The World is our Office™

Explorers' Edge

2012 Quantitative Research - Detailed Findings

April 23, 2012

CLOUD AdAgents

Methodology

- Online quantitative research survey:
  - 1230 respondents answering 38 questions
  - Distributed to ensure a quota based on age, income, gender, travel habits and geographic location
  - Completed by residents of Southern Western Ontario
  - Conducted between February 27th and March 2nd 2012

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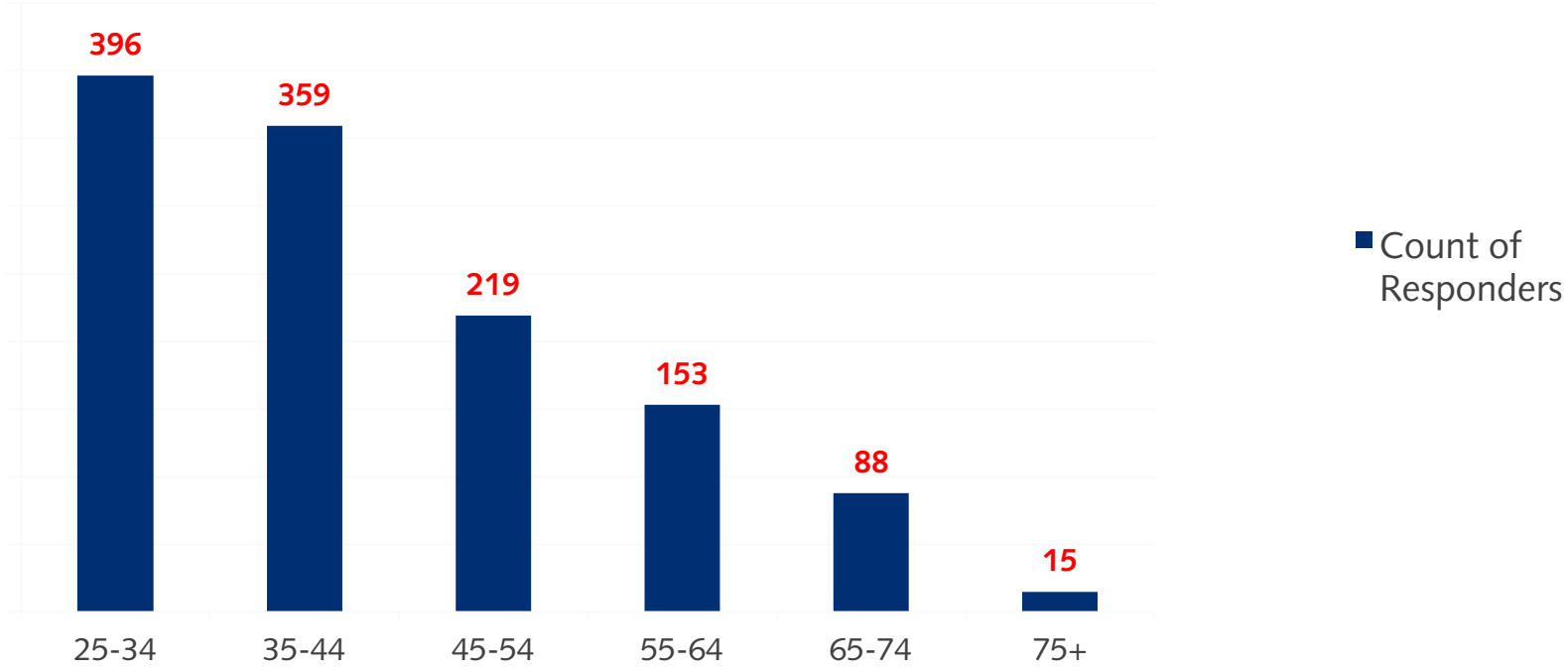
Age distribution of survey respondents

- The survey data ensured a quota by age group with a deliberate skew to a younger 25-44 demographic



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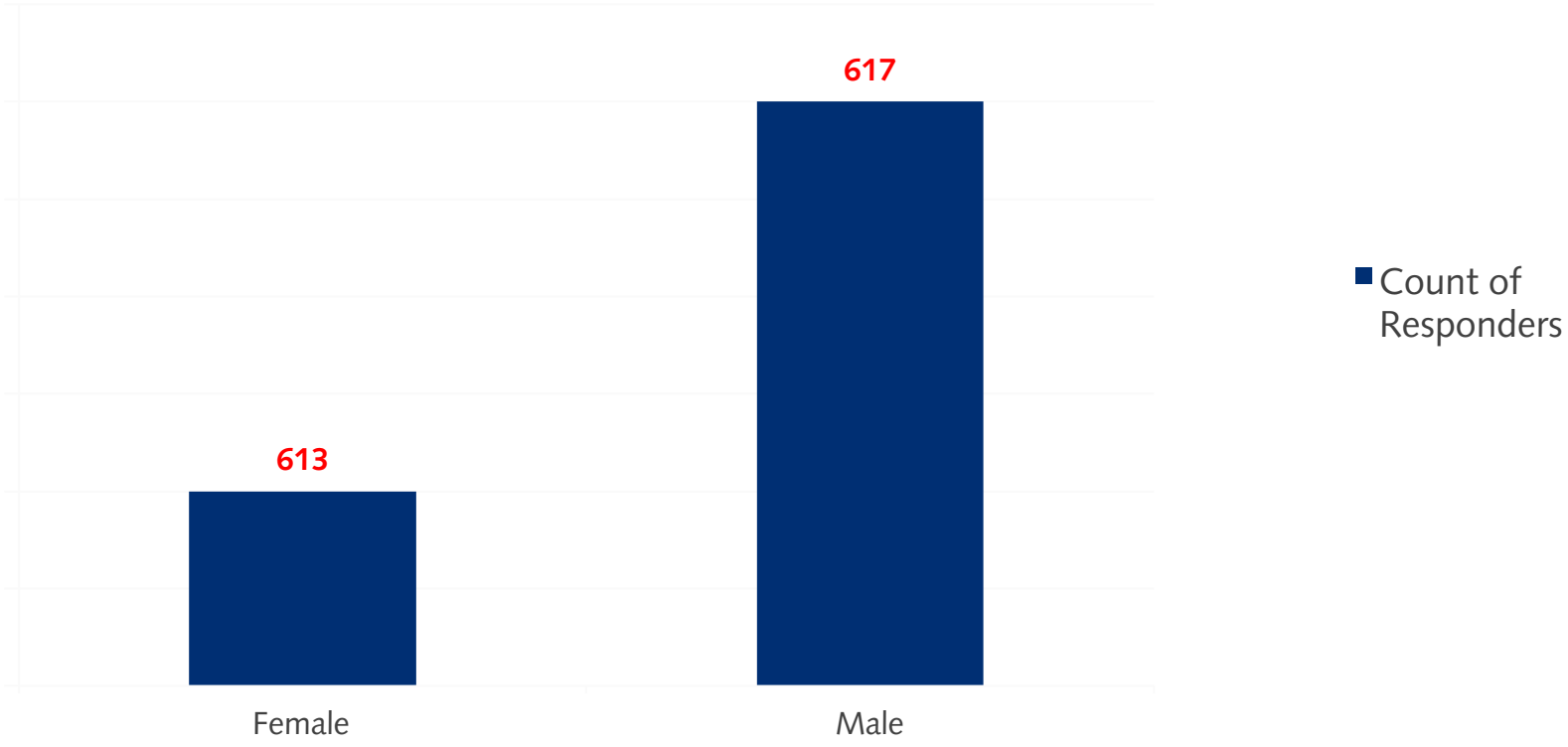
Gender distribution of survey respondents

- As per the survey quota, we've delivered a roughly 50/50 gender split across the 1230 respondents



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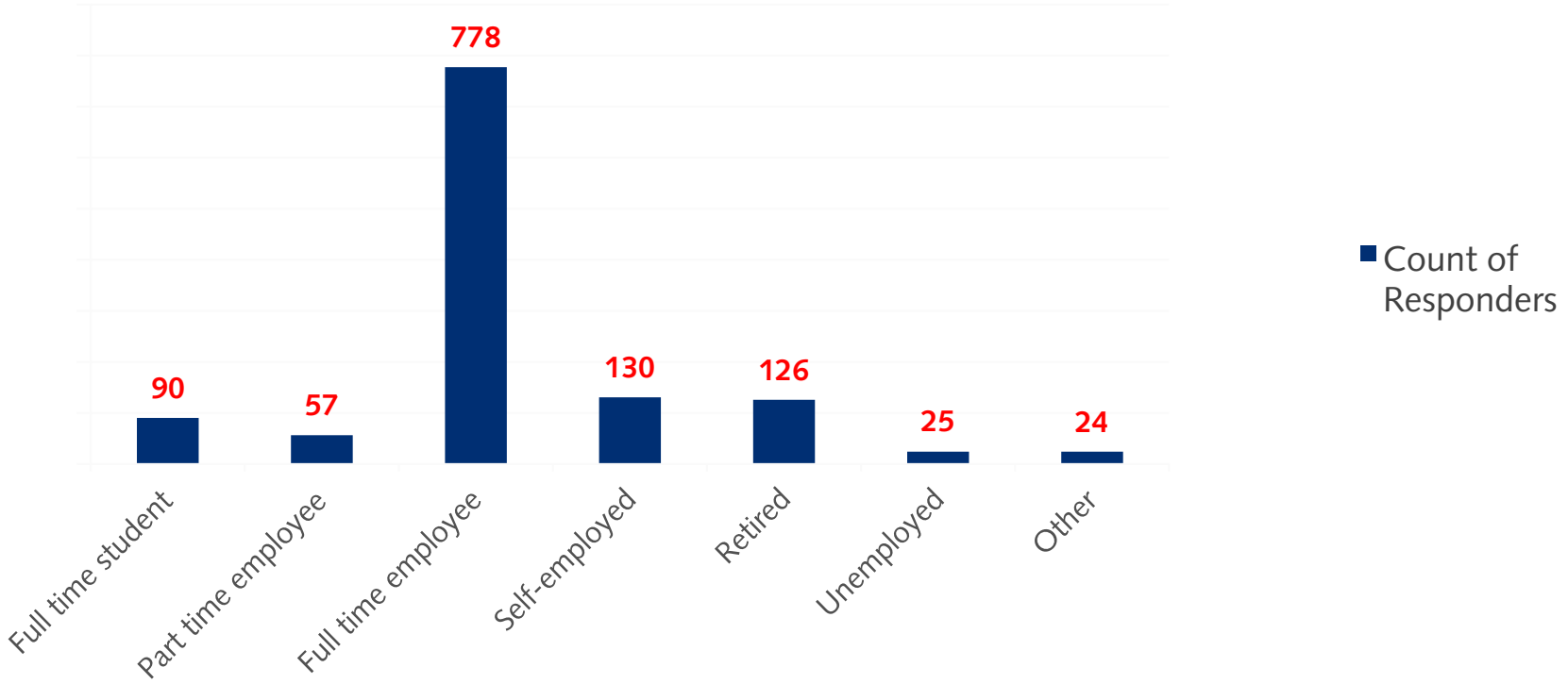
Employment status distribution of survey respondents

- Based on the survey quota, full-time employment was deemed as an important qualifier for respondents



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Residency distribution of survey respondents

- Proximity to RTO12 was considered an important qualifier for the survey quota.
- Toronto, in particular, was specifically targeted

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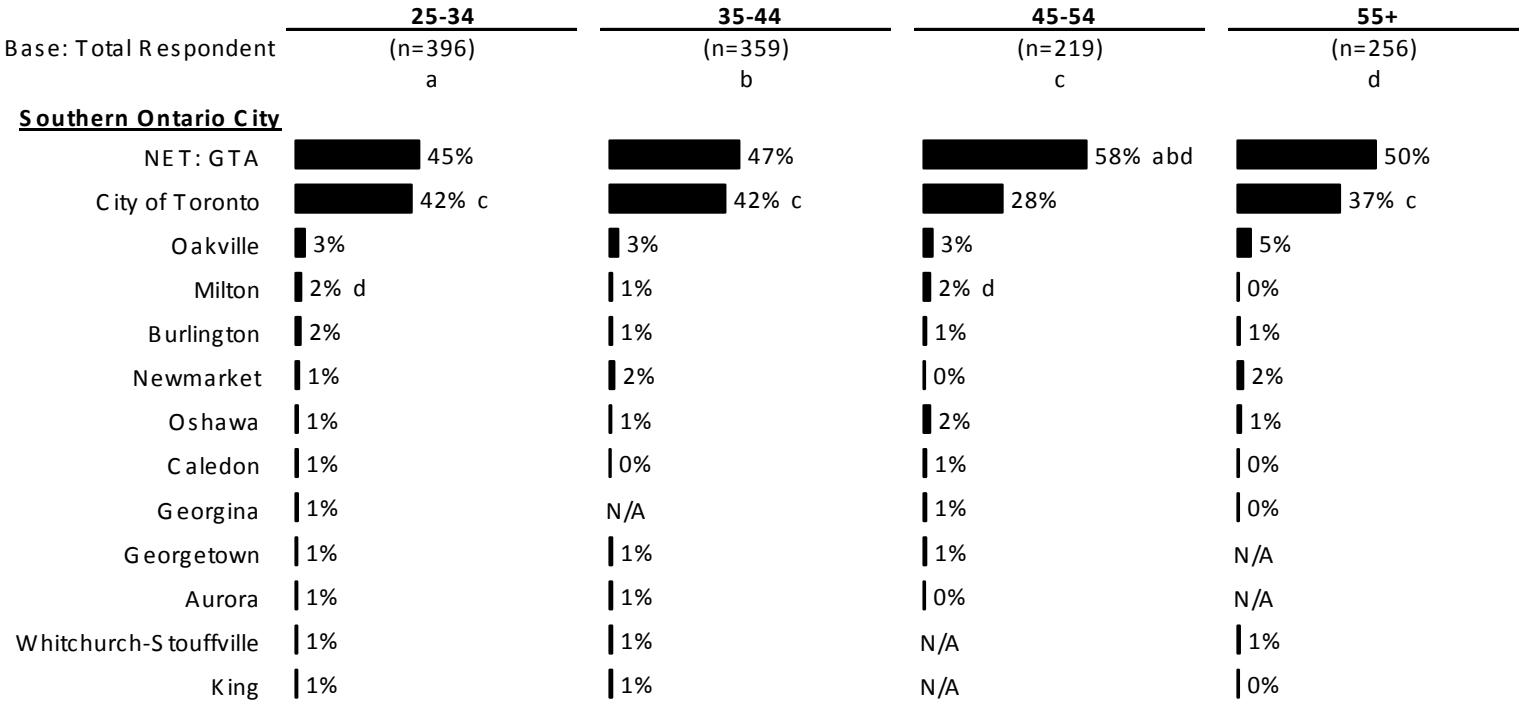
Age by Region of Residence



S4 In which of the following Southern Ontario city or town do you reside? Please select one

a/b/c/d - Lower case letters indicate significance at the 90% level.

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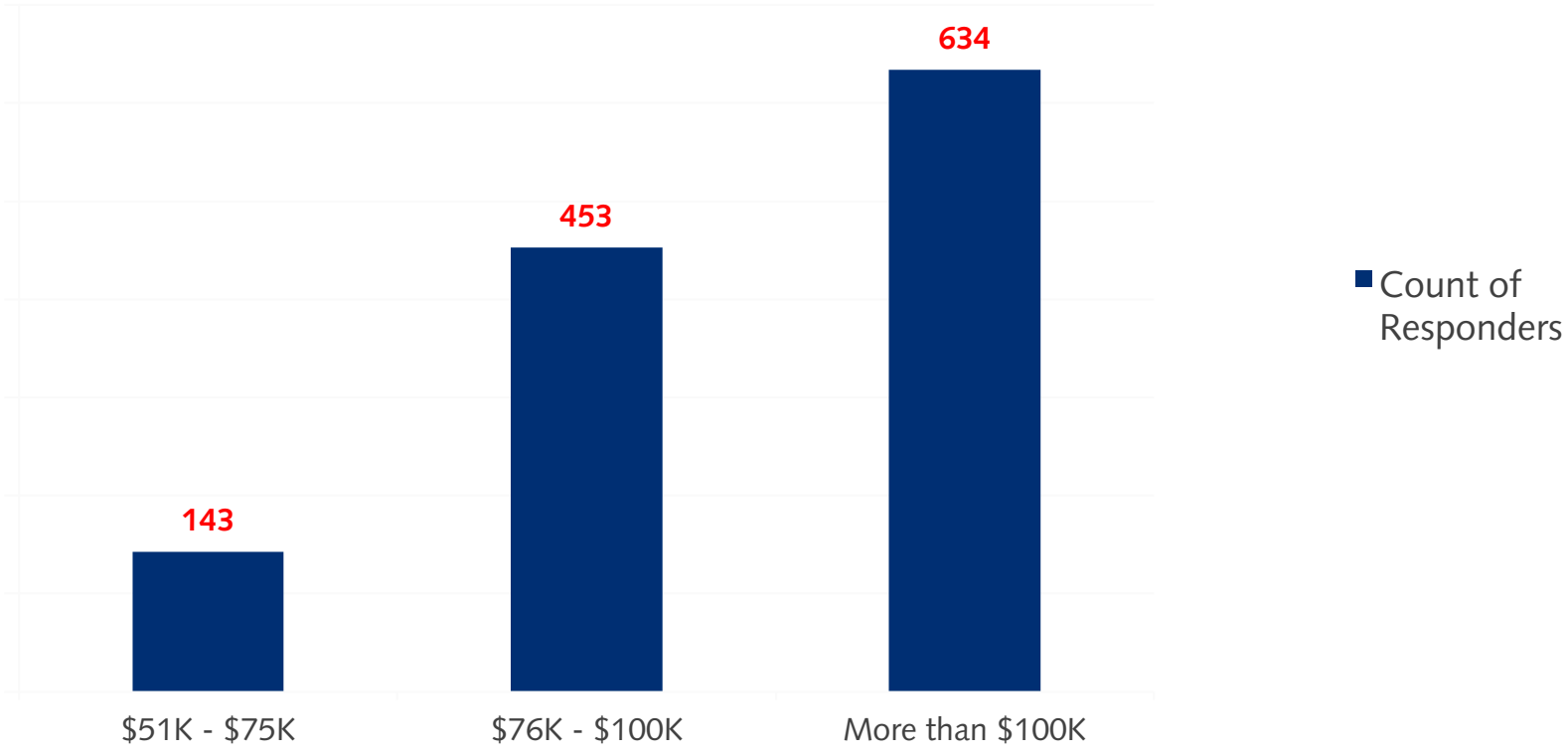
Income distribution of survey respondents

- An emphasis was placed on securing respondents with a slightly-higher-than-average annual income.



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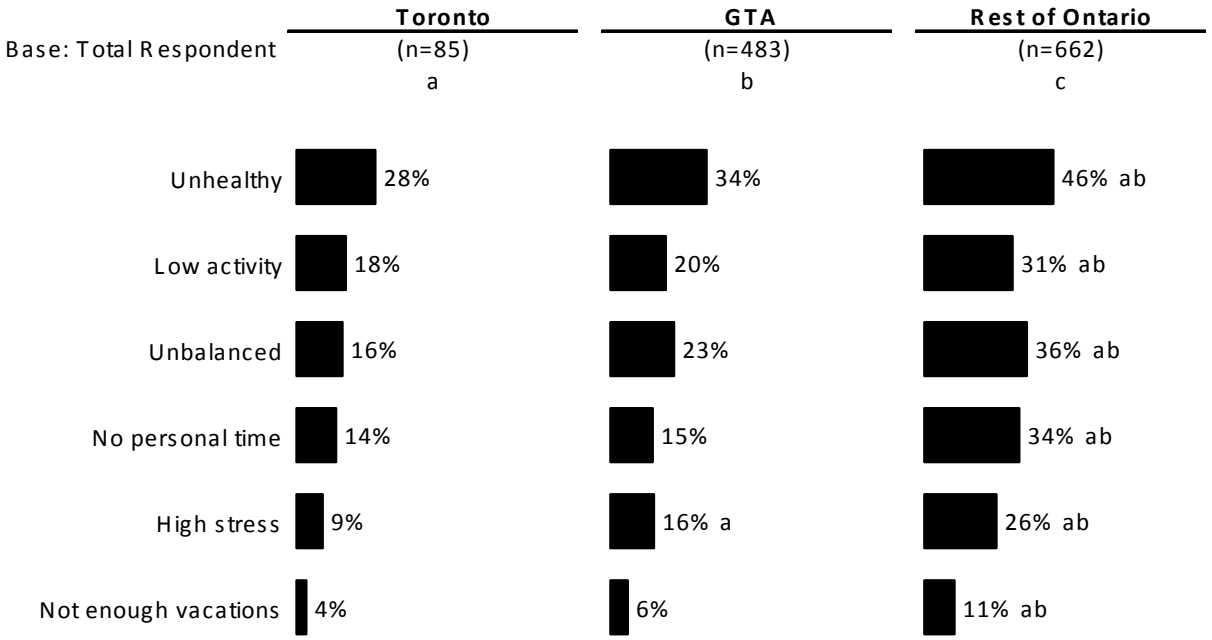
Lifestyle by City of Residence



Top-3-Box Mentions Shown

Q28: How would you rate yourself / life on the following attributes?

a/b/c - Lower case letters indicate significance at the 90% level.

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PRESENTATION APPENDIX

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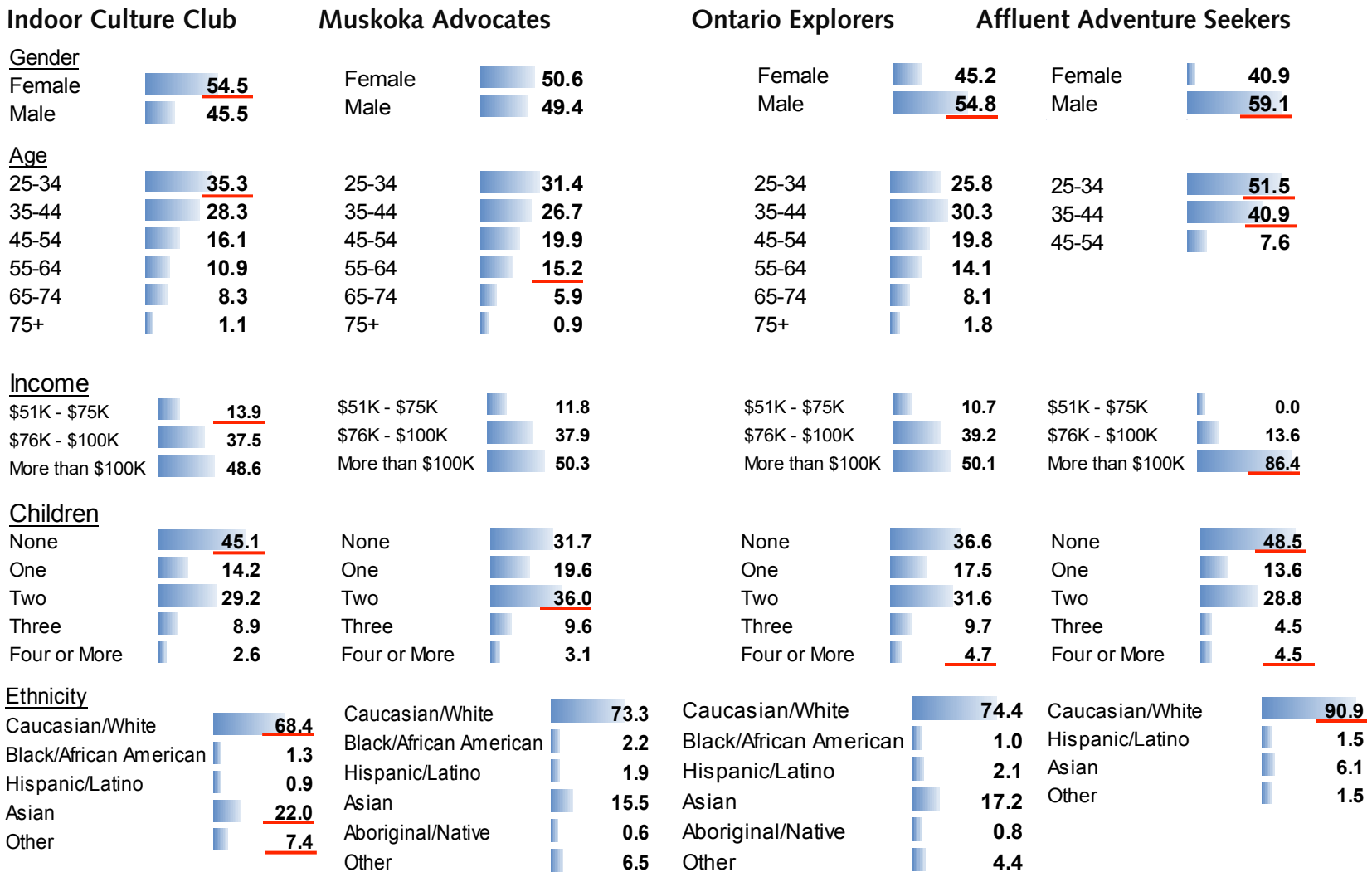
Cluster Demographics



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Cluster Work Profile

Indoor Culture Club

Employment Status

Full time student	6.3
Part time employee	5.0
Full time employee	63.8
Self-employed	9.6
Retired	10.0
Unemployed	3.1
Other	2.2

Education

Less than high school	0.7
High school or equivalent	5.9
College or trade school	20.9
Associate's degree	7.0
Bachelor's degree	40.7
Graduate degree	24.8

Hours/Week

Less than 20 hours	15.9
21 to 35 hours	10.9
36 - 45 hours	55.3
46 - 60 hours	14.4
61 - 80 hours	2.8
81 hours +	0.7

Vacation/Year

7 days or less	7.8
10 days	12.0
14 days	33.1
21 days	22.9
21+ days	24.2

Muskoka Advocates

Full time student	7.8
Part time employee	4.3
Full time employee	62.1
Self-employed	10.9
Retired	10.9
Unemployed	1.6
Other	2.5

High school or equivalent	7.8
College or trade school	28.6
Associate's degree	5.9
Bachelor's degree	41.0
Graduate degree	16.8

Less than 20 hours	13.4
21 to 35 hours	9.6
36 - 45 hours	54.7
46 - 60 hours	20.2
61 - 80 hours	1.9
81 hours +	0.3

7 days or less	8.1
10 days	14.3
14 days	24.5
21 days	22.0
21+ days	31.1

Ontario Explorers

Full time student	6.0
Part time employee	5.2
Full time employee	61.4
Self-employed	12.5
Retired	11.7
Unemployed	1.6
Other	1.6

Less than high school	0.5
High school or equivalent	7.3
College or trade school	20.1
Associate's degree	8.9
Bachelor's degree	43.3
Graduate degree	19.8

Less than 20 hours	16.2
21 to 35 hours	9.9
36 - 45 hours	52.2
46 - 60 hours	19.1
61 - 80 hours	1.8
81 hours +	0.8

7 days or less	5.5
10 days	10.4
14 days	24.3
21 days	23.2
21+ days	36.6

Affluent Adventure Seekers

Full time student	19.7
Full time employee	75.8
Self-employed	4.5

High school or equivalent	3.0
College or trade school	1.5
Associate's degree	34.8
Bachelor's degree	51.5
Graduate degree	9.1

21 to 35 hours	4.5
36 - 45 hours	33.3
46 - 60 hours	9.1
61 - 80 hours	3.0
81 hours +	50.0

7 days or less	3.0
10 days	3.0
14 days	24.2
21 days	9.1
21+ days	60.6

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Primary Motivation for Vacation

	Indoor Culture Club	Muskoka Advocates	Ontario Explorers	Affluent Adventure Seekers
Spend time with family and/ or friends	53%	57%	56%	42%
Relax / de-stress	69%	64%	63%	29%
Enjoy personal hobbies and/or activities	16%	17%	18%	27%
Escape city life	24%	35%	29%	27%
Get back to nature	8%	18%	21%	20%
Business	1%	2%	1%	18%
Time for self	20%	14%	15%	21%
Special occassion (birthday, anniversary, etc)	17%	12%	13%	29%
Statutory holiday / time off work	19%	18%	14%	18%
Adventure / exploration	14%	21%	23%	30%

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	Indoor Culture Club	Muskoka Advocates	Ontario Explorers	Affluent Adventure Seekers
Search for information on sites like Google, Yahoo! or MSN	58%	57%	61%	41%
Read online blogs/reviews posted by people	27%	28%	30%	44%
Read online blogs/reviews posted by travel experts	23%	26%	29%	27%
Visit the regions website	58%	65%	69%	48%
Browse online advertisements	21%	33%	30%	41%
Visit travel sites like expedia, travelocity, etc	56%	51%	56%	41%
Talk to friends	56%	64%	61%	41%
Talk to family members	46%	56%	51%	44%
Look for videos on youtube	6%	10%	10%	38%
Look on facebook	4%	5%	4%	38%
Read twitter posts	2%	2%	2%	48%
Browse tourism brochures, pamplets, etc	27%	36%	36%	38%
Talk to a tourism representative	6%	8%	8%	44%

Barriers to visiting Explorers' Edge

Lowest "Not of Interest" Score

	Indoor Culture Club	Muskoka`s My Paradise	Outdoor Families	Affluent Adventure Seekers
Never thought of it	1.5	1.5	1.5	0.8
Too far	1.2	1.3	1.2	1.6
Not of interest	1.4	1.3	1.0	0.4
Decided to stay in town	0.3	0.5	0.4	0.5
Too expensive	0.3	0.6	0.4	1.4
Poor weather condition	0.3	0.4	0.4	0.8
Did not offer preferred activity	0.4	0.4	0.4	1.1
Unable to take time off work	0.2	0.6	0.3	0.4
Travel partner unable to go	0.2	0.5	0.3	0.9
No transportation	0.2	0.5	0.3	0.7
Read a poor review online	0.1	0.1	0.1	0.3

Travel a lot, Price Conscious

Vacations centered around activities

Q: What do you believe has prevented you in the past from visiting Explorers' Edge?

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Influencer Attributes

- I consider myself an expert in certain areas (such as work, hobbies, or interests).
- People often ask my advice on subjects on which I am knowledgeable.
- When I find a new product I like, I often recommend it to friends.
- I have a large social circle and am often referring people to one another based on their interests.
- I am active online with things such as blogs, social network sites, email discussion groups, online community boards and so on.

Indoor Culture Club	Muskoka Advocates	Ontario Explorers	Affluent Adventure Seekers
3.7	3.9	3.9	4.1
3.9	4.1	4.1	4.2
3.7	4.1	4.0	4.2
3.0	3.4	3.4	4.2
2.6	2.9	2.9	4.4

*Individuals rated themselves on the Scale from 1 to 5

Non-Online Influencers

Lowest Influencer Rank

Top Influencer Rating

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Lifestyle Rating

	Indoor Culture Club	Muskoka Advocates	Ontario Explorers	Affluent Adventure Seekers
Not enough vacations	4.0	4.2	4.1	7.4
Unbalanced	5.8	6.0	6.2	8.1
High stress	5.0	5.1	5.3	7.7
Unhealthy	6.3	6.8	6.6	8.2
No personal time	5.6	5.9	5.9	8.0
Low activity	5.6	6.0	6.0	8.3

*Individuals rated themselves on the Scale from 1 to 10
(ex. Not enough vacations 1 10 Too many vacations)

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SURVEY DEMOGRAPHICS

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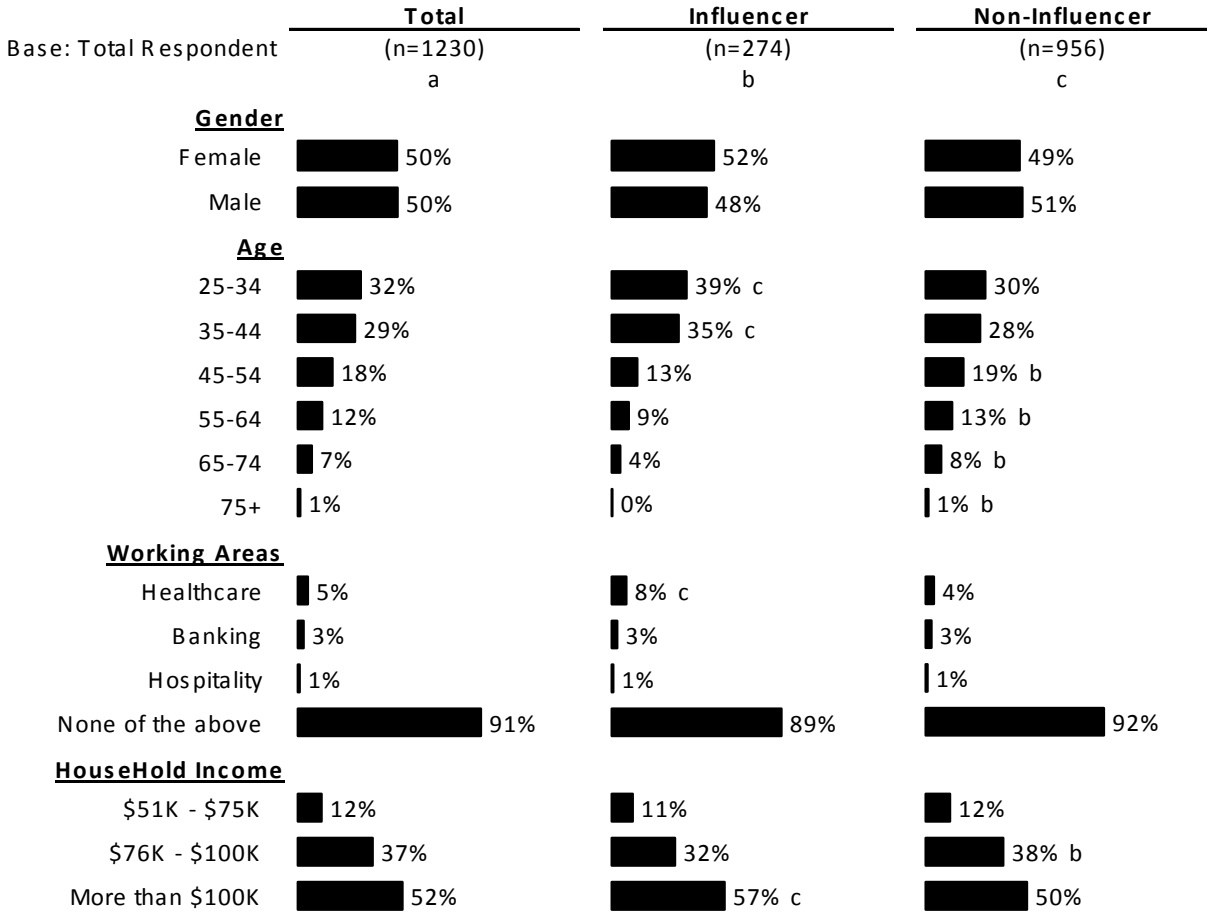
Demographics – Total & Influencer/Non-Influencer



S1, S2, S3, S5

b/c - Lower case letters indicate significance at the 90% level.

