



Summer 2021 Driving Survey



July 2021: **FOR PUBLIC RELEASE**

STRICTLY PRIVILEGED AND CONFIDENTIAL

A blue-tinted photograph of a multi-lane highway. The road curves to the right in the distance. There are several cars on the road. In the foreground, a diamond-shaped sign with an upward-pointing arrow is visible. The sky is clear and blue. The overall scene is a wide, open highway.

Survey Objectives & Methodology

Key Objectives and Sample Design

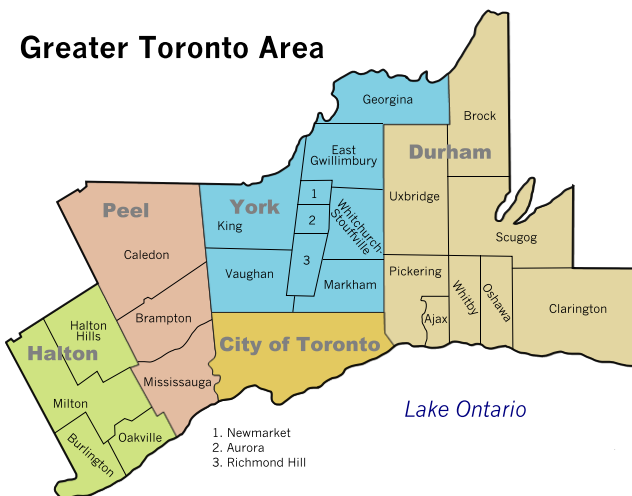
Key Objectives: To develop and execute a study the attitudes of licensed drivers in Ontario between the ages of 18 and 80 on driving safety, and summer vacation plans – with a particular emphasis on road trips.

Sample Plan: Oversample of N=200 in Peel, York, Halton and Durham regions. Remaining over-sample applied to Mississauga and Brampton.

The survey data is weighted by age and gender within Ontario sub-regions. Weights are calculated from the full sample before non-drivers are screened out, to ensure the sample is representative of the entire Ontario population. Results are reported only among drivers who completed the full survey.

During the weighting process, oversamples in Durham, York, Halton, and Peel are down-weighted proportionately. This ensures that the Ontario-wide sample is regionally balanced. When oversamples are reported separately the full sample size – accounting for the oversample – is reported.

In addition, remaining 905 sample once Durham, York, and Halton targets were reached focused on additional completes in Brampton and Mississauga.



Survey Methodology (Online)

These are the results of an online survey of licensed drivers in Ontario between the ages of 18 and 80 conducted between June 15th and June 21st, 2021.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Leger, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size: n=1,647 Ontario general population, aged 18 to 80 with a current driver's license. The province-wide results are weighted to n=600 based on Census data from Statistics Canada. The remaining 847 interviews were used as oversample to allow for more confidence in the findings for the regions and cities of the GTA.

Field Dates: June 15th to 21st, 2021.

Weighting: Results are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data.
Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	145	8.8%	83	13.8%
Males 35-54	261	15.9%	101	16.9%
Males 55+	396	24.1%	113	18.9%
Females 18-34	225	13.7%	74	12.4%
Females 35-54	279	17.0%	102	17.1%
Females 55+	338	20.6%	125	20.9%
Outside GTA	427	25.9%	316	52.7%
City of Toronto	198	12.0%	123	20.4%
Durham	212	12.9%	28	4.7%
York	256	15.5%	50	8.4%
Halton	213	12.9%	24	4.0%
Peel	341	20.7%	59	9.8%
Peel: Brampton	109	32.0%	24	41.5%
Peel: Mississauga	219	64.2%	31	53.2%

Travel: Road Trips

Key Findings

01

Taking a road trip is a fundamental part of the Ontario experience.

- Prior to COVID-19, taking a road trip was the single most common annual travel experience for Ontarians.
- Almost 4-in-5 Ontarians have enjoyed road tripping at some point in their lives.
- Road trips are largely a family activity, with 81% saying they would like to take a road trip with their family this summer.
- Listening to music is a key part of the road trip experience, especially for people who have been road tripping all their lives.

02

Taking a road trip is the top choice when it comes to travel this summer.

- This year, 2-in-3 (66%) say they are considering a road trip this summer compared to 49% in an average year.
- Road trips and other local travel appear to be filling a void left by a dramatic decline in air travel outside of Canada.
- Road trip's are a particularly popular option for respondents who have not taken a vacation in the past 6 month or who are generally less likely to take winter vacations.

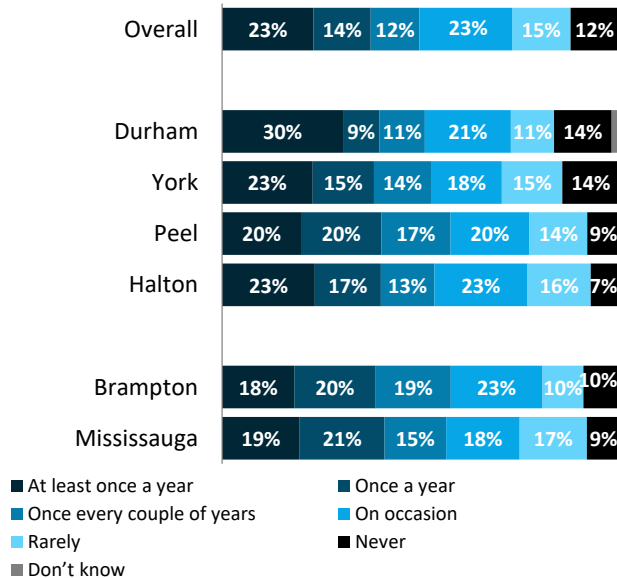
03

Younger Generations are the most likely to embrace road tripping.

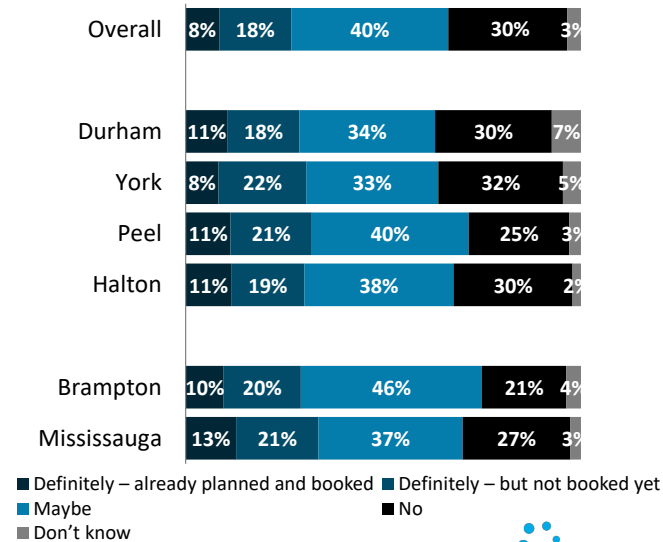
- While Boomers are often depicted as having the strongest relationships with their cars, they are the least likely to have the road trip habit.
- Gen Z has been less likely than Millennials or Gen X to road trip in the past but they are the most likely to plan to do so this summer.

Road Trip by Region: Durham most likely region Pre-COVID to take summer road trips; overall, now only 1-in-4 (27%) would take it

Q Prior to COVID-19, how often would you do each of the following during the SUMMER months? **Take a road trip**
 [asked of all respondents; n=600]

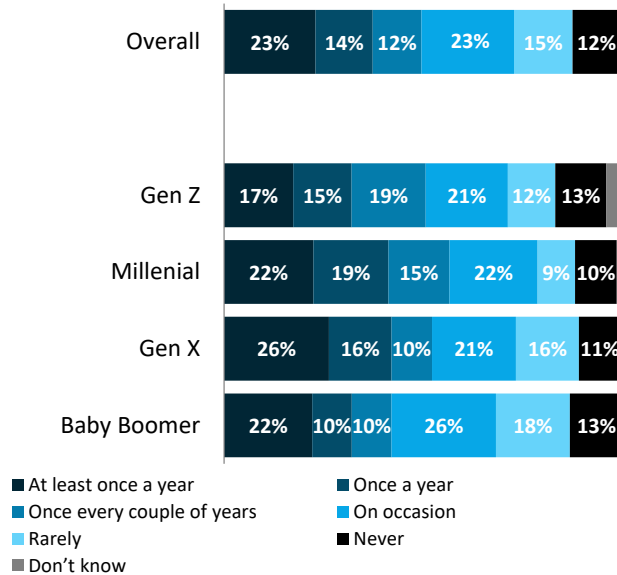


Which of the following do you plan on doing this summer? **Take a road trip**
 [asked of all respondents; n=600]

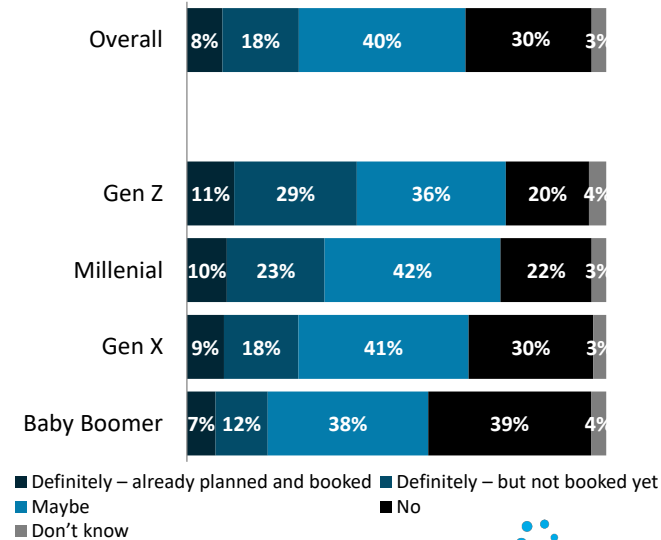


Road Trip by Generation: Gen Z are most likely to anticipate taking a road trip this summer but report going less frequently pre-COVID

Q Prior to COVID-19, how often would you do each of the following during the SUMMER months? **Take a road trip**
 [asked of all respondents; n=600]



Which of the following do you plan on doing this summer? **Take a road trip**
 [asked of all respondents; n=600]

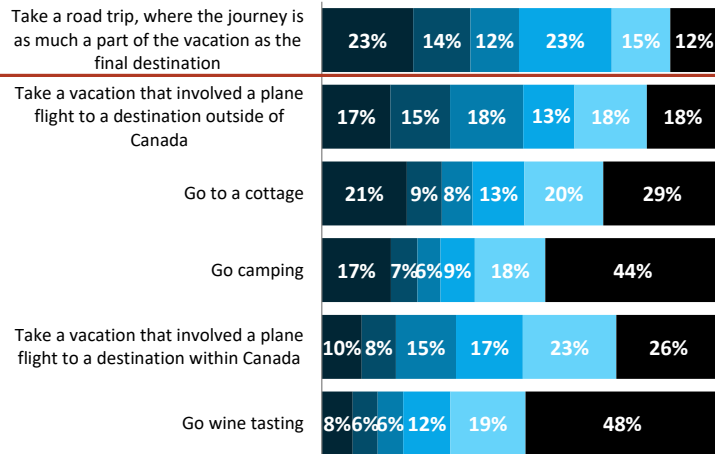


Summer Travel: Taking a road trip is the most common activity done at least yearly pre-COVID and highest on at least maybe doing this summer



Prior to COVID-19, how often would you do each of the following during the SUMMER months?

