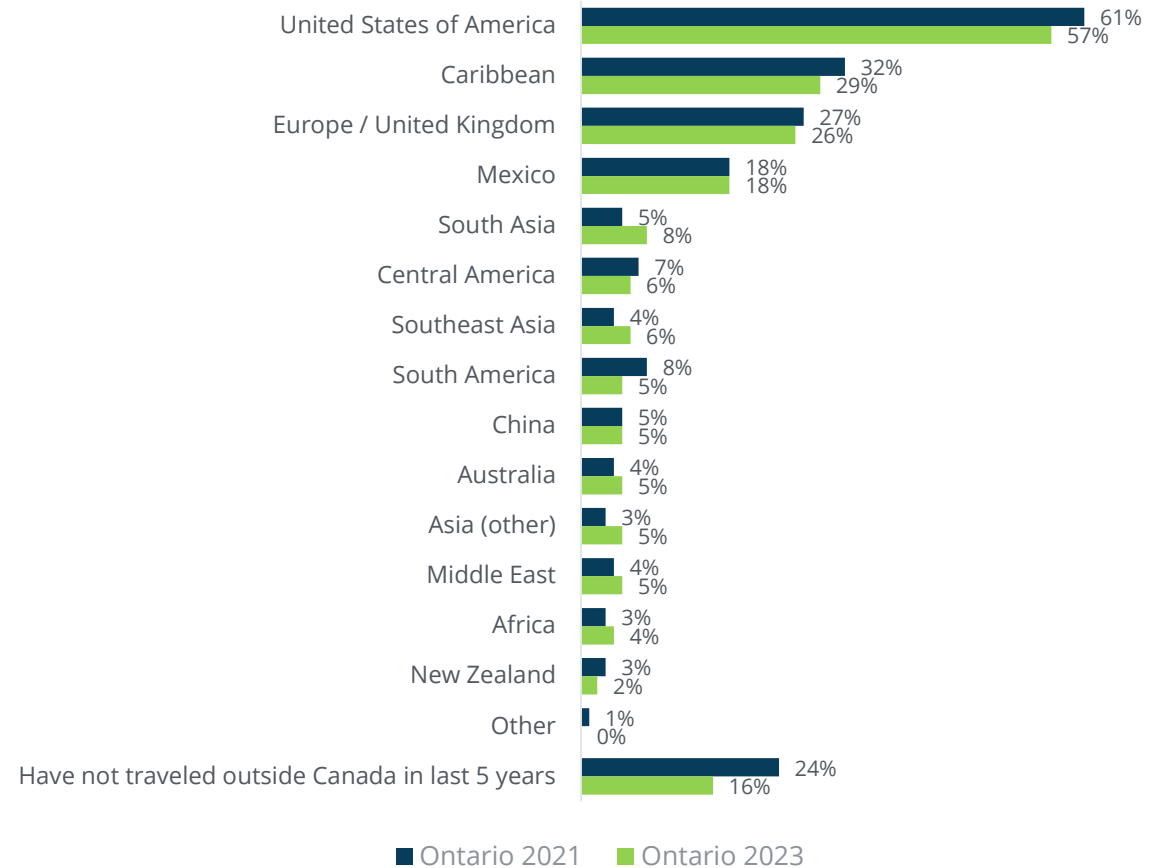


Travel profile

Which of the following provinces have you traveled to in the last 5 years? [CHECK ALL THAT APPLY]

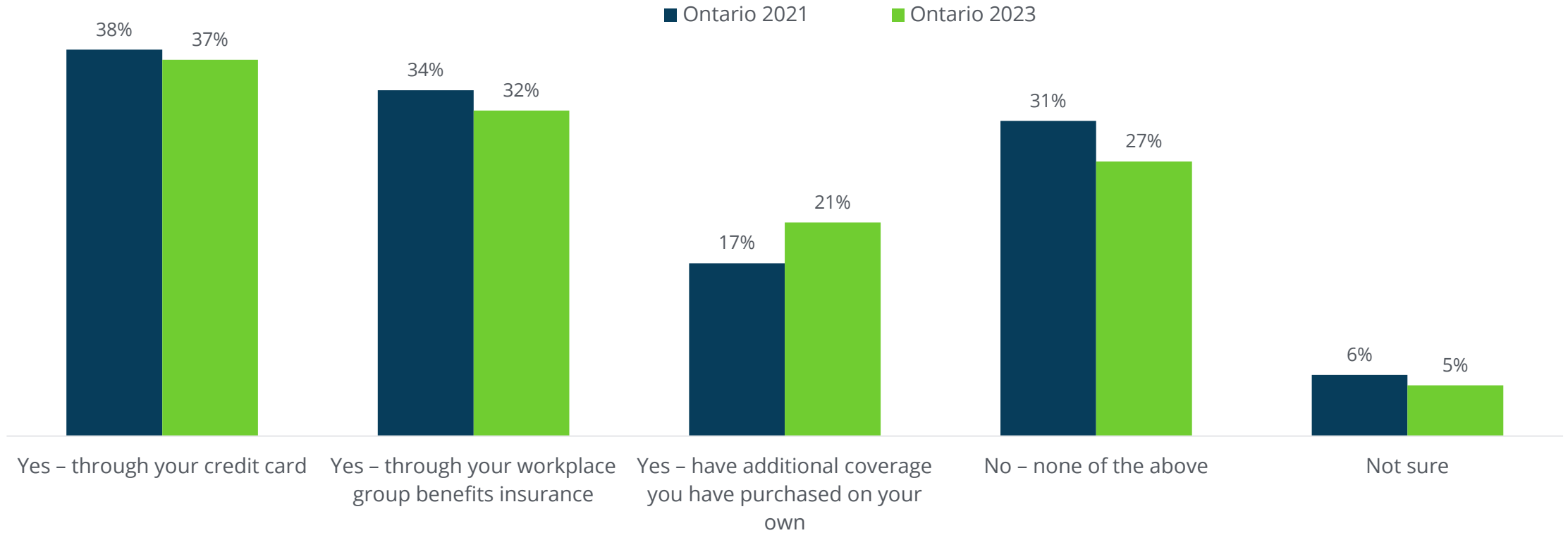


Which of the following locations OUTSIDE OF CANADA have you traveled to in the last 5 years? [CHECK ALL THAT APPLY]



Incidence of travel insurance coverage

Do you currently have travel insurance coverage via any of the following? [CHECK ALL THAT APPLY]



Frequency of purchasing travel insurance

When you book travel, how often do you purchase some type of travel insurance? That is, in addition to any coverage you may already have through work or through a credit card, etc.

