Research Tracking and Measurement

September 2, 2014

EXPLORERS'
EDGE

Naturally Adventurous

Overview

- Presentation 2014 Brand Health and Implications

- Tourism Indicator Framework

- Visitor Exit Survey

- Next Steps

2014 BRAND & IMPLICATIONS

Explorers' Edge

Brand Health Study, 2014

Executive Summary

- Overall awareness of EE remains at about 7%. Not surprisingly, awareness of EE is highest with people who have visited and with residents of Toronto/GTA. Awareness is consistent across age groups with the exception of 55+, where it is virtually zero. Those who are aware of Explorers' Edge associate it with words consistent with our brand positioning

- Toronto and Niagara have the highest rate of repeat visits, which likely reflects the fact that the preponderance of their visits are of short duration

- Summer continues to dominate in EE, with little change YOY. Older consumers are most likely of all age groups to visit in fall, while younger consumers are the most likely to visit in winter. Niagara continues to be relatively less seasonal than other regions. Of the EE regions, Almaguin's traffic is least seasonal

- When it comes to unaided awareness, Niagara is top of mind, but Muskoka is in second place. However, awareness doesn't necessarily drive travel intentions. Niagara tops the list of intended getaway destinations. Collingwood and Muskoka are virtually tied for second place. Older consumers have a slightly stronger preference for Muskoka and Parry Sound. When asked to name their preferred getaway destinations, Niagara came out on top across age all groups, with Muskoka some distance behind in second pace

- Visitation patterns have changed very little over the past three years with Niagara, Toronto, Collingwood and Muskoka in the top spots. There are very few differences in regions visited when data is viewed across location of respondent and age group

- Muskoka is perceived to be growing in popularity, though not at the same pace as Niagara

Executive Summary

- A region's website is still the most important vacation planning tool, and it's growing in importance

- While EE's regions score high on vacation decision criteria related to nature, they do not fare well on others such as proximity, accommodations, accessibility, cultural activities, attractions and dining/entertainment and packaged deals

- Perceptions of distance is a particularly stubborn issue for EE, compared to competitors like Niagara and Collinwood. Muskoka is also seen as expensive

Implications for Marketing

- Overall, most brand health metrics are unchanged from 2013 and 2012. This is not surprising given the limited investment in brand advertising over the past 36 months. For that reason, we recommend that RTO 12 survey brand perceptions every 36 months only, and not on an annual basis

- The research confirms the decisions to focus the 2013/2014 marketing programs on highly-focused tactical efforts to drive traffic to the EE web site. Investing in those programs delivers quantifiable results over the short-term, which brand advertising cannot

  - That said, we will not abandon brand-building – tacticals efforts such as content marketing and promotions like F&F do build brand while driving visitor traffic

- With respect to the GTA visitor target, Niagara is still our biggest competitor:

  - The survey confirms that EE must focus its content strategy on overcoming the region's perceived shortcomings versus competition like Niagara – namely proximity, accommodations, accessibility, cultural activities, attractions and dining/entertainment and packaged deals

- The survey points to the importance of continued investment in digital assets such the regional website and Facebook Page as these are important to the traveller when planning a trip

  - Improving the user experience on EE.ca and integrating a booking engine should be an urgent priority for 2014

Methodology

- Online quantitative research survey:

    - The 2014 was in-field in March – a total of 528 surveys were completed online

    - Distributed to ensure a quota based on age, income, gender and geographic location