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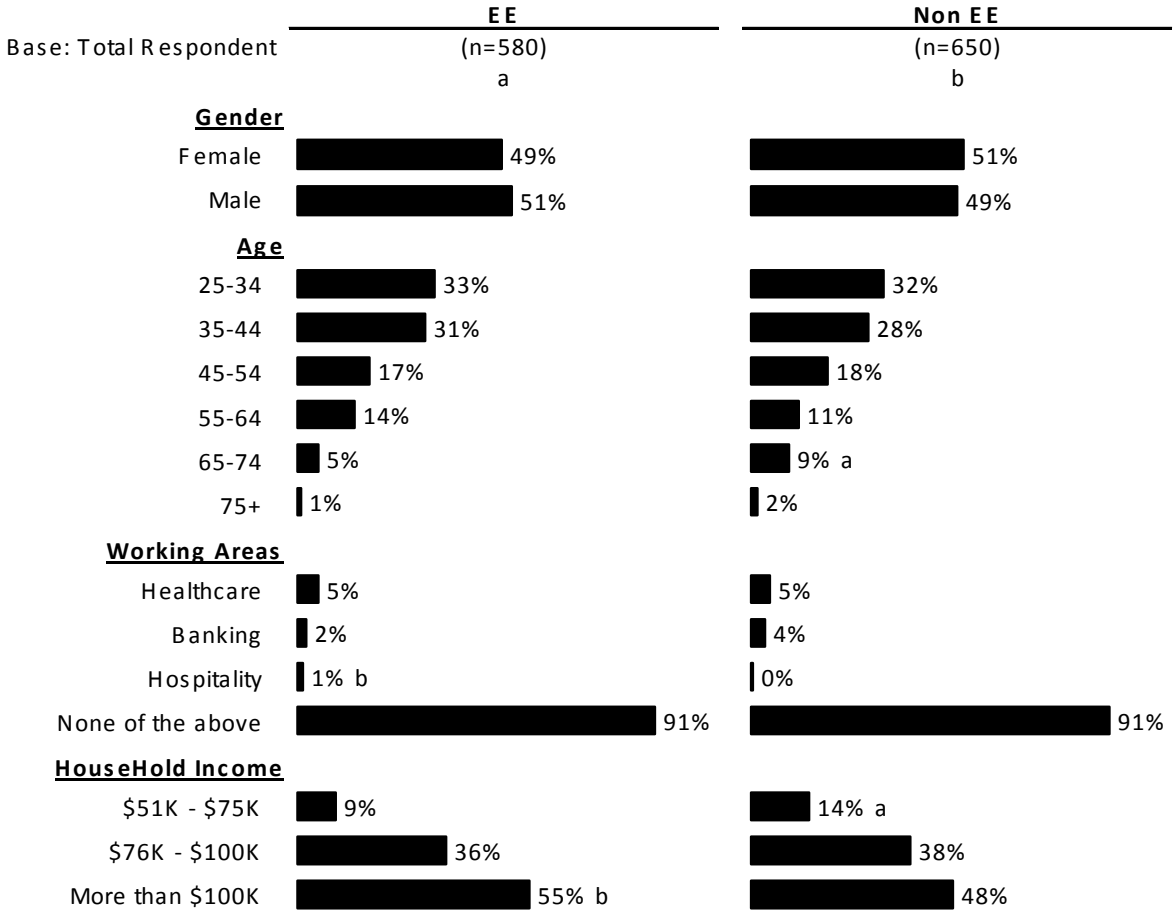
Demographics – EE vs. Non-EE



S1, S2, S3, S5

a/b - Lower case letters indicate significance at the 90% level.

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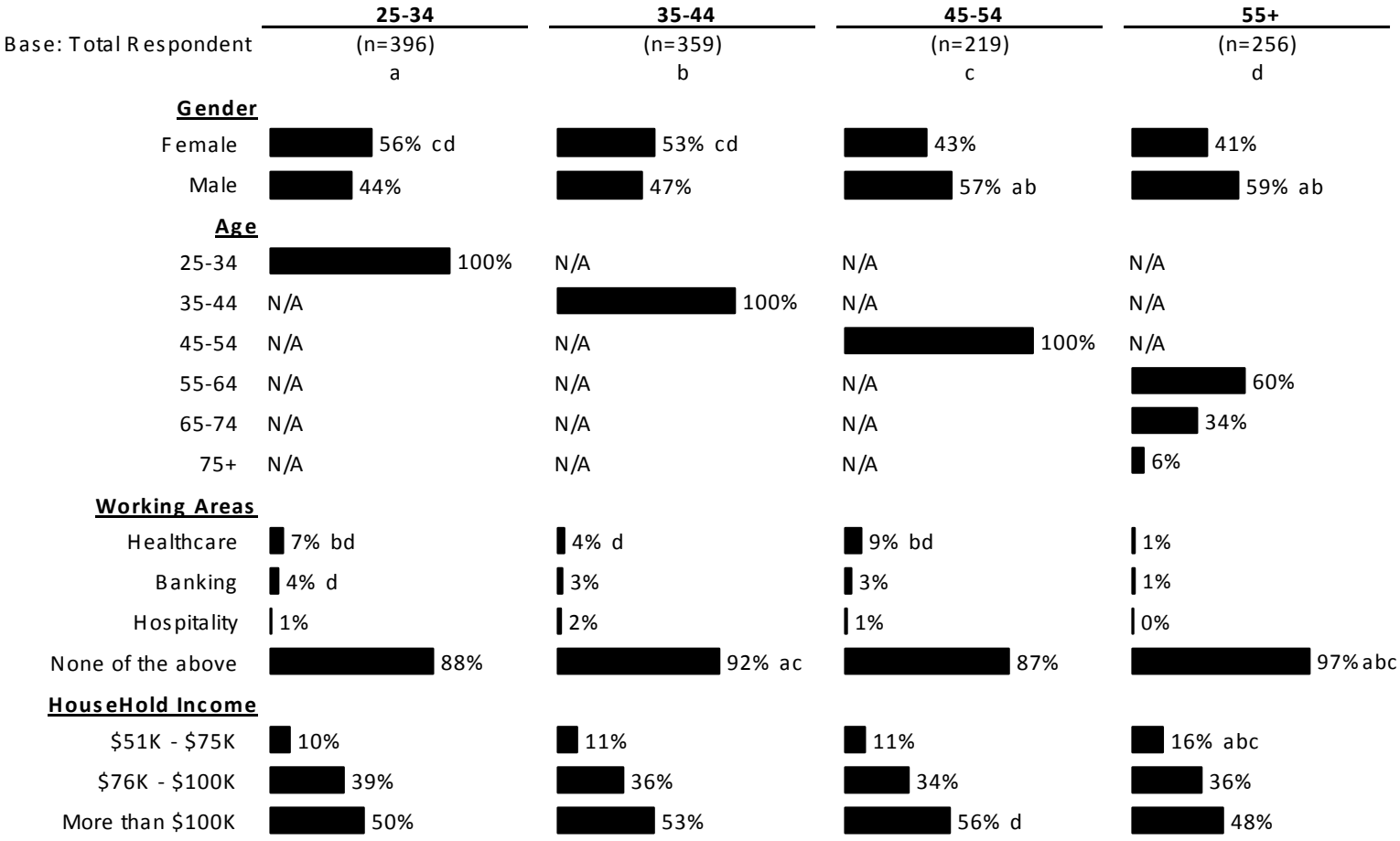
Demographics - Age



S1, S2, S3, S5

a/b/c/d - Lower case letters indicate significance at the 90% level.

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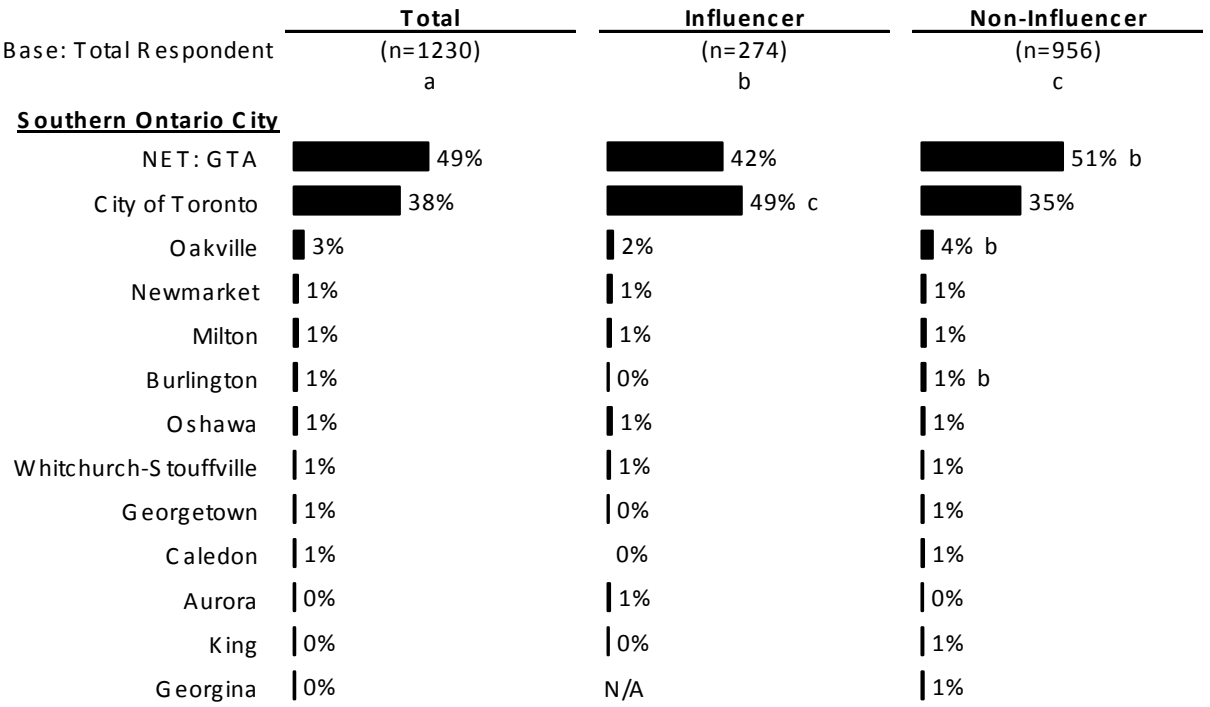
Demographics (Cont' d) – Total & Influencer/Non-Influencer



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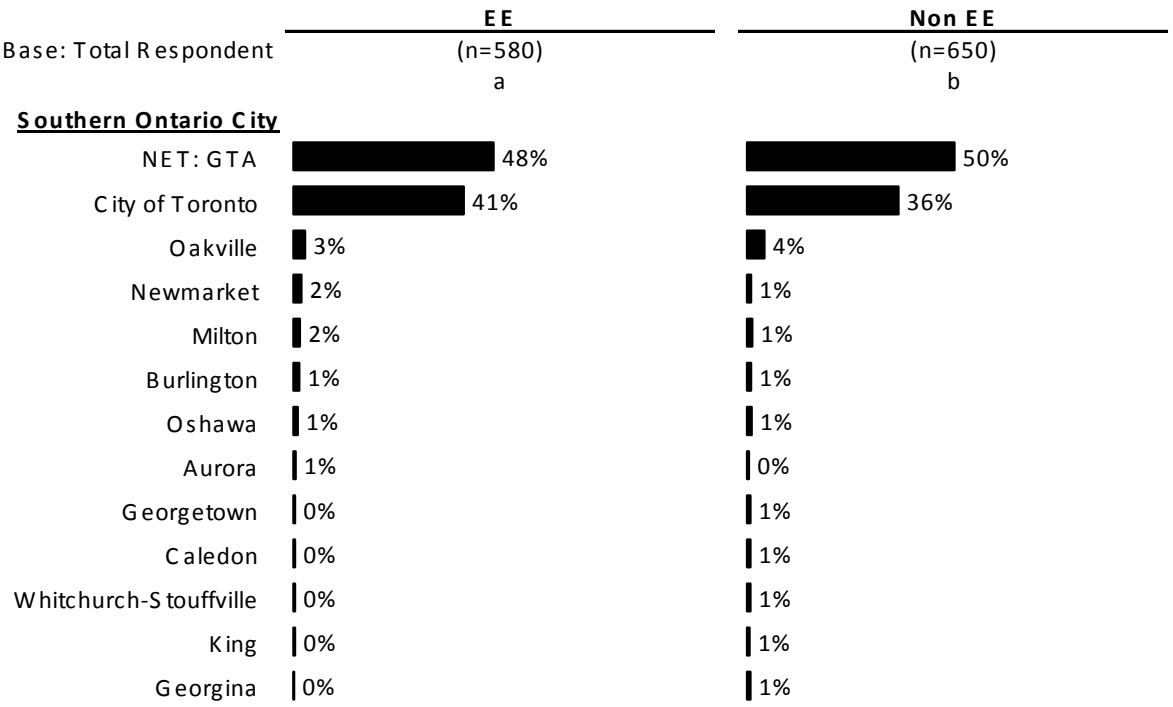
Demographics (Cont' d) – EE vs. Non-EE



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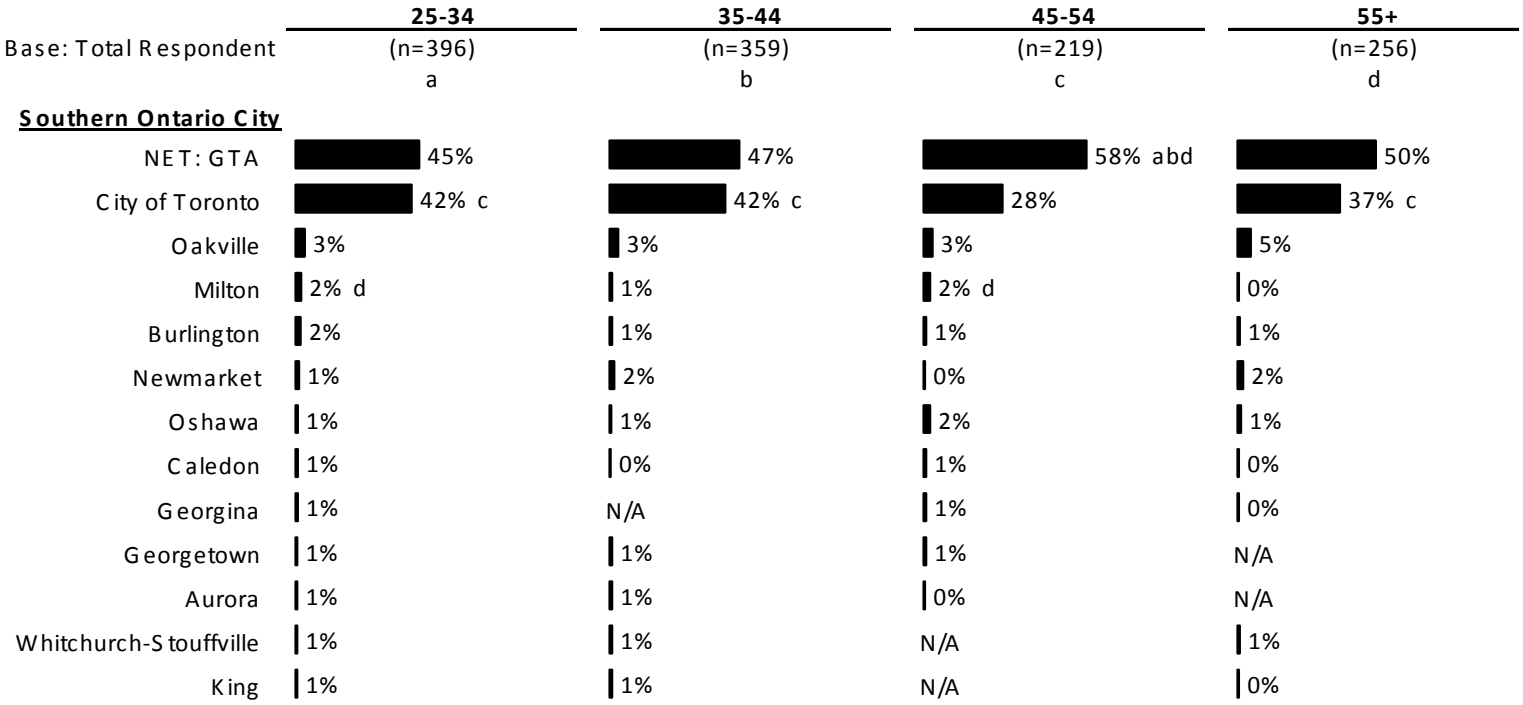
Demographics (Cont' d) - Age

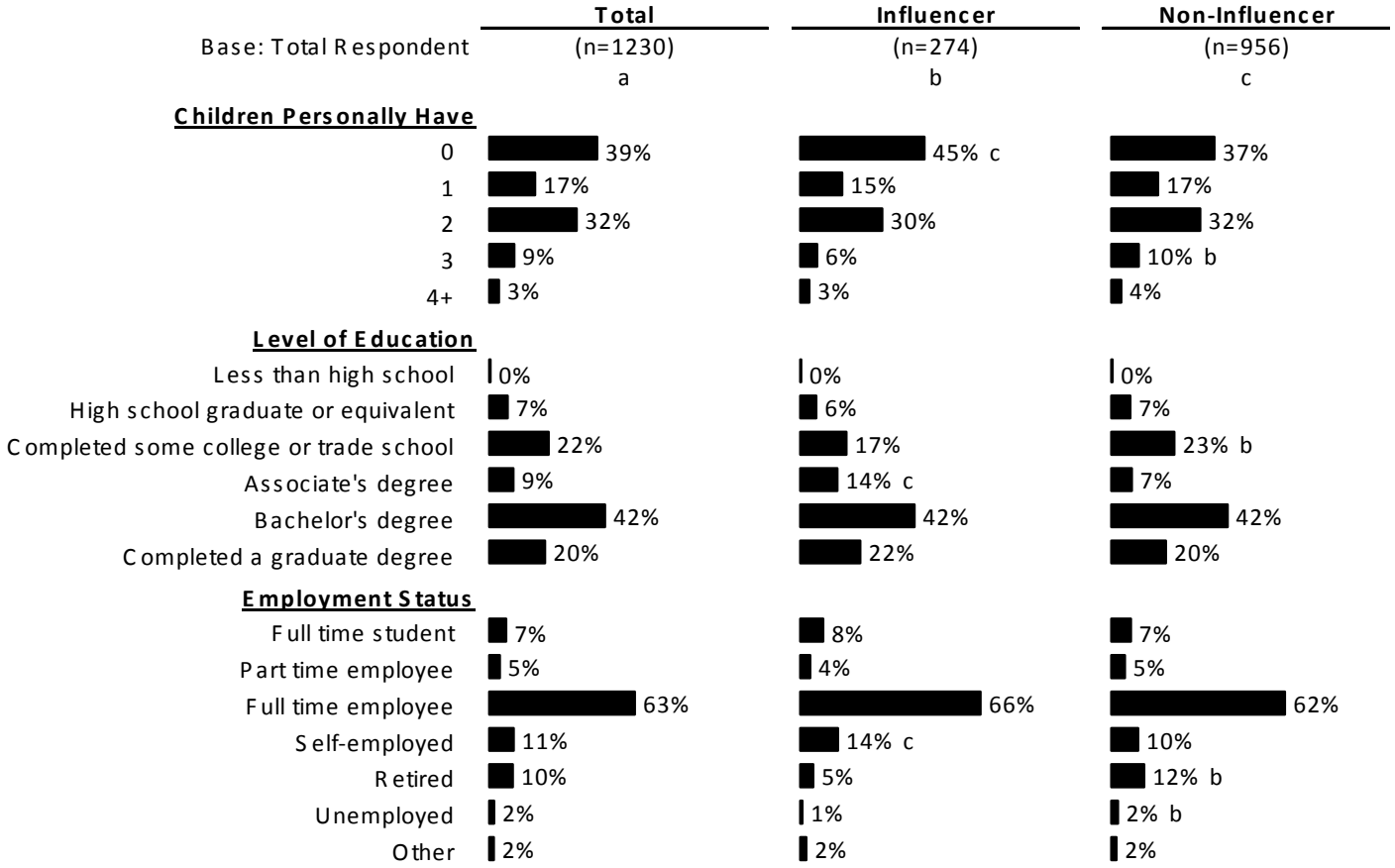


S4

a/b/c/d - Lower case letters indicate significance at the 90% level.

CLOUD AdAgents

Demographics (Cont' d) – Total & Influencer/Non-Influencer



Q32: How many children do you personally have, regardless of whether they live with you or not?
Q33: What is the highest level of education you have completed?
Q34: What is your employment status?
b/c - Lower case letters indicate significance at the 90% level.

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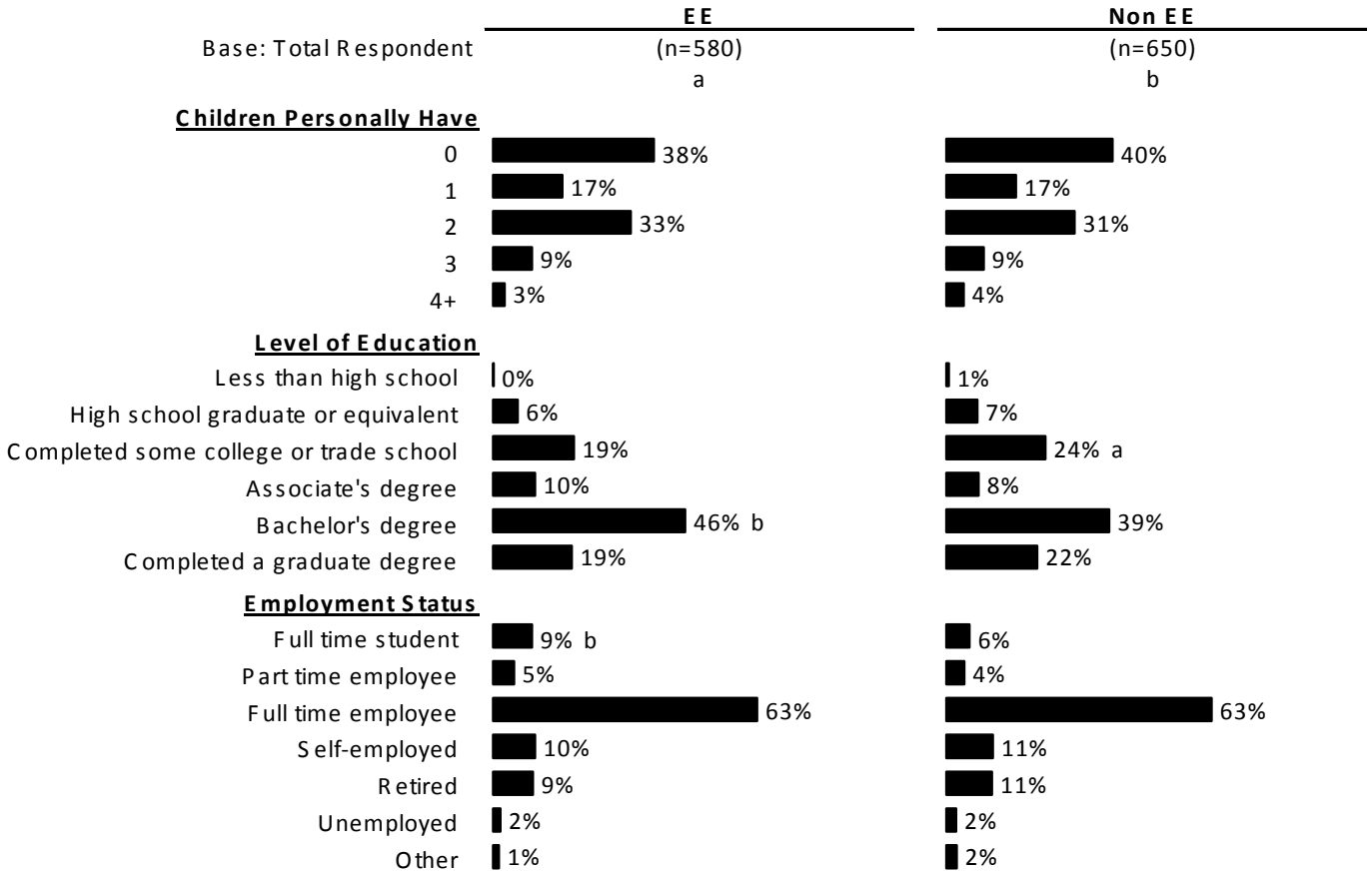
Demographics (Cont' d) – EE vs. Non-EE



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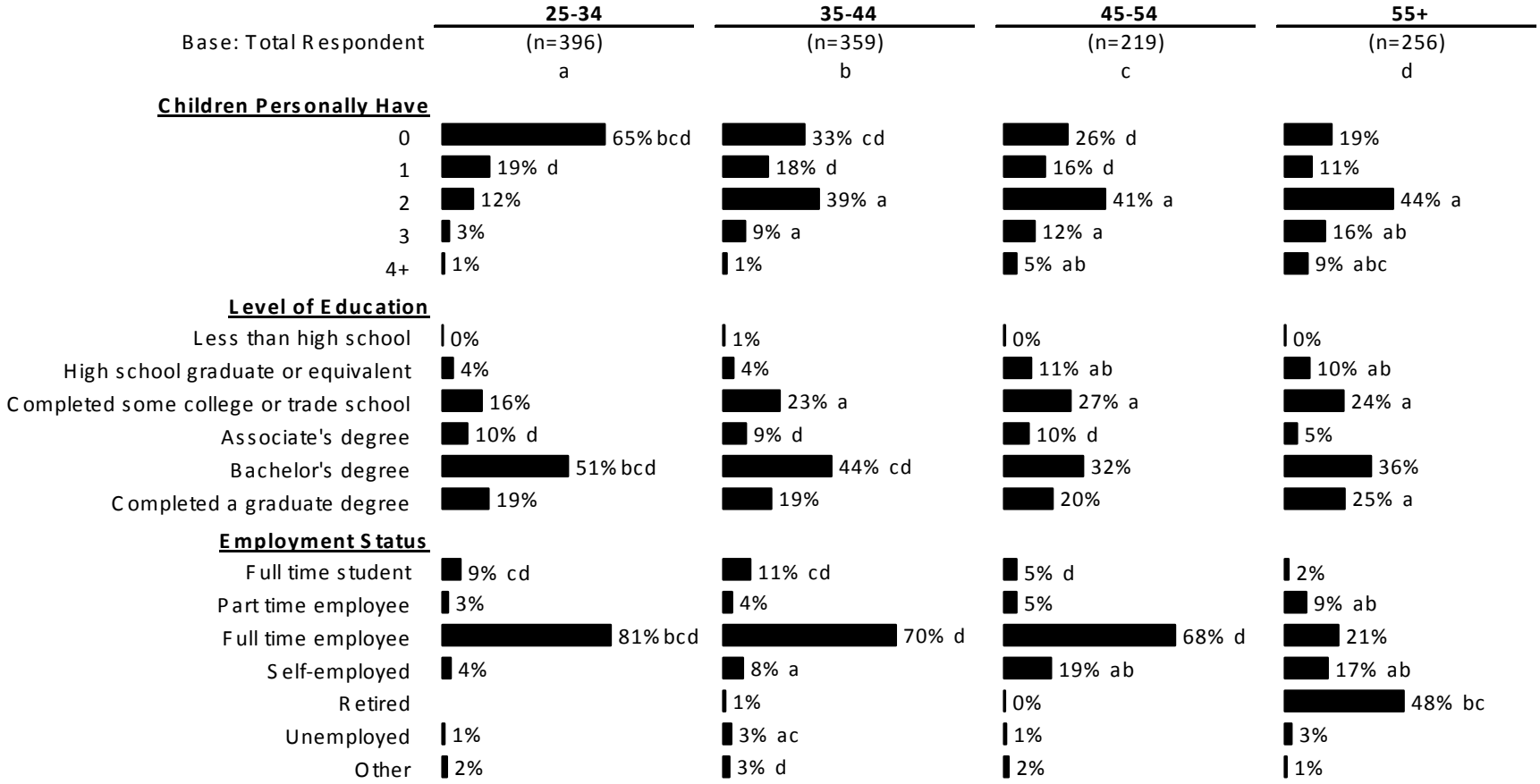
Demographics (Cont' d) - Age



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Q34: What is your employment status?
a/b/c/d - Lower case letters indicate significance at the 90% level.

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Demographics – Total & Influencer/Non-Influencer

Base: Total Respondent	Total (n=1230) a	Influencer (n=274) b	Non-Influencer (n=956) c
Ethnicity			
Caucasian / White	73%	73%	73%
Black / African American	1%	2%	1%
Hispanic / Latino	2%	3%	1%
Asian	18%	15%	19%
Aboriginal / Native American	0%	1%	0%
Other	6%	7%	6%
Main Source of Transportation			
Own a vehicle	88%	87%	88%
Ride with friends or family members	1%	1%	1%
Vehicle you borrow from friends or family	1%	2% c	1%
Member of car share program	0%	N/A	1%
Lease or rent a vehicle	2%	2%	2%
Walk or bike	2%	3%	2%
Bus, train or subway	6%	5%	6%
Taxi	0%	N/A	0%

Q35: Please indicate your ethnicity.
Q36: What is your household's main source of transportation?
b/c - Lower case letters indicate significance at the 90% level.

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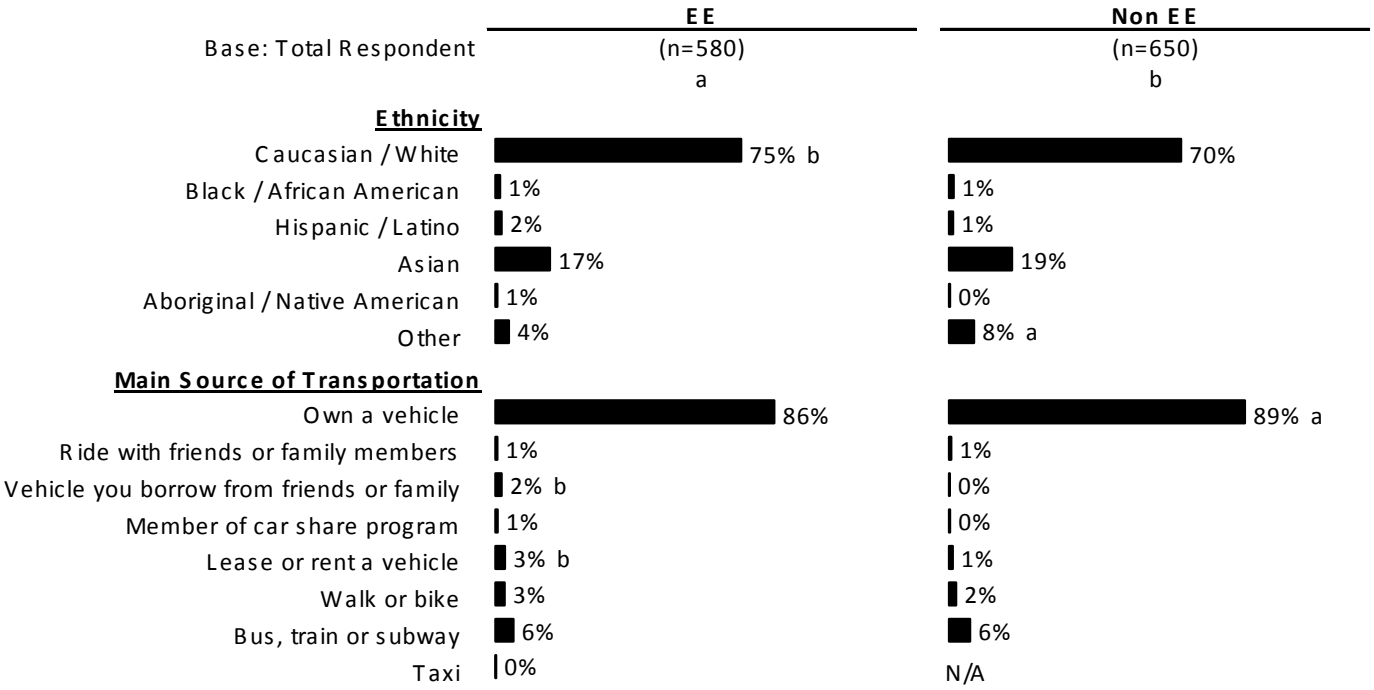
Demographics – EE vs. Non-EE



Q35: Please indicate your ethnicity.
Q36: What is your household's main source of transportation?
a/b - Lower case letters indicate significance at the 90% level.

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Demographics (Cont' d) - Age

Base: Total Respondent	25-34 (n=396) a	35-44 (n=359) b	45-54 (n=219) c	55+ (n=256) d
Ethnicity				
Caucasian / White	64%	68%	79% ab	87% abc
Black / African American	2% cd	2% cd	0%	0%
Hispanic / Latino	2%	3% cd	0%	1%
Asian	22% cd	21% cd	15%	10%
Aboriginal / Native American	1%	1%	N/A	N/A
Other	9% cd	6% d	5% d	2%
Main Source of Transportation				
Own a vehicle	85%	86%	88%	93% abc
Ride with friends or family members	0%	1%	1%	N/A
Vehicle you borrow from friends or family	0%	3% a	N/A	N/A
Member of car share program	1%	1%	N/A	N/A
Lease or rent a vehicle	2%	1%	4% bd	1%
Walk or bike	4%	2%	2%	2%
Bus, train or subway	8% d	6%	5%	4%
Taxi	0%	N/A	N/A	N/A

Q35: Please indicate your ethnicity.
Q36: What is your household's main source of transportation?
a/b/c/d - Lower case letters indicate significance at the 90% level.