[asked of all respondents; n=600]

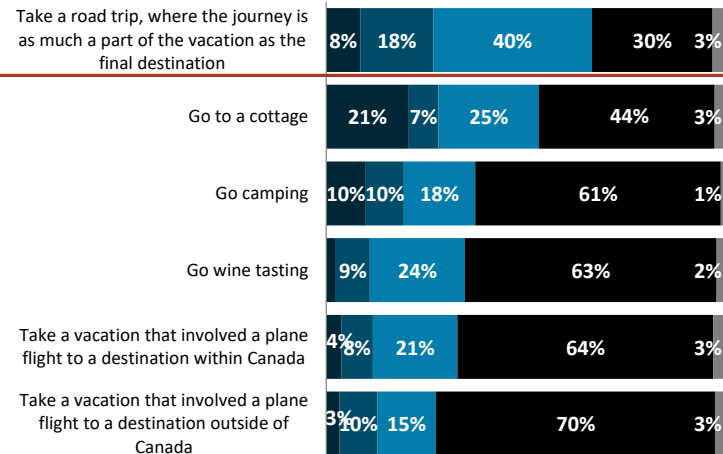


At least once a year
 Once every couple of years
 Rarely
 Don't know

Once a year
 On occasion
 Never

Which of the following do you plan on doing this summer?

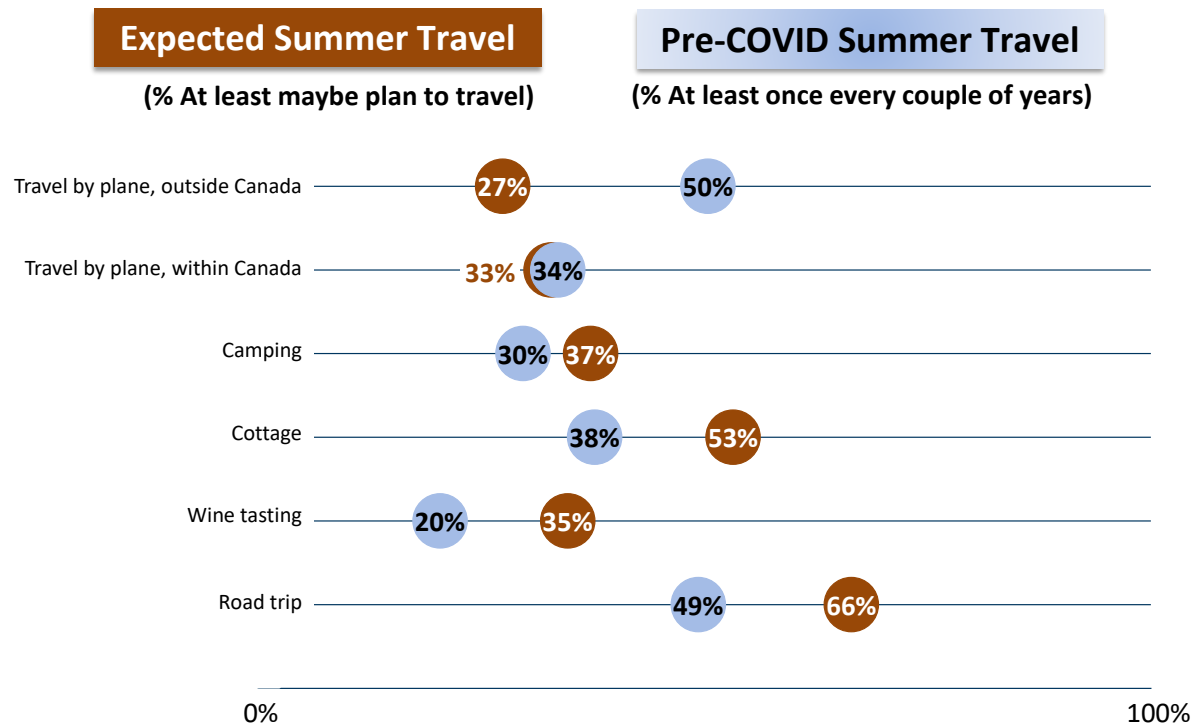
[asked of all respondents; n=600]



Definitely - already planned and booked
 Definitely - but not booked yet
 Maybe
 Don't know

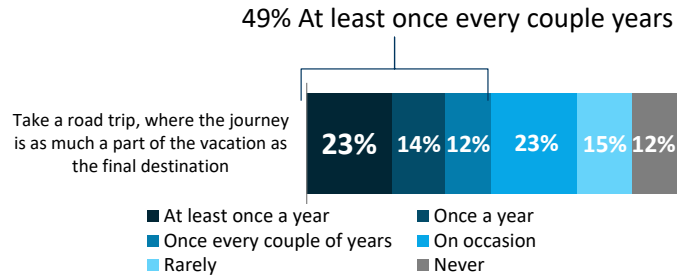
Summer Travel: 66% say they will maybe take a road trip compared to 49% who said they used to once every couple of years

10

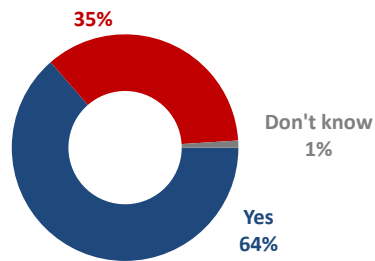


Road Tripper Segmentation: Half (49%) of respondents take a summer road trip at least once every couple years ¹¹

Q Prior to COVID-19, how often would you do each of the following during the SUMMER months?
[asked of all respondents; n=600]



Q Were family road trips a part of your childhood?
[asked of all respondents; n=600]



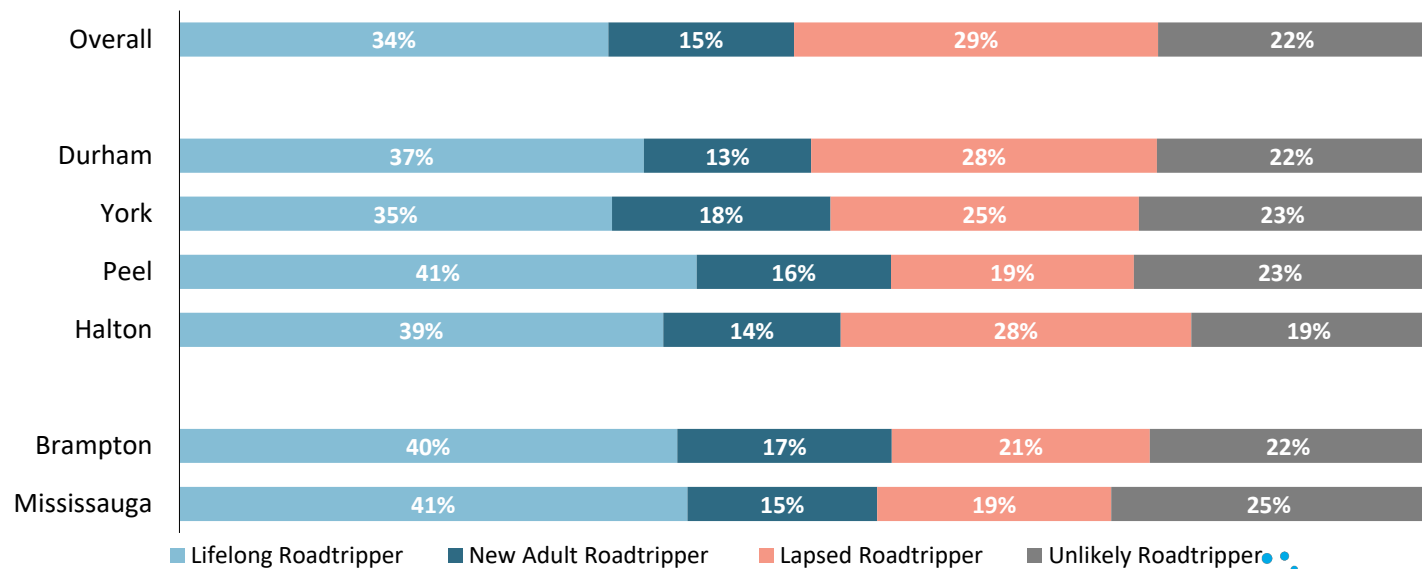
		Road trip at least once every couple years	
		Yes	No
Family Roadtrips	Yes	Lifelong Roadtripper 34%	Lapsed Roadtripper 29%
	No	New Adult Roadtripper 15%	Unlikely Roadtripper 22%

Profile by Region/City: 4-in-10 respondents in Peel (41%) and Halton (39%) are Lifelong Roadtrippers

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Road Trip Segmentation by Region and City
[asked of all respondents; n=600]



■ Lifelong Roadtripper ■ New Adult Roadtripper ■ Lapsed Roadtripper ■ Unlikely Roadtripper