    - Completed by residents of Southwestern Ontario

Respondent Profiles
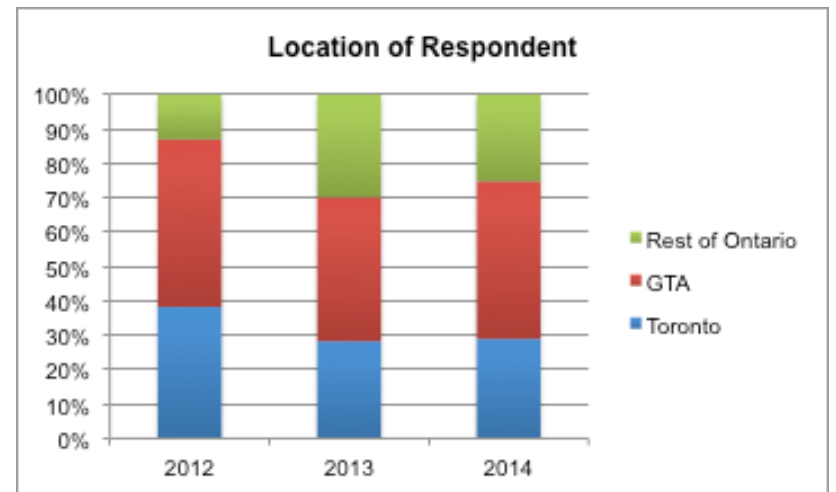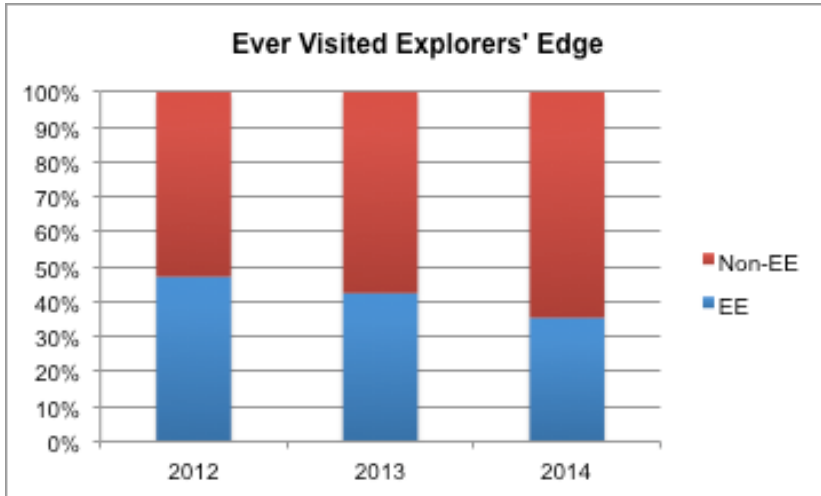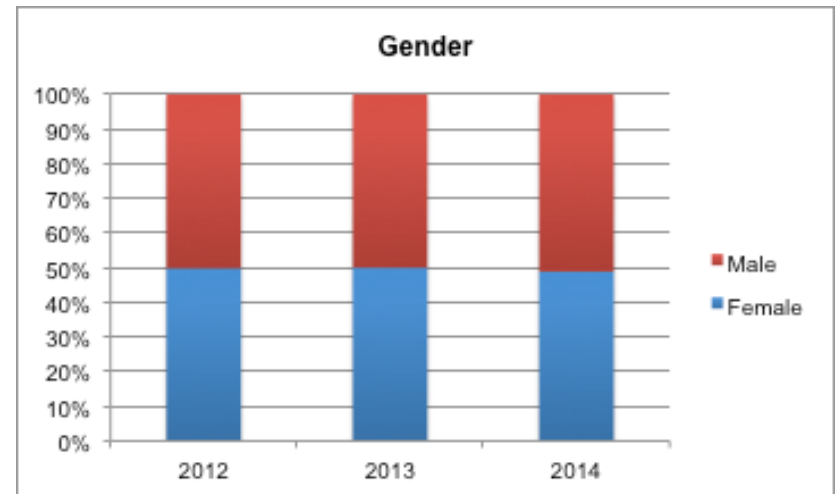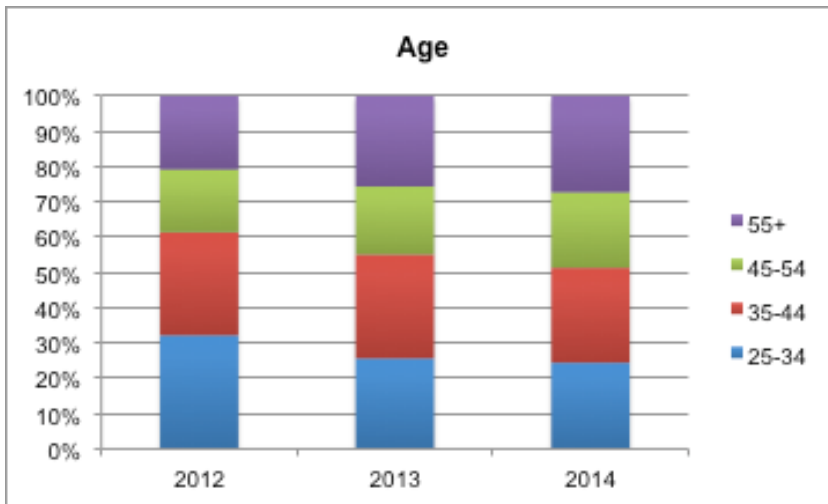
Respondent Profiles
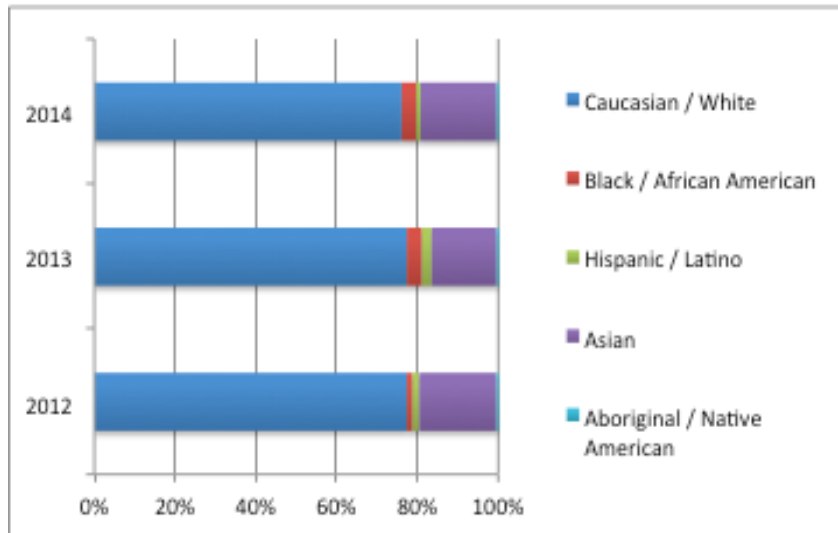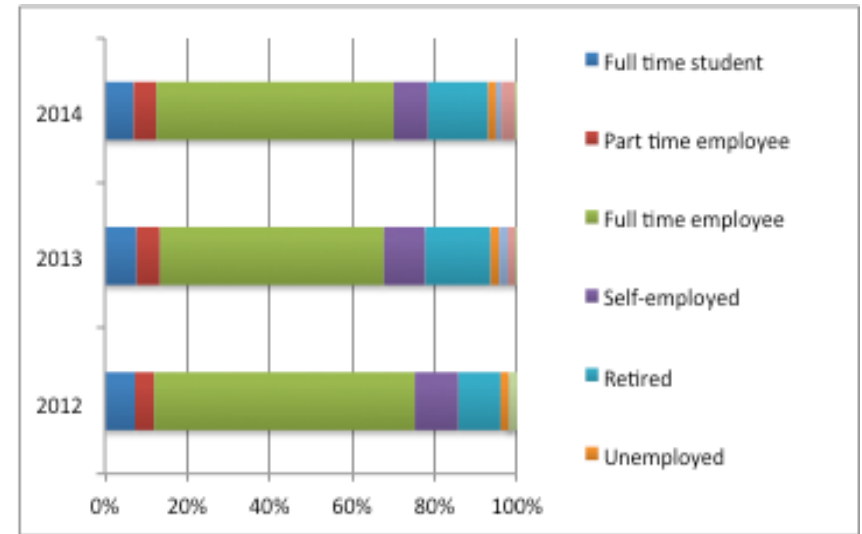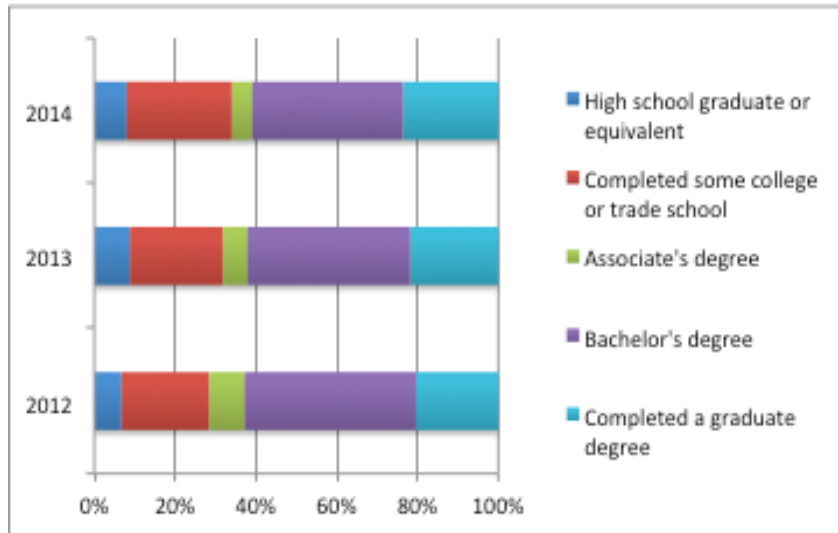
Frequency of Visits

- Toronto and Niagara have the highest rate of repeat visits, which likely reflects that the preponderance of their visits are of short duration
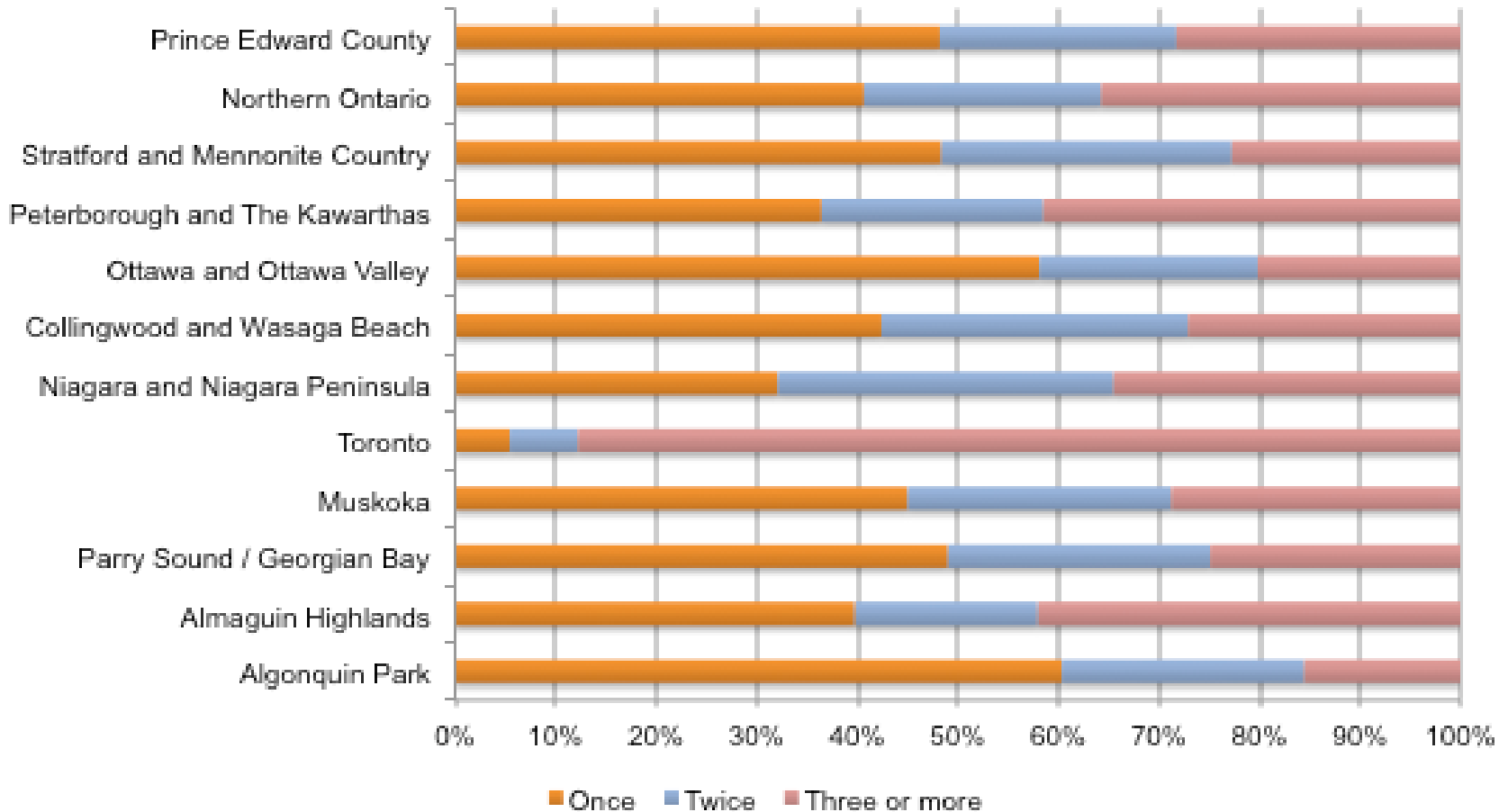
Q1D.   How many times in the past year have you visited each of the following regions?