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RESPONDENT LIFESTYLE

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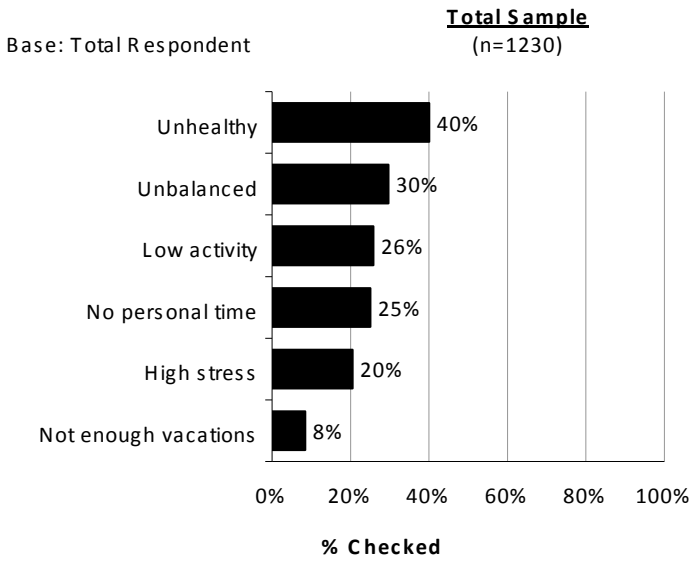
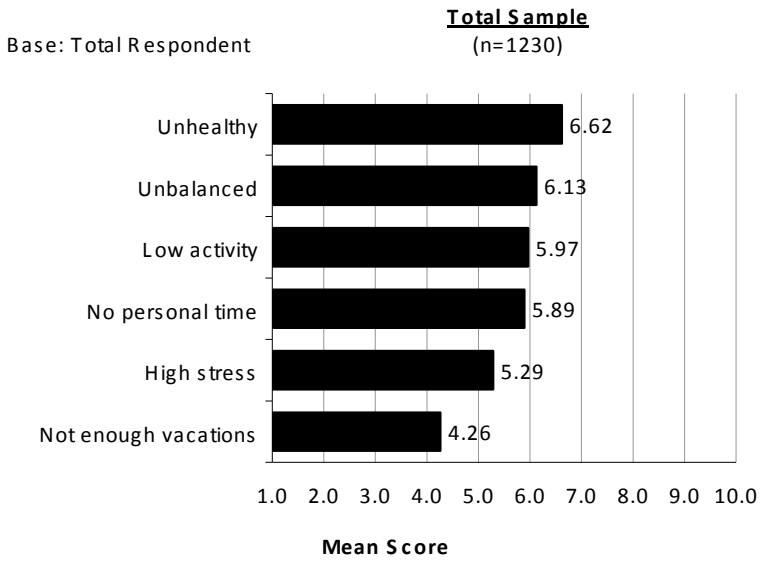
Attitude statements: Work / Life





Q28:How would you rate yourself / life on the following attributes?

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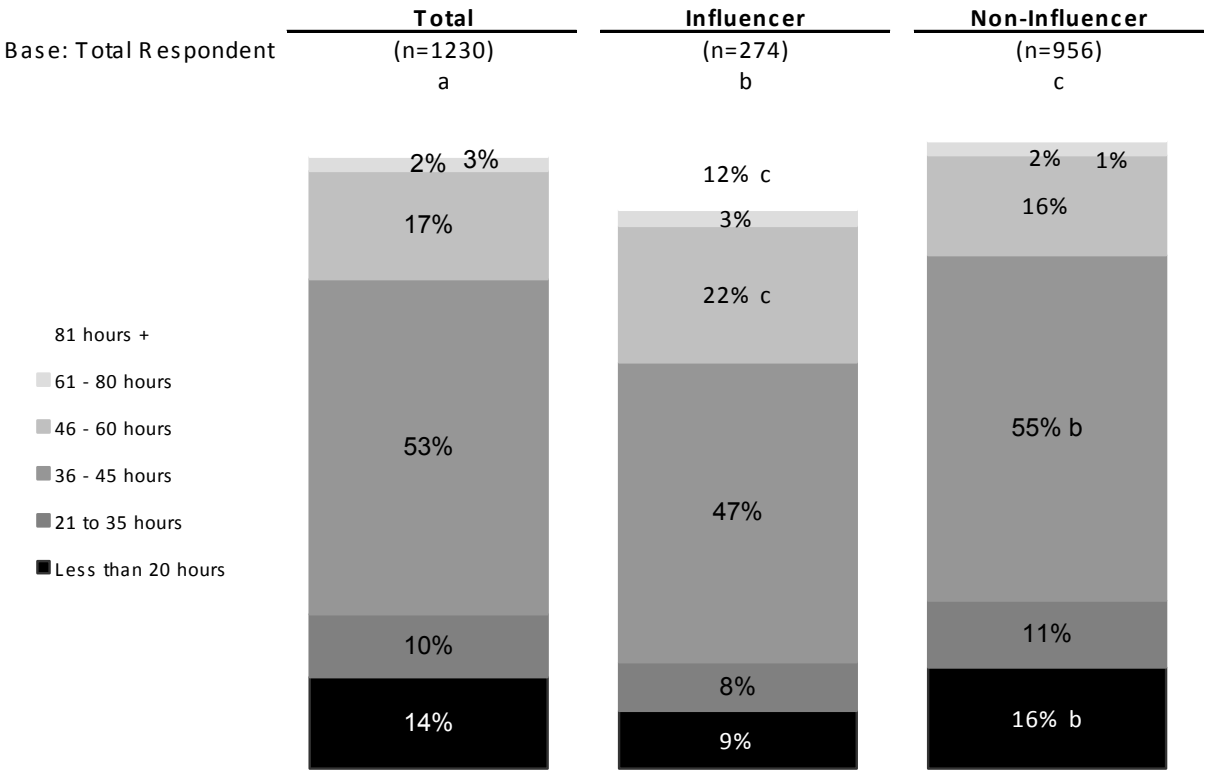
Hours Spend at Work During a Typical Work Week – Total & Influencer/Non-Influencer



Q25: How many hours do you spend at work during a typical work week?
b/c - Lower case letters indicate significance at the 90% level.

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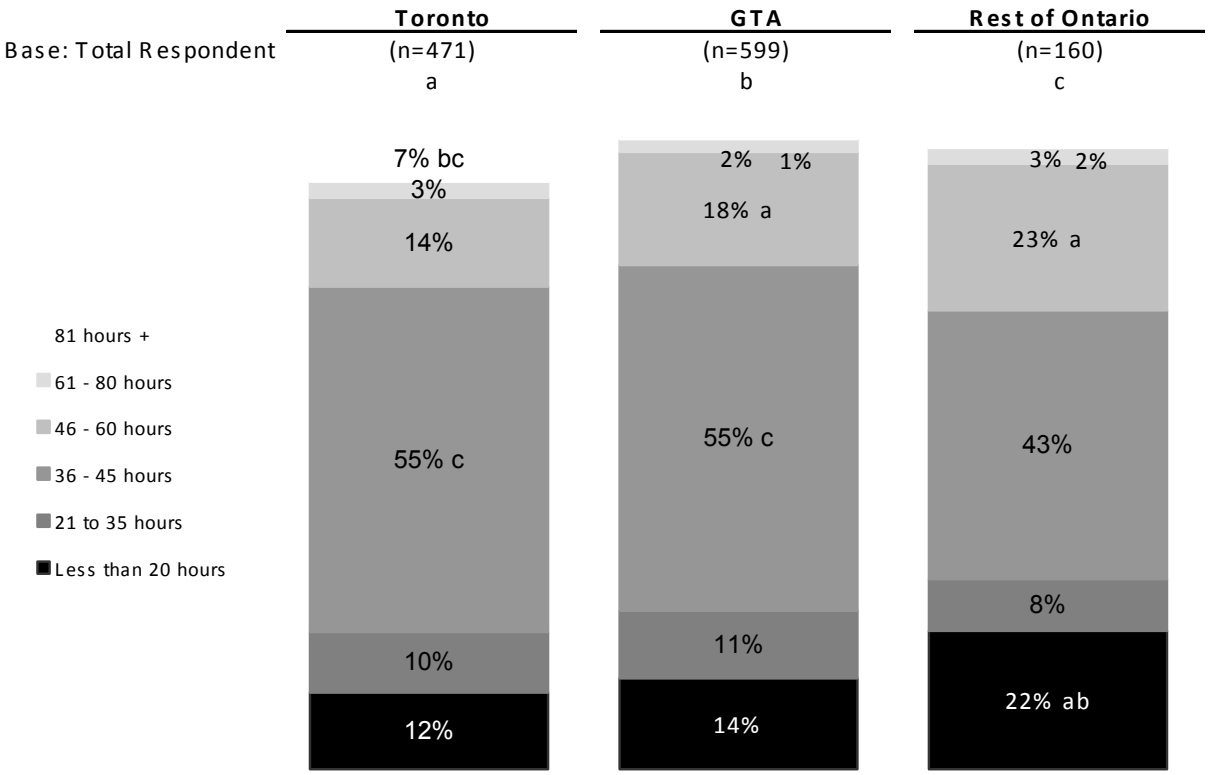
Hours Spend at Work During a Typical Work Week – By City



Q25: How many hours do you spend at work during a typical work week?
a/b/c - Lower case letters indicate significance at the 90% level.

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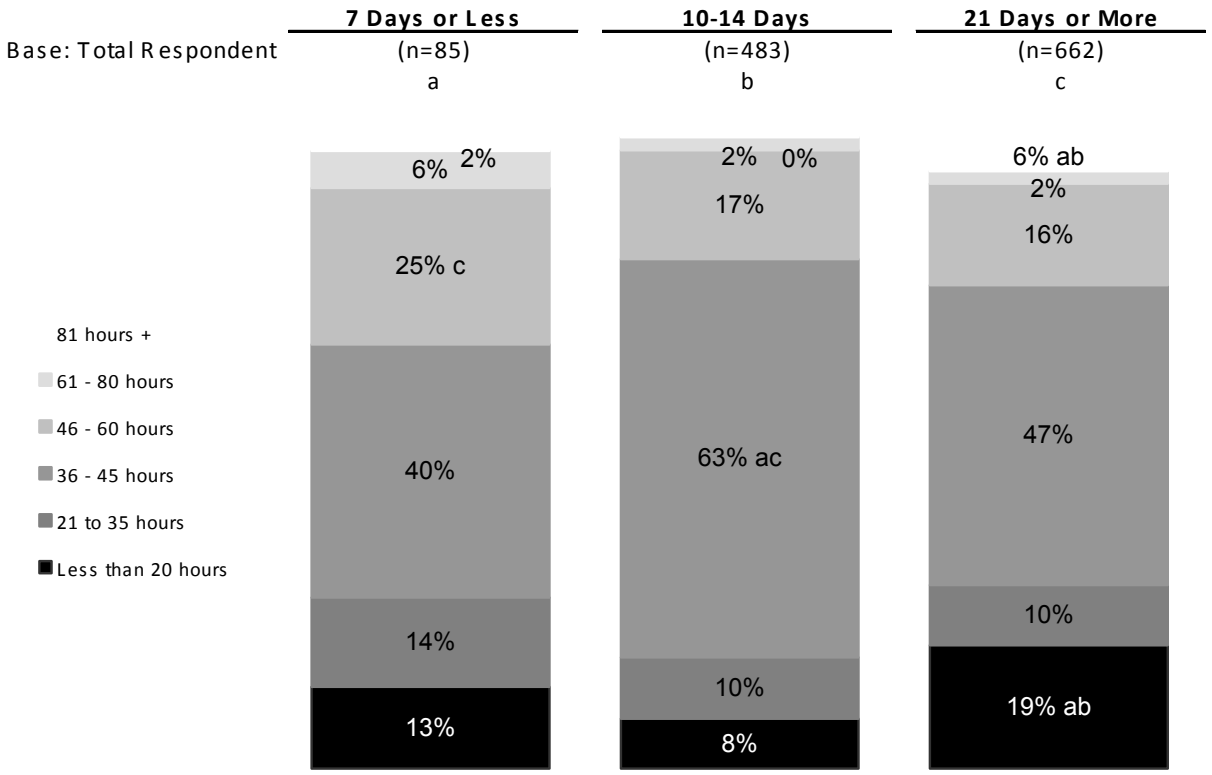
Hours Spend at Work During a Typical Work Week – Vacation Days Per Year



Q25: How many hours do you spend at work during a typical work week?
a/b/c - Lower case letters indicate significance at the 90% level.

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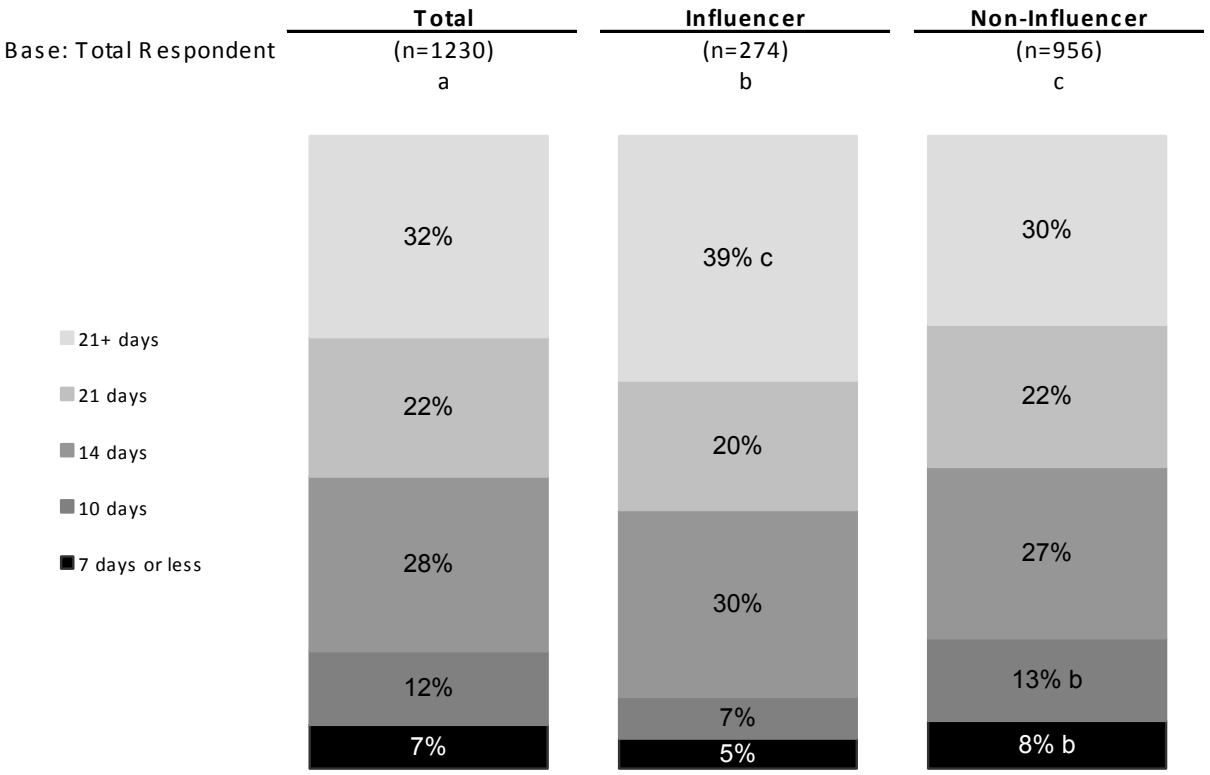
Days Usually Spend on Vacation Per Year – Total & Influencer/Non-Influencer



Q26: How many days do you usually spend on vacation per year?
b/c - Lower case letters indicate significance at the 90% level.

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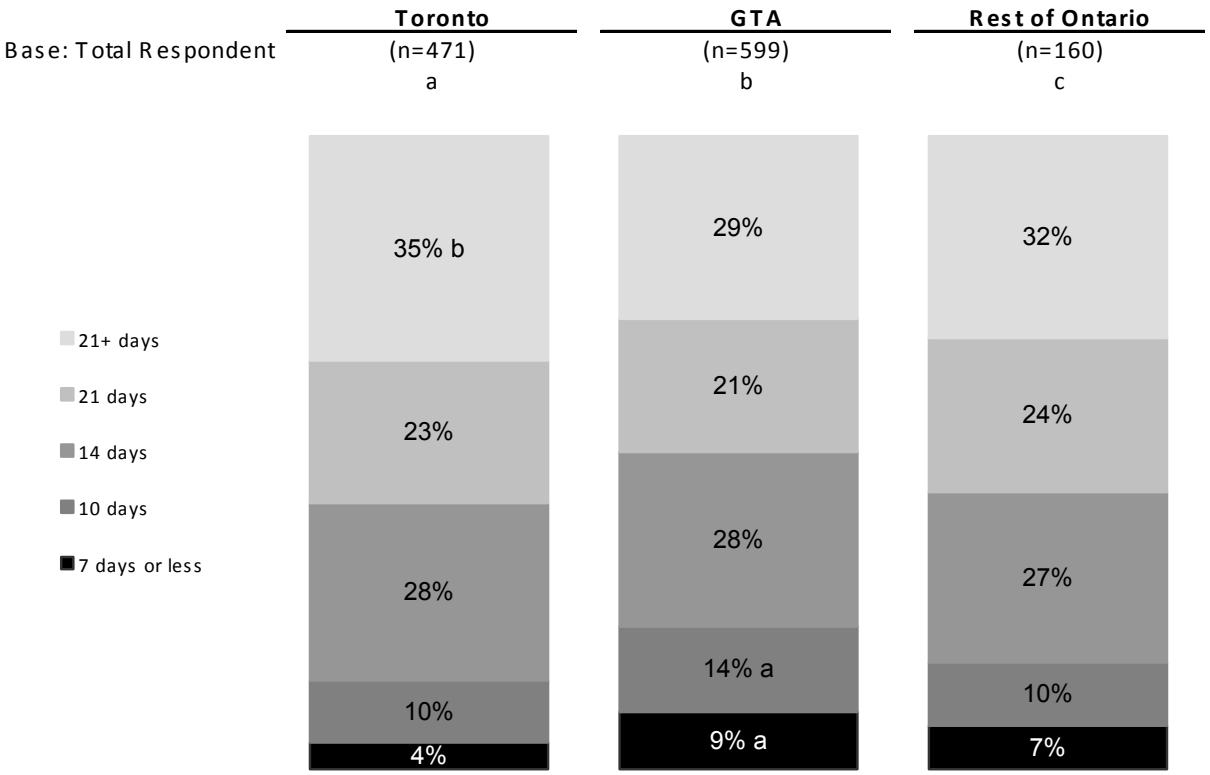
Days Usually Spend on Vacation Per Year – By City



Q26: How many days do you usually spend on vacation per year?
a/b/c - Lower case letters indicate significance at the 90% level.

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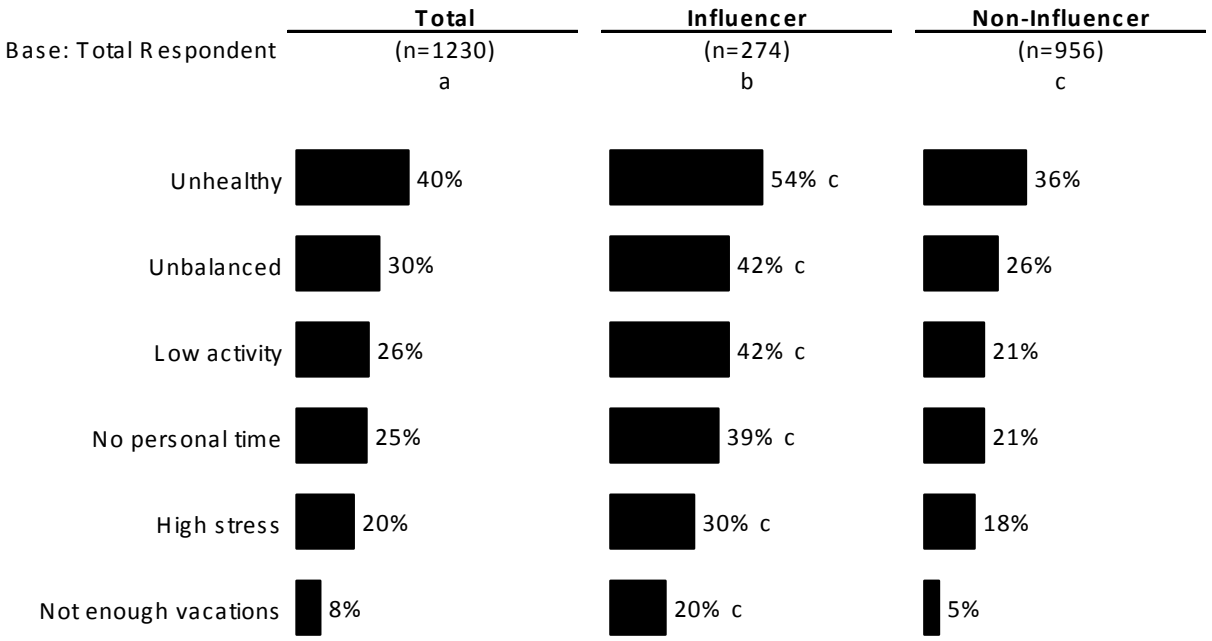
Rating Based on Attributes – Total & Influencer/Non-Influencer



Top-3-Box Mentions Shown

Q28: How would you rate yourself / life on the following attributes?

b/c - Lower case letters indicate significance at the 90% level.

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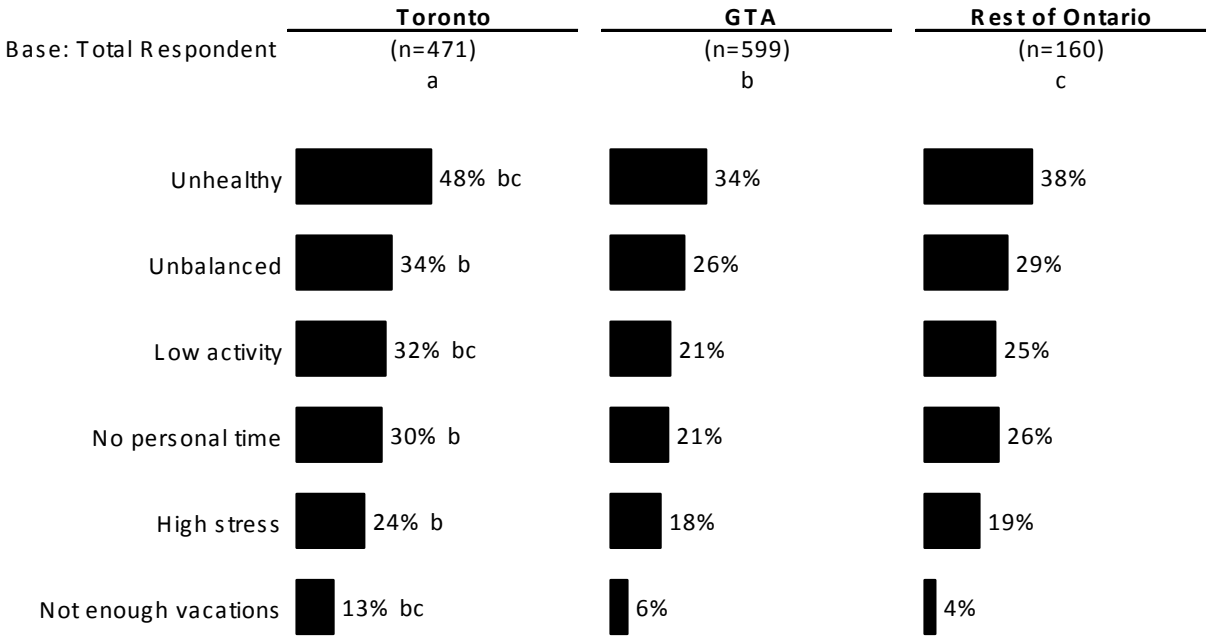
Rating Based on Attributes – By City



Top-3-Box Mentions Shown

Q28: How would you rate yourself / life on the following attributes?

a/b/c - Lower case letters indicate significance at the 90% level.

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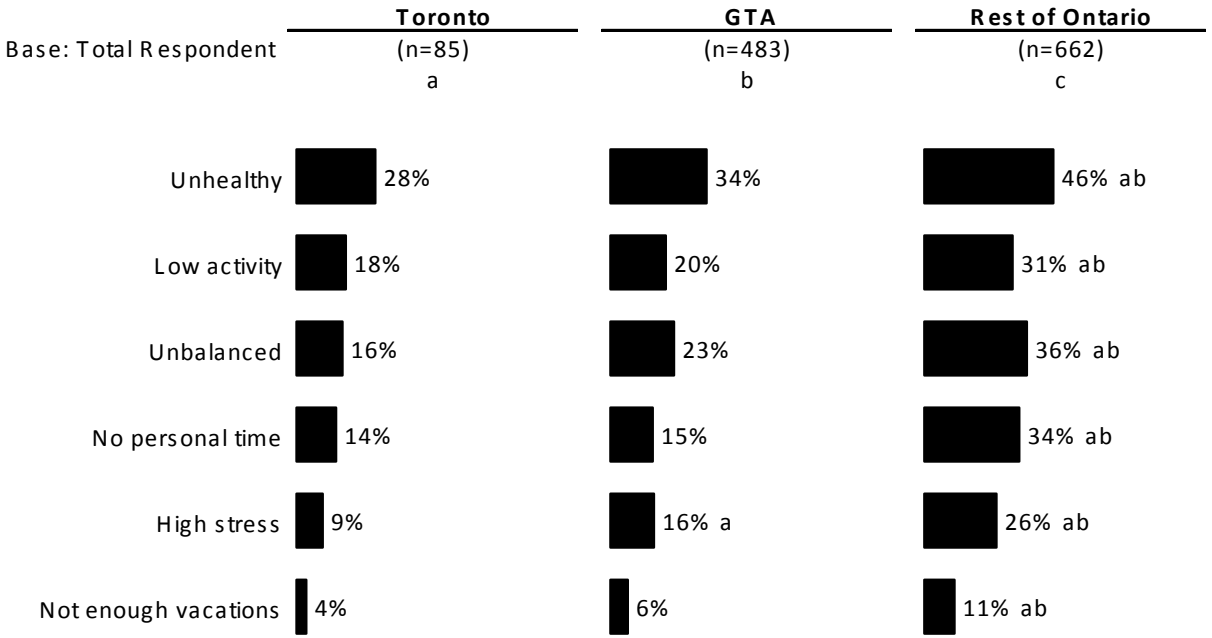
Rating Based on Attributes – Vacation Days Per Year



Top-3-Box Mentions Shown

Q28: How would you rate yourself / life on the following attributes?

a/b/c - Lower case letters indicate significance at the 90% level.

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VACATIONING PROFILE

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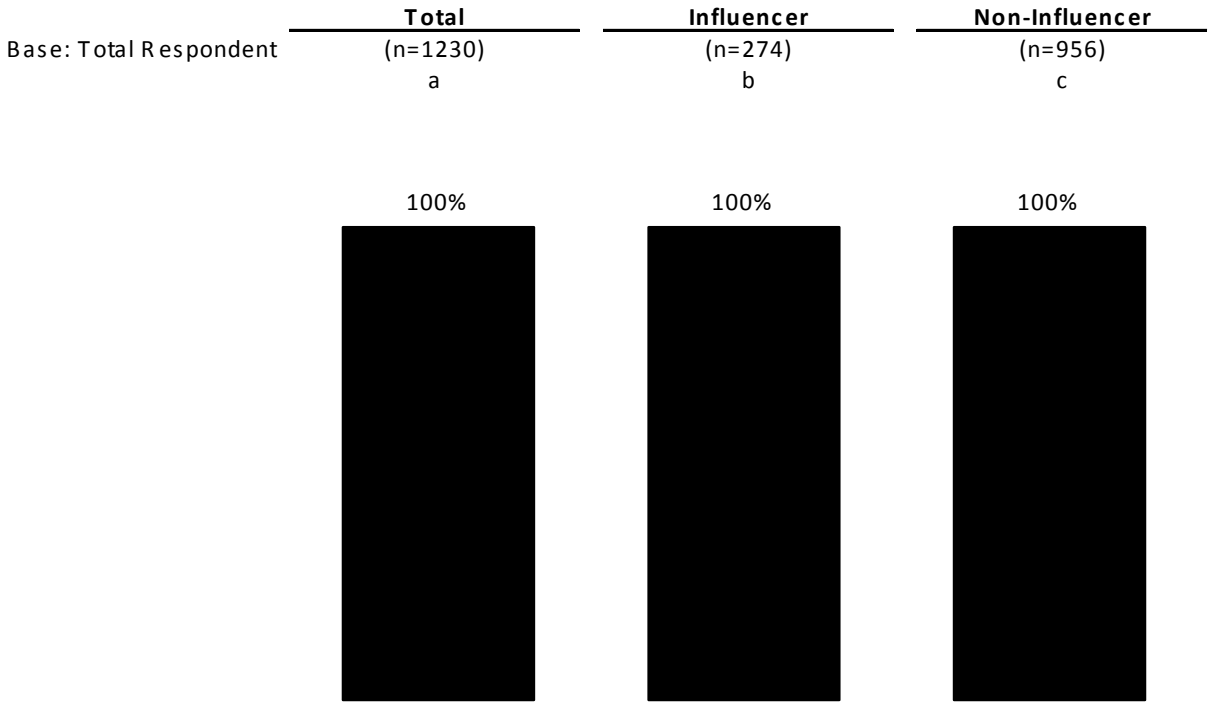
Visited Another Region in Ontario in the Past Year – Total & Influencer/Non-Influencer



S6: Please indicate if you have visited another region in Ontario in the past year for vacation and/or leisure purposes.
b/c - Lower case letters indicate significance at the 90% level.

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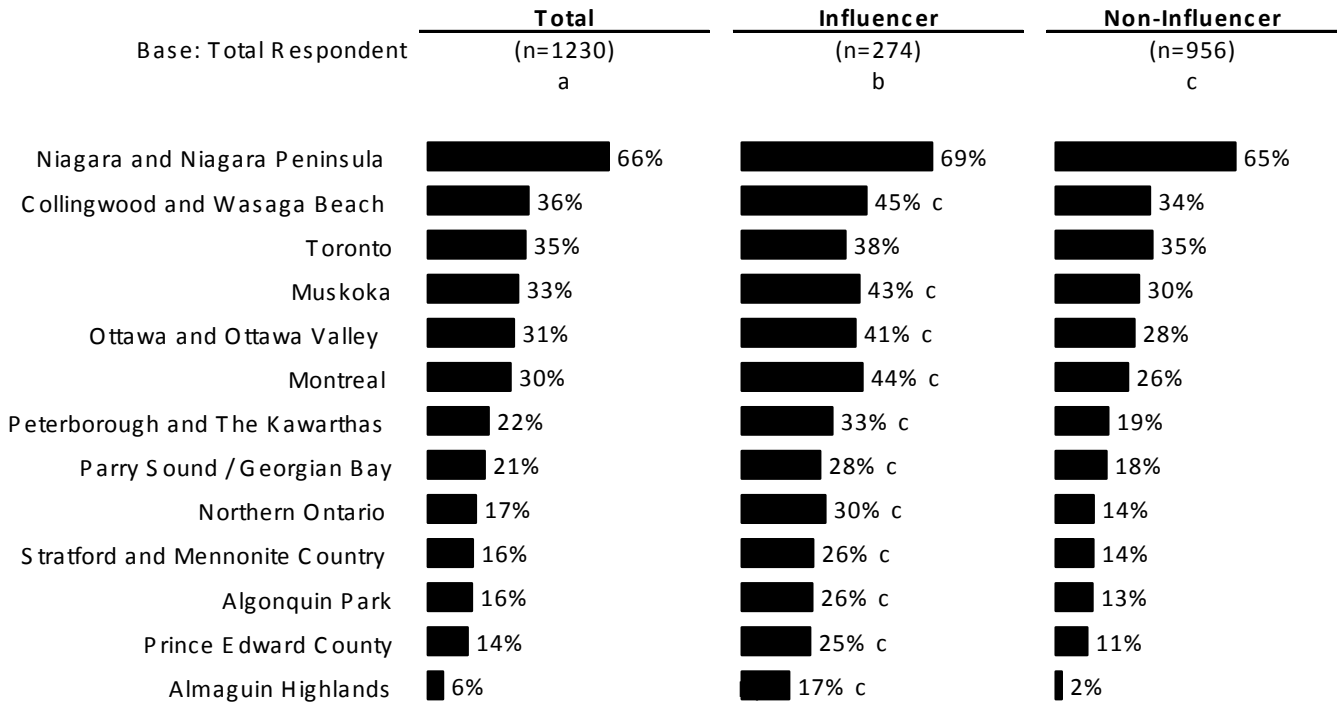
Areas Visited in the Past Year – Total & Influencer/Non-Influencer



S7: Which of the following areas have you visited within the past year?
b/c - Lower case letters indicate significance at the 90% level.