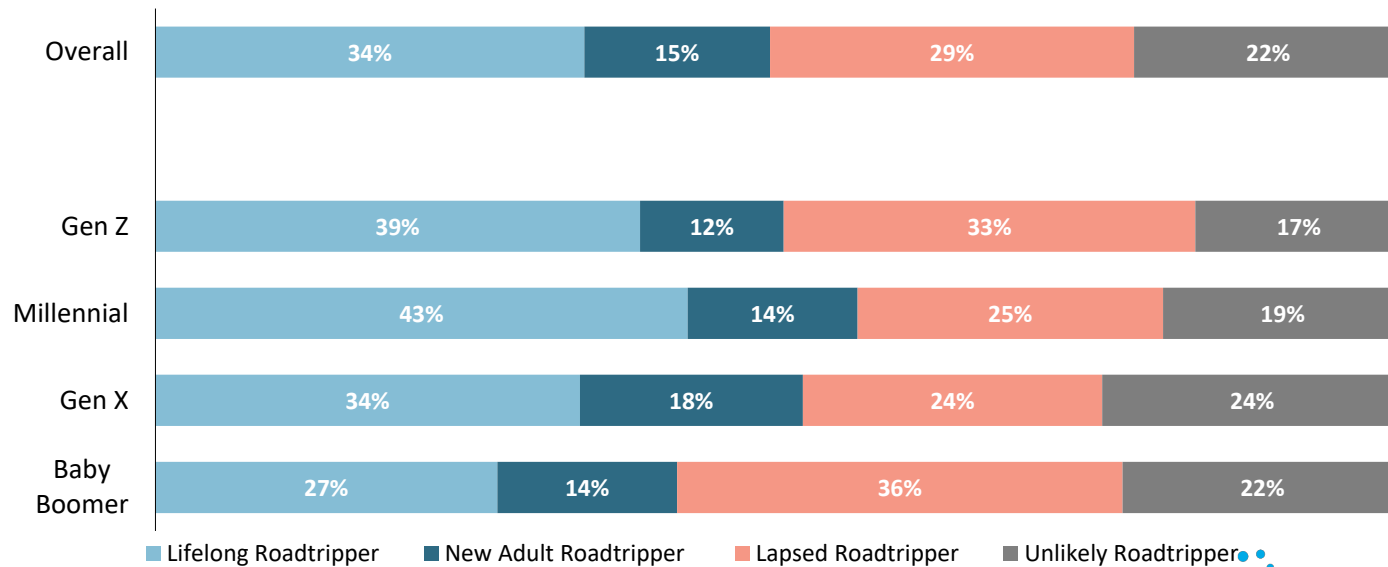


Profile by Generation: Millennials (43%) most likely to be Lifelong Roadtrippers while only 1-in-4 (27%) Baby Boomers say the same

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Road Trip Segmentation by Generation
[asked of all respondents; n=600]



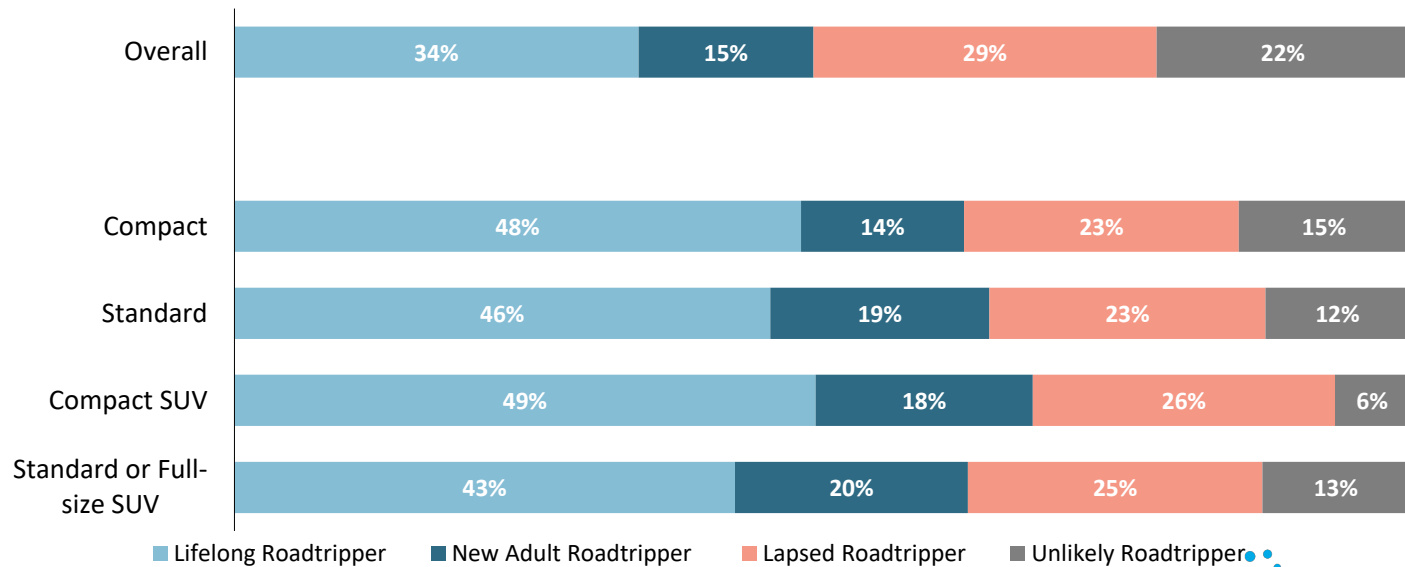
Profile by Road Trip Car Type: Nearly half of Road Trip SUV drivers, Standard, and Compact drivers are Lifelong Roadtrippers

14



Road Trip Segmentation by Road Trip Car Type

[asked of respondents considering a road trip; multiple mention; n=399]



■ Lifelong Roadtripper ■ New Adult Roadtripper ■ Lapsed Roadtripper ■ Unlikely Roadtripper

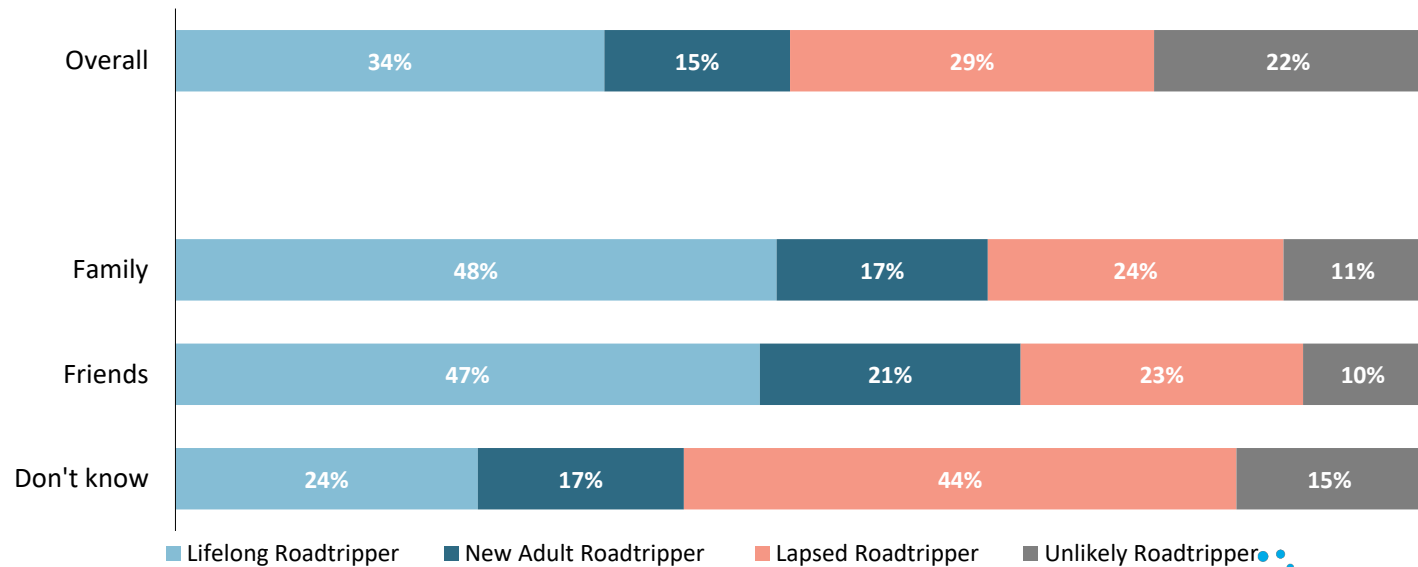


Road Tripper Profile by Trip Partner: Those taking trips with friends are a bit more likely to be new to road trips

15



Road Trip Segmentation by Trip Partner
[asked of all respondents considering a road trip; n=399]



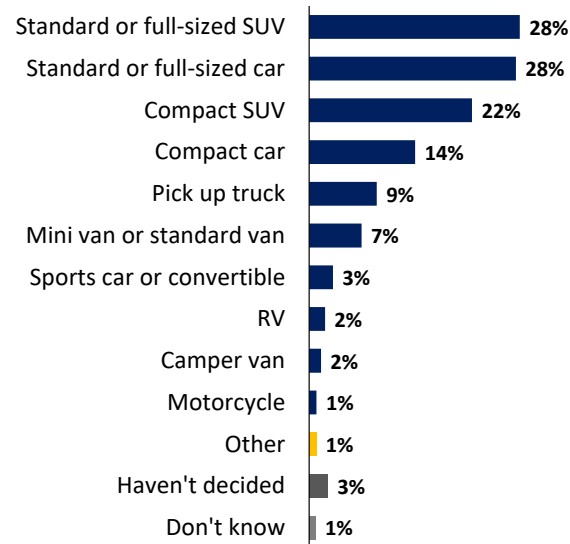
■ Lifelong Roadtripper ■ New Adult Roadtripper ■ Lapsed Roadtripper ■ Unlikely Roadtripper



Car Type for Road Trip: Top choice for road trips is a standard/full-sized SUV or car (28%), followed by a compact SUV (22%)