Seasonality of Visits – All EE

- Summer continues to dominate, with little change YOY. Older consumers are most likely of all age groups to visit in fall, while younger consumers are the most likely to visit in winter
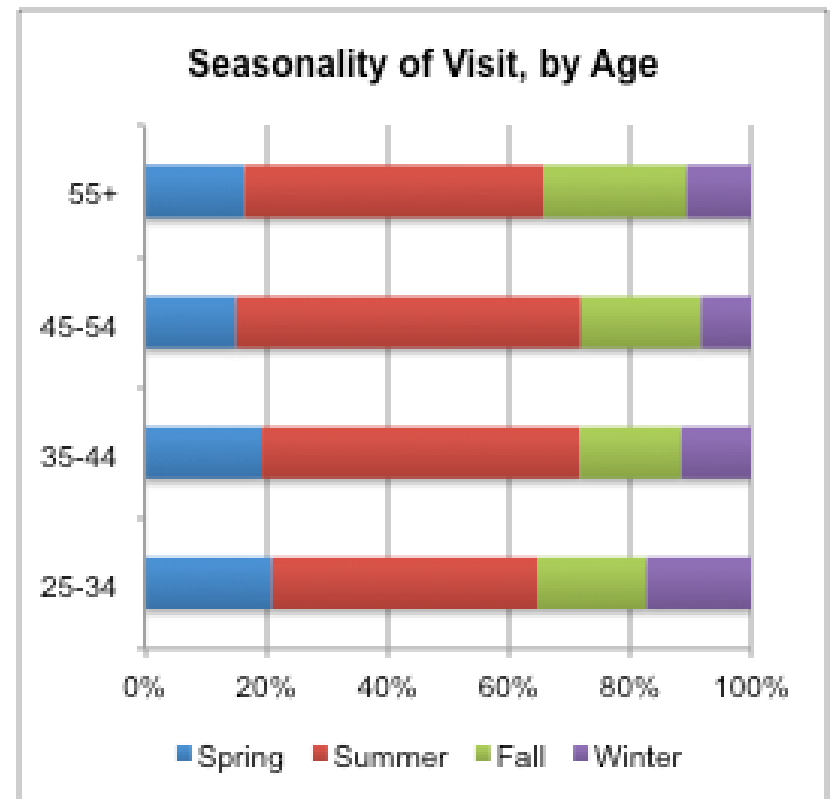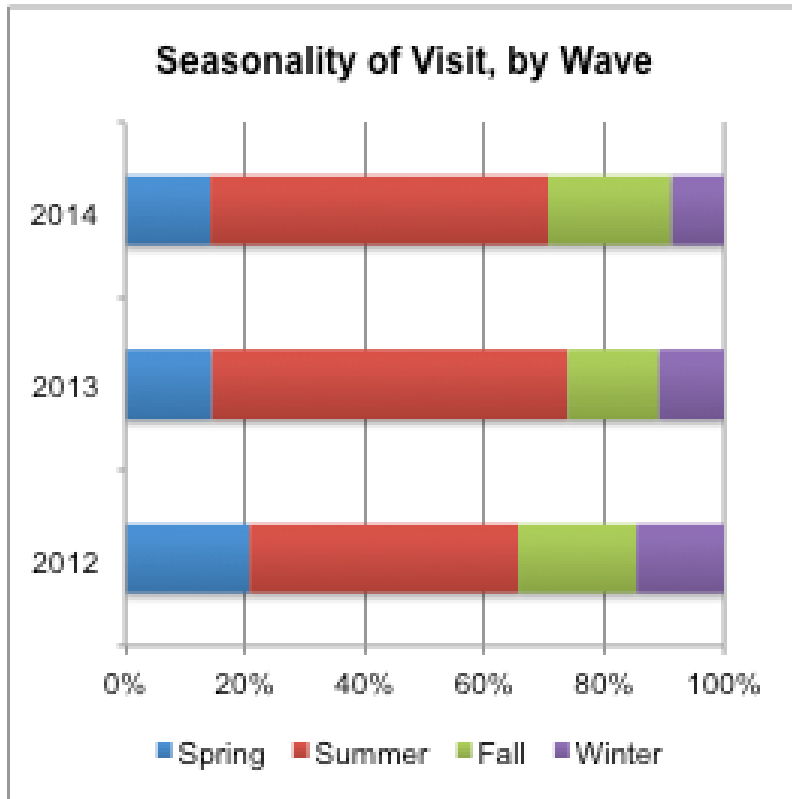
Q3A. During what season(s) have you visited each of the following regions?

Seasonality of Visits

- Niagara/Toronto continue to least seasonal. Of the EE regions, Almaguin's traffic is least seasonal

Destination Rankings, Unaided by Age

- Niagara is top of mind, but Muskoka is in second place. However, awareness doesn't necessarily drive travel intentions (see question 9b)

Region	2012	2013	2014
Niagara/Stratford	1	1	1
Muskoka/Huntsville	2	2	2
Ottawa	3	3	3
Wasaga Beach/Georgian Bay	5	5	4
Prince Edward county/Kingston/1000 islands	6	6	5
Barrie/Collingwood/Blue Mountain	4	4	6
Northern Ontario	8	7	7
London/Kitchener/Waterloo/W. Ontario	11	12	8
Algonquin	7	8	9
Toronto/GTA	10	11	10
Kawarthas/Peterborough	9	9	11
Haliburton	12	10	12

Q8. When it comes to going on a vacation in Ontario or nearby, what places come to mind?

Destination Rankings, Unaided by Location

Region	Toronto	GTA	Rest of Ontario
Niagara/Stratford	1	1	1
Muskoka/Huntsville	2	2	2
Ottawa	3	3	3
Prince Edward county/Kingston/1000 islands	4	6	5
Barrie/Collingwood/Blue Mountain	5	4	8
Wasaga Beach/Georgian Bay	6	5	4
Northern Ontario	7	9	7
Algonquin	8	7	9
London/Kitchener/Waterloo/W. Ontario	9	11	11
Kawarthas/Peterborough	10	10	10
Haliburton	11	12	12
Toronto/GTA	12	8	6

Q8.   When it comes to going on a vacation in Ontario or nearby, what places come to mind?

Destination Rankings, Unaided by Age Group

Region	25-34	35-44	45-54	55+
Niagara/Stratford	1	1	1	1
Muskoka/Huntsville	2	2	2	2
Ottawa	3	3	3	3
Prince Edward county/Kingston/1000 islands	8	6	4	4
Wasaga Beach/Georgian Bay	4	5	5	5
Barrie/Collingwood/Blue Mountain	5	4	6	6
Kawarthas/Peterborough	10	11	7	9
Northern Ontario	7	8	8	7
Algonquin	6	7	9	11
Toronto/GTA	9	9	10	12
London/Kitchener/Waterloo/W. Ontario	11	10	11	8
Haliburton	12	12	12	10

Q8.   When it comes to going on a vacation in Ontario or nearby, what places come to mind?