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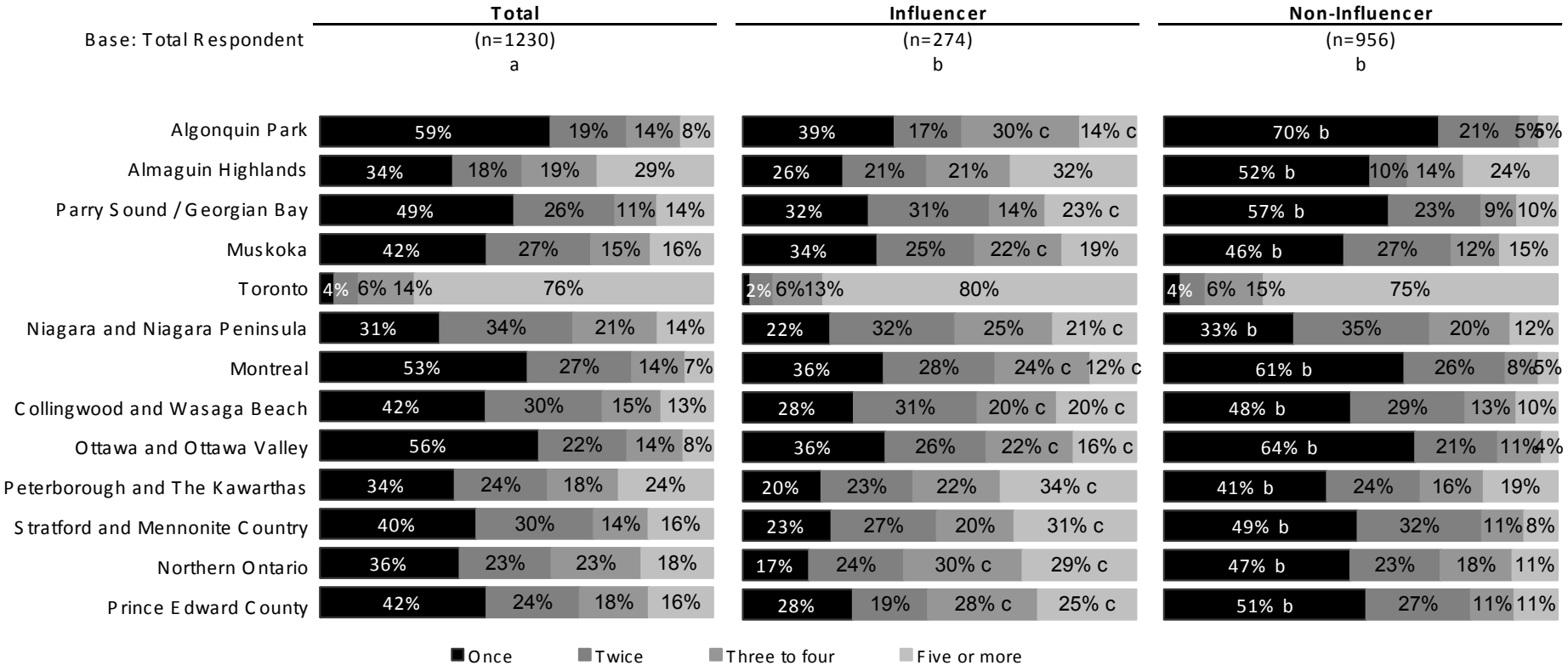
of Times Visited in the Past Year – Total & Influencer/Non-Influencer



Q1: How many times in the past year have you visited each of the following regions?
b/c - Lower case letters indicate significance at the 90% level.

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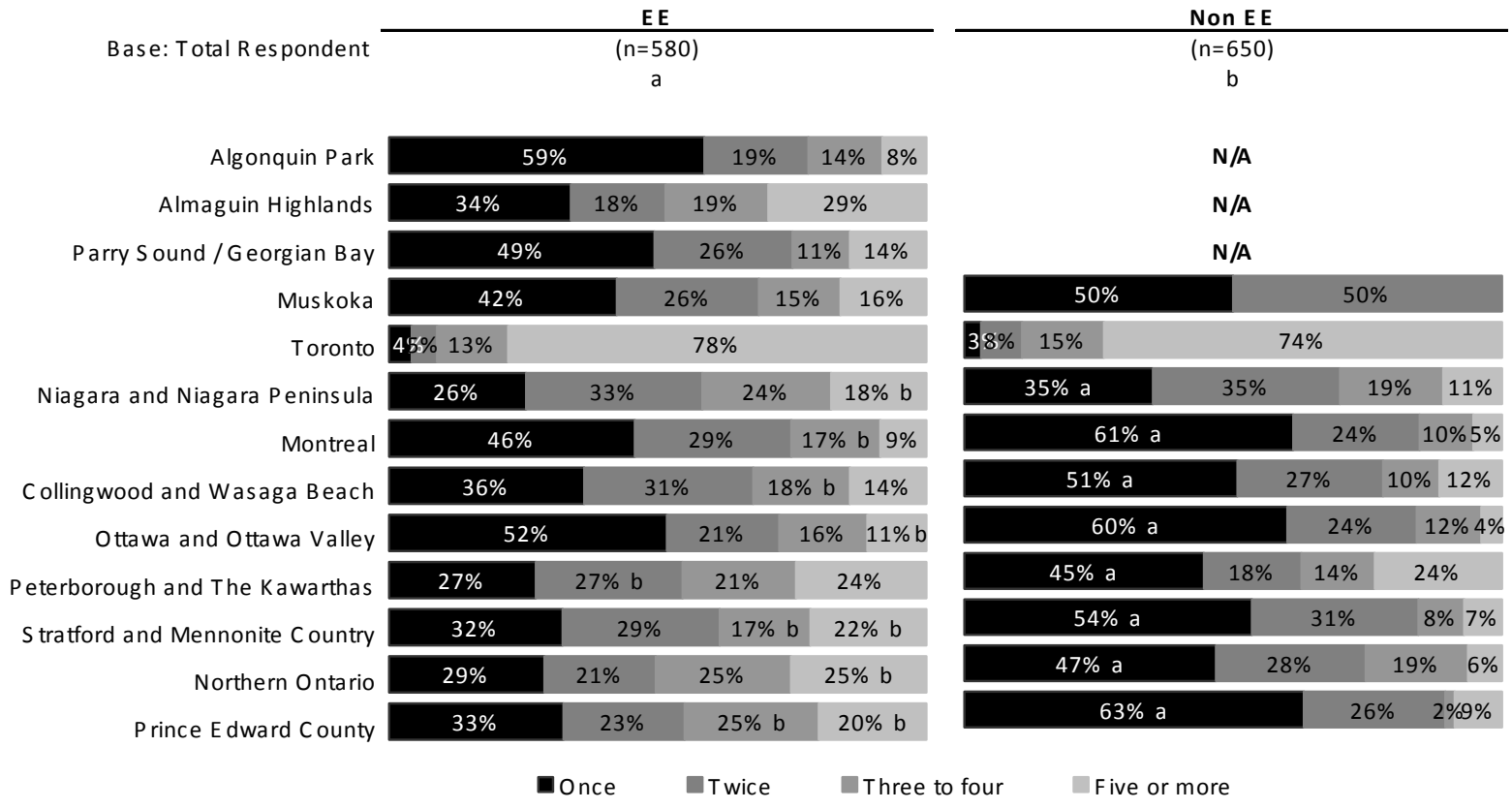
of Times Visited in the Past Year – EE vs. Non-EE



Q1: How many times in the past year have you visited each of the following regions?
a/b - Lower case letters indicate significance at the 90% level.

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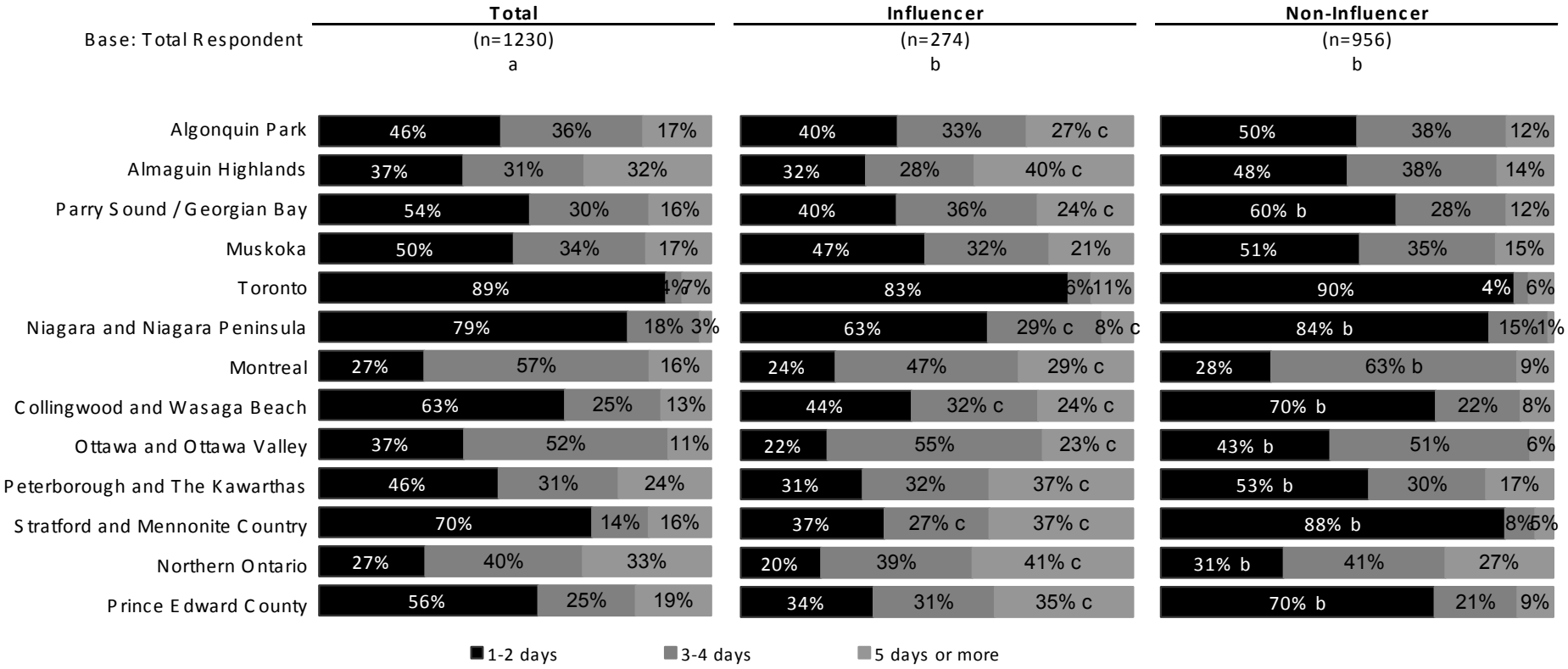
Duration of Visit – Total & Influencer/Non-Influencer



Q2: On average, how long do you typically visit each of the following regions?
b/c - Lower case letters indicate significance at the 90% level.

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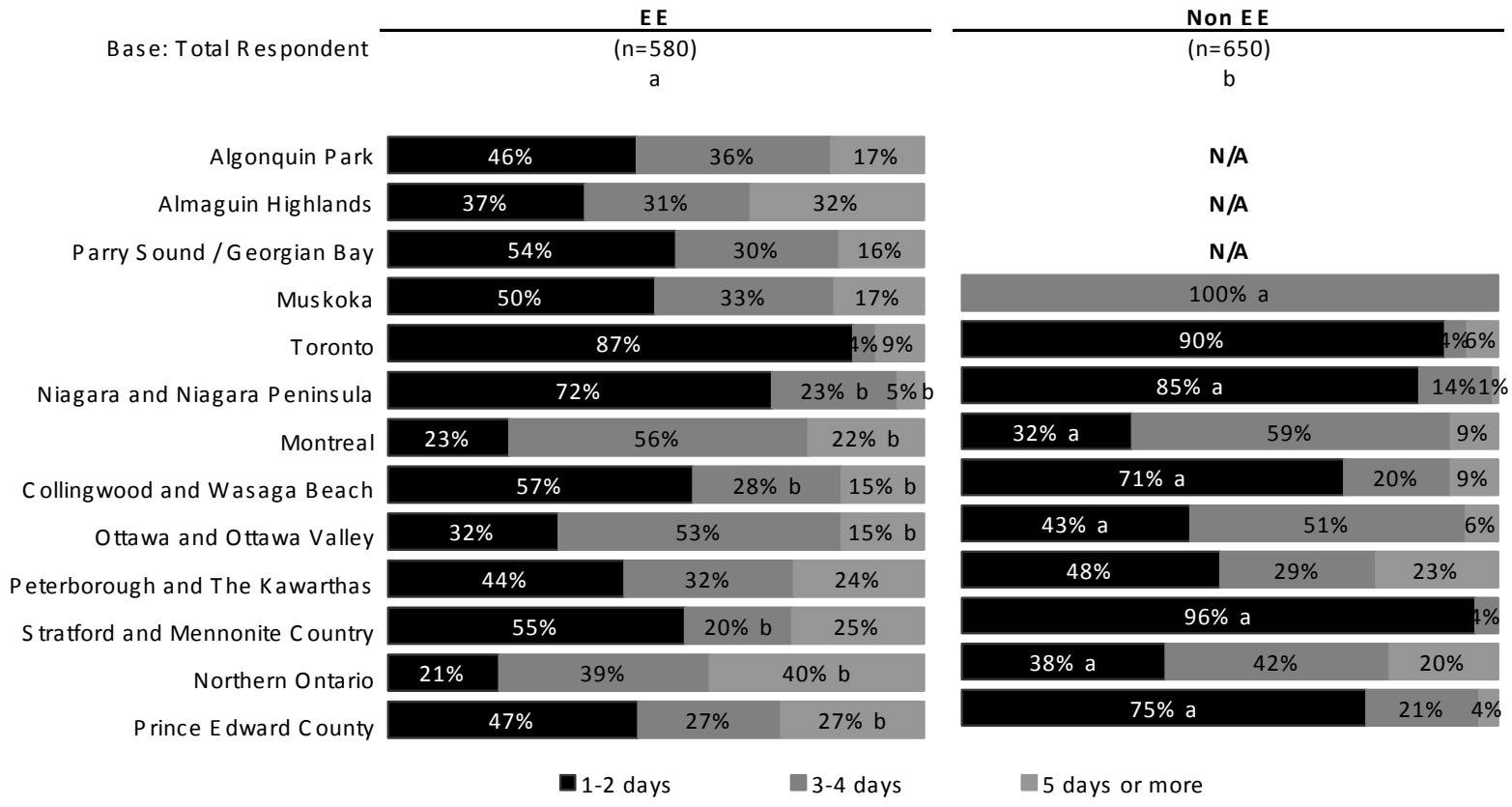
Duration of Visit – EE vs. Non-EE



Q2: On average, how long do you typically visit each of the following regions?
a/b - Lower case letters indicate significance at the 90% level.

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Season of Visit – Total & Influencer/Non-Influencer

	Spring			Summer			Winter			Fall		
	Total	Influencer	Non-Influencer	Total	Influencer	Non-Influencer	Total	Influencer	Non-Influencer	Total	Influencer	Non-Influencer
Base: Total Respondent	(n=1230) a	(n=274) b	(n=956) c	(n=1230) d	(n=274) e	(n=956) f	(n=1230) g	(n=274) h	(n=956) i	(n=1230) j	(n=274) k	(n=956) l
Niagara and Niagara Peninsula	33%	40% c	31%	51%	56% f	50%	27%	36% i	25%	29%	34% l	28%
Toronto	30%	33%	30%	33%	35%	32%	29%	31%	29%	29%	31%	29%
Ottawa and Ottawa Valley	12%	22% c	10%	20%	26% f	18%	13%	23% i	10%	10%	20% l	7%
Muskoka	11%	21% c	8%	27%	35% f	25%	9%	17% i	7%	11%	15% l	9%
Montreal	11%	23% c	7%	20%	29% f	17%	13%	24% i	9%	10%	19% l	7%
Peterborough and The Kawarthas	9%	17% c	7%	17%	25% f	15%	8%	18% i	5%	10%	19% l	7%
Collingwood and Wasaga Beach	8%	16% c	6%	28%	36% f	26%	13%	19% i	11%	8%	15% l	6%
Parry Sound / Georgian Bay	7%	16% c	4%	17%	24% f	15%	5%	13% i	2%	7%	13% l	5%
Stratford and Mennonite Country	6%	14% c	4%	11%	17% f	10%	4%	14% i	2%	8%	17% l	5%
Northern Ontario	6%	14% c	3%	12%	21% f	10%	6%	15% i	3%	8%	17% l	5%
Algonquin Park	5%	15% c	3%	11%	20% f	9%	3%	9% i	1%	6%	11% l	4%
Prince Edward County	5%	12% c	3%	11%	17% f	9%	5%	13% i	3%	6%	14% l	4%
Almaguin Highlands	4%	14% c	1%	3%	10% f	1%	3%	12% i	0%	2%	8% l	1%
None of the above	28%	16%	31% b	5%	3%	6% e	31%	18%	35% h	30%	21%	32% k

Q3: During what season(s) have you visited each of the following regions?
b/c, e/f, h/I, k/l - Lower case letters indicate significance at the 90% level.

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Season of Visit – EE vs. Non-EE

	Spring		Summer		Winter		Fall	
	EE	Non EE	EE	Non EE	EE	Non EE	EE	Non EE
Base: Total Respondent	(n=580) a	(n=650) b	(n=580) c	(n=650) d	(n=580) e	(n=650) f	(n=580) g	(n=650) h
Niagara and Niagara Peninsula	35% b	30%	52%	50%	32% f	23%	32% h	27%
Toronto	31%	30%	33%	32%	31%	27%	31%	28%
Ottawa and Ottawa Valley	14% b	11%	22%	18%	16% f	10%	12% h	8%
Muskoka	24%	N/A	58% d	N/A	19%	N/A	23%	N/A
Montreal	12%	9%	23% d	17%	16% f	10%	12% h	8%
Peterborough and The Kawarthas	12% b	6%	21% d	14%	12% f	5%	13% h	6%
Collingwood and Wasaga Beach	11% b	5%	36% d	22%	17% f	8%	10% h	6%
Parry Sound / Georgian Bay	15%	N/A	37%	N/A	10%	N/A	15%	N/A
Stratford and Mennonite Country	10% b	3%	16% d	8%	8% f	1%	11% h	5%
Northern Ontario	8% b	4%	17% d	9%	9% f	3%	11% h	5%
Algonquin Park	12%	N/A	24%	N/A	6%	N/A	13%	N/A
Prince Edward County	8% b	2%	15% d	7%	9% f	2%	11% h	3%
Almaguin Highlands	8%	N/A	7%	N/A	6%	N/A	5%	N/A
None of the above	20%	35% a	1%	9% c	23%	38% e	21%	37% g

Q3: During what season(s) have you visited each of the following regions?
a/b - Lower case letters indicate significance at the 90% level.

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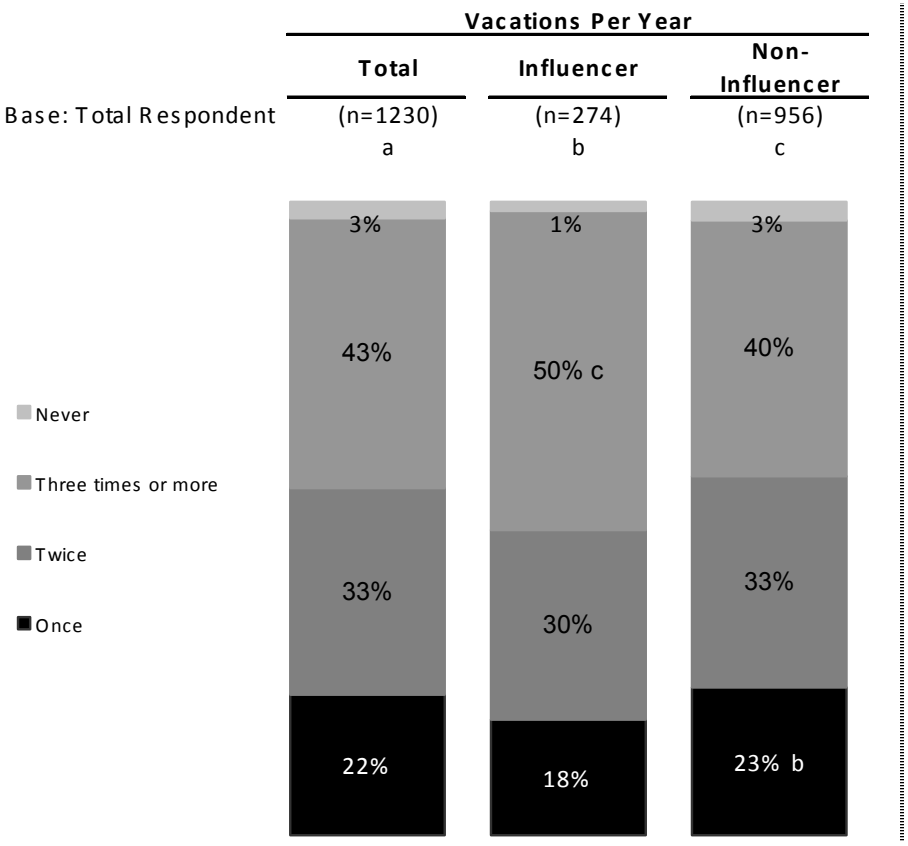
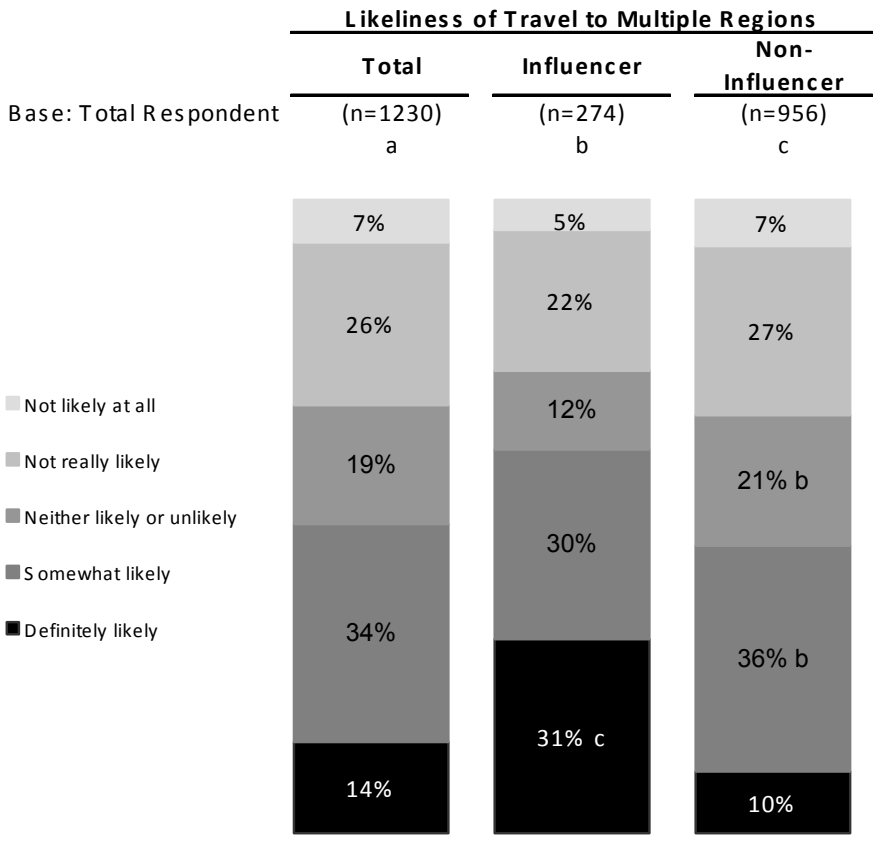
Vacations – Total & Influencer/Non-Influencer





Q4: How often do you go on a [[PIPE HVAC]] vacations per year?

Q5: When thinking about taking a [[PIPE HVAC]], how likely are you to travel to multiple regions/areas on that same trip versus staying in one area?

b/c - Lower case letters indicate significance at the 90% level.

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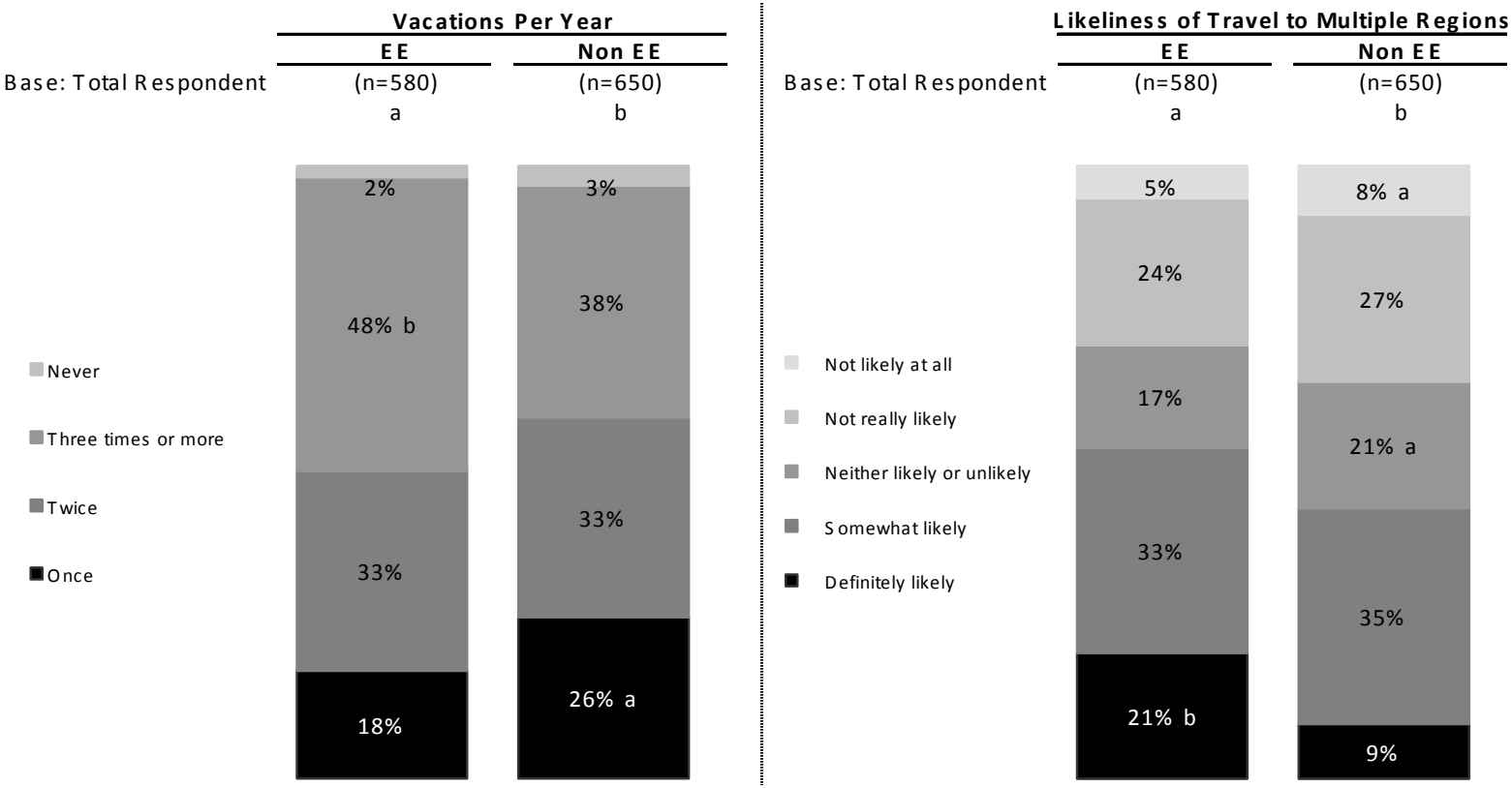
Vacations – EE vs. Non-EE



Q4: How often do you go on a [[PIPE HVAC]] vacations per year?

Q5: When thinking about taking a [[PIPE HVAC]], how likely are you to travel to multiple regions/areas on that same trip versus staying in one area?

a/b - Lower case letters indicate significance at the 90% level.

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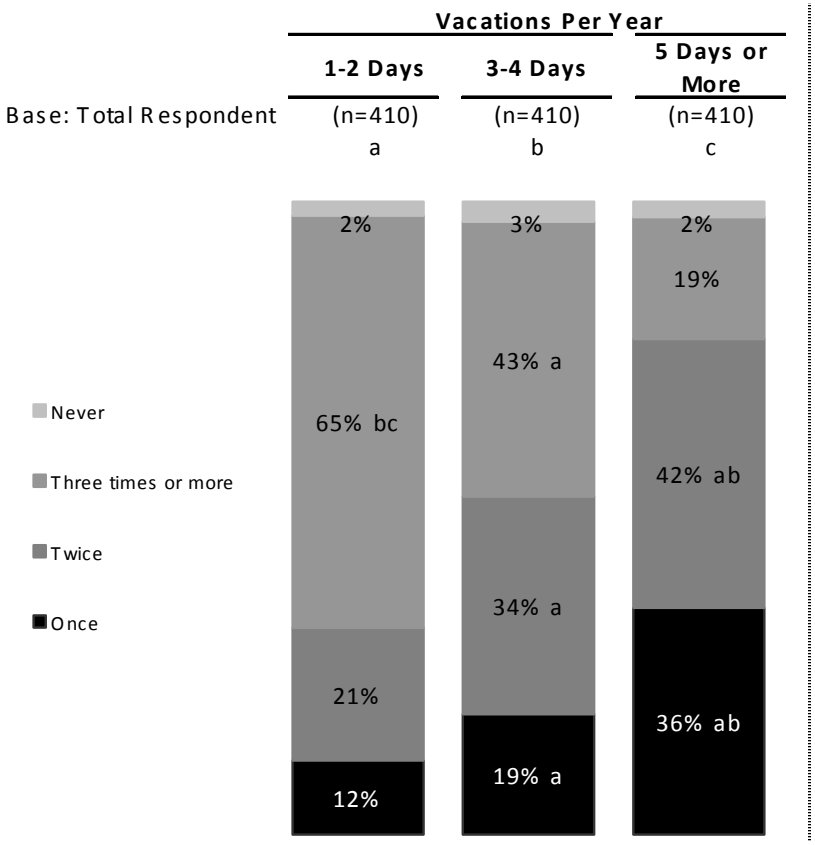
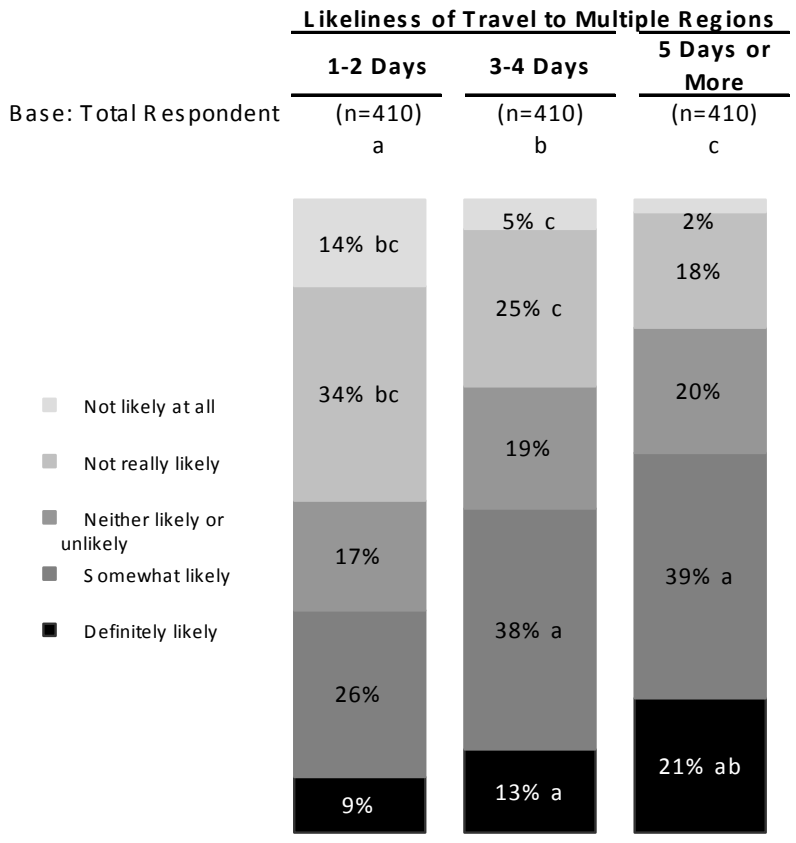
Vacations – Visitation Duration





Q4: How often do you go on a [[PIPE HVAC]] vacations per year?

Q5: When thinking about taking a [[PIPE HVAC]], how likely are you to travel to multiple regions/areas on that same trip versus staying in one area?

a/b/c - Lower case letters indicate significance at the 90% level.

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ACTIVITIES

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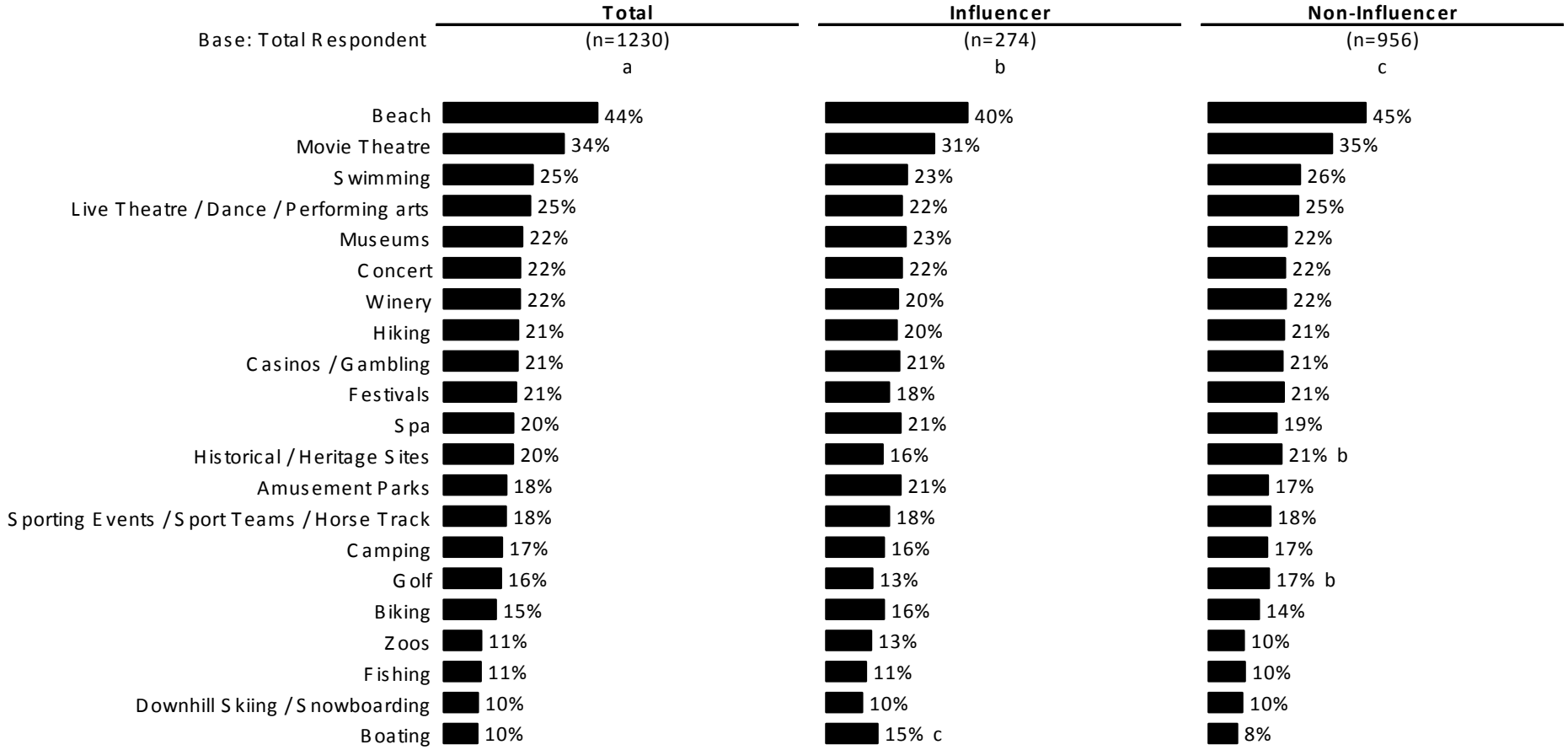
Favourite Activities in Spare Time – Total & Influencer/Non-Influencer



Mentions above 10% shown

Q6: Out of the following list, what are your favourite activities you like to do in your spare time?

b/c - Lower case letters indicate significance at the 90% level.