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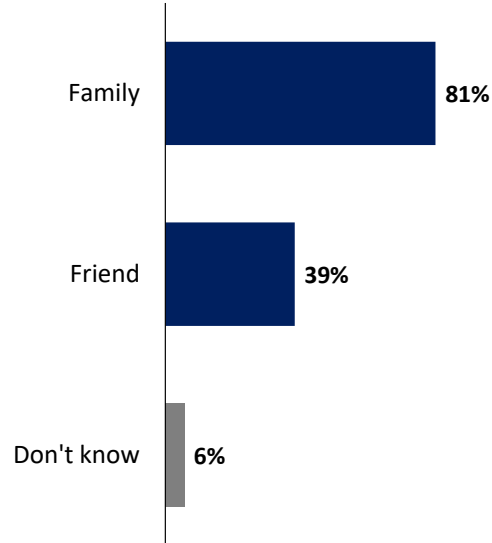
Q On your road trip(s), what type of vehicle do you expect to be driving? Please check as many as apply if you are planning multiple road trips.
[asked of respondents considering a road trip, multiple mention; n=399]



Preferred Road Trip Partner: 8-in-10 (81%) plan to travel with family, most likely among women, SUV-drivers, and Lifelong Roadtrippers

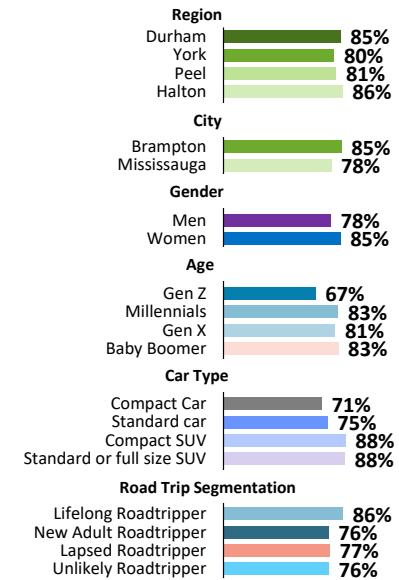


Who would you like to go on a road trip with this summer? Please select as many as apply.
[asked of respondents considering a road trip, multiple mention; n=399]



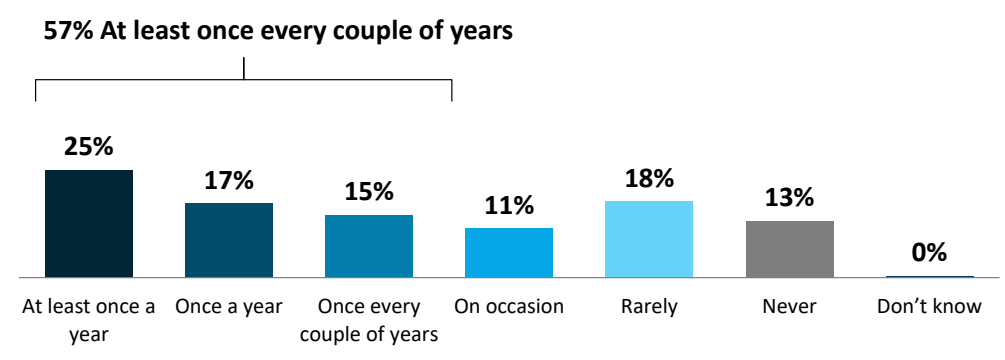
Segmentation

Those who say 'Family'



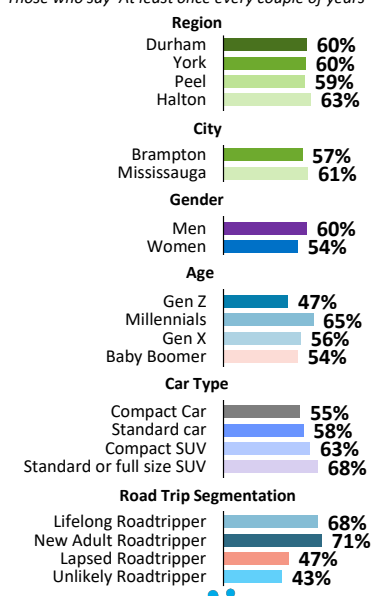
Winter Travel, Pre-COVID: Nearly 6-in-10 (57%) travel at least every couple of years in winter, with Millennials (65%) most frequent travelers

Q Prior to COVID-19, how often would you typically take a vacation during the WINTER months?
[asked of all respondents; n=600]



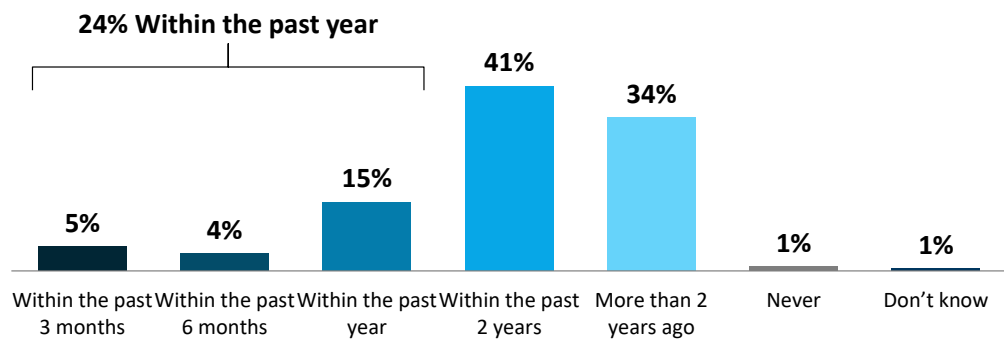
Segmentation

Those who say 'At least once every couple of years'



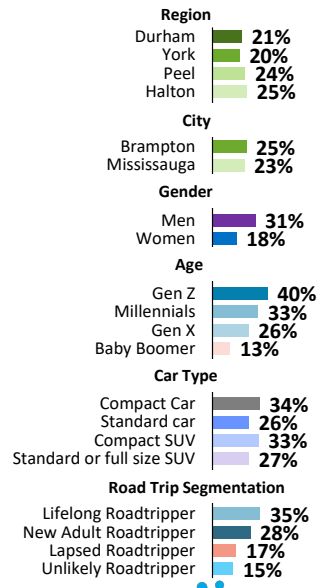
Last Vacation: 1-in-4 (24%) took a vacation in past year with Gen Z (40%) and men (31%) the most likely to travel

Q When did you last take a vacation?
[asked of all respondents; n=600]



Segmentation

Those who say 'Within the past year'



Ontarian Drivers Who Usually Travel in Winter But Didn't in 2021: Are They More Likely to Take Road Trips?

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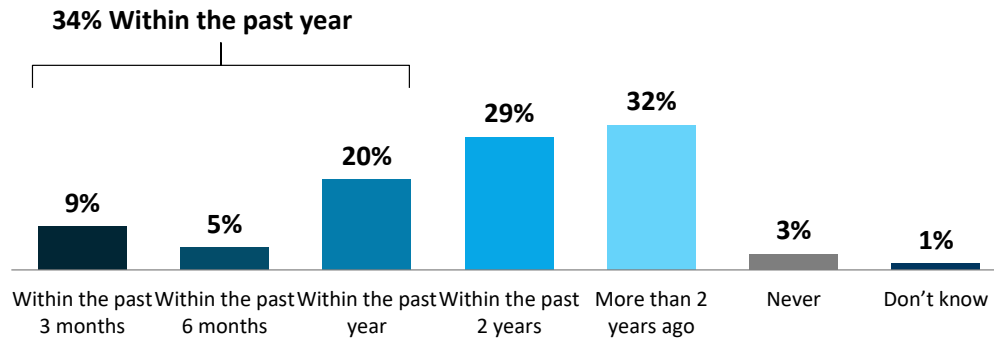
Expected Summer Travel (Definitely)	Travel in Winter?			
	At least once every couple of years		Less Often	
	Last Vacation?			
	More than 6 months	Less than 6 months	More than 6 months	Less than 6 months
Flight, International	15%	40%	5%	8%
Flight, Domestic	13%	33%	6%	0%
Camping	20%	48%	15%	17%
Cottage	35%	53%	15%	27%
Wine Tasting	11%	26%	8%	8%
Road Trip	31%	37%	19%	42%

- Those who took a vacation in the last six months are more likely to plan a summer road trip.
- **Among those that didn't take a vacation this Winter, those who usually travel during that time are much more likely to plan a summer 2021 road trip.**

Last Road Trip: A third (34%) of respondents took a road trip in the past year, about half (49%) of Lifelong Roadtrippers say the same

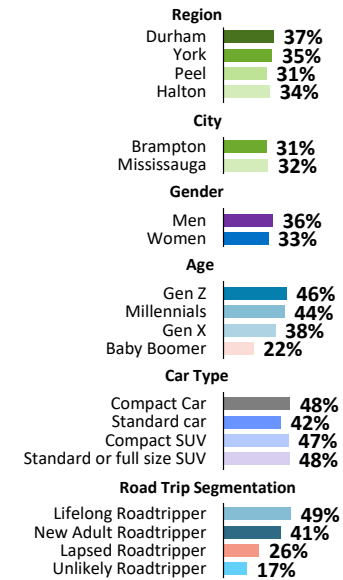


When is the last time you took a road trip?
[asked of all respondents; n=600]



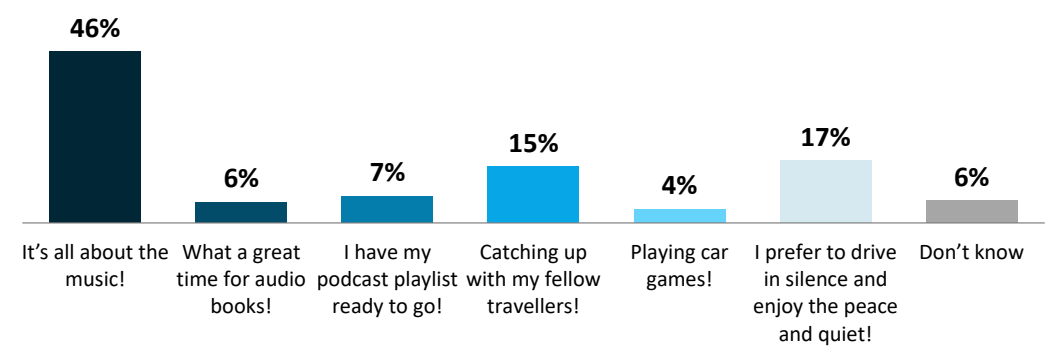
Segmentation

Those who say 'Within the past year'