Niagara Remains a Formidable Competitor

- Niagara tops the list of intended getaway destinations. Collingwood and Muskoka are virtually tied for second place. Older consumers have a slightly stronger preference for Muskoka and Parry Sound

	Total	Location		Age			
		Toronto & GTA	Rest of Ontario	25-34	35-44	45-54	55+
Niagara and Niagara Peninsula	73%	73%	74%	71%	72%	78%	74%
Toronto	64%	54%	87%	55%	56%	71%	74%
Collingwood and Wasaga Beach	45%	47%	42%	50%	47%	46%	39%
Muskoka	**41%**	**40%**	**44%**	**39%**	**42%**	**49%**	**36%**
Montreal	37%	41%	27%	50%	40%	33%	25%
Ottawa and Ottawa Valley	33%	33%	31%	37%	31%	33%	31%
Peterborough and The Kawarthas	32%	32%	32%	27%	31%	39%	31%
Parry Sound / Georgian Bay	**28%**	**27%**	**32%**	**29%**	**23%**	**36%**	**26%**
Stratford and Mennonite Country	27%	26%	31%	18%	24%	32%	35%
Algonquin Park	**22%**	**24%**	**19%**	**29%**	**24%**	**28%**	**9%**
Northern Ontario	22%	23%	22%	26%	24%	23%	16%
Prince Edward County	22%	23%	19%	19%	21%	26%	24%
Almaguin Highlands	**2%**	**6%**	**2%**	**9%**	**7%**	**4%**	**1%**
None of the above	2%	5%	2%	5%	6%	2%	3%

Q9B.   Which of the following regions do you intend to visit in the next 12 months?

Regions Visited Past Year

- Visitation patterns have changed very little over the past three years

2014: Niagara and Niagara Peninsula 23% | Toronto 15% | Collingwood and Wasaga Beach 12% | Muskoka 9% | 8% | 8% | 4% | 5% | 5% | 5% | 5% | 1%

2013: Niagara and Niagara Peninsula 23% | Toronto 13% | Collingwood and Wasaga Beach 11% | Muskoka 9% | 9% | 9% | 6% | 6% | 5% | 5% | 5% | 1%

2012: Niagara and Niagara Peninsula 21% | Toronto 11% | Collingwood and Wasaga Beach 12% | Muskoka 10% | 10% | 7% | 7% | 6% | 5% | 5% | 5% | 2%

Legend:
- Niagara and Niagara Peninsula
- Toronto
- Collingwood and Wasaga Beach
- Muskoka
- Ottawa and Ottawa Valley
- Peterborough and The Kawarthas
- Parry Sound / Georgian Bay
- Northern Ontario
- Stratford and Mennonite Country
- Algonquin Park
- Prince Edward County
- Almaguin Highlands

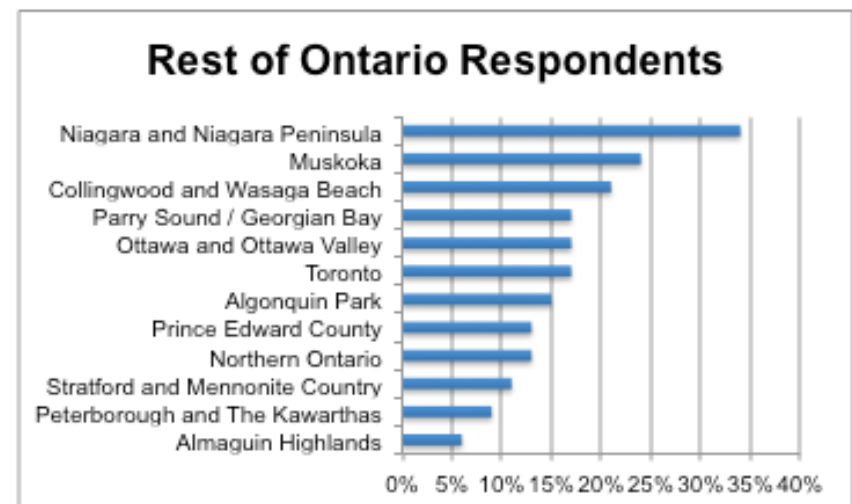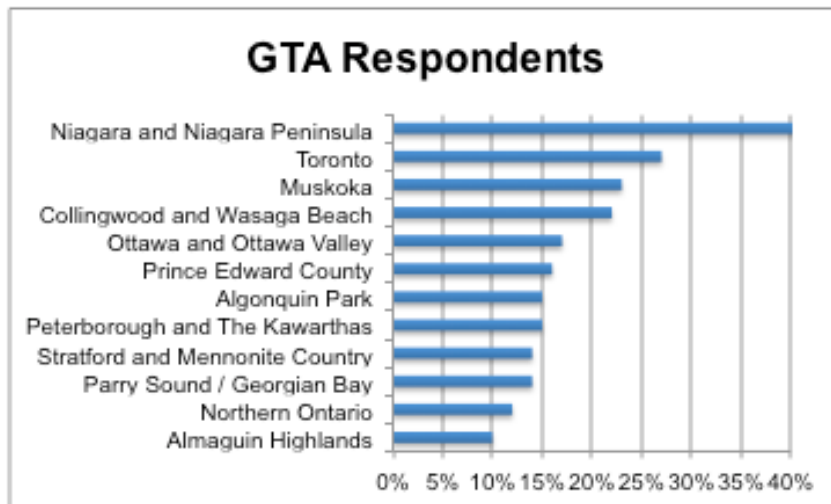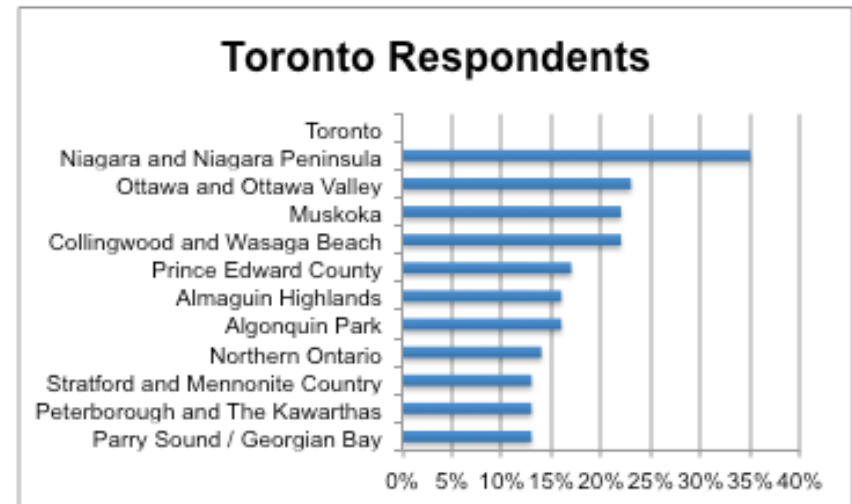QS7.   Which of the following areas have you visited within the past year?