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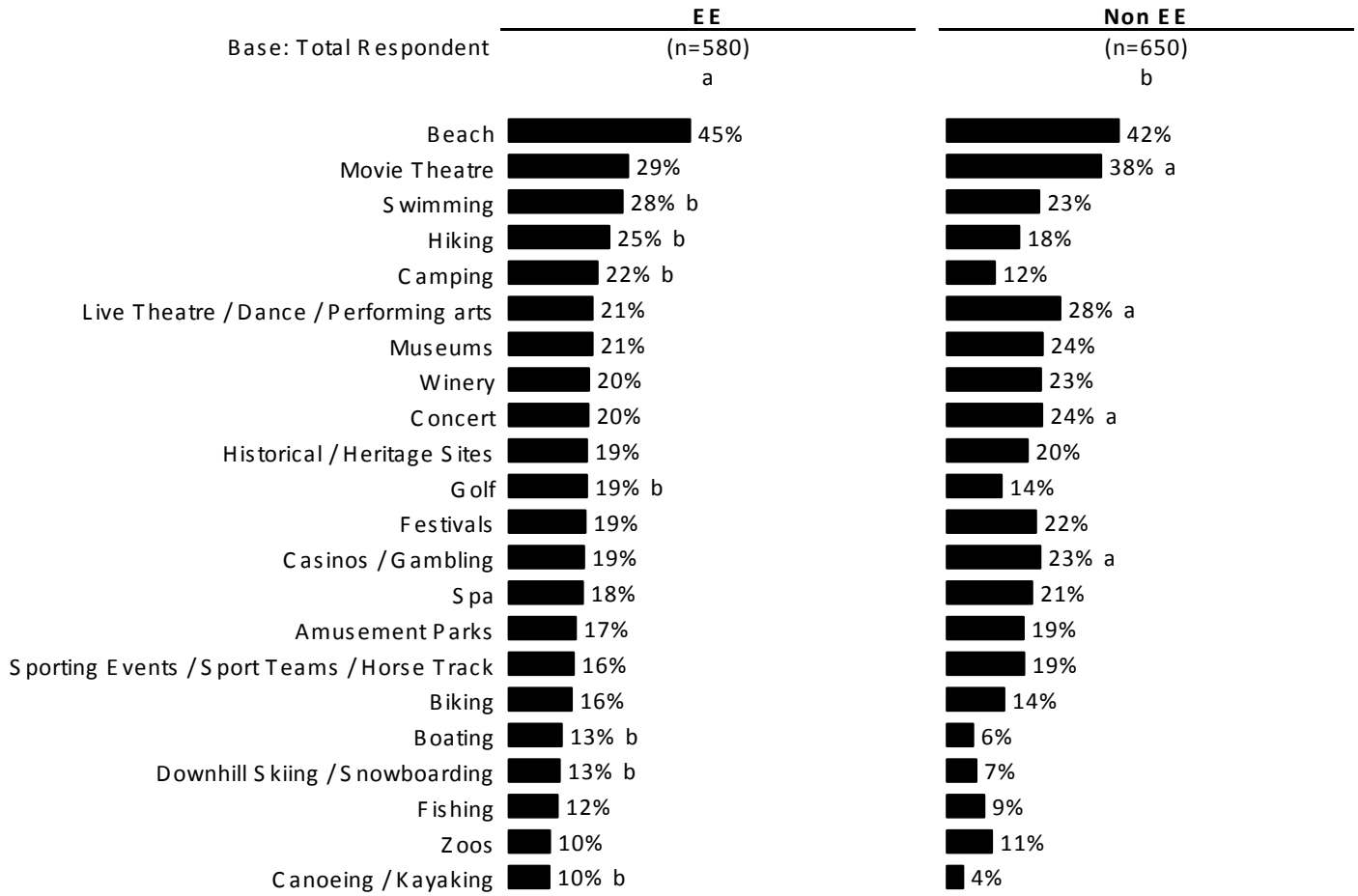
Favourite Activities in Spare Time – EE vs. Non-EE



Mentions above 10% shown

Q6: Out of the following list, what are your favourite activities you like to do in your spare time?

a/b - Lower case letters indicate significance at the 90% level.

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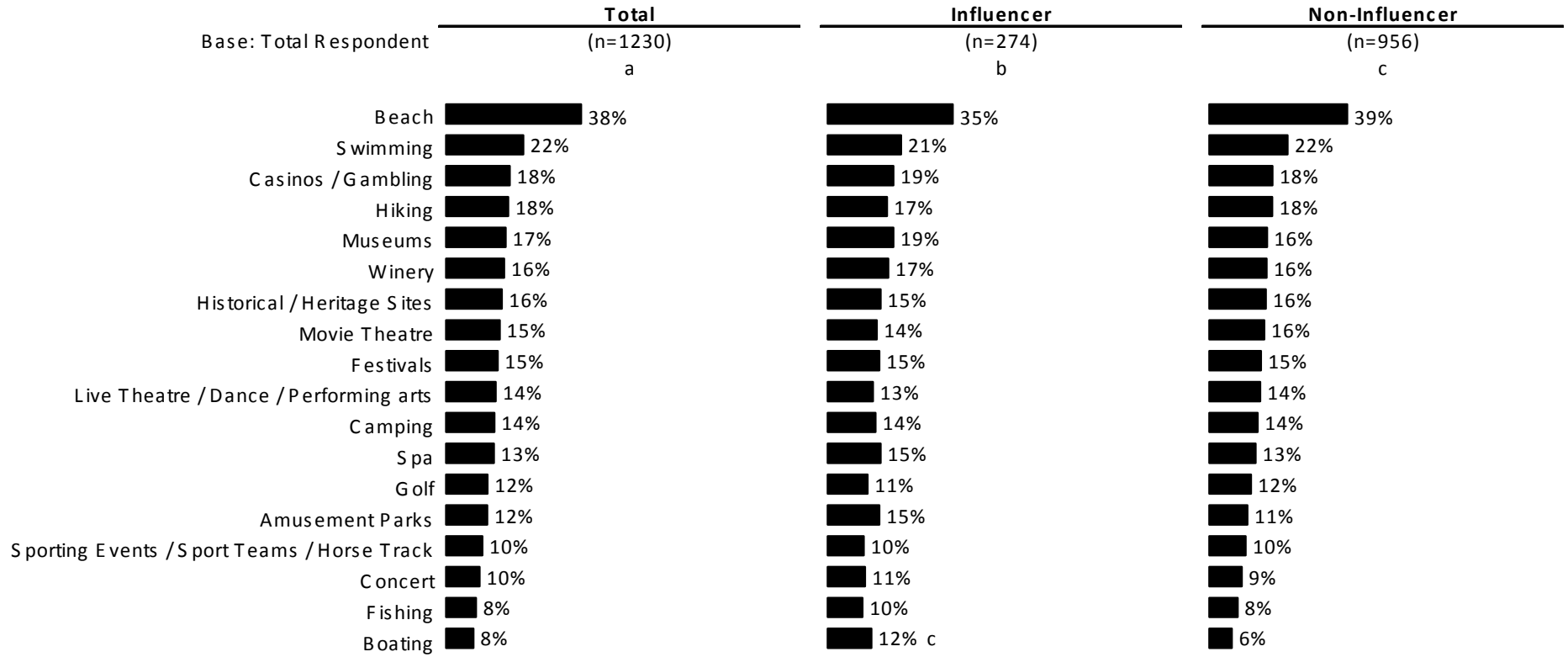
Activities Participated in Past Year – Total & Influencer/Non-Influencer



Mentions above 10% shown

Q7: Out of the activities you indicated, in the past year which have you participated in when on vacation?

b/c - Lower case letters indicate significance at the 90% level.

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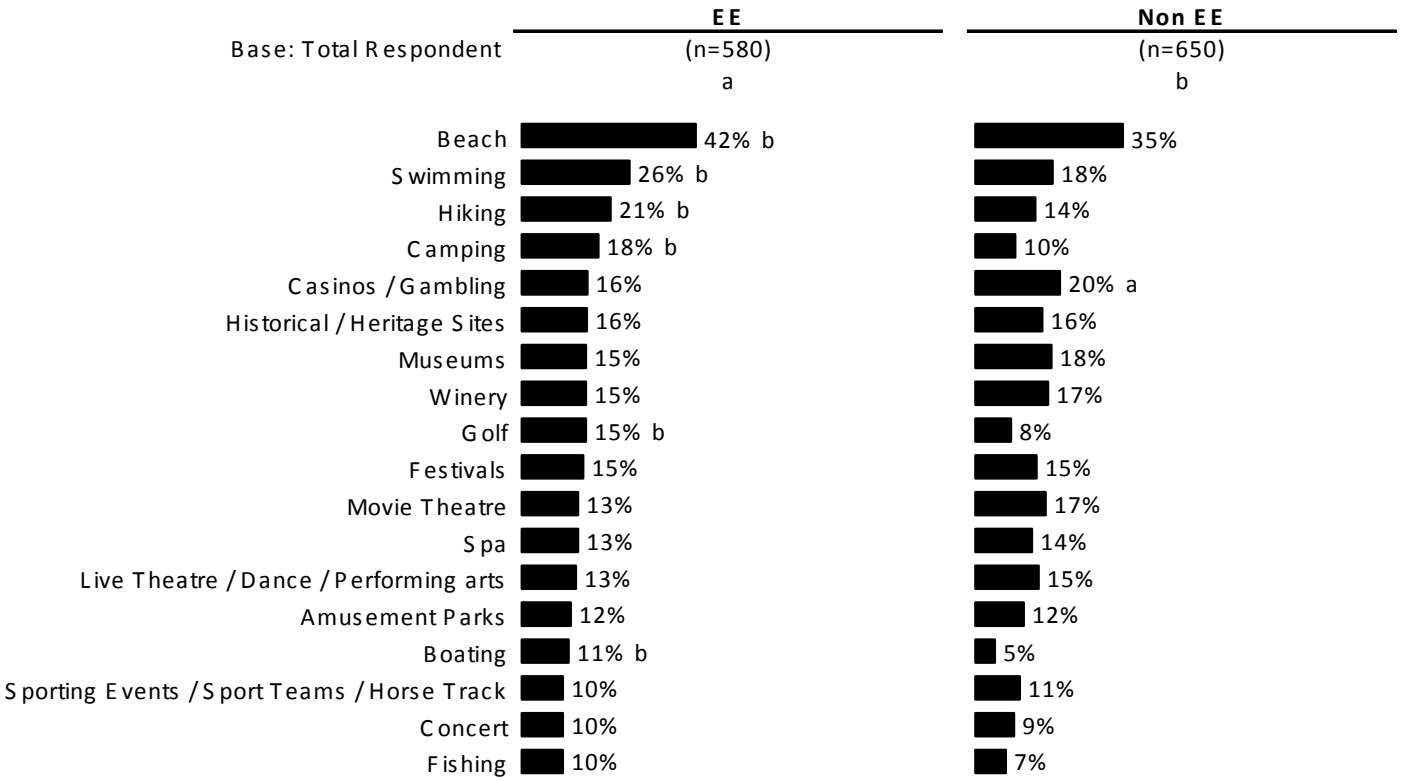
Activities Participated in Past Year – EE vs. Non-EE



Mentions above 10% shown

Q7: Out of the activities you indicated, in the past year which have you participated in when on vacation?

a/b - Lower case letters indicate significance at the 90% level.

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EXPLORERS' EDGE

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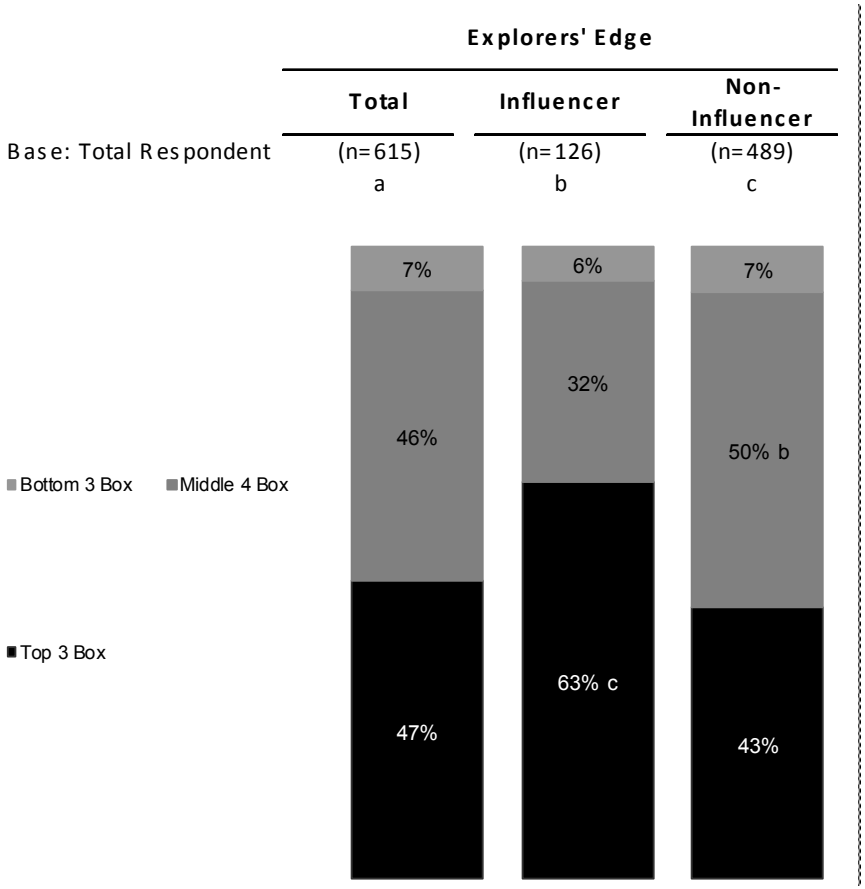
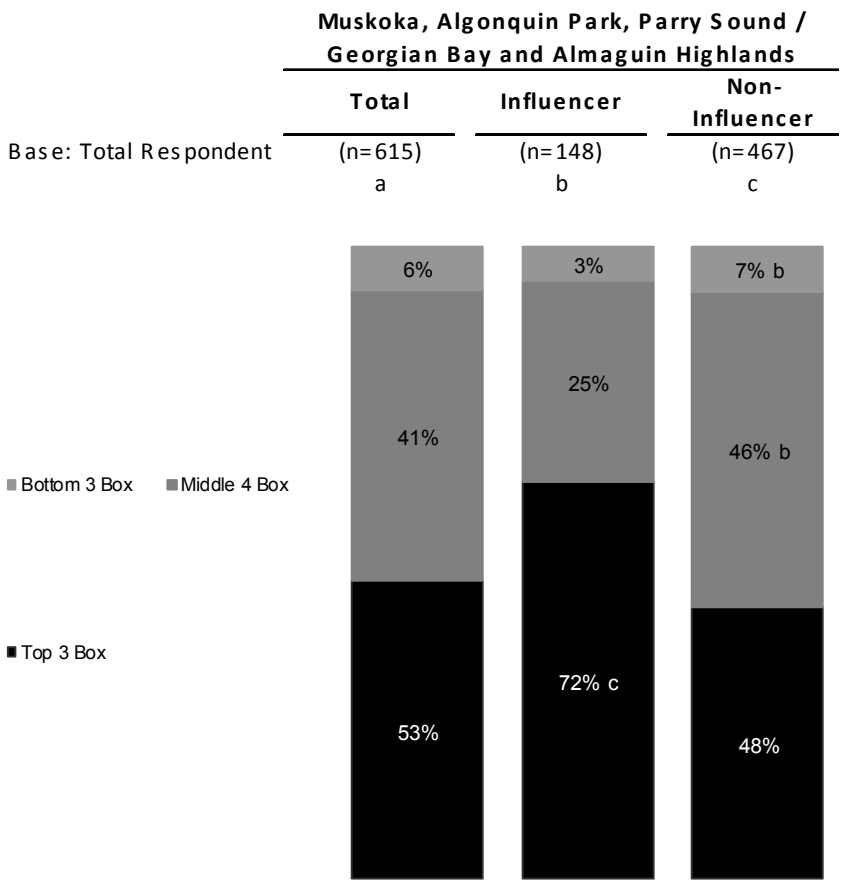
Level of Interest – Total & Influencer/Non-Influencer





Q38A: Explorers' Edge is a region in Ontario consisting of Muskoka, Algonquin Park, Parry Sound / Georgian Bay and Almaguin Highlands that offers several incredible outdoor activities. On a scale of 1 to 10, with 10 being the highest, how interested are you in visiting this region in the future?

Q38B: Muskoka, Algonquin Park, Parry Sound / Georgian Bay and Almaguin Highlands are regions in Ontario that offer several incredible outdoor activities. On a scale of 1 to 10, with 10 being the highest, how interested are you in visiting these regions in the future.

b/c - Lower case letters indicate significance at the 90% level.

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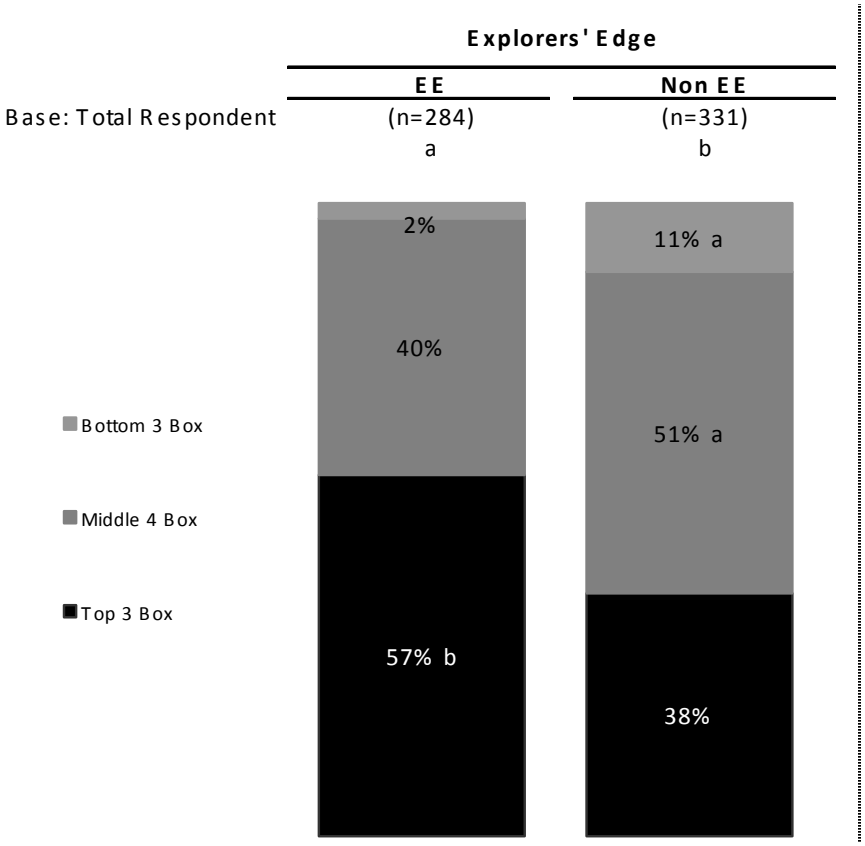
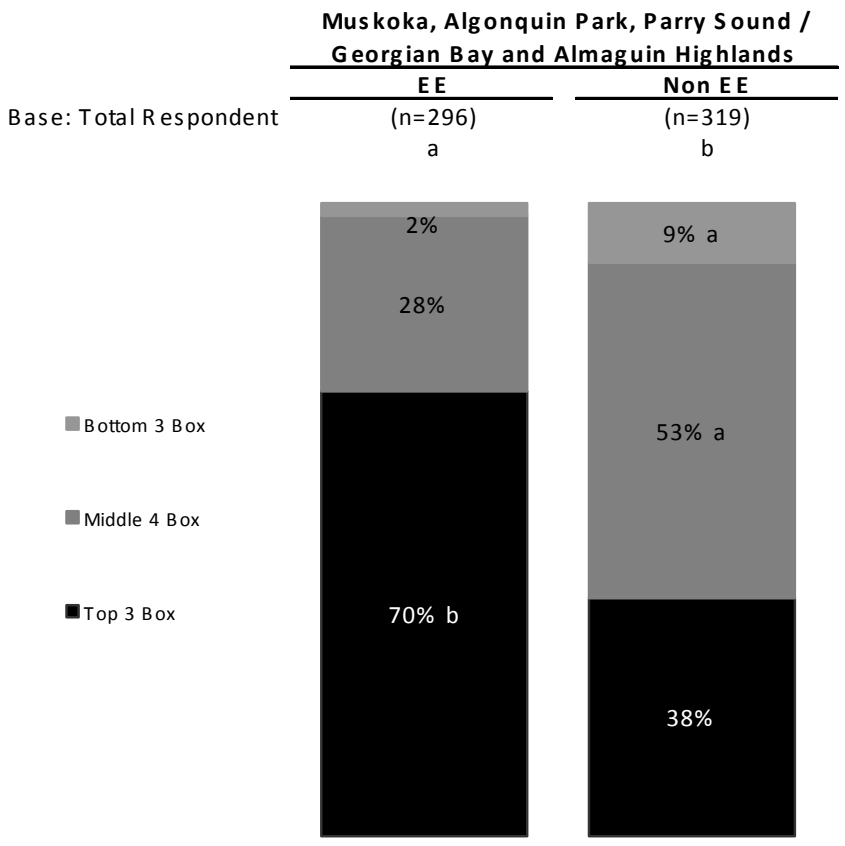
Level of Interest – EE vs. Non-EE





Q38A: Explorers' Edge is a region in Ontario consisting of Muskoka, Algonquin Park, Parry Sound / Georgian Bay and Almaguin Highlands that offers several incredible outdoor activities. On a scale of 1 to 10, with 10 being the highest, how interested are you in visiting this region in the future?

Q38B: Muskoka, Algonquin Park, Parry Sound / Georgian Bay and Almaguin Highlands are regions in Ontario that offer several incredible outdoor activities. On a scale of 1 to 10, with 10 being the highest, how interested are you in visiting these regions in the future.

a/b - Lower case letters indicate significance at the 90% level.

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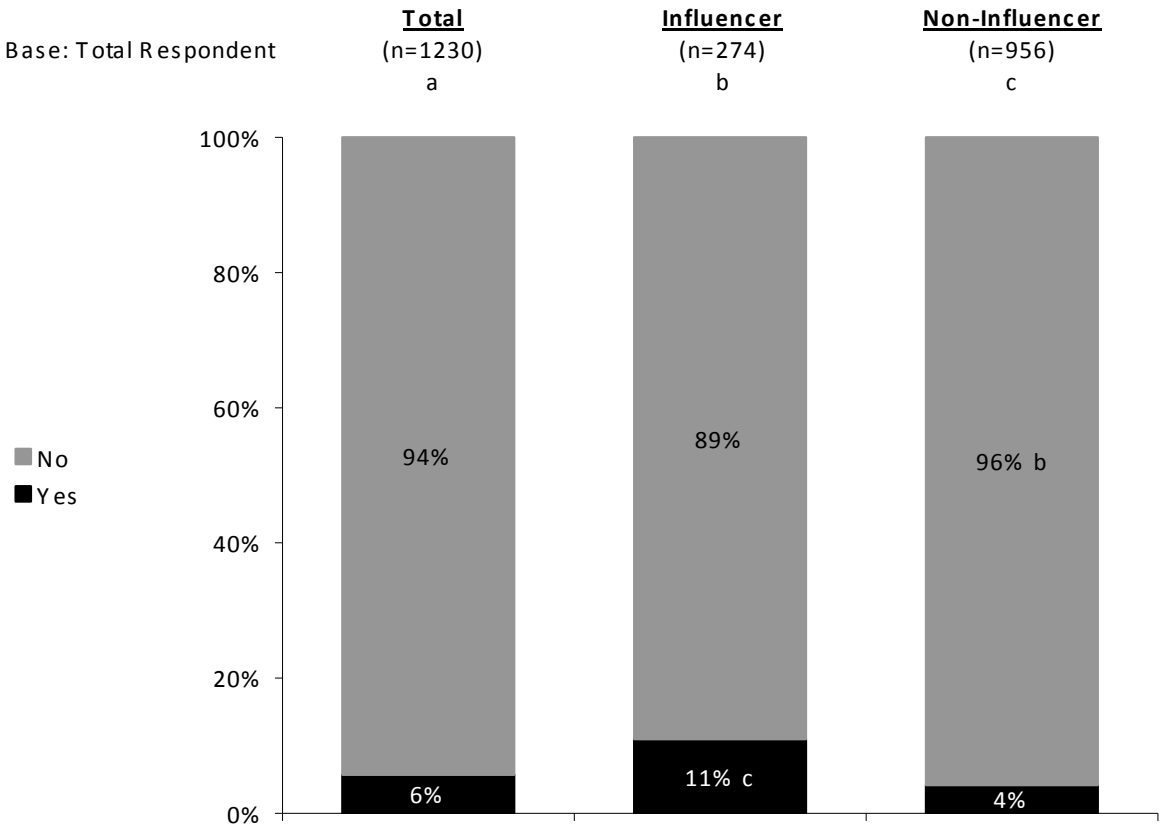
Familiar with the Explorers' Edge region



Q37a: Are you familiar with the Explorers' Edge region?
b/c - Lower case letters indicate significance at the 90% level.

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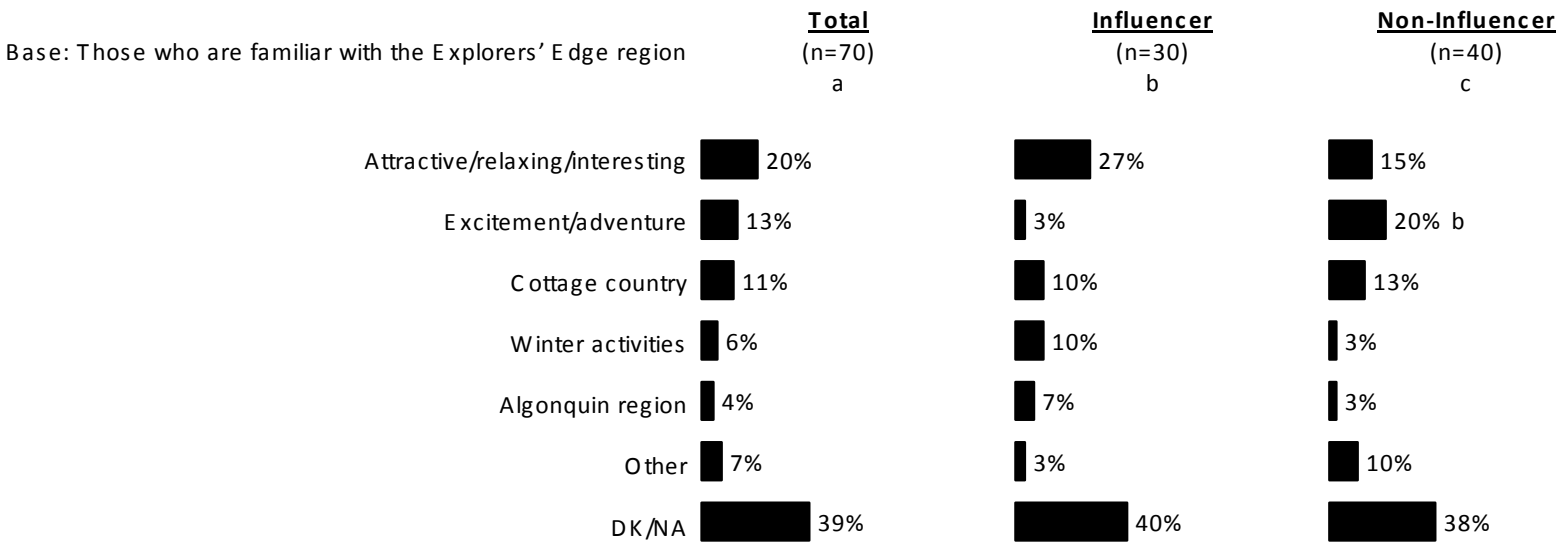
Explorers' Edge Region Means



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DRIVERS OVERALL

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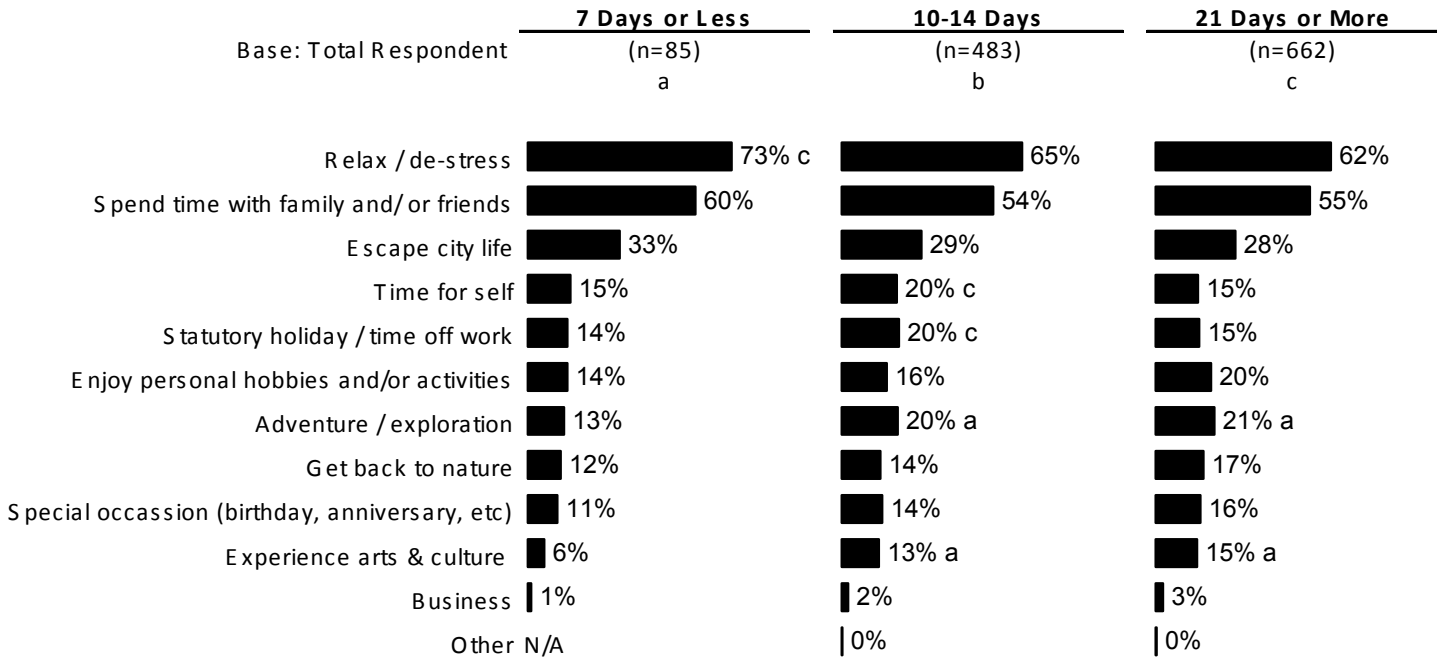
Primary Motivation – Vacation Days Per Year



Q15: When considering going on a [[PIPE HVAC]] what is your primary motivation?
a/b/c - Lower case letters indicate significance at the 90% level.