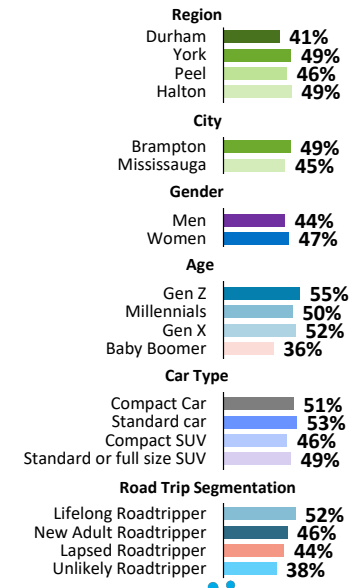
Entertainment on Road Trip: It's all about the music (46%), particularly for Gen Z (55%) and Lifelong Roadtrippers (52%)

Q When you are on a road trip, which of the following best describes you? Even if you don't take road trips, which of the following do you think would best describe you if you did take one some day?
[asked of all respondents; n=600]



Segmentation

Those who say 'Music'



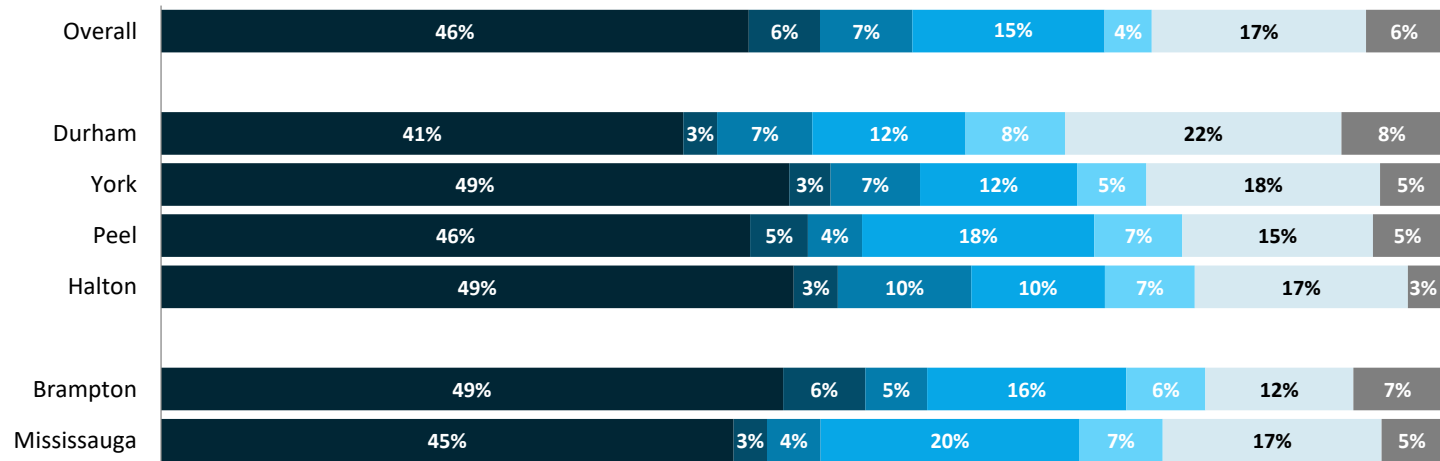
Entertainment on Road Trip: Across all regions, 'It's all about the music!' is the clear top choice

23



When you are on a road trip, which of the following best describes you? Even if you don't take road trips, which of the following do you think would best describe you if you did take one some day?

[asked of all respondents; n=600]



- It's all about the music!
- I have my podcast playlist ready to go!
- Playing car games!
- Don't know

- What a great time for audio books!
- Catching up with the fellow travellers!
- I prefer to drive in silence and enjoy the peace and quiet!





Safety: Are Ontario Drivers Ready?

Key Findings

01

Only 1-in-10 (10%) have all three safety measures. Most Ontario drivers have a roadside assistance plan (71%) or an emergency kit (52%), but very few have a high-visibility vest (14%).

- Lifelong Roadtrippers are mostly likely to have all three measures (14%) compared to other key segments.
- There's a wide generation gap on roadside assistance, with Baby Boomers (83%) much more likely to have a roadside assistance plan than Gen Z (61%), as well as an eight-point gap on owning an in-car emergency car kit (55% Boomers to 47% Gen Z).
- Halton residents are more likely than York, Peel, or Durham to have a plan (80%) or a kit (60%).

02

3-in-10 (31%) say they are 'extremely' or 'very well' prepared for an emergency, with a plurality landing somewhere in the middle thinking they're 'somewhat well' prepared (41%). Only 6% say they are not prepared at all.

- Men (42%) are twice as likely to feel prepared than women (21%).
- There's also a clear generational gap on this measure between Baby Boomers and Gen X (34-35% 'extremely/very well') and Gen Z (22%)/Millennials (26%).
- Lifelong Roadtrippers are more likely to feel prepared.

03

Some Ontario drivers appear overconfident in their ability to handle a roadside emergency.

- Among those with none of the three safety measures in their car, 1-in-10 (11%) feels 'extremely' or 'very well' prepared.

04

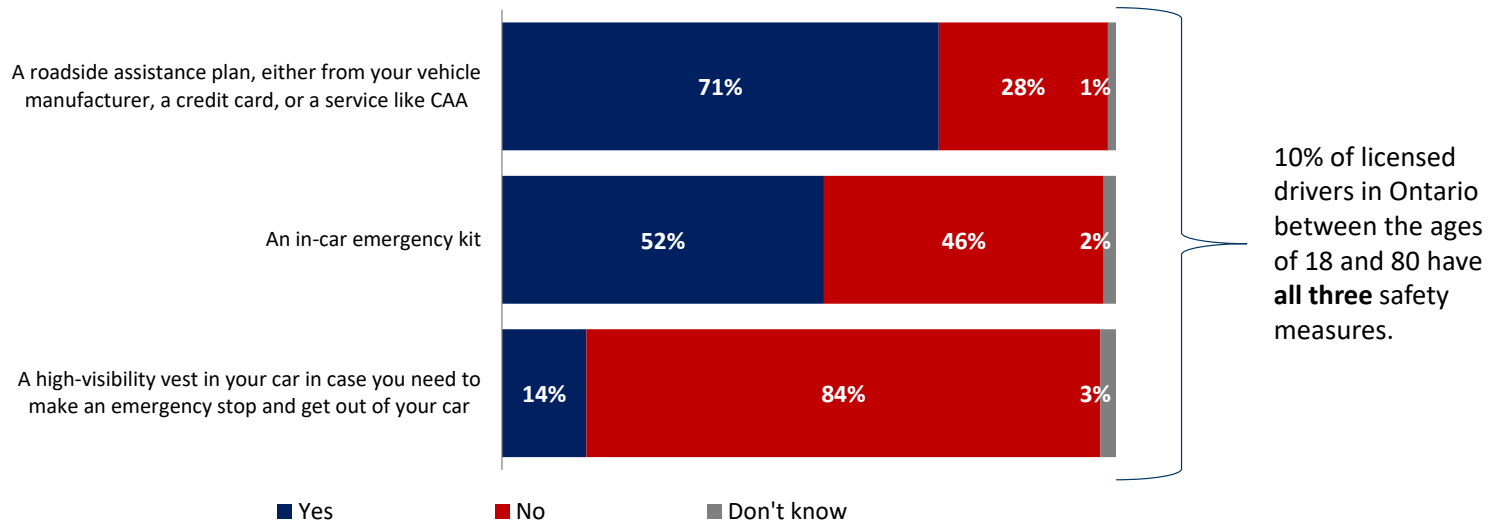
Driving less is having a big impact on Gen Z's confidence.

- While older Ontarians who have been driving longer report little difference in their driving confidence, nearly half (47%) of Gen Z respondents say they feel less confident behind the wheel than before COVID.

Vehicle Safety: 7-in-10 (71%) have a roadside assistance plan and half (52%) have an emergency kit; only 1-in-10 (10%) have all three ²⁶



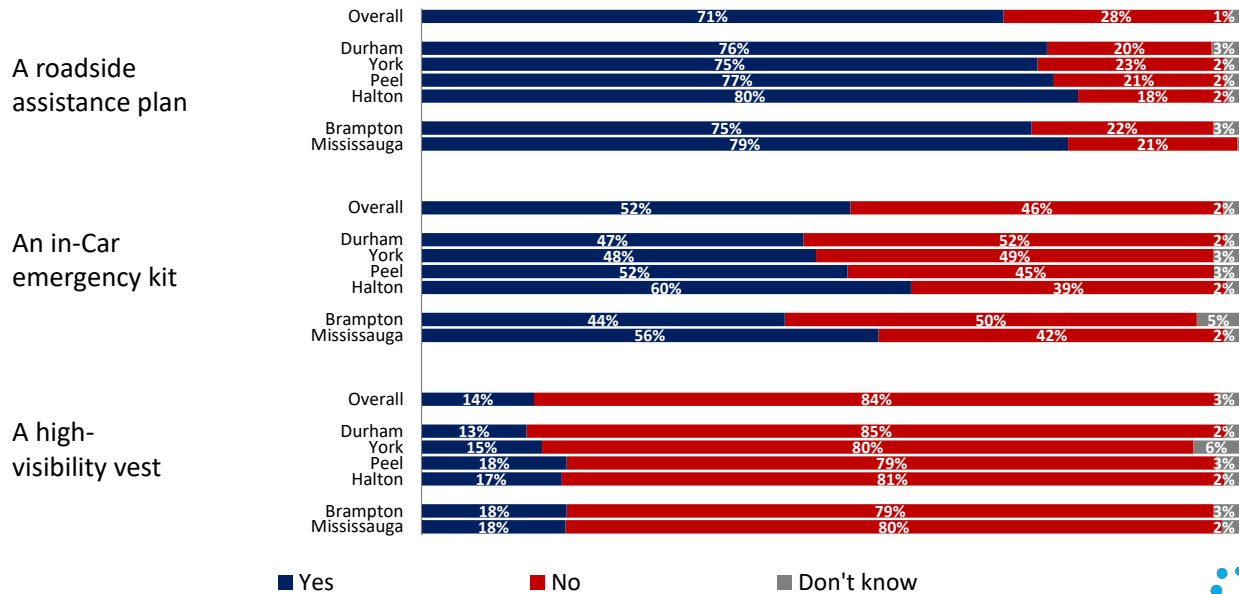
These questions are about safety related to vehicle travel. Please indicate whether you currently have each of the following:
[asked of all respondents; n=600]