Regions Visited Past Year

- There are very few differences in regions visited when data is viewed across location of respondent and age group

Top chart (by location):

Region	Niagara and Niagara Peninsula	Toronto	Collingwood and Wasaga Beach	Muskoka	Ottawa and Ottawa Valley	Peterborough and The Kawarthas	Parry Sound / Georgian Bay	Northern Ontario	Stratford and Mennonite Country	Algonquin Park	Prince Edward County	Almaguin Highlands
Rest of Ontario	21%	19%	11%	10%	7%	8%	6%	5%	5%	4%	3%	1%
GTA	22%	19%	12%	9%	9%	7%	5%	4%	4%	4%	4%	1%
Toronto	22%		12%	11%	11%	9%	6%	7%	6%	6%	7%	3%

Bottom chart (by age group):

Age	Niagara and Niagara Peninsula	Toronto	Collingwood and Wasaga Beach	Muskoka	Ottawa and Ottawa Valley	Peterborough and The Kawarthas	Parry Sound / Georgian Bay	Northern Ontario	Stratford and Mennonite Country	Algonquin Park	Prince Edward County	Almaguin Highlands
55+	21%	14%	11%	10%	9%	8%	6%	5%	7%	3%	6%	0%
45-54	22%	13%	11%	10%	9%	9%	7%	5%	5%	5%	4%	1%
35-44	22%	11%	12%	10%	9%	7%	5%	5%	5%	6%	5%	2%
25-34	22%	12%	12%	9%	10%	7%	6%	6%	4%	6%	4%	2%

QS7.   Which of the following areas have you visited within the past year?
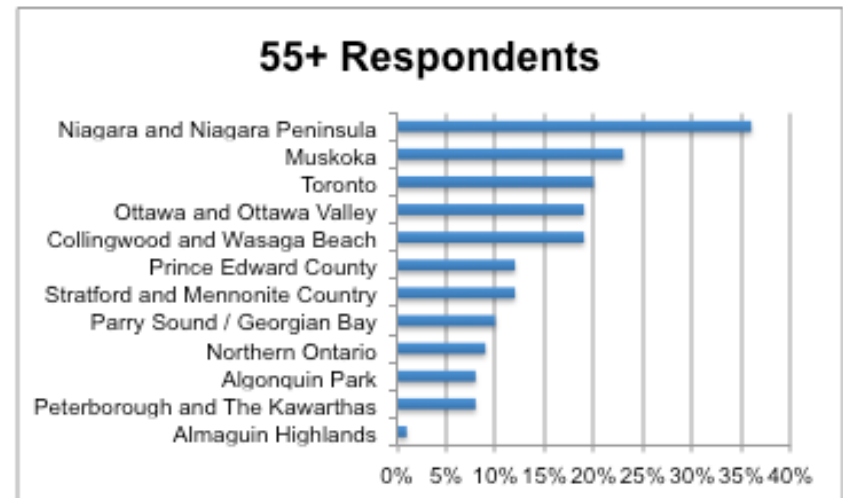
Preference by Location
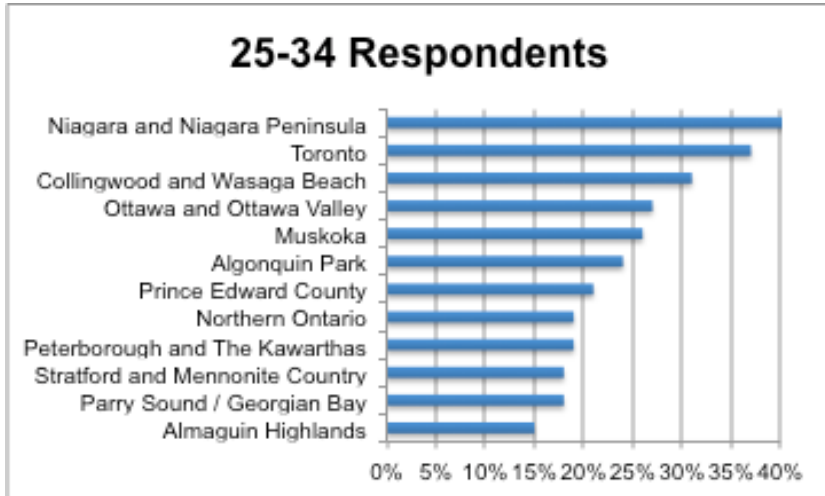
- Niagara is the preferred choice across all location groups with Muskoka some distance behind

Preference by Age Group

- Niagara is the preferred choice across age groups. Muskoka is popular with younger respondents

25-34 Respondents

Region	Percentage
Niagara and Niagara Peninsula	
Toronto	
Collingwood and Wasaga Beach	
Ottawa and Ottawa Valley	
Muskoka	
Algonquin Park	
Prince Edward County	
Northern Ontario	
Peterborough and The Kawarthas	
Stratford and Mennonite Country	
Parry Sound / Georgian Bay	
Almaguin Highlands	

35-44 Respondents

Region	Percentage
Niagara and Niagara Peninsula	
Toronto	
Collingwood and Wasaga Beach	
Muskoka	
Prince Edward County	
Almaguin Highlands	
Algonquin Park	
Northern Ontario	
Ottawa and Ottawa Valley	
Peterborough and The Kawarthas	
Parry Sound / Georgian Bay	
Stratford and Mennonite Country	

45-54 Respondents

Region	Percentage
Niagara and Niagara Peninsula	
Muskoka	
Parry Sound / Georgian Bay	
Collingwood and Wasaga Beach	
Algonquin Park	
Peterborough and The Kawarthas	
Ottawa and Ottawa Valley	
Toronto	
Almaguin Highlands	
Prince Edward County	
Stratford and Mennonite Country	
Northern Ontario	

55+ Respondents

Region	Percentage
Niagara and Niagara Peninsula	
Muskoka	
Toronto	
Ottawa and Ottawa Valley	
Collingwood and Wasaga Beach	
Prince Edward County	
Stratford and Mennonite Country	
Parry Sound / Georgian Bay	
Northern Ontario	
Algonquin Park	
Peterborough and The Kawarthas	
Almaguin Highlands	

Q10F. Imagine you wanted to go on a vacation / get-away in Ontario or nearby, which statement best describes how you feel about each region?
Percentage represent total respondents who said it was "The only choice I would consider" and "My preferred choice but I would consider other alternatives".
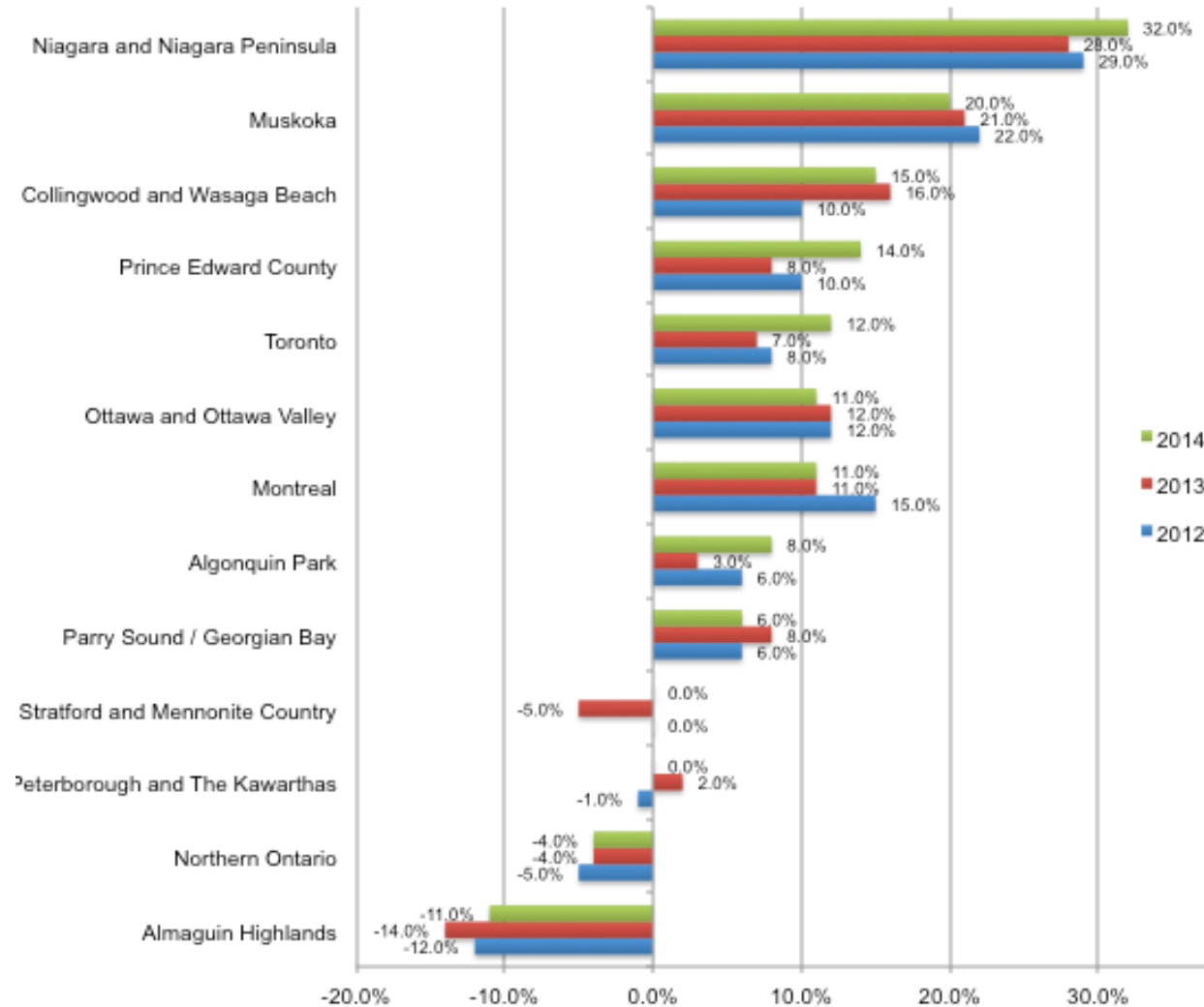
Momentum is Relatively Unchanged