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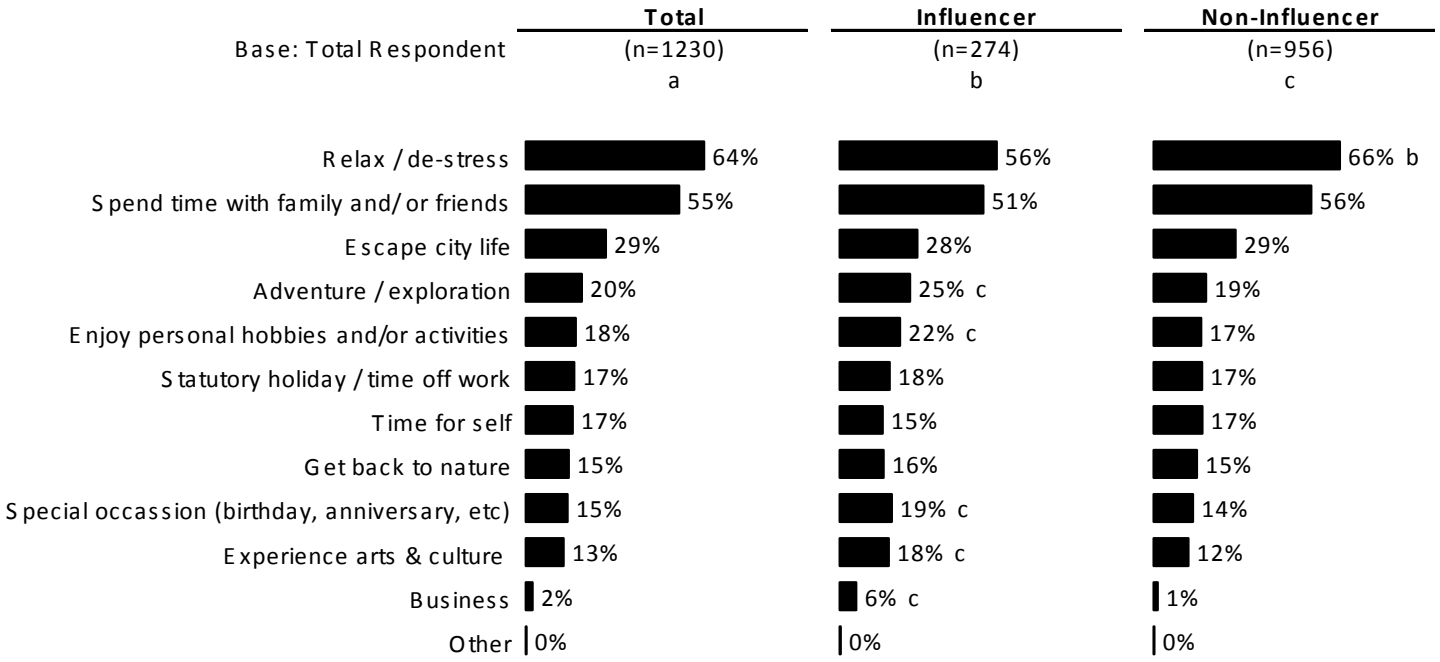
Primary Motivation – Total & Influencer/Non-Influencer



Q15: When considering going on a [[PIPE HVAC]] what is your primary motivation?
b/c - Lower case letters indicate significance at the 90% level.

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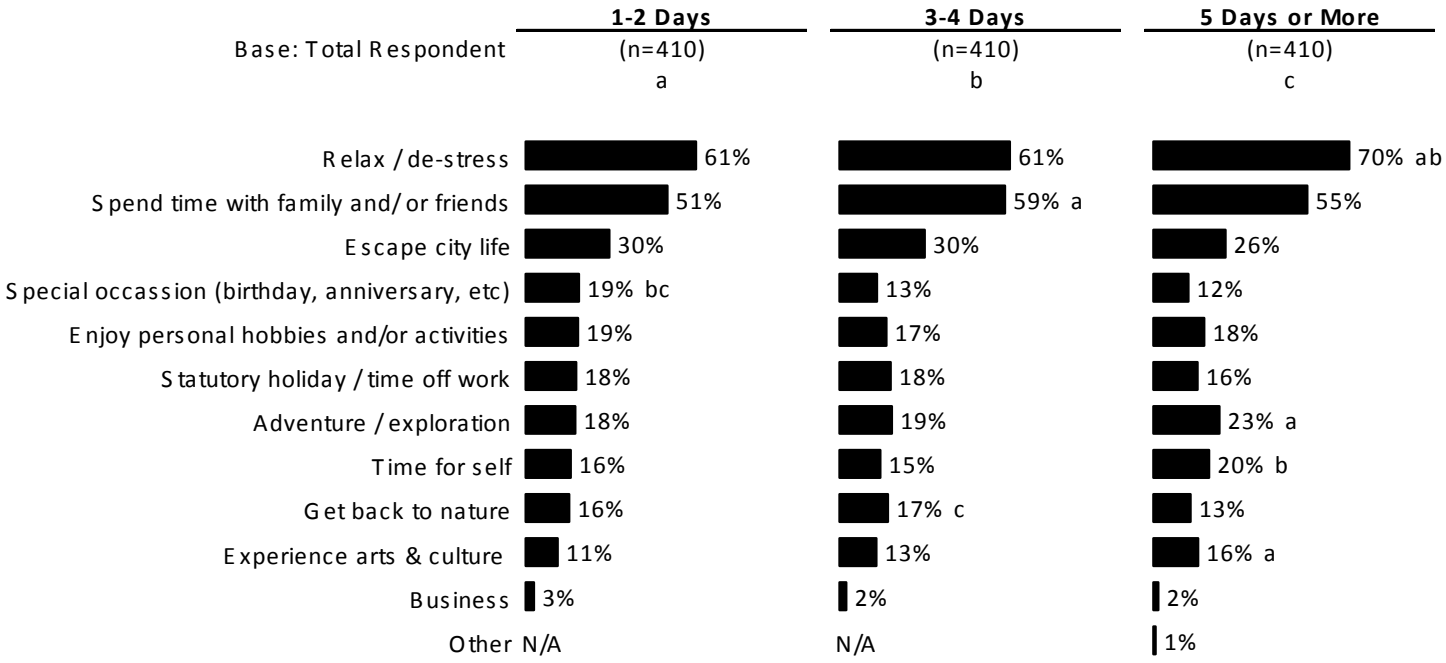
Primary Motivation – Visitation Duration



Q15: When considering going on a [[PIPE HVAC]] what is your primary motivation?
a/b/c - Lower case letters indicate significance at the 90% level.

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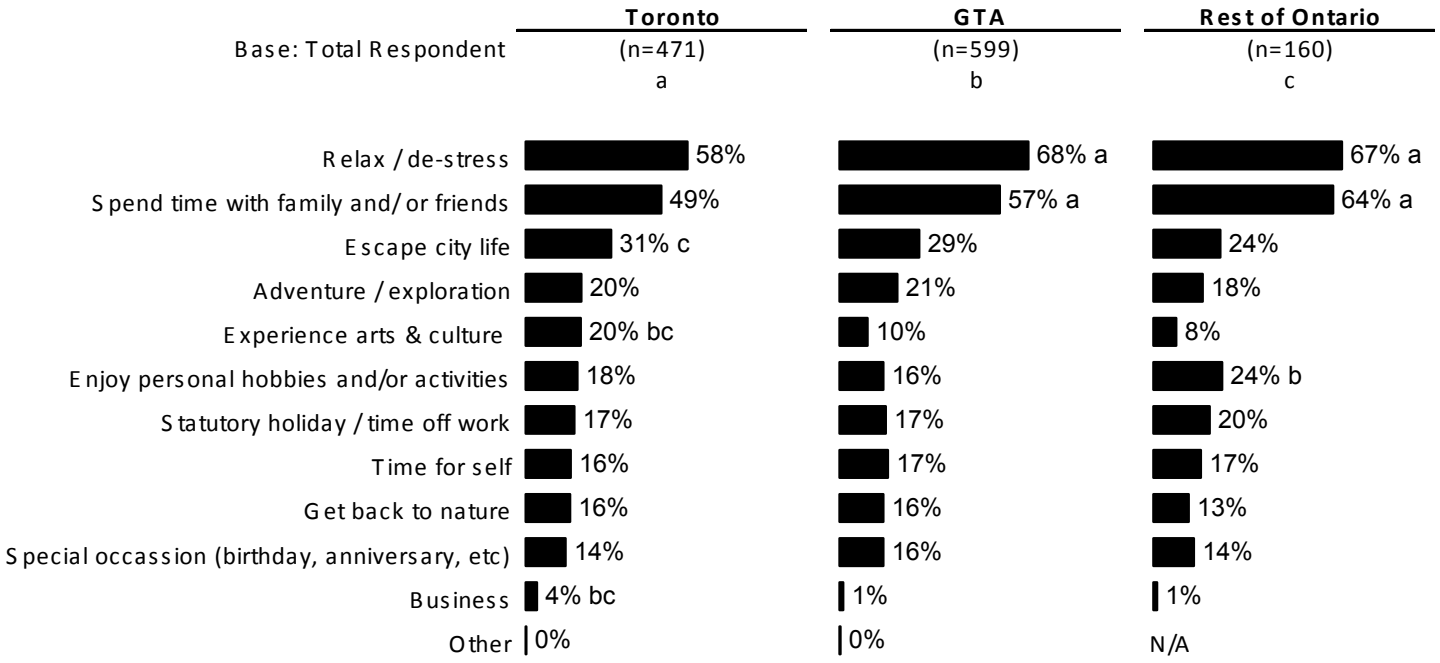
Primary Motivation – By City



Q15: When considering going on a [[PIPE HVAC]], what is your primary motivation?
a/b/c - Lower case letters indicate significance at the 90% level.

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Drivers of Preference & Performance – Total

	Other Regions									EE Regions			
	Toronto	Niagara & Niagara Peninsula	Montreal	Collingwood & Wasaga Beach	Ottawa & Ottawa Valley	Peter borough & Kawarthas	Stratford & Mennonite Country	Northern Ontario	Prince Edward County	Muskoka	Algonquin Park	Parry Sound / Georgian Bay	Almaguin Highlands
Base: Total Respondent	(n=410)	(n=410)	(n=410)	(n=410)	(n=410)	(n=410)	(n=411)	(n=410)	(n=409)	(n=410)	(n=410)	(n=410)	(n=410)
Close proximity to home	55%	41%	-12%	21%	-4%	13%	12%	-13%	5%	14%	-5%	4%	-15%
Has large variety of outdoor activities	6%	17%	-5%	22%	12%	14%	-11%	21%	10%	26%	27%	19%	-1%
Best location for favorite activity	3%	-1%	-6%	-9%	-12%	-19%	-28%	-15%	-20%	-2%	-14%	-16%	-31%
Top rated accommodations	27%	21%	21%	-8%	11%	-20%	-16%	-26%	-17%	6%	-27%	-19%	-33%
Accessible transportation	53%	35%	44%	-1%	38%	-6%	-4%	-12%	-10%	-9%	-18%	-14%	-20%
Family friendly	26%	31%	13%	30%	28%	22%	14%	23%	20%	32%	28%	20%	-1%
Offers exclusive packaged deals	17%	25%	14%	-7%	5%	-18%	-16%	-18%	-15%	-2%	-22%	-16%	-29%
Cultural activities (i.e. galleries, museums, etc)	44%	6%	35%	-20%	33%	-16%	8%	-17%	-12%	-15%	-22%	-21%	-24%
Incredible nature	-34%	11%	-28%	8%	-2%	11%	-9%	24%	11%	26%	28%	17%	-1%
Relaxing environment	-40%	-18%	-33%	-6%	-20%	-4%	-15%	-1%	-4%	7%	5%	-1%	-21%
Attractions (i.e. theme parks, amusement parks, etc)	31%	32%	16%	-1%	7%	-20%	-17%	-21%	-22%	-12%	-20%	-18%	-23%
Great dining & entertaining experiences	22%	14%	18%	-18%	8%	-32%	-15%	-33%	-17%	-11%	-43%	-32%	-44%

Q20: When deciding between get-away trips among the different tourism regions in Ontario, how important are each of the following to you?
Q21: How well do you think each of the following tourism regions would perform on each criteria?

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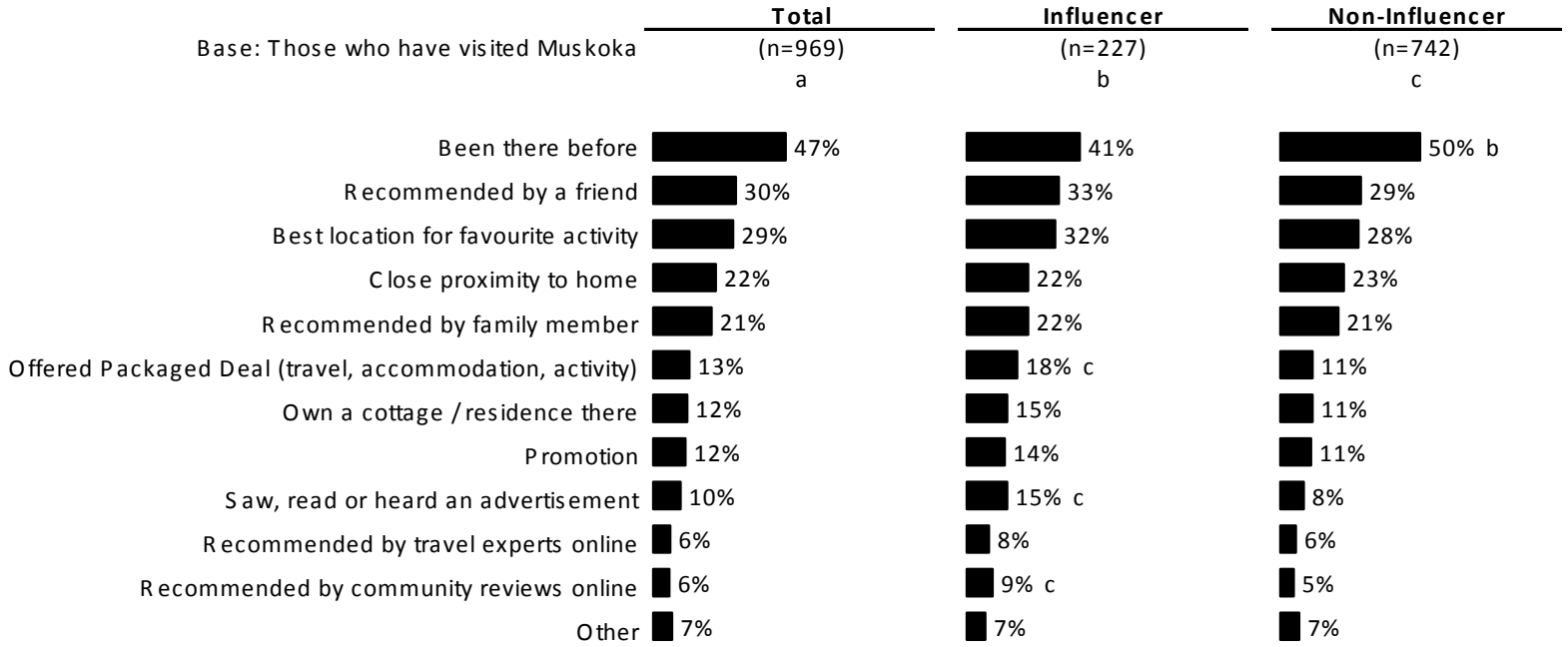
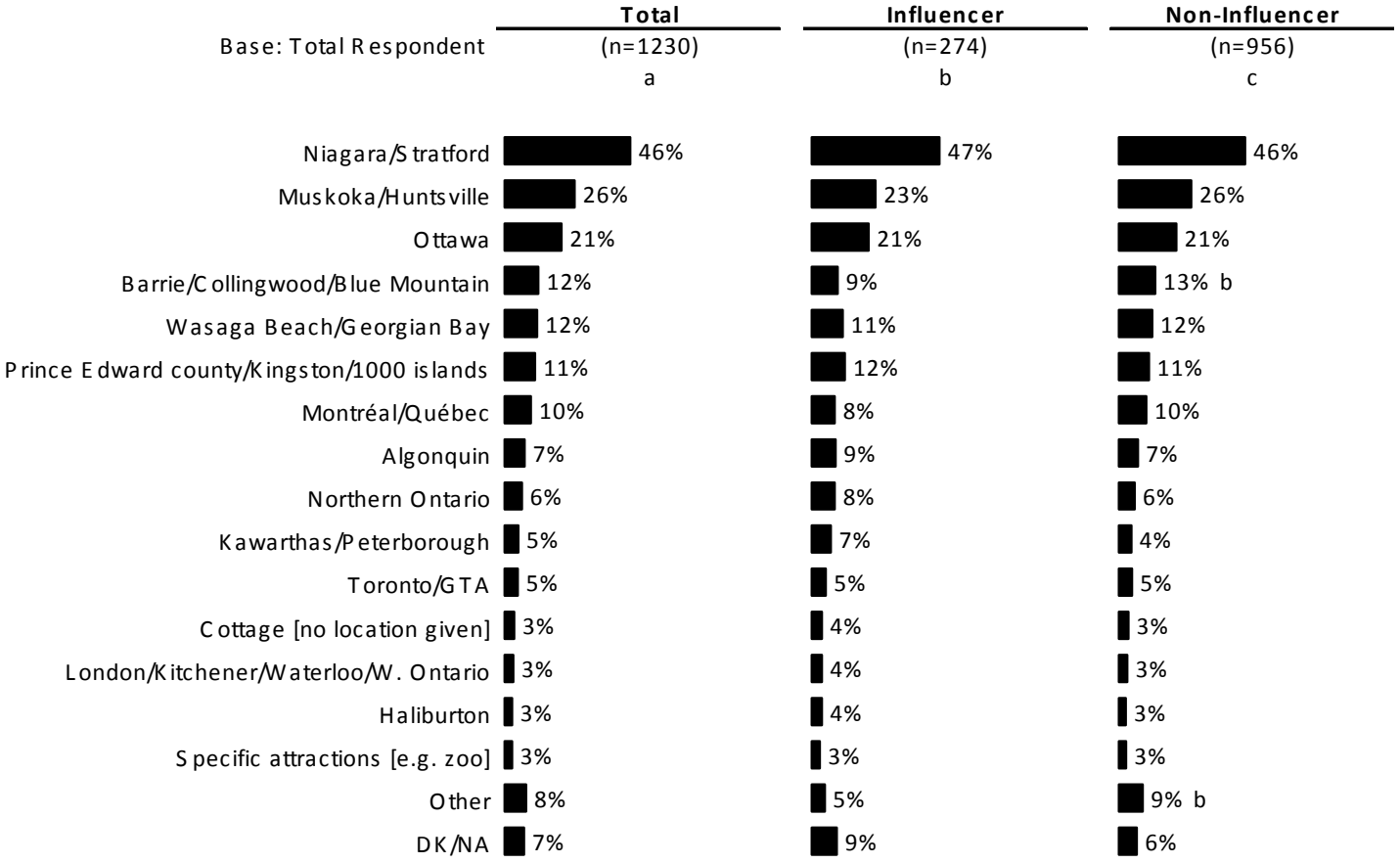
Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Muskoka



Q22: Thinking back to the last time you went on vacation to each of the following regions, what made you choose that specific place to go? Please select up to 3.
b/c - Lower case letters indicate significance at the 90% level.

CLOUD AdAgents

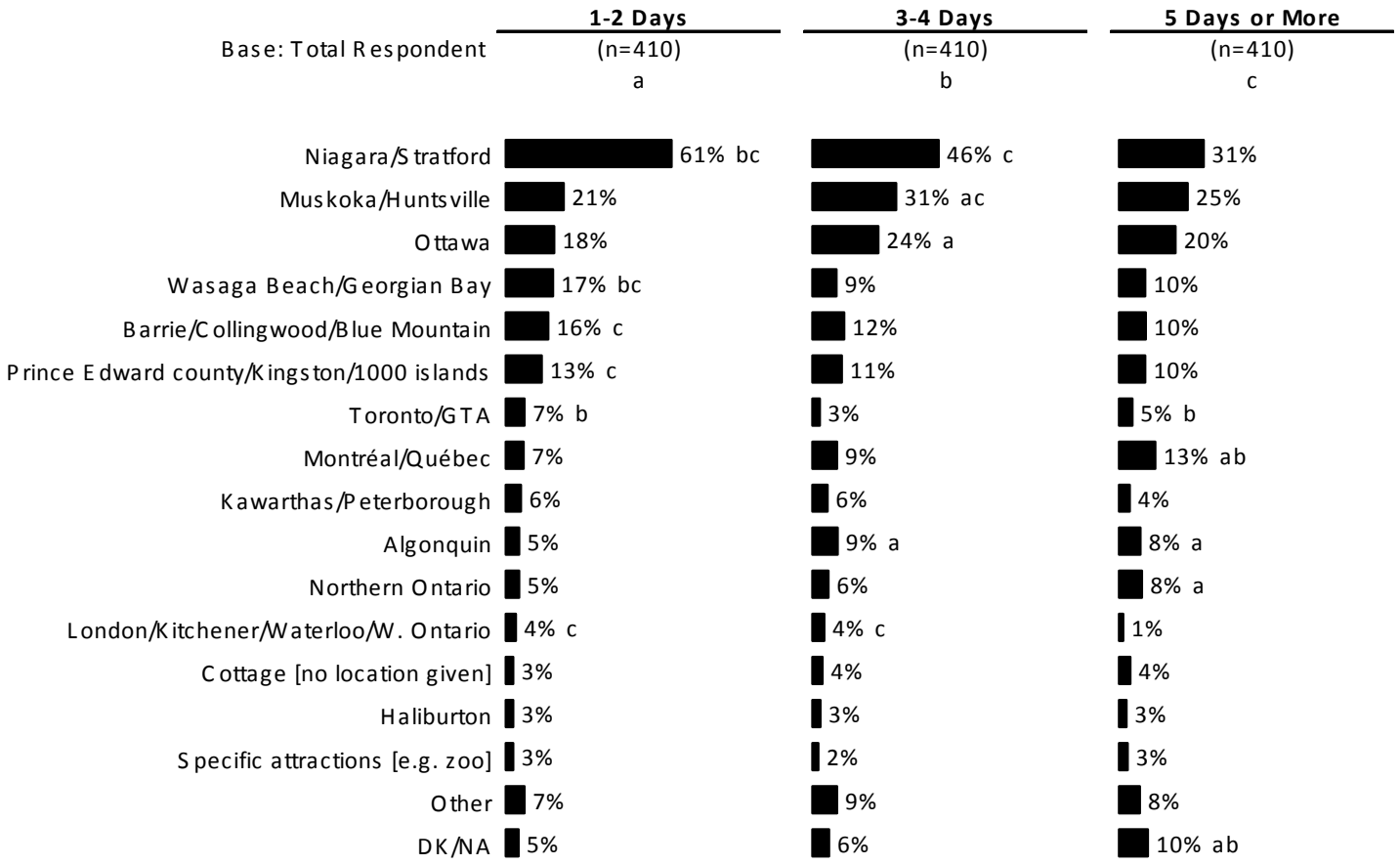
Ontario/Nearby, Places Which Come to Mind – Total & Influencer/Non-Influencer



Q8: When it comes to going on a [[PIPE HVAC]] in Ontario or nearby, what places come to mind?
b/c - Lower case letters indicate significance at the 90% level.

CLOUD AdAgents

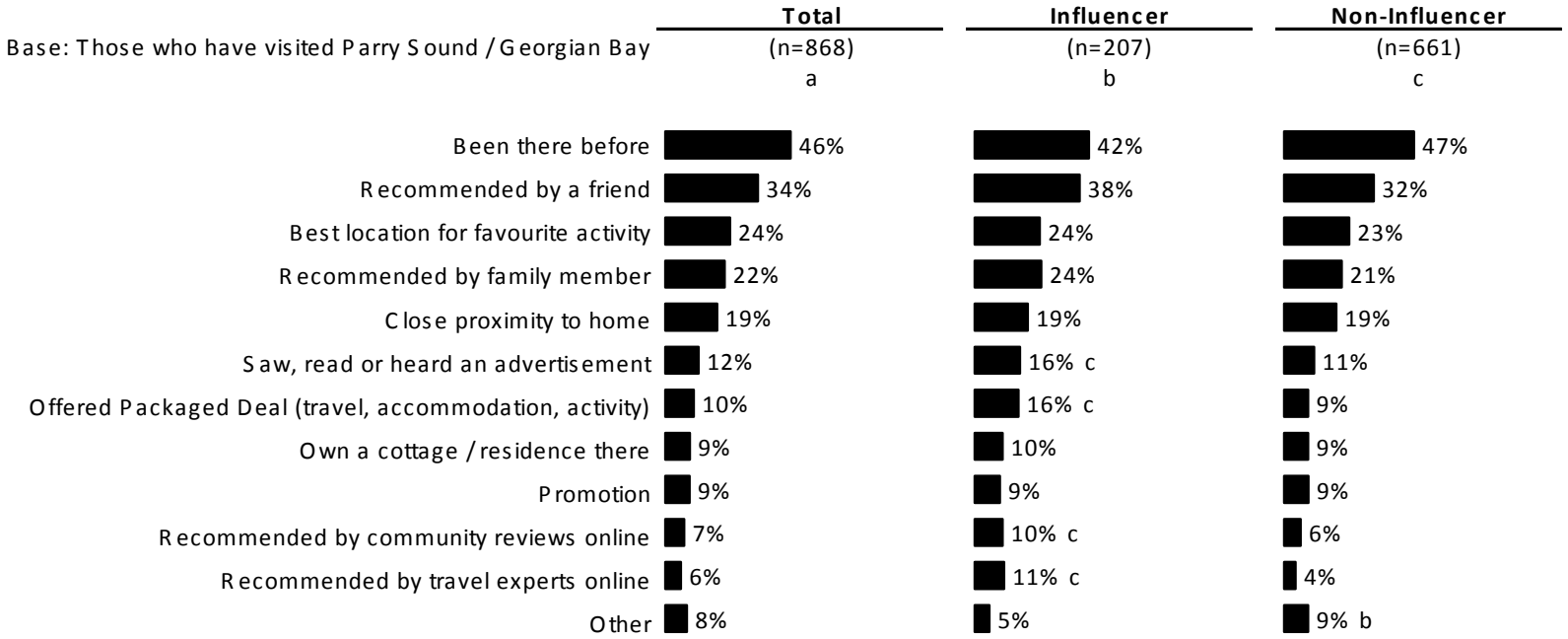
Ontario/Nearby, Places Which Come to Mind – Visitation Duration



Q8: When it comes to going on a [[PIPE HVAC]] in Ontario or nearby, what places come to mind?
a/b/c - Lower case letters indicate significance at the 90% level.

CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Parry Sound / Georgian Bay



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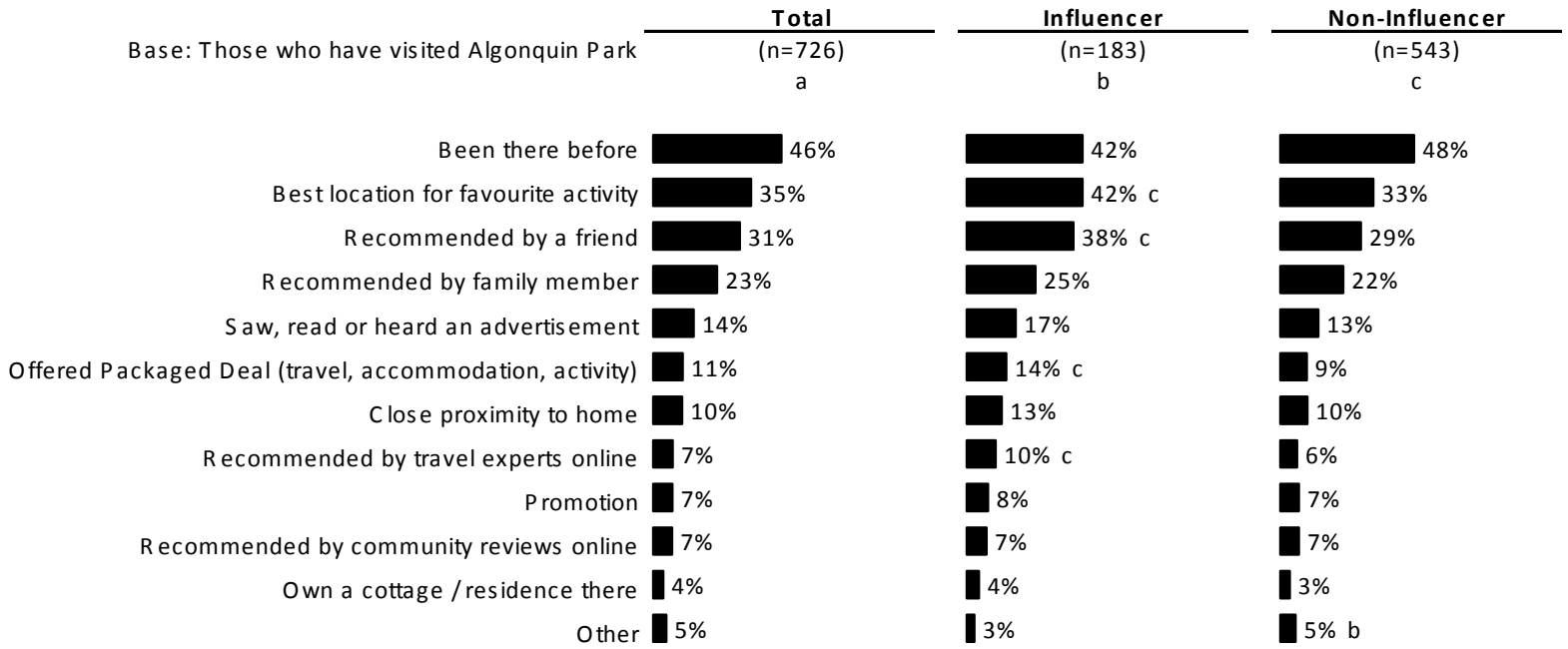
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Algonquin Park



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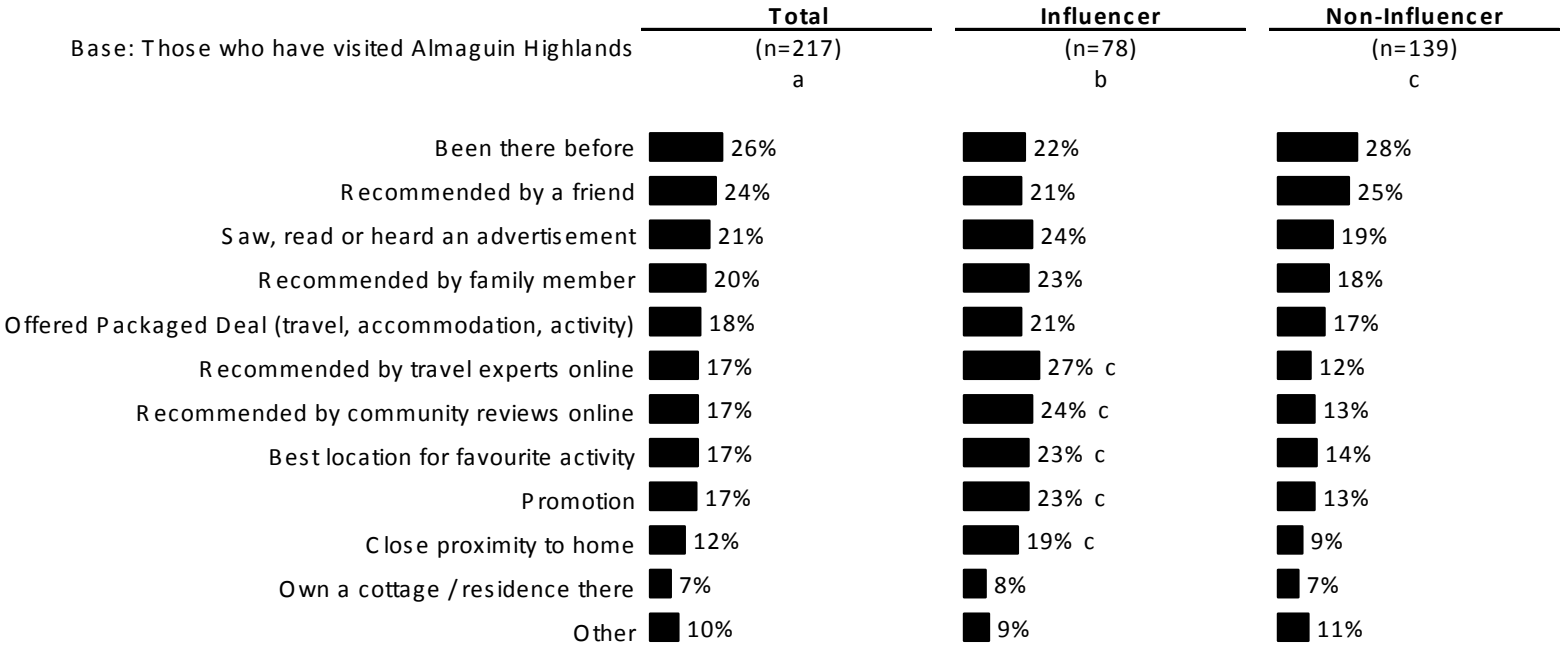
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Almaguin Highlands



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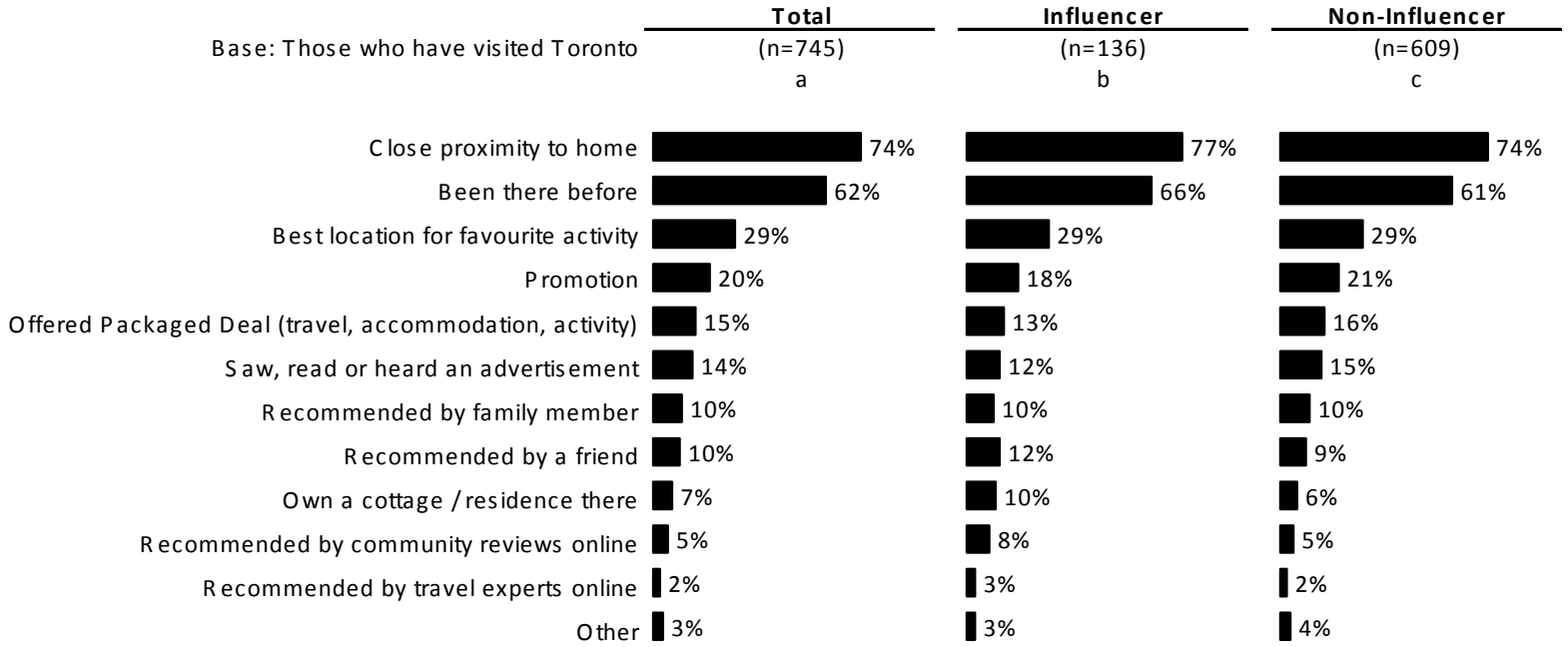
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Toronto