Vehicle Safety by Region: Halton is most likely region to have a roadside assistance plan (80%) or an in-car emergency kit (60%)

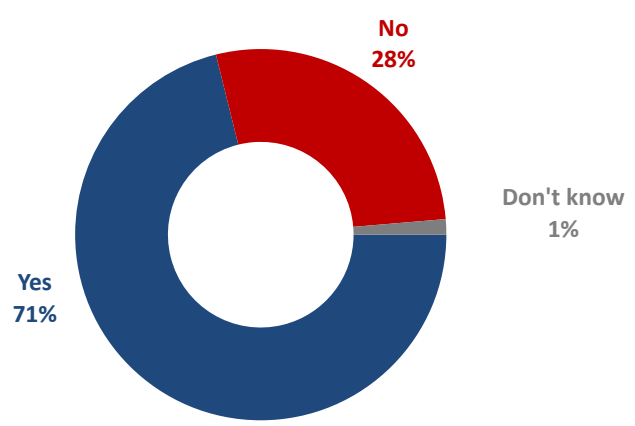


These questions are about safety related to vehicle travel. Please indicate whether you currently have each of the following by Region:
[asked of all respondents; n=600]



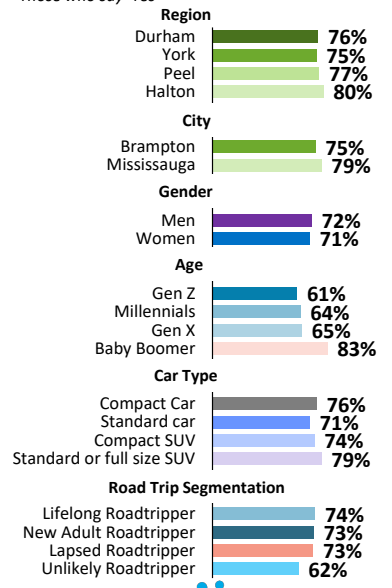
Roadside Assistance Plan: 7-in-10 (71%) have assistance plan, Baby Boomers (83%) much more likely to say they do than Gen Z (61%)

Q These questions are about safety related to vehicle travel. Please indicate whether you currently have each of the following: **a roadside assistance plan, either from your vehicle manufacturer, a credit card, or a service like CAA.**
[asked of all respondents; n=600]



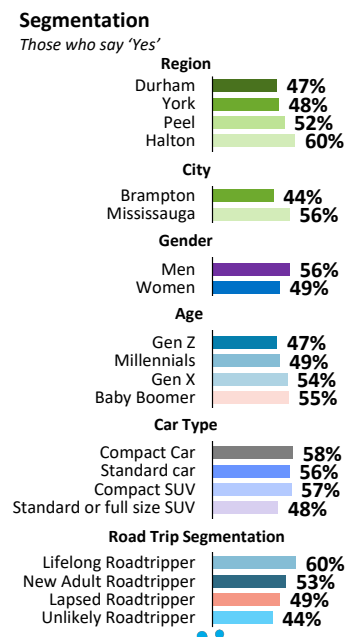
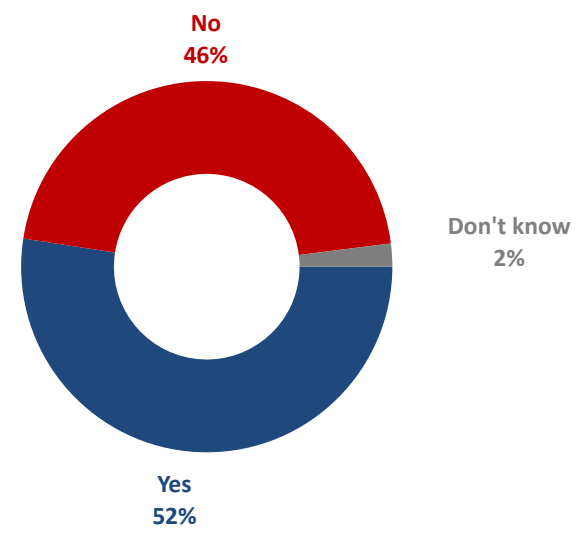
Segmentation

Those who say 'Yes'



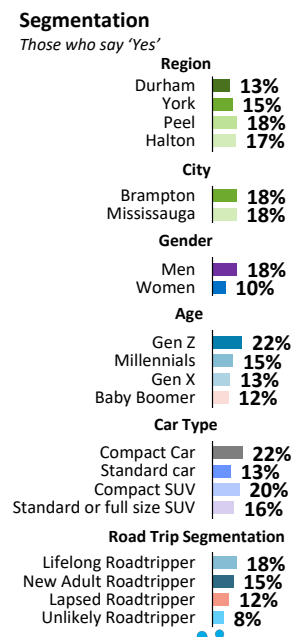
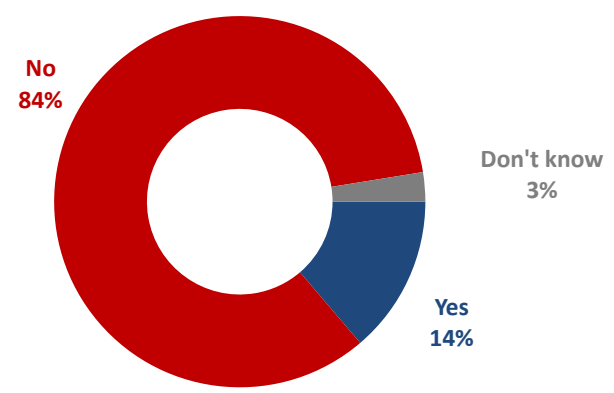
Emergency Kit: About half (52%) have an emergency kit, largest portion in Halton (60%) and Mississauga (56%)

Q These questions are about safety related to vehicle travel. Please indicate whether you currently have each of the following: an **in-car emergency car kit**.
[asked of all respondents; n=600]



High-visibility Vest: 1-in-7 (14%) have a high-visibility vest, slightly higher among Gen Z (22%) and men (18%)

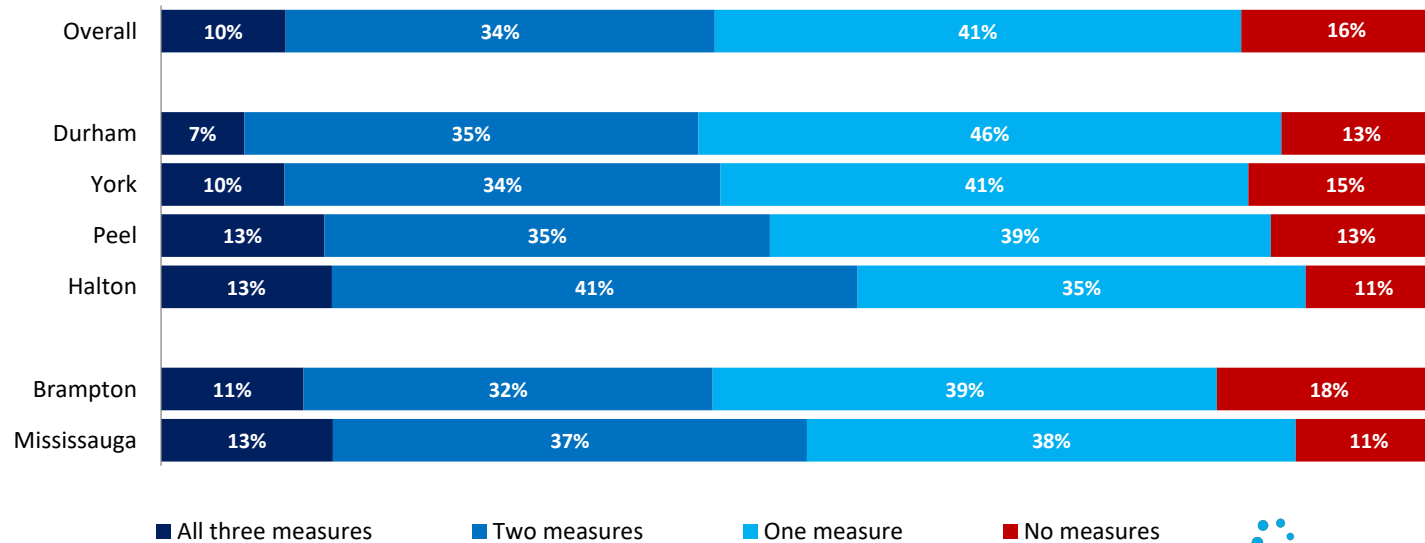
Q These questions are about safety related to vehicle travel. Please indicate whether you currently have each of the following: **a high-visibility vest in your car in case you need to make an emergency stop and get out of your car.**
[asked of all respondents; n=600]



Preparedness Index: A strong majority of respondents across all regions have at least one measure, but very few have all three