- This measure tracks the momentum in perceived popularity of a region: It is based on the difference between those who say a region is "gaining ground" less those who say a region is "losing ground"

Digital is critical for vacation planning

- A region's website is still the most important planning tool, and growing in importance

Activity	All	25-34	35-44	45-54	55+
Visit the regions website	1	4	1	1	1
Talk to friends	2	1	2	3	3
Search for information on sites like Google, Yahoo! or MSN	3	2	4	2	2
Visit travel sites like expedia, travelocity, etc	4	3	3	4	4
Talk to family members	5	5	5	5	5
Browse tourism brochures, pamplets, etc	6	8	6	6	6
Read online blogs/reviews posted by people	7	6	7	8	9
Read online blogs/reviews posted by travel experts	8	7	8	9	8
Browse online advertisements	9	9	9	7	7
Talk to a tourism representative	10	11	11	11	10
Look for videos on youtube	11	10	10	10	12
Look on facebook	12	12	12	12	13
Other	13	14	14	13	11
Read twitter posts	14	13	13	14	14

Q17.   When planning a vacation, please indicate which actions you typically do.

Niagara is still our main competition

- While EE's regions score high on vacation decision criteria related to nature, they do not fare well on others such as proximity, accommodations, accessibility, cultural activities, attractions and dining/entertainment and packaged deals

Criterion	Muskoka	Parry Sound / Georgian Bay	Algonquin	Almaguin Highlands	Niagara and Niagara Peninsula	Collingwood and Wasaga Beach	Stratford and Mennonite Country	Prince Edward County	Peterborough and The Kawarthas
Close proximity to home	48%	40%	31%	22%	74%	57%	48%	40%	50%
Has large variety of outdoor activities	81%	74%	81%	55%	71%	80%	46%	65%	70%
Best location for favorite activity	62%	51%	51%	33%	65%	58%	38%	45%	47%
Top rated accommodations	69%	46%	37%	28%	82%	57%	47%	46%	42%
Accessible to me (i.e., by car, bus, etc)	47%	41%	37%	26%	78%	52%	47%	40%	45%
Family friendly	82%	72%	78%	51%	80%	81%	66%	69%	73%
Offers exclusive packaged deals	55%	39%	34%	26%	79%	50%	40%	40%	37%
Cultural activities	35%	29%	26%	23%	56%	30%	57%	37%	32%
Incredible nature	87%	80%	90%	60%	70%	70%	53%	71%	72%
Relaxing environment	86%	79%	84%	57%	61%	73%	64%	73%	74%
Attractions	33%	28%	26%	23%	79%	45%	30%	25%	27%
Great dining & entertaining experiences	58%	39%	27%	26%	81%	53%	55%	49%	39%

Q21FA. How well do you think each of the following tourism regions would perform on each criteria?

Impediments to Visit

- Perceptions of distance remains an issue, compared to competitors like Niagara and Collinwood.

- Muskoka is seen as expensive

- Lack of interest may reflect the fact that the region falls short on factors such as culinary experiences, packages, etc.

Reason	Niagara and Niagara Peninsula	Collingwood and Wasaga Beach	Peterborough and The Kawarthas	Stratford and Mennonite Country	Northern Ontario	Prince Edward County	Almaguin Highlands	Algonquin Park	Muskoka	Parry Sound / Georgian Bay
Decided to stay in town	35%	15%	14%	13%	10%	11%	7%	13%	15%	13%
Did not offer preferred activity	12%	17%	13%	15%	10%	9%	7%	16%	13%	10%
Never thought of it	13%	29%	45%	46%	33%	49%	62%	25%	27%	40%
No transportation	9%	14%	10%	8%	10%	8%	6%	9%	12%	11%
Not of interest	17%	35%	47%	44%	38%	36%	31%	37%	32%	40%
Poor weather condition	23%	11%	7%	6%	11%	5%	4%	10%	11%	9%
Read a poor review online	11%	6%	6%	4%	2%	2%	2%	2%	4%	4%
Too expensive	22%	15%	6%	8%	9%	9%	4%	8%	24%	9%
Too far	11%	19%	22%	18%	52%	26%	17%	47%	33%	37%
Travel partner unable to go	21%	13%	9%	8%	6%	6%	4%	10%	9%	9%
Unable to take time off work	22%	15%	9%	10%	9%	9%	5%	8%	14%	8%

Q23A.   *What do you believe has prevented you in the past from visiting each of the following regions?*

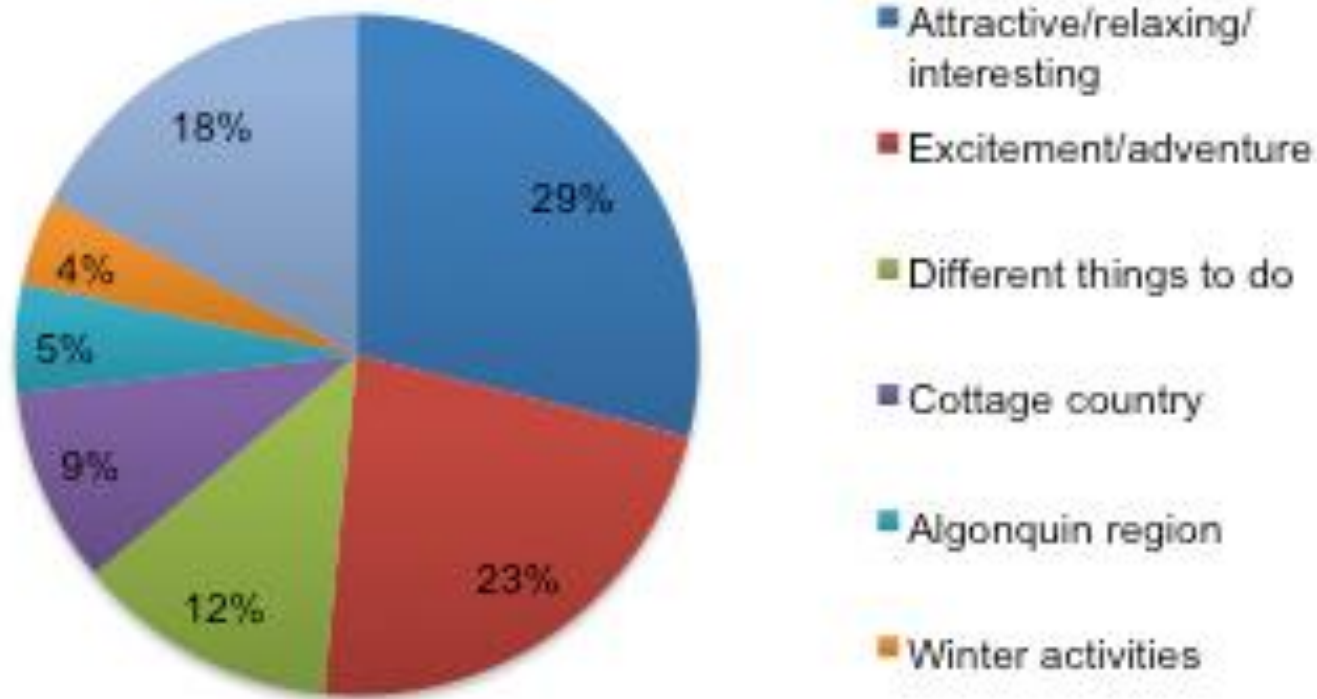# Aided awareness is unchanged over the previous year