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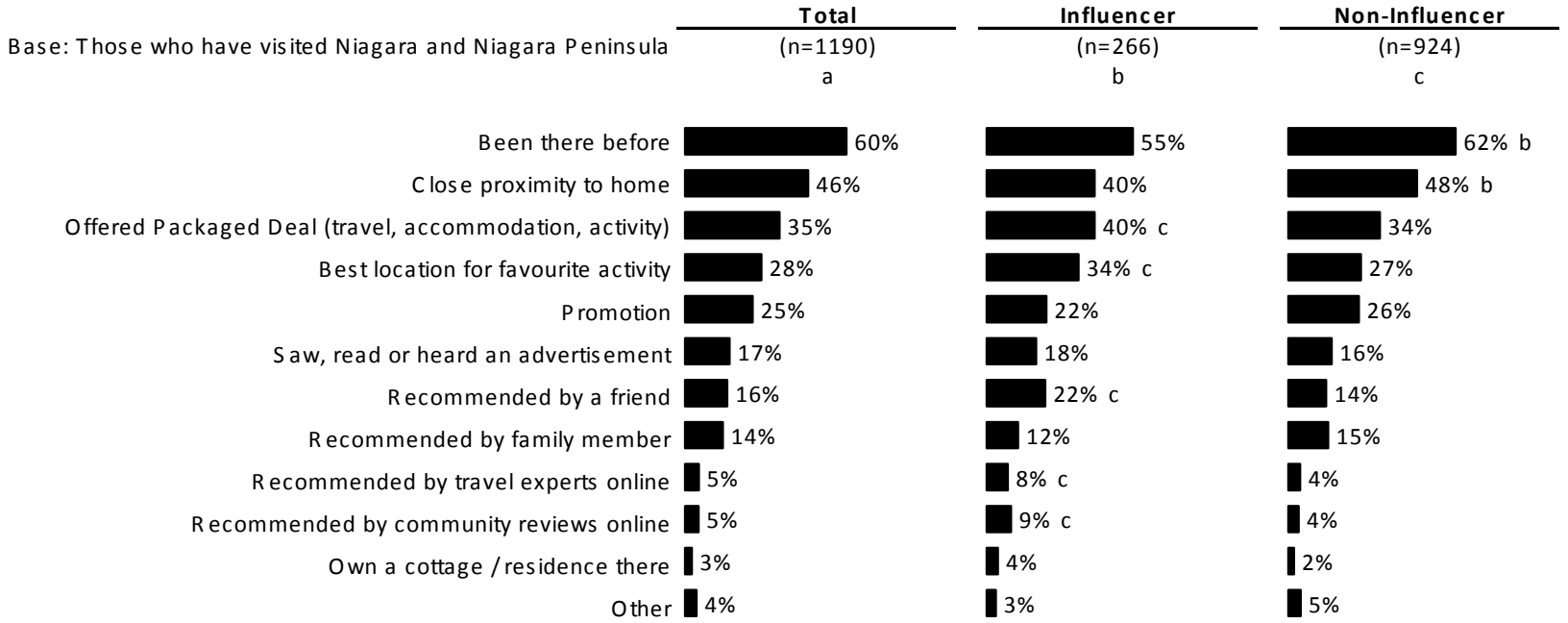
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Niagara and Niagara Peninsula



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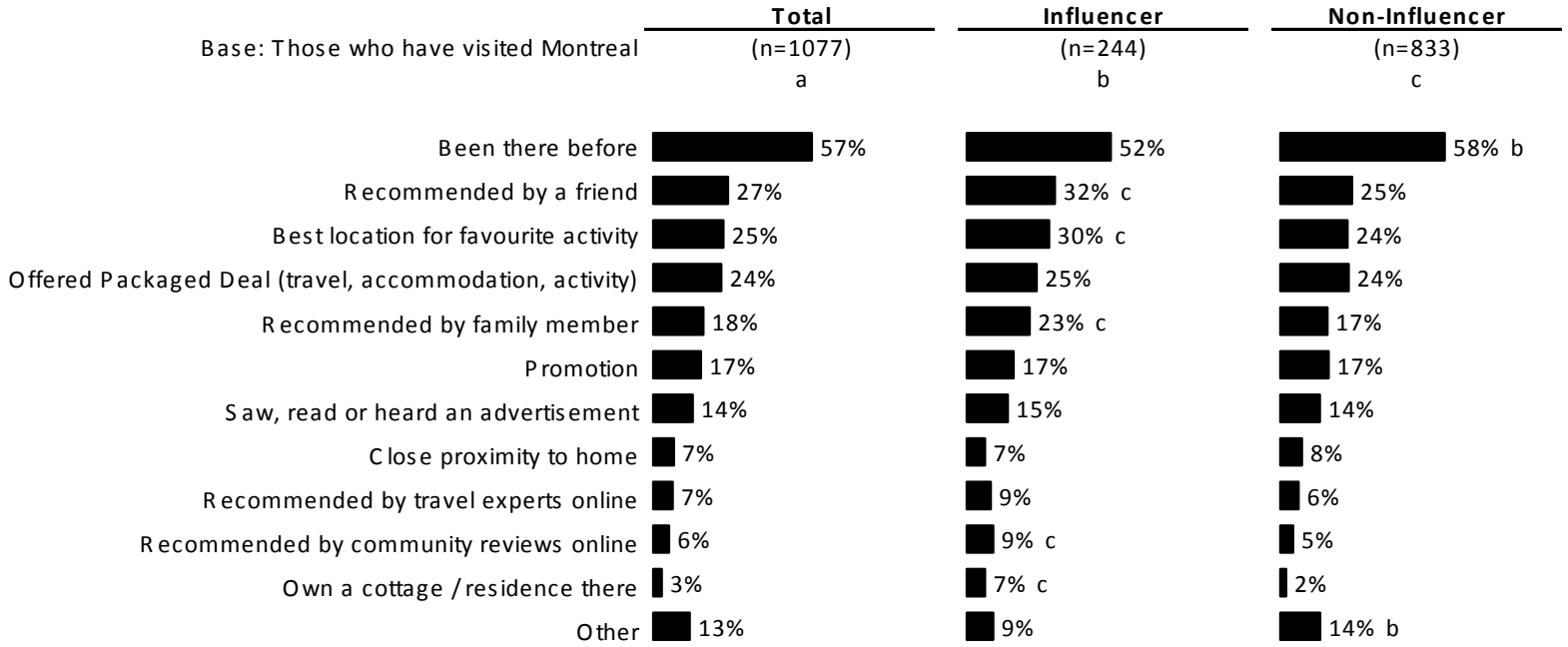
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Montreal



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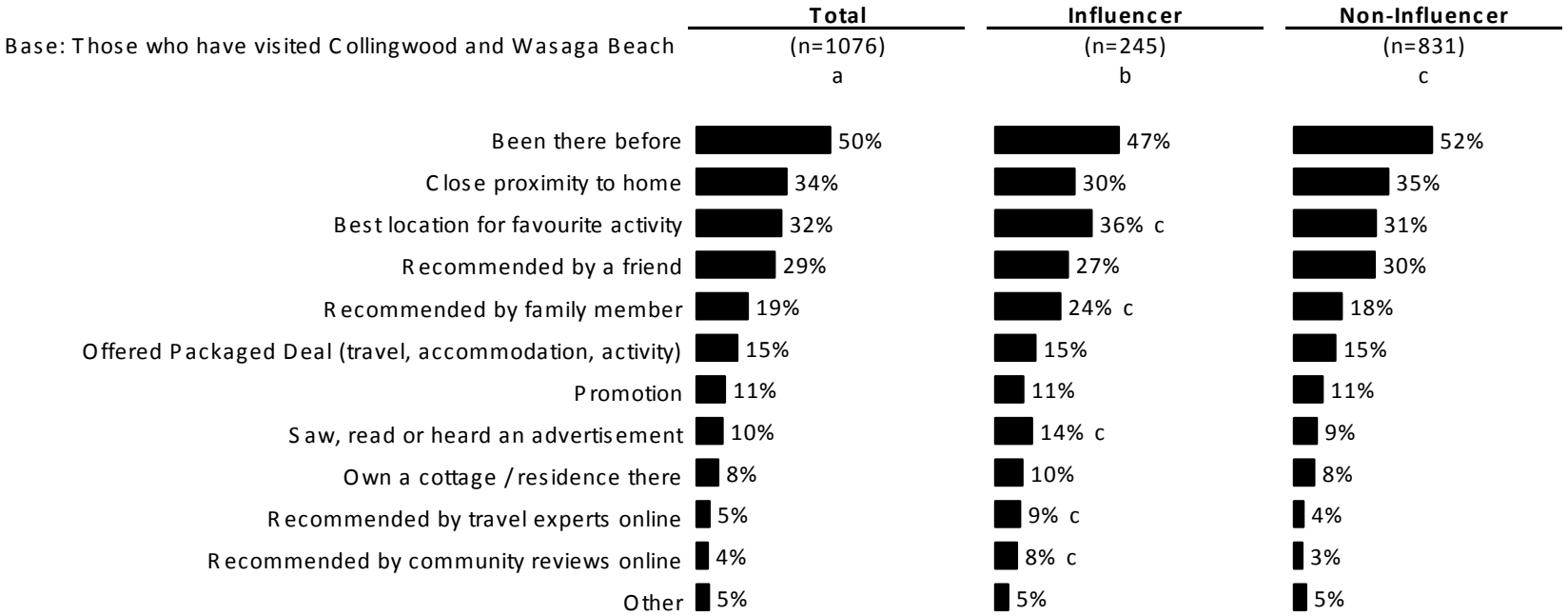
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Collingwood and Wasaga Beach



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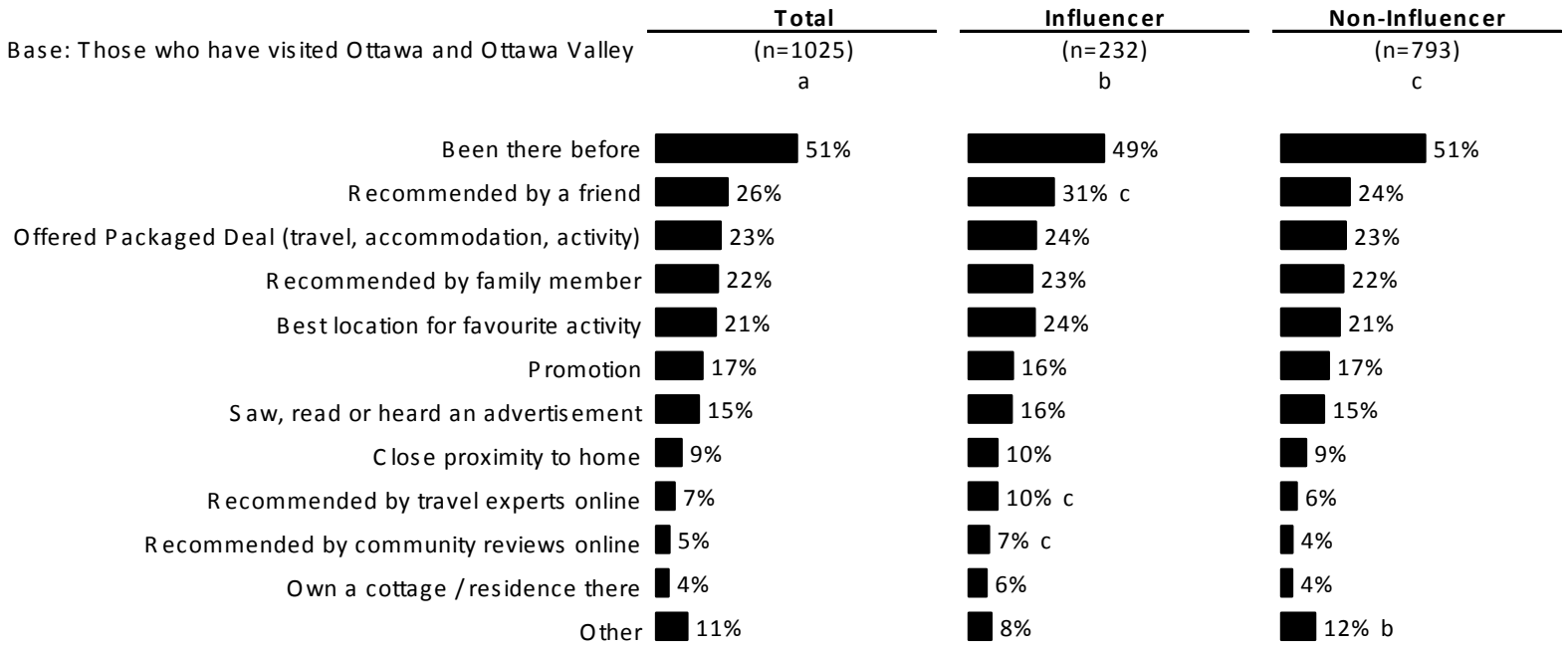
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Ottawa and Ottawa Valley



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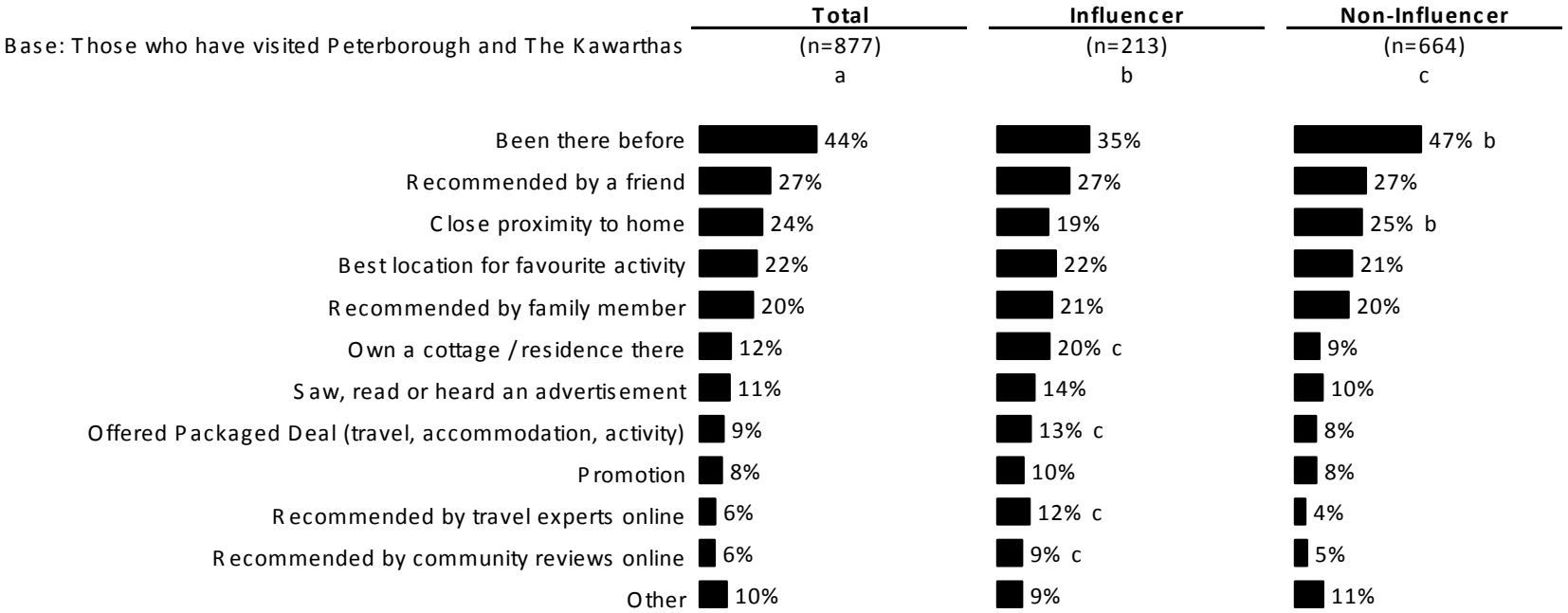
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Peterborough and The Kawarthas



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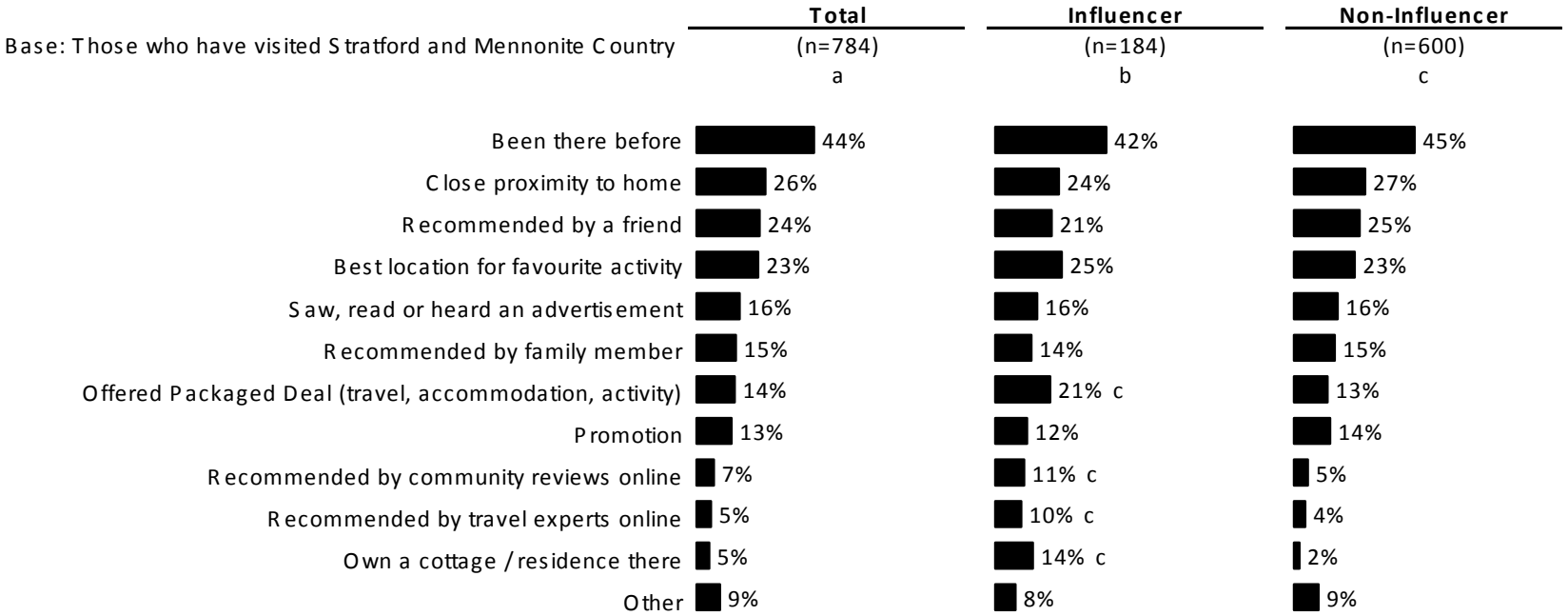
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Stratford and Mennonite Country



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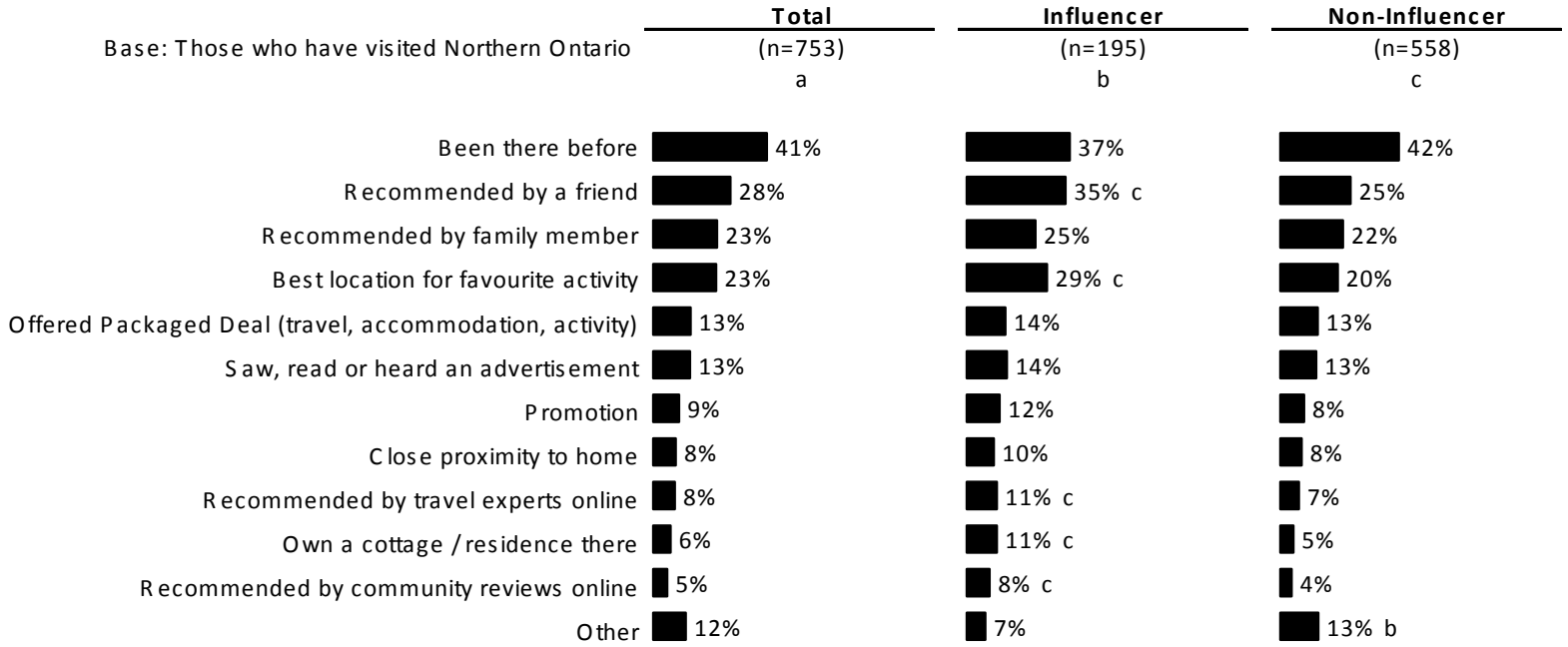
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Northern Ontario



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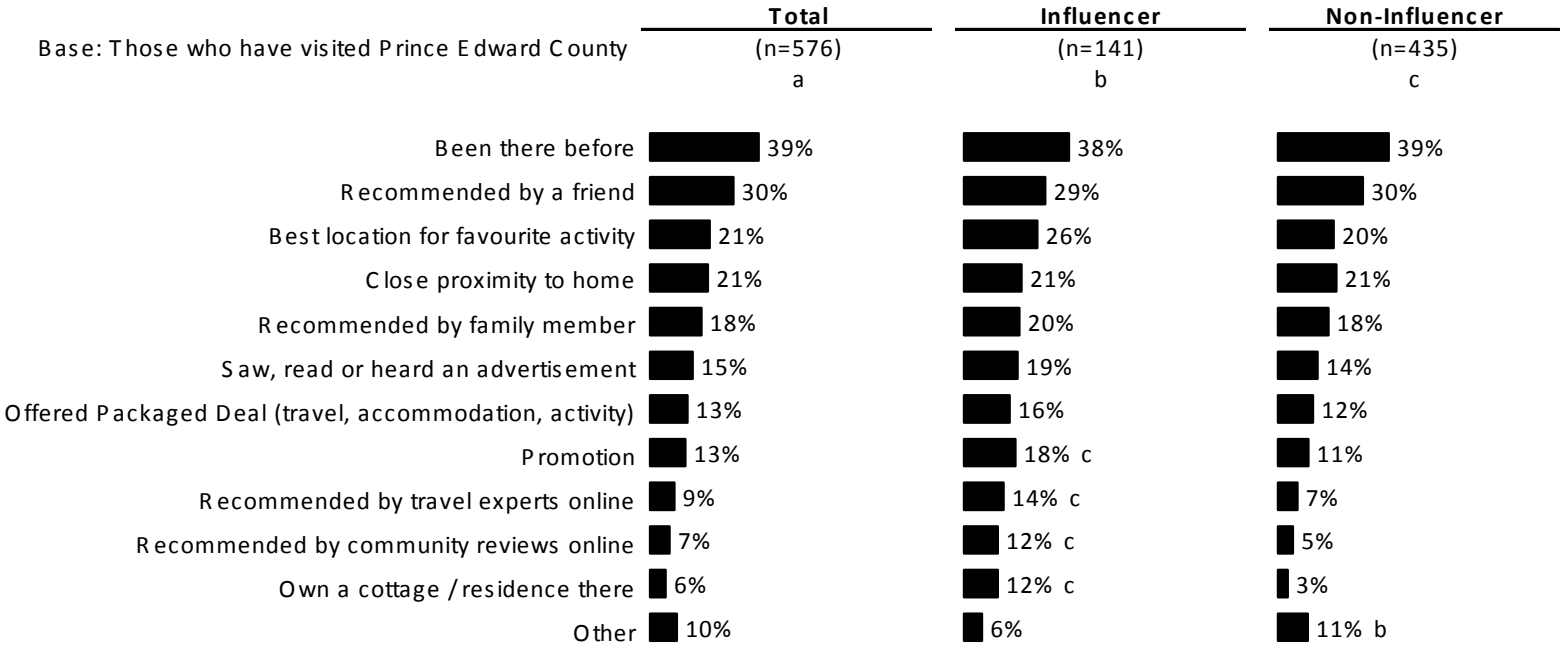
CLOUD AdAgents

Reasons to Choose Specific Region – Total & Influencer/Non-Influencer - Prince Edward County



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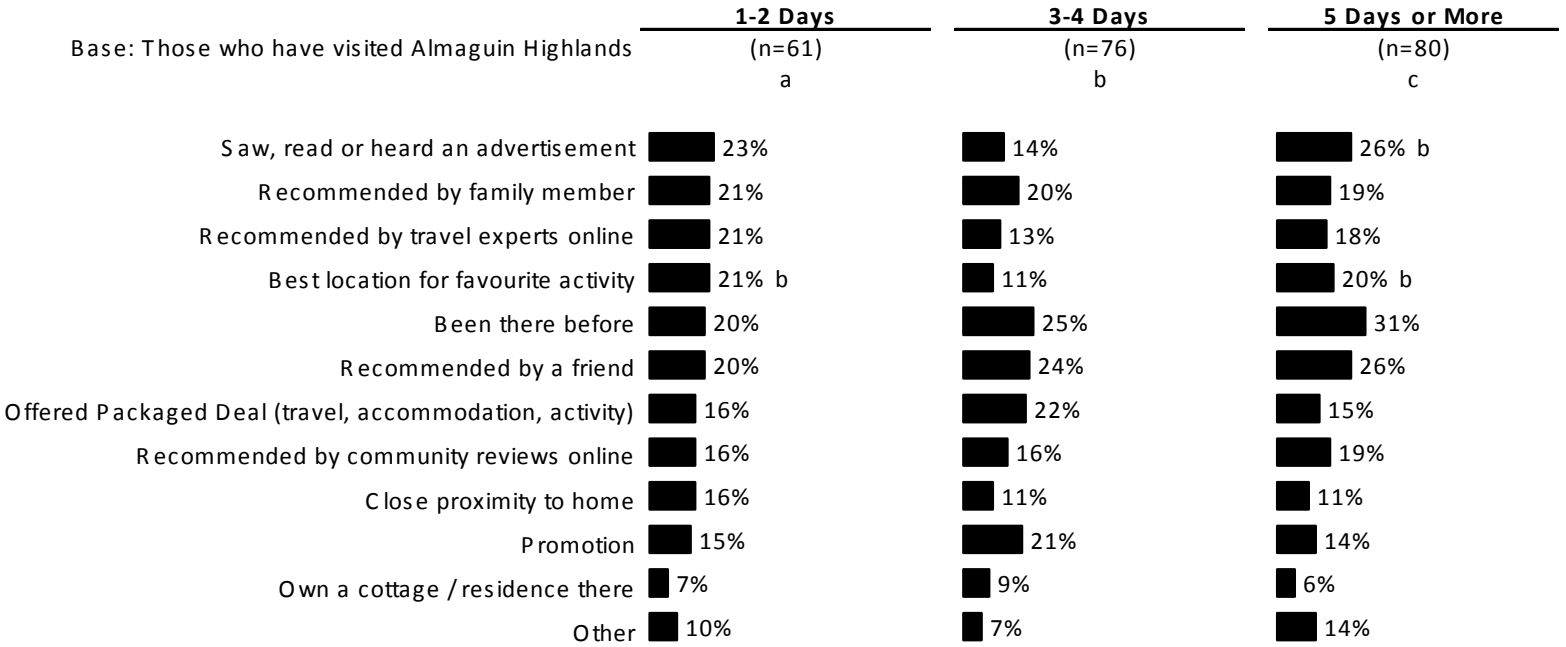
CLOUD AdAgents

DRIVERS BY VACATION DURATION

CLOUD
AdAgents

Reasons to Choose Specific Region – Visitation Duration
Almaguin Highlands



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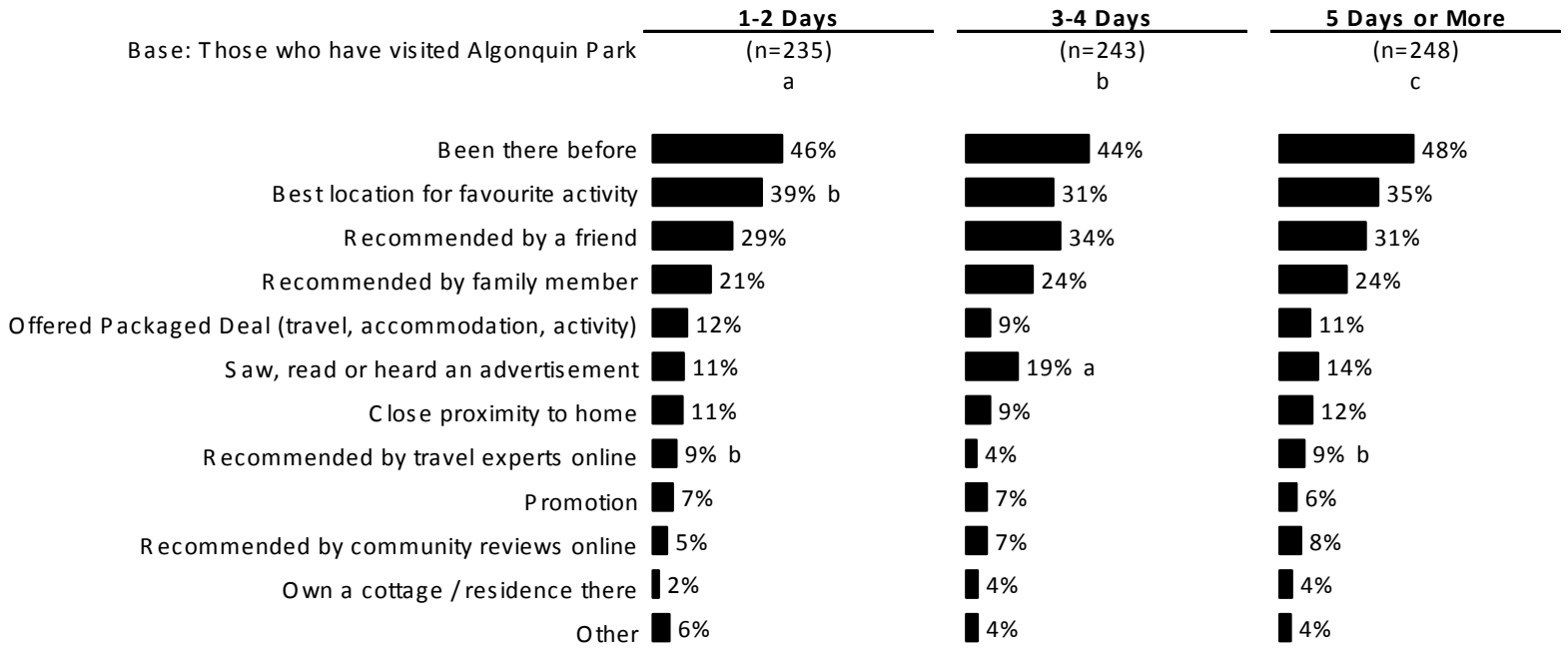
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Algonquin Park