31

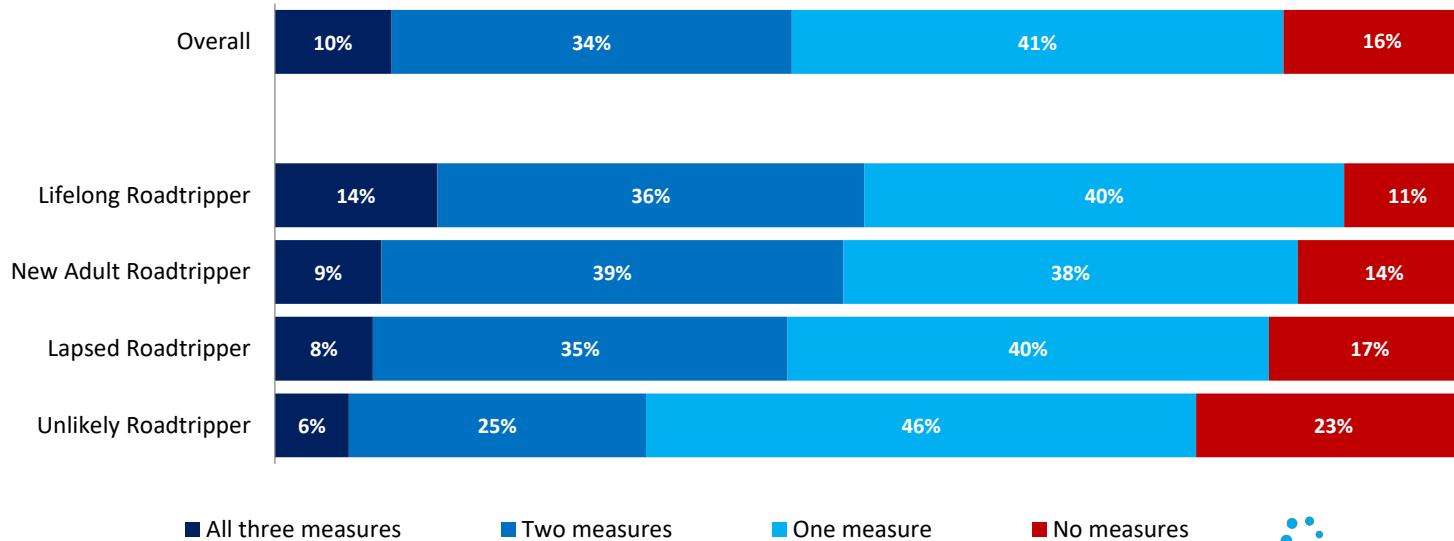
Based on the three questions on safety items related to vehicle travel, we create an index of the number of safety items a respondent has ranging from none to three. BY Region
[asked of all respondents; n=600]



Preparedness Index: Lifelong Roadtrippers are the most likely to have all three measures and only 11% have none

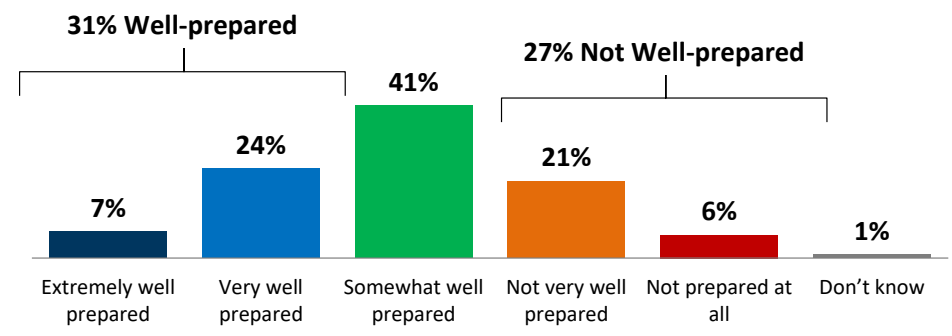
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Based on the three questions on safety items related to vehicle travel, we create an index of the number of safety items a respondent has ranging from none to three. BY Road Trip Segmentation
[asked of all respondents; n=600]



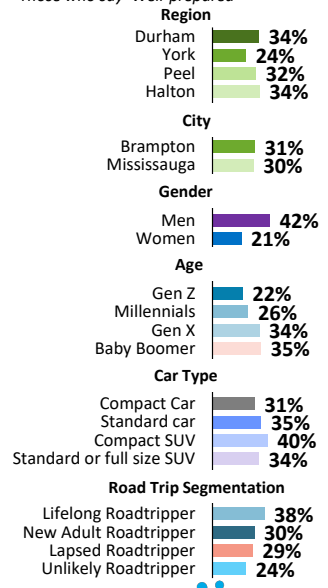
Well-prepared: 3-in-10 (31%) say they are well-prepared to handle an emergency, men (42%) feel twice as prepared as women (21%)

Q How well-prepared do you feel to be able to handle a roadside emergency, such as a flat tire, running out of gas or engine problems?
[asked of all respondents; n=600]



Segmentation

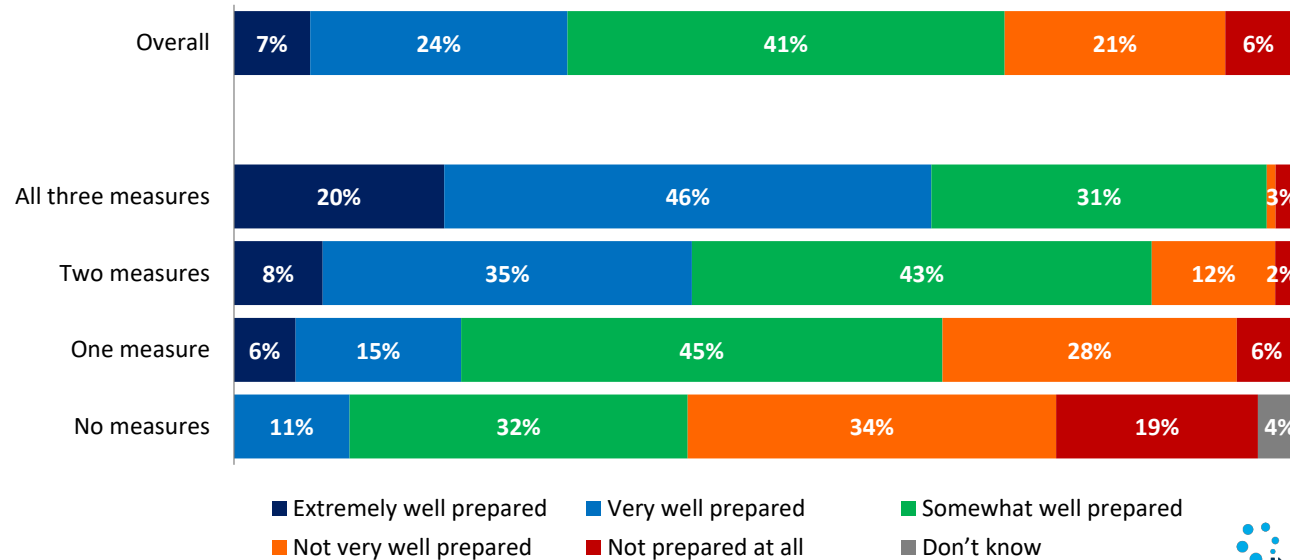
Those who say 'Well-prepared'



Preparedness by Safety Measures: Majority of those with all measures feel prepared, 1-in-10 (11%) of those with no measures feel prepared ³⁴

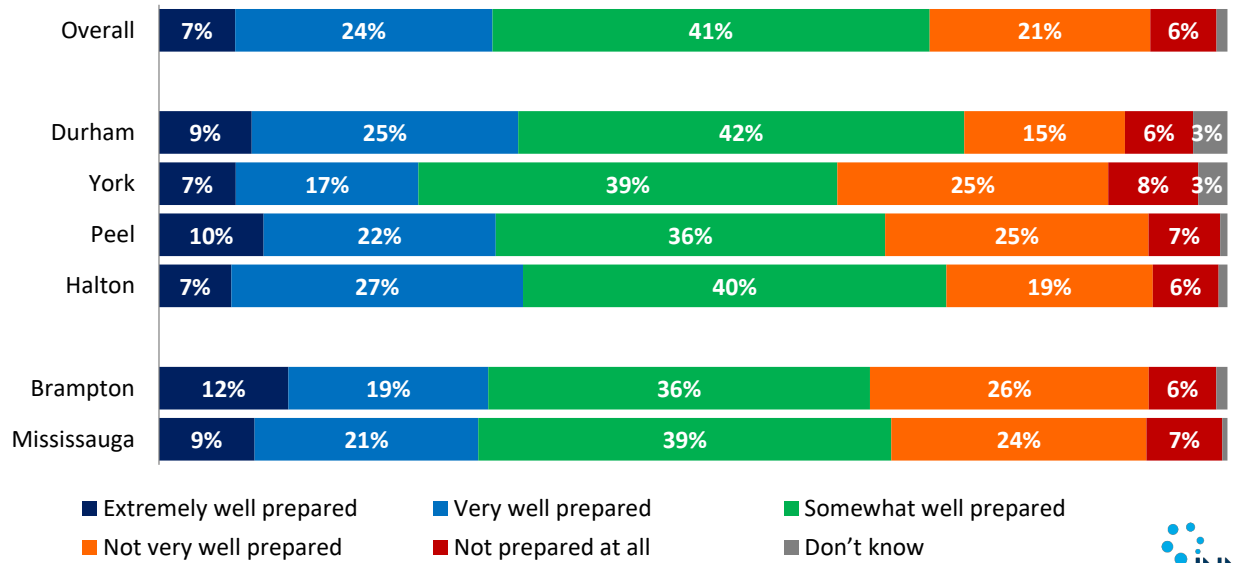


How well-prepared do you feel to be able to handle a roadside emergency, such as a flat tire, running out of gas or engine problems?
[asked of all respondents; n=600]



Feeling Prepared by Region: York region slightly less likely to feel well-prepared for a roadside emergency

Q How well-prepared do you feel to be able to handle a roadside emergency, such as a flat tire, running out of gas or engine problems?
[asked of all respondents; n=600]

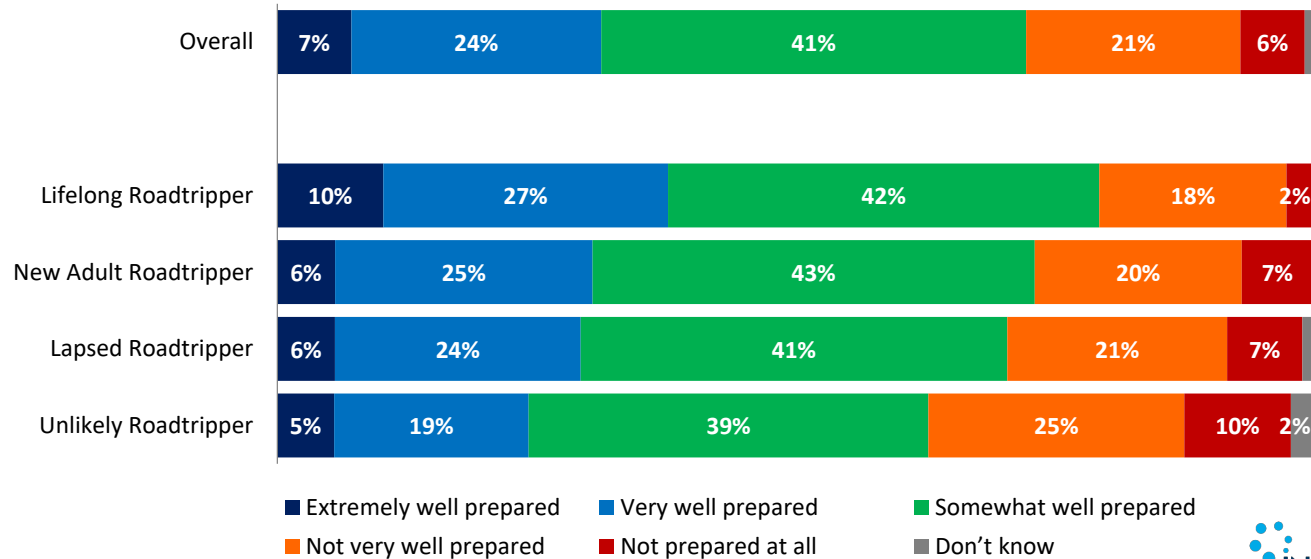


Feeling Prepared by Road trip Segmentation: Lifelong Roadtripper much more likely than other segments to feel well-prepared