- Awareness is highest with people who have visited and with residents of Toronto/GTA. Awareness is consistent across age groups with the exception of 55+, where it is virtually zero

	Visited EE			Never Visited EE			Toronto/GTA			Rest of Ontario		
	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014
Aware	6%	7%	7%	8%	8%	11%	3%	6%	5%	6%	8%	8%	4%	4%	4%
Unaware	94%	93%	93%	92%	92%	89%	97%	94%	95%	94%	92%	92%	96%	96%	96%

	25-34			35-44			45-54			55+		
	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014
Aware	5%	10%	10%	11%	8%	8%	2%	6%	9%	3%	3%	1%
Unaware	95%	90%	90%	89%	92%	92%	98%	94%	91%	97%	97%	99%

Brand Associations

- Those who are aware of Explorers' Edge associate it with words consistent with our brand positioning

Legend:
- **Attractive/relaxing/interesting** — 29%
- **Excitement/adventure** — 23%
- **Different things to do** — 12%
- **Cottage country** — 9%
- **Algonquin region** — 5%
- **Winter activities** — 4%
- (light blue) — 18%

Q37B.   Please explain what the Explorers' Edge region means to you?

TOURISM INDICATOR FRAMEWORK

EXPLORERS' EDGE
Naturally Adventurous

Accommodations and attractions indices are up in fiscal Q4.

All Indices — YTD ■ Q4
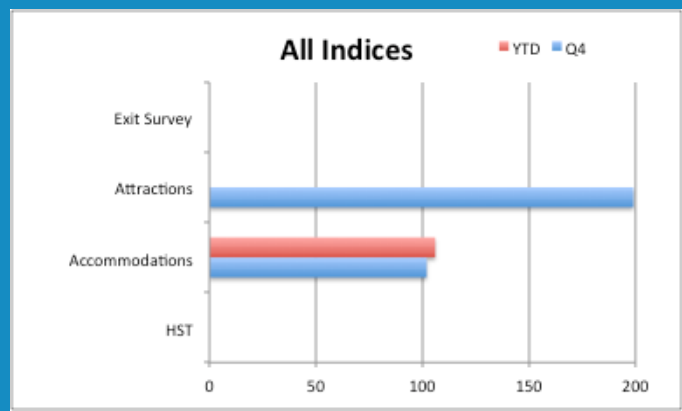
HST Index
Data Incomplete

Occupancy Index
Up 2% in Q4, up 5.8% YTD (vs 1.9% in Ont)

Parks Index
Data not available for Fiscal Q4

Exit Survey
Data Incomplete

Winter Attractions Index
Up 99% in Q4

Weather Index

	Average Temperature	Days of Precipitation	Total Precipitation
	-11.6°c (-6.3°c in 2012)	Not Available	Not Available

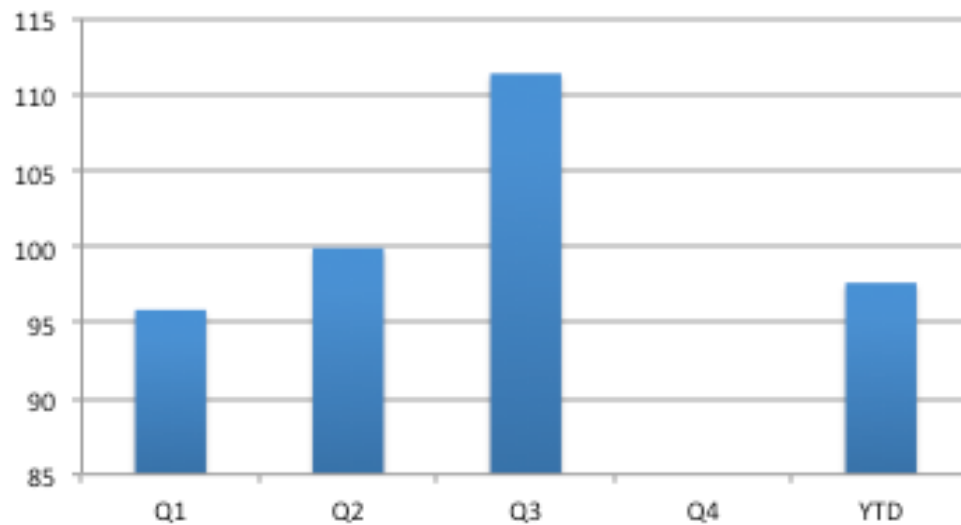| Weather Index	Average Temperature	Days of Precipitation	Total Precipitation
	-11.6°c (-6.3°c in 2012)	Not Available	Not Available

Average Temperature
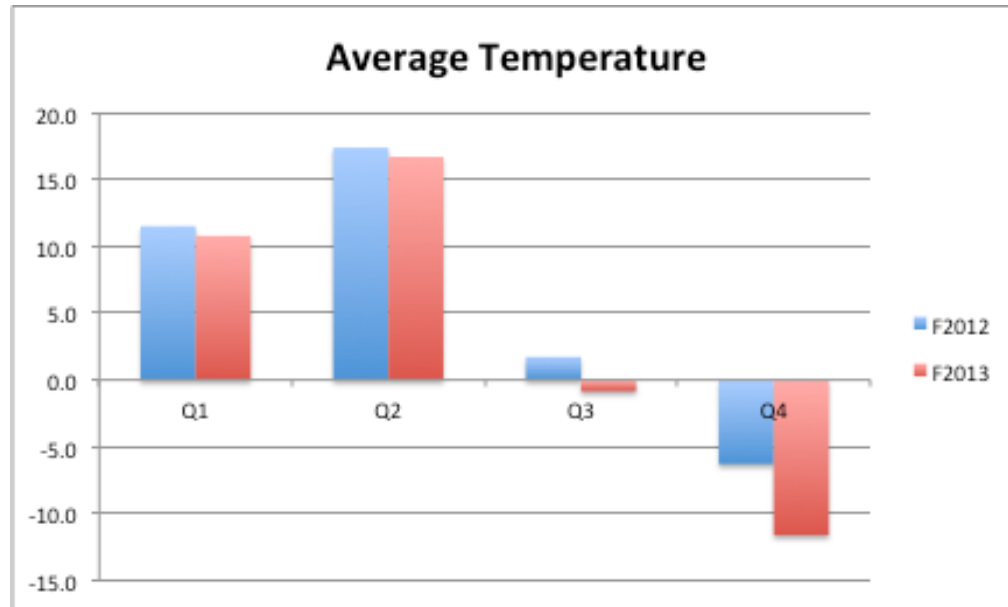
HST Index by Month (F2013 versus F2012)
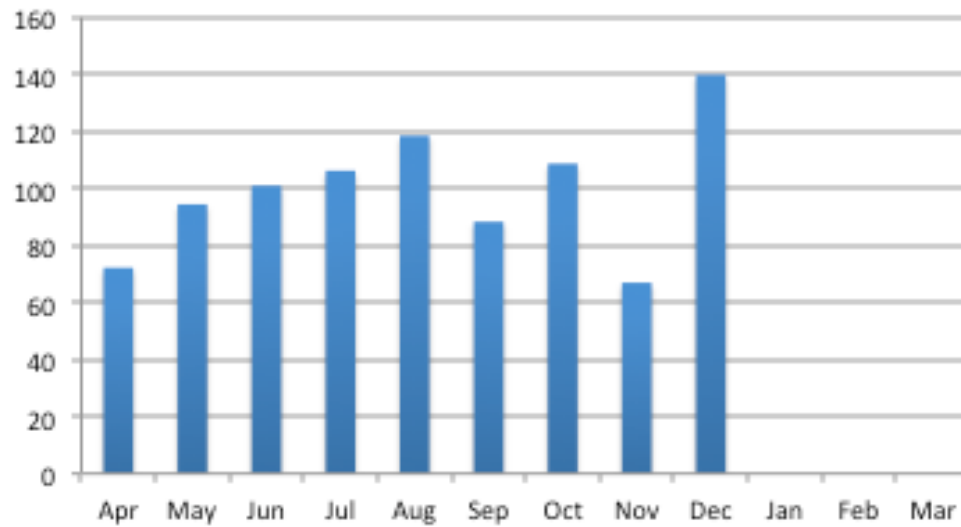
HST Index by Quarter (F2013 versus F2012)

Occupancy Index — Up 2% in Q4, up 5.8% YTD (versus 1.9% in Ontario)

Room Occupancy — RTO12, Ontario

Revenue Per Room — RTO 12, Ontario

Winter Attractions Index
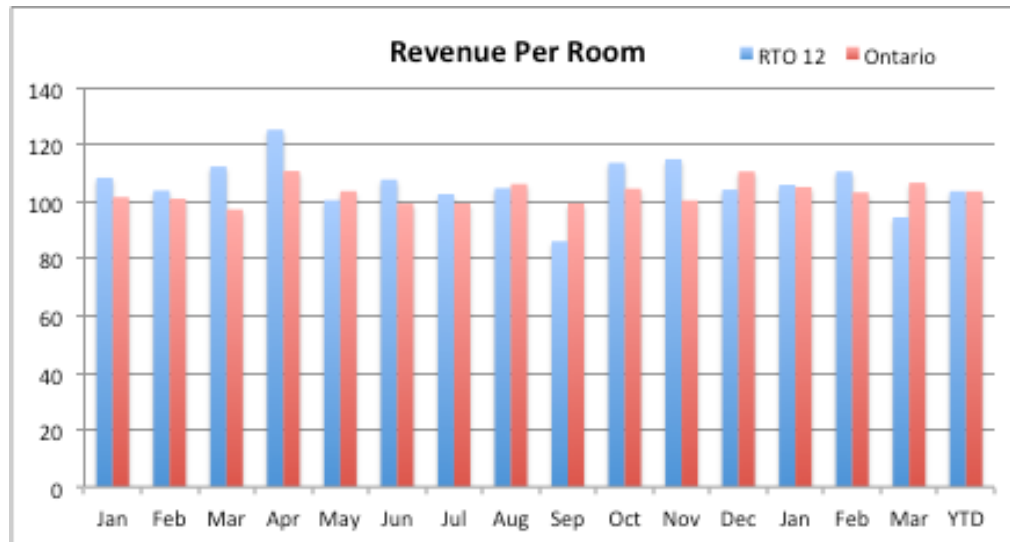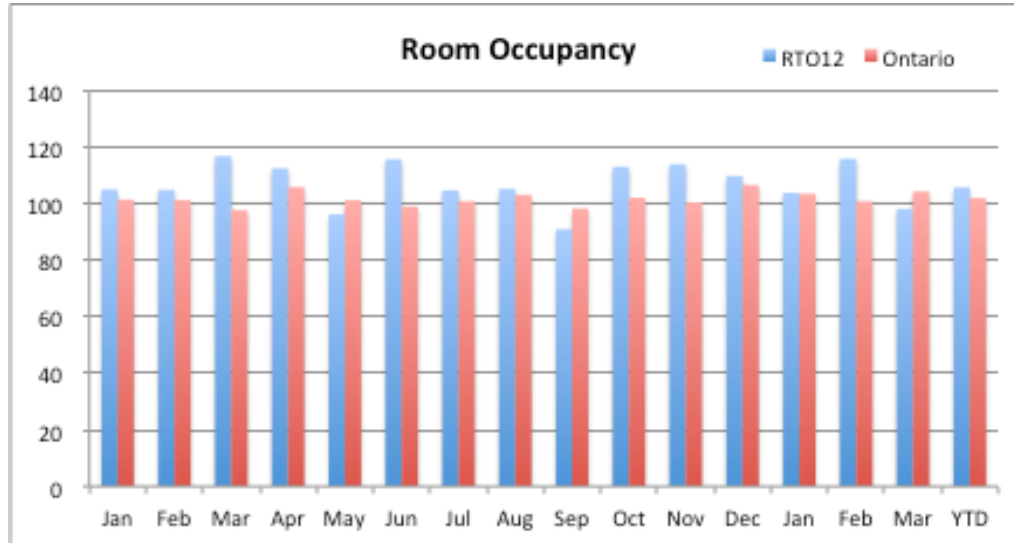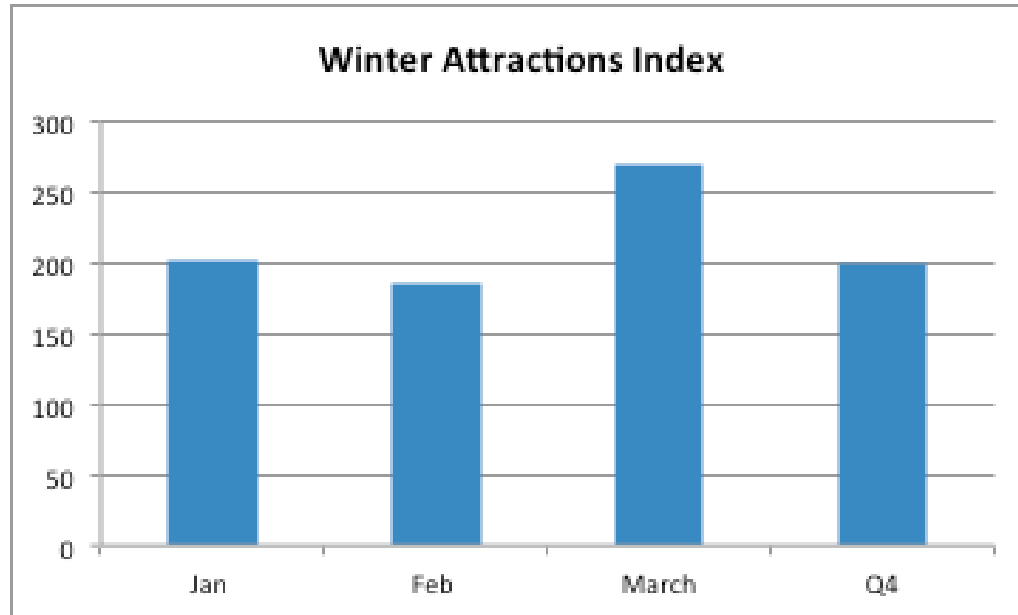
Interpreting the Data

The data sources are as follows:

- HST is collected by Segall & Partners LLP. Data is provided by month. 11 board members have participated up to December, so caution must be exercised with this data as the sample size is small

- Occupancy data is from PKF Consulting and is reported Monthly.

- Weather data is from the Environment Canada's Muskoka weather station. Precipitation data not available in 2014.

- Parks data is provided by Ontario Parks, MNR. Data is reported for May through October only. Reporting parks are Algonquin, Arrowhead, Grundy, Killbear, Mikisew & Restoule

- Winter attractions data is from 3 operators only. Shown in aggregate only. Caution must be exercised with this data as the sample size is small

- Segall was able to collect golf data from one operator only. As a result the data cannot be reported

- Exit survey data is provided by RTO 12, and is pulled from an ongoing survey fielded in local hotels. Sample size is presently very small

Tourism Indicator Framework

- Winter Travel Season
  - April Data Collection (May Presentation)

- Spring and Summer
  - September Data Collection (November Presentation)

- Fall Travel Season
  - December Data Collection (January Presentation)

- Data Collection
  - Three times a year
  - Continue month over month statistics

Visitor Exit Survey

- I-Pad Responses
  - 47 entries to date

- Distributed 250 Rack Cards
  - 25 accommodation providers

- Communication
  - Separate section on the website

Questions