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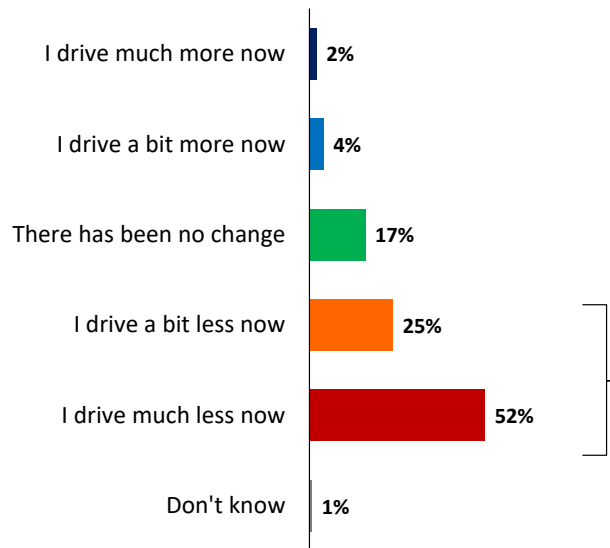


How well-prepared do you feel to be able to handle a roadside emergency, such as a flat tire, running out of gas or engine problems?
[asked of all respondents; n=600]



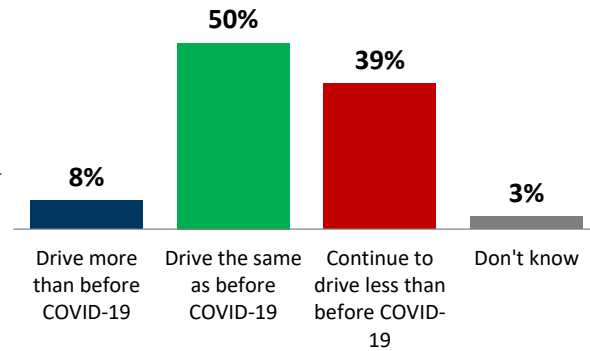
Driving Impact, COVID-19: 3-in-4 (76%) are doing less driving post-COVID; of those driving less, 4-in-10 (39%) will continue to do so

Q How has the amount of driving you typically do been impacted by COVID-19?
[asked of all respondents; n=600]



76% Less

As the province reduces COVID-19 restrictions and re-opens, do you expect to drive more than you did before COVID-19, return to your previous level of driving, or continue to drive less than you did before COVID-19?
[asked of all respondents who drive less; n=457]

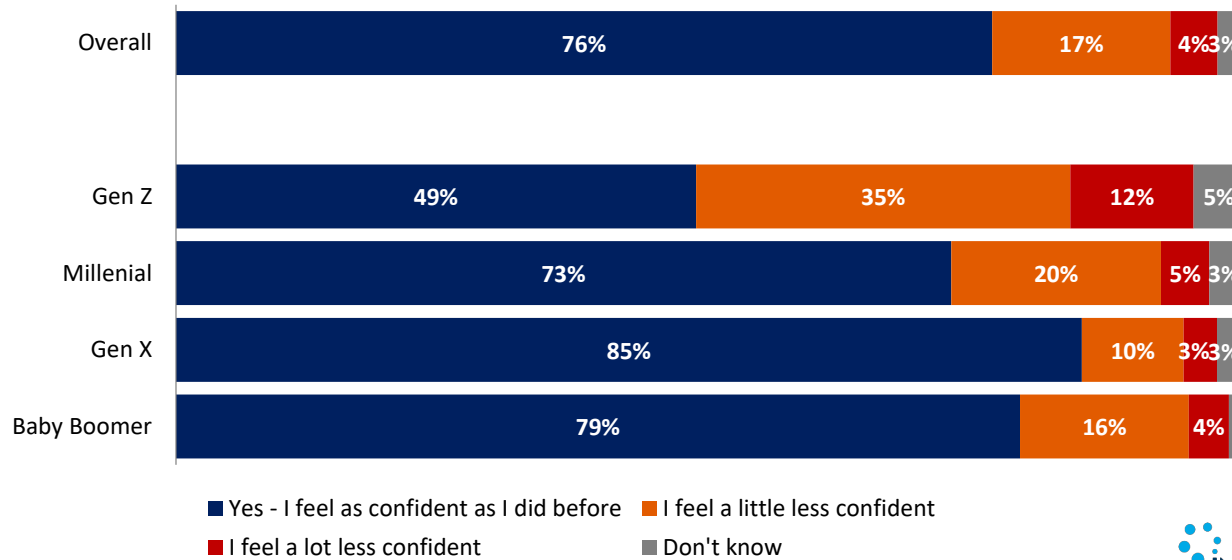


Driving Confidence: Only half of Gen Z feel as confident behind the wheel as they did prior to COVID-19

38



As traffic levels grow during the recovery, do you feel as confident behind the wheel as you did prior to the pandemic? BY generation
[asked of all respondents; n=600]





Key Regional Takeaways

Key Takeaways: Halton

Travel | Road Trips

Those from Halton are slightly more keen on travel overall compared to other regions

- 63% say that they typically take a vacation in the winter months at least every couple years compared to 57% overall
 - Halton is the highest regionally on saying they have taken a vacation in the last year (25%)
 - When it comes to road trips specifically, those from Halton are the least likely regionally to be 'Unlikely Roadtrippers' (19%)
-

Driver Safety

Halton residents are also the most well-prepared when it comes to driver safety

- They are the most likely to have a roadside assistance plan (80% vs 71% overall) and an in-car emergency kit (60% vs 52% overall)
 - Only 11% of those from Halton do not have any of the three safety measures we talked about compared to 16% overall
 - When it comes to their own sense of preparedness, they are higher than those from York and Peel and on par with those from Durham
-

Key Takeaways: Durham

Travel | Road Trips

Road trips are particularly popular among those from Durham

- When thinking about summer travel pre-COVID, 30% say they would take a road trip at least once a year compared to only 23% overall.
- Additionally, 37% say they have taken a road trip in the last year – the highest regionally.

Driver Safety

But when it comes to safety measures, those from Durham are generally less likely to have them in place

- Across the four major regions, Durham respondents are the least likely to carry an emergency kit (47%) or a high-visibility vest (13%).
 - Only 7% of respondents have all three measures in place compared to 13% in Halton and Peele and 10% in York.
 - Despite this, they are not any less likely to feel ill prepared to handle a roadside emergency
-

Key Takeaways: York

Travel | Road Trips

While still a plurality, those from York are less likely to be 'lifelong roadtrippers' than the other main regions

- 1-in-3 (35%) of York respondents are lifelong roadtrippers compared to 41% in Peel and 39% in Halton
- 1-in-5 (22%) are unlikely roadtrippers
- Only 20% report having taken a vacation in the last year, slightly lower than compared to all respondents (24%)

Driver Safety

Those from York score low on both preparedness measures and how prepared they feel to handle a roadside emergency

- York respondents are the least likely regionally to have a roadside assistance plan (75%) and among the least likely to have an emergency kit (48%) or high-visibility vest (15%)
 - When it comes to self-perceptions of preparedness, only 24% feel either extremely or very well prepared to handle a roadside emergency compared to 31% overall
-

Key Takeaways: Peel

Travel | Road Trips

Peel respondents are most likely to be lifelong roadtrippers and to say they plan to take a road trip this summer

- 41% of those in Peel are lifelong roadtrippers
- When it comes to taking a road trip this summer, Peel respondents are most likely to say they will at least 'maybe' take a road trip, especially those from Brampton

Driver Safety

Similar to Halton, those from Peel are among the highest in preparedness to deal with an emergency, particularly those in Mississauga

- 77% in Peel have a roadside assistance plan compared to 71% overall
 - 52% have an in-car emergency kit – higher than in Durham (47%) and York (48%)
 - Peel respondents are most likely regionally to have a high-visibility vest
-

Key Takeaways: Mississauga

Travel | Road Trips

Those in Mississauga are among the most likely to be 'likelong roadtrippers'

- 41% of those in Mississauga are lifelong roadtrippers and 1-in-3 (34%) say they will definitely be taking a road trip this summer compared to only 27% overall

Driver Safety

Across key regions in Ontario, those from Mississauga are some of the most prepared for a roadside emergency

- 79% in Mississauga have a roadside assistance plan compared to 71% overall; 56% have an emergency kit compared to only 44% in neighbouring Brampton; 18% have a high-visibility vest compared to 14% overall
 - Only 11% do not have any of the three safety measures
-

Key Takeaways: Brampton

Travel | Road Trips

Road trips are a particularly popular choice for summer travel among those from Brampton

- When it comes to taking a road trip this summer, Brampton respondents are most likely to say they will at least 'maybe' take a road trip at 75%

Driver Safety

Compared to neighbouring Mississauga, those from Brampton are less prepared when it comes to roadside safety

- 1-in-5 (18%) do not have any of the three safety items we ask about – the highest regionally
 - But, this doesn't seem to impact their own feeling of preparedness: they are just as likely as those from Mississauga to feel extremely or very well prepared to handle a roadside emergency
-



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