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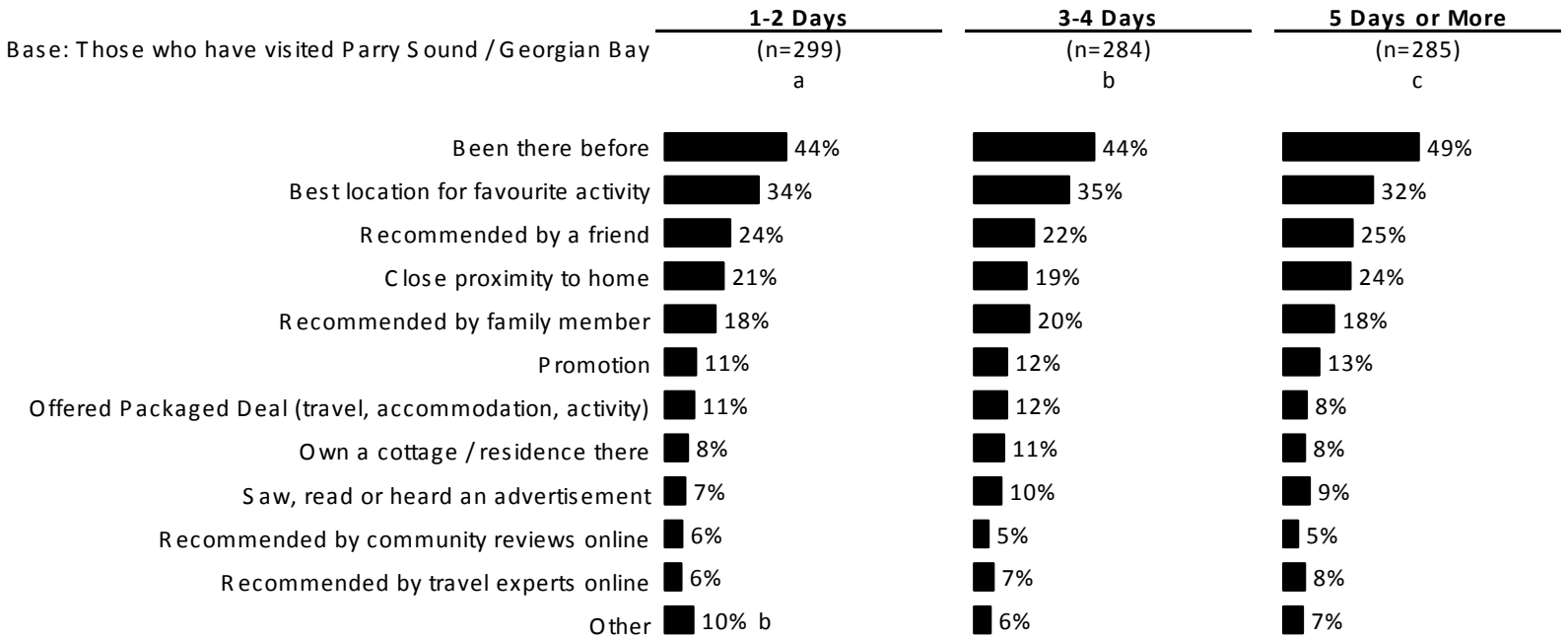
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Parry Sound / Georgian Bay



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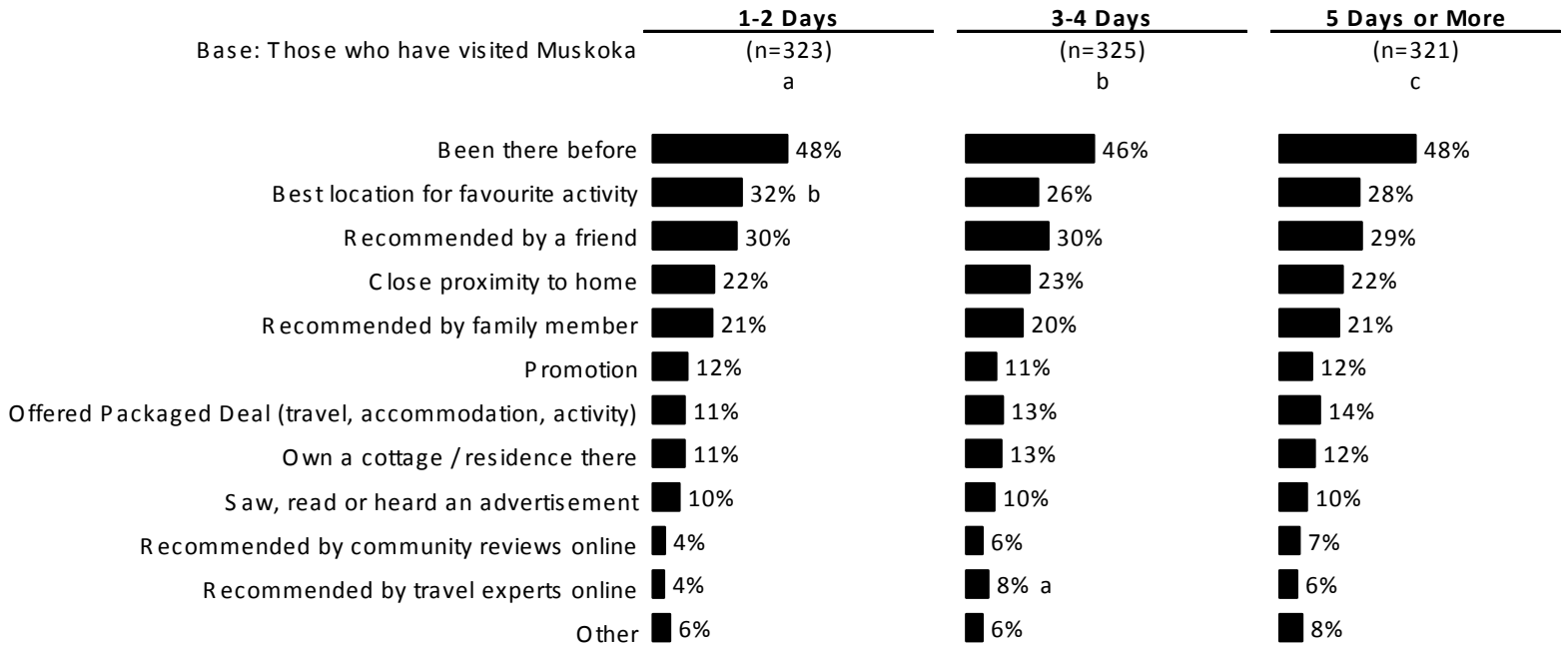
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Muskoka



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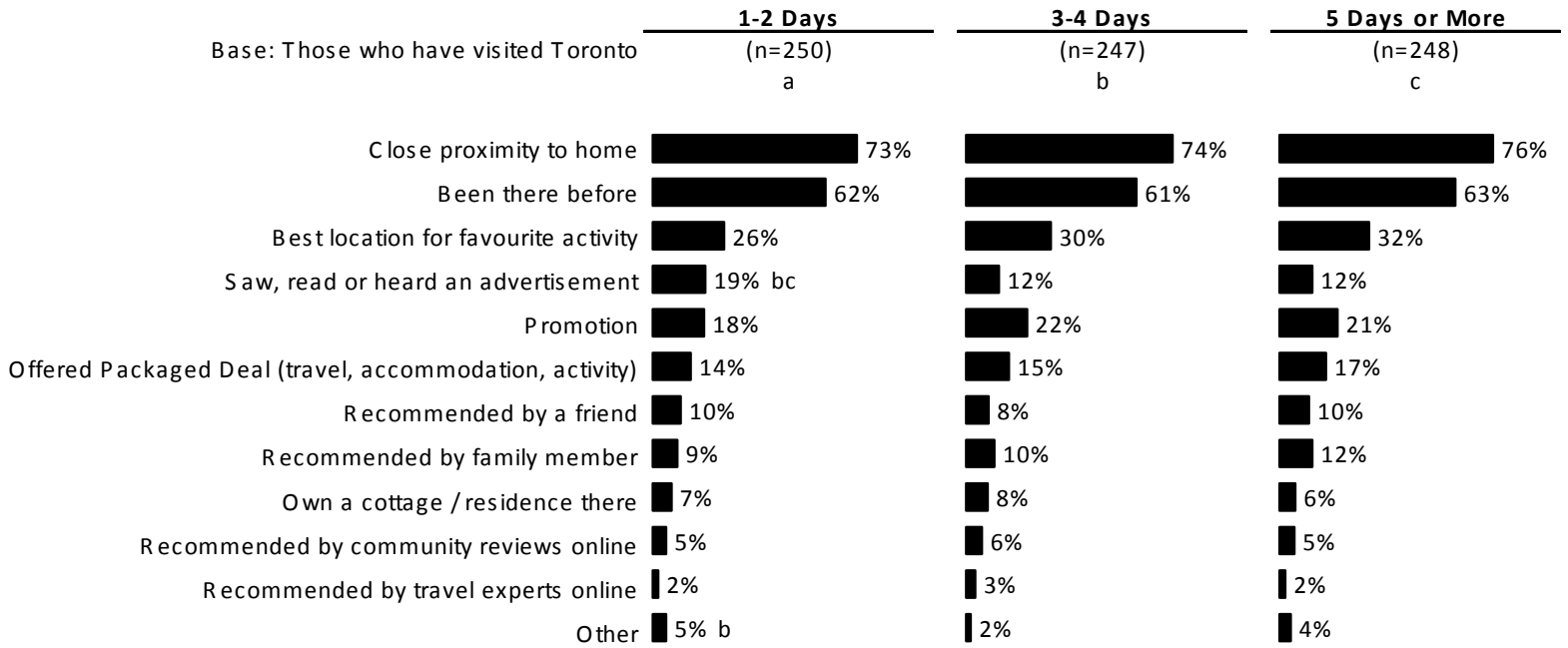
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration Toronto



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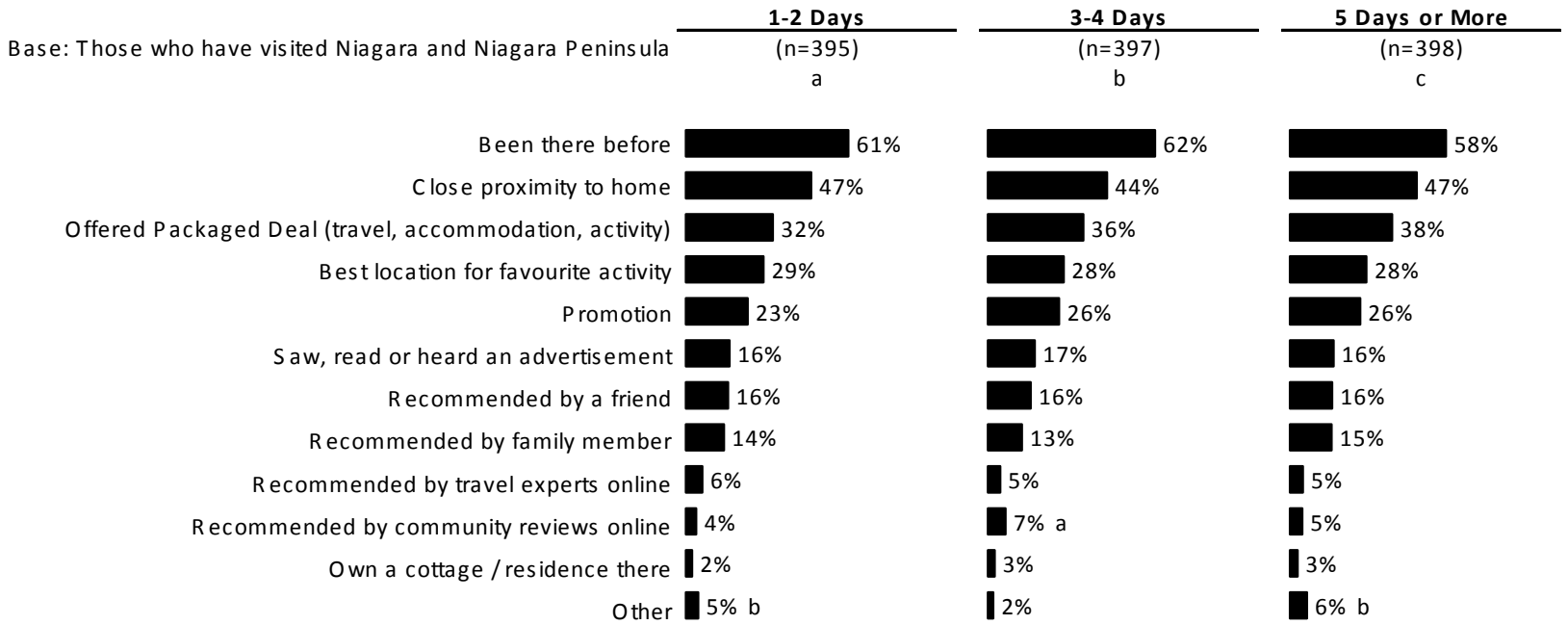
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Niagara and Niagara Peninsula



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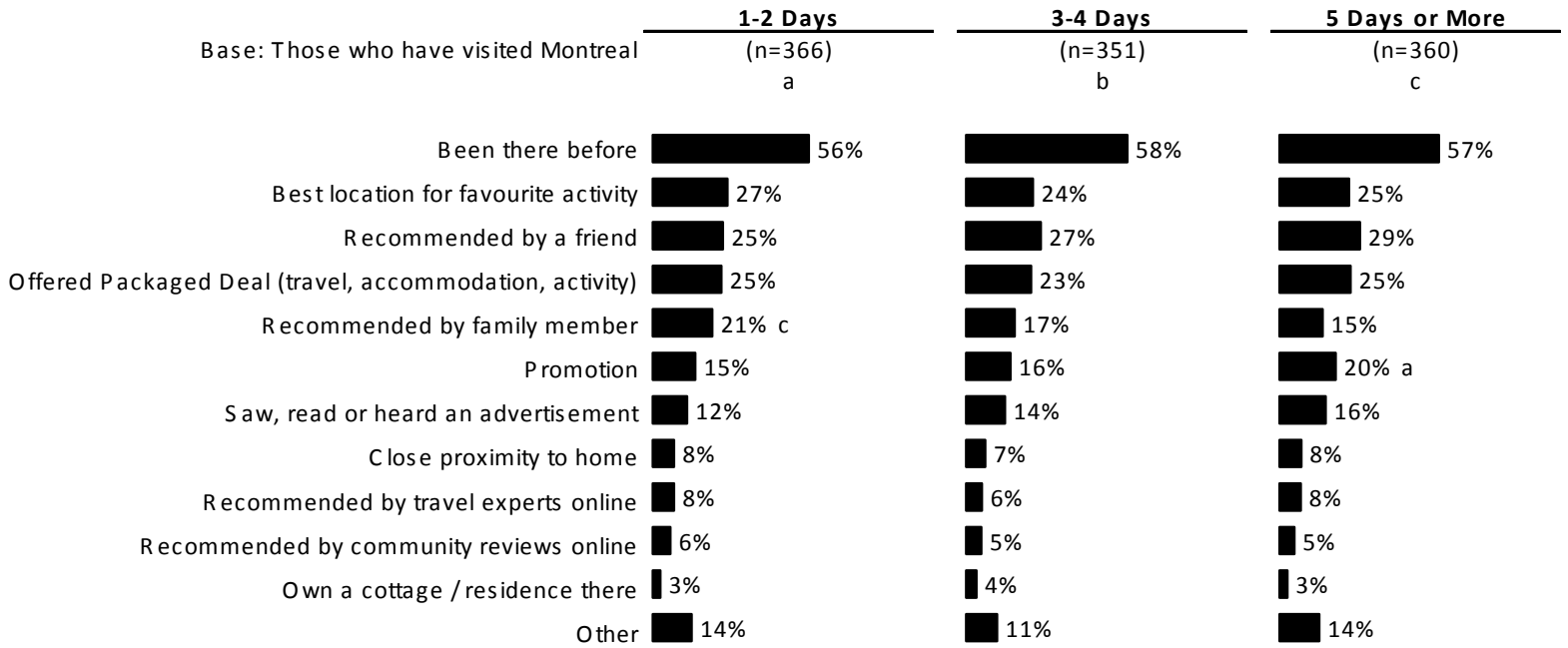
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration Montreal



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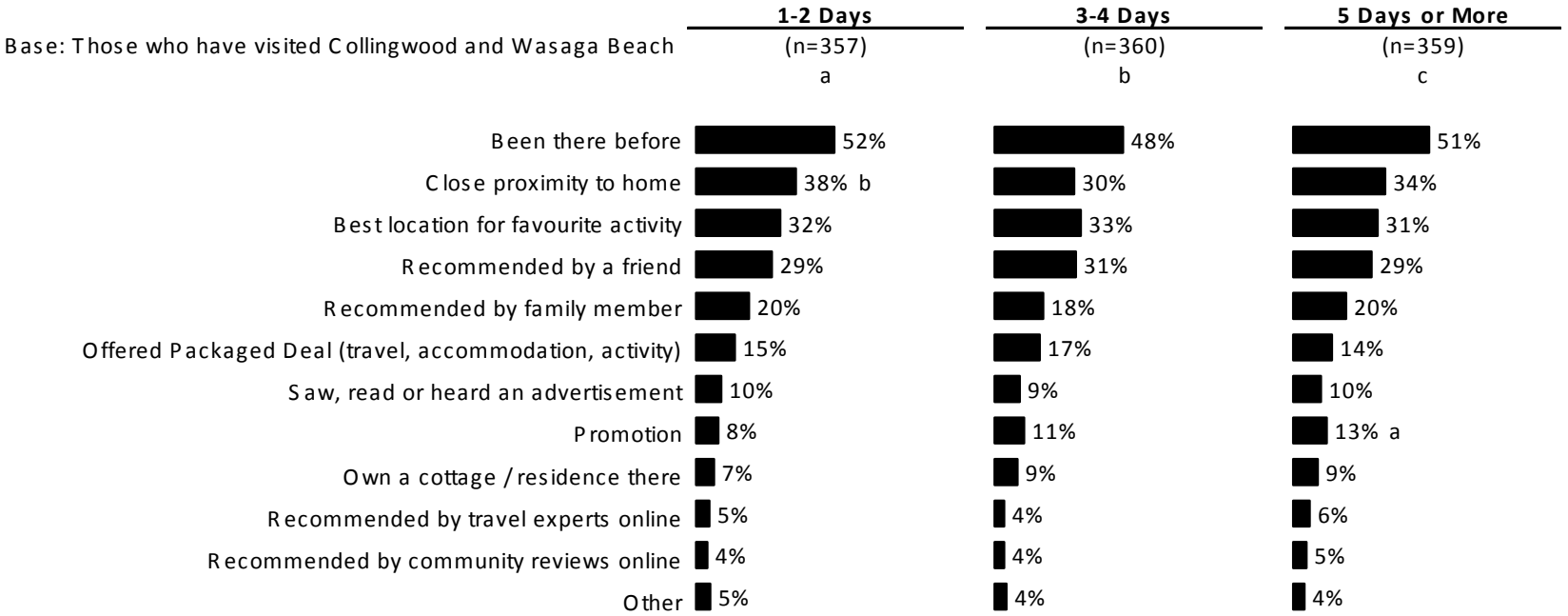
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Collingwood and Wasaga Beach



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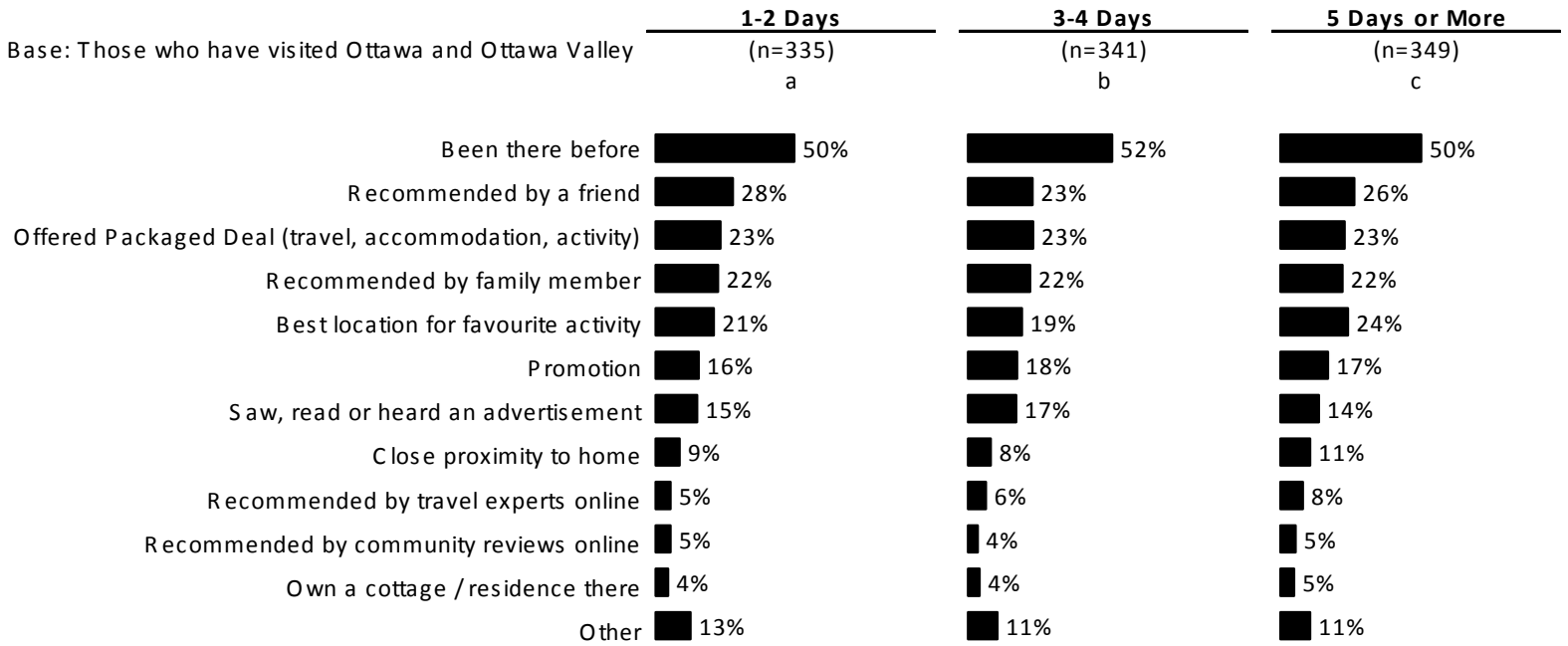
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Ottawa and Ottawa Valley



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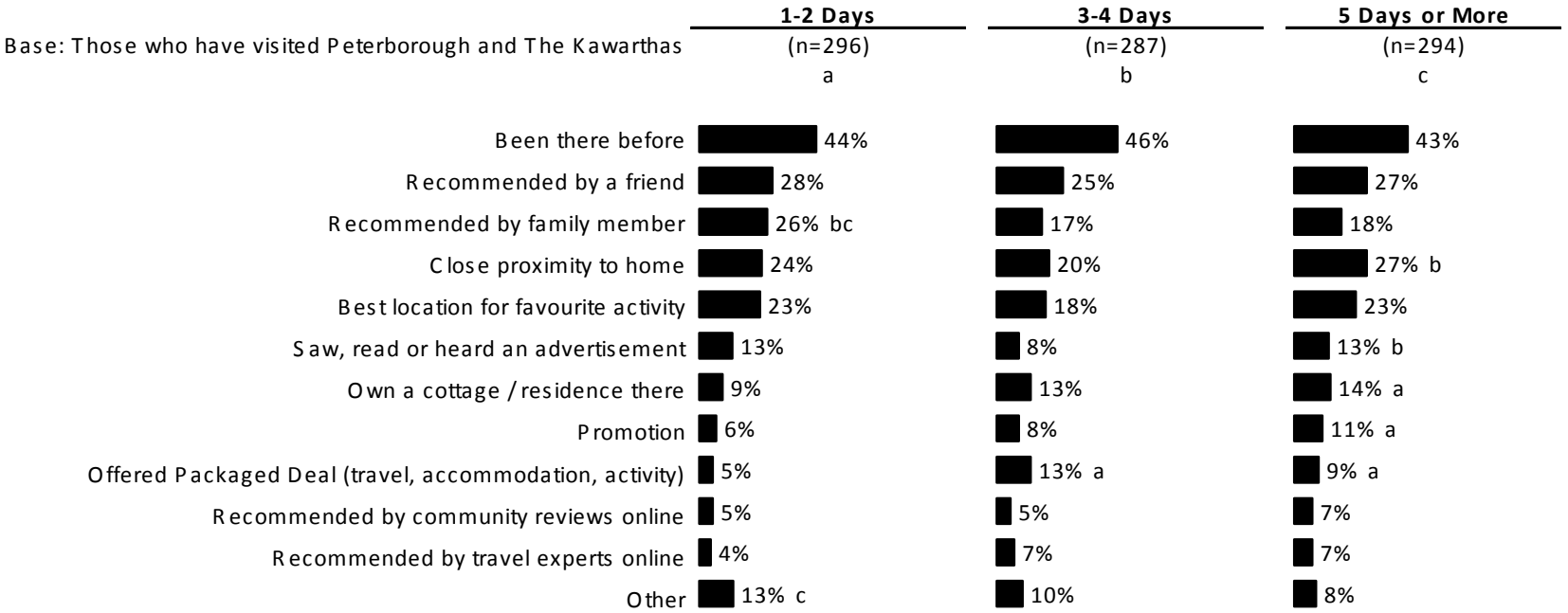
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Peterborough and The Kawarthas



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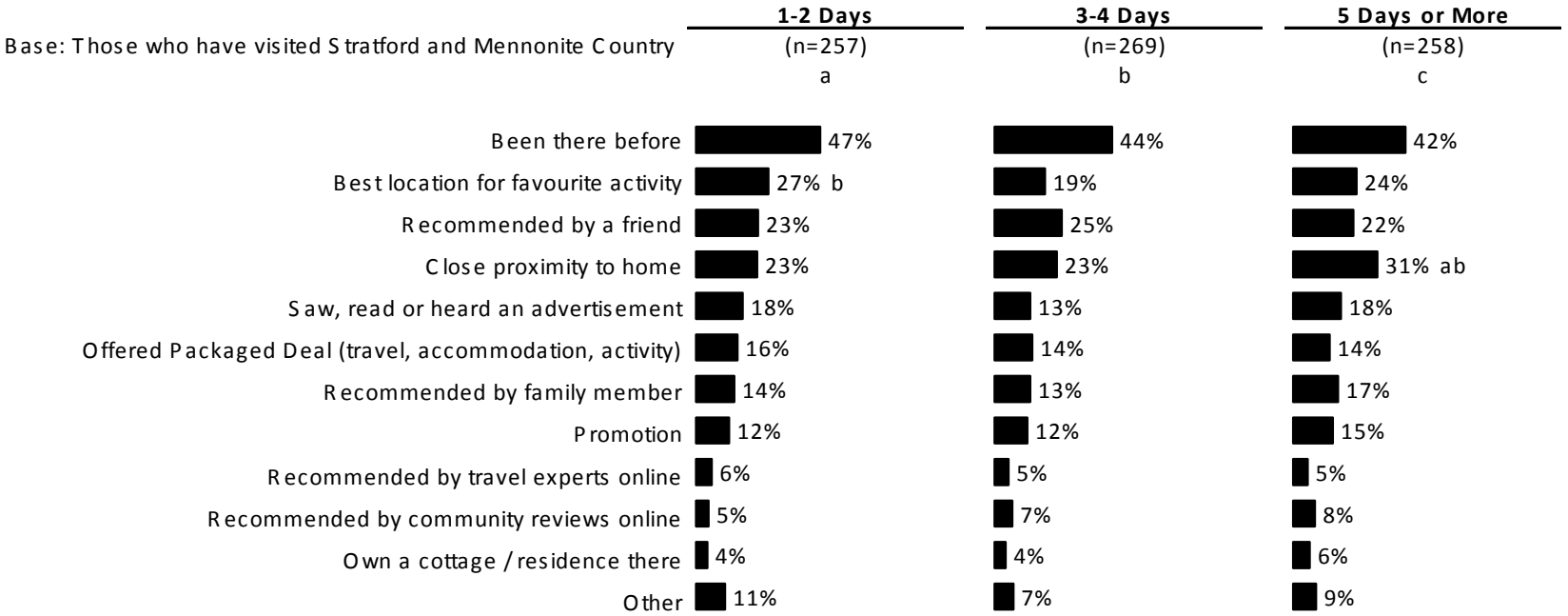
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Stratford and Mennonite Country



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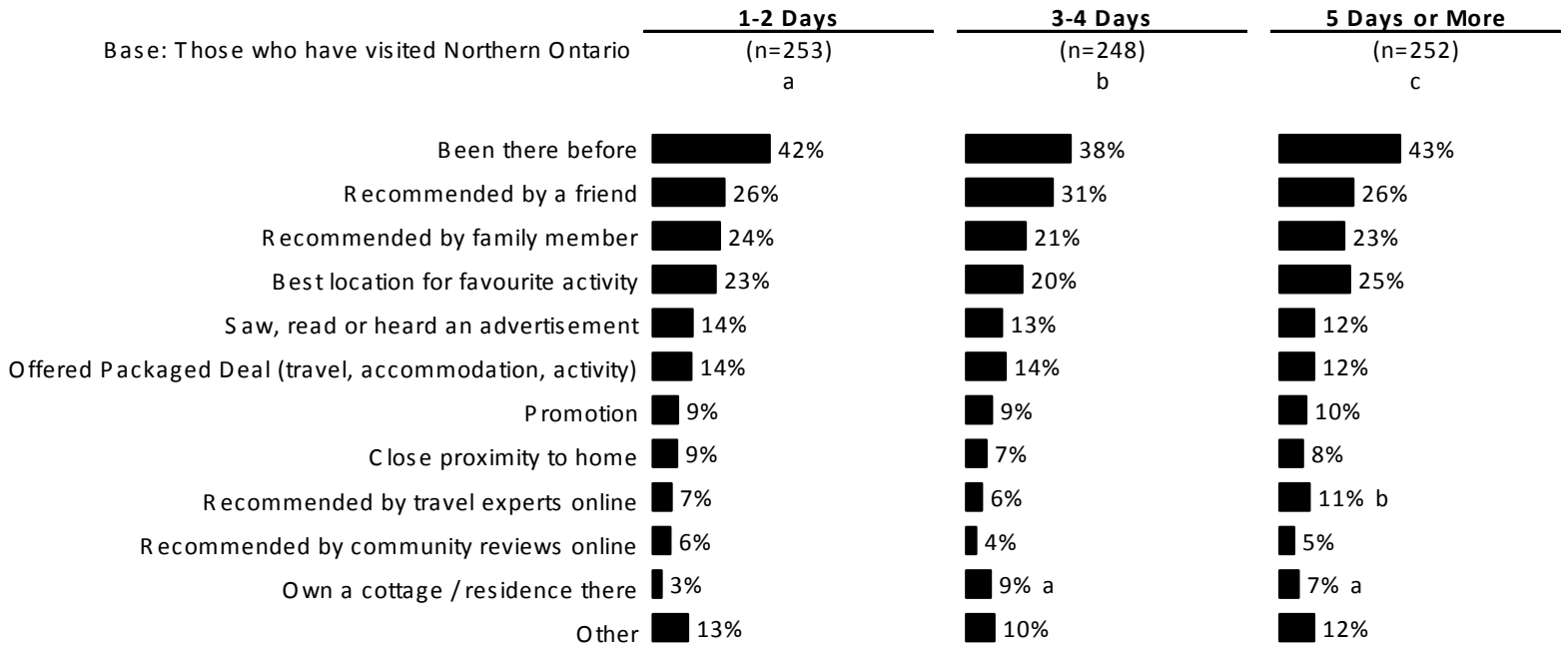
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Northern Ontario



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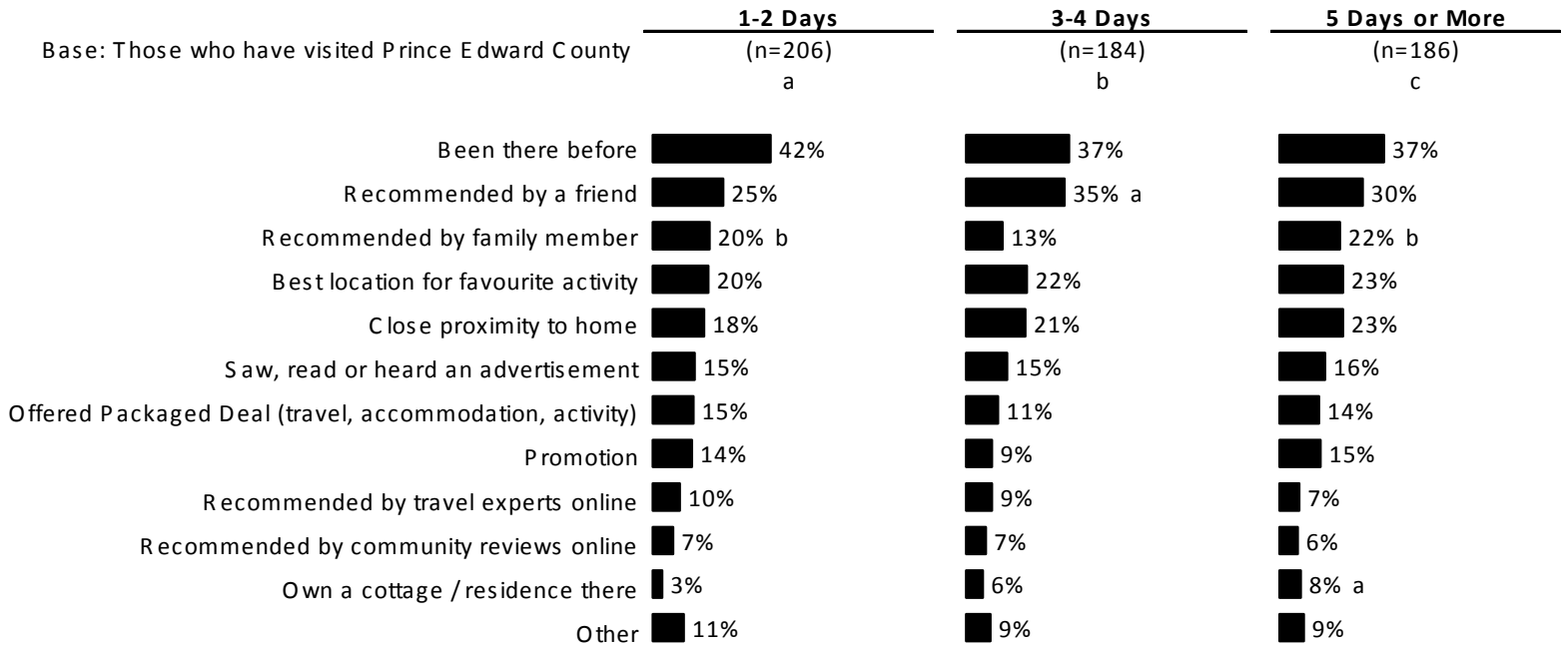
CLOUD AdAgents

Reasons to Choose Specific Region – Visitation Duration
Prince Edward County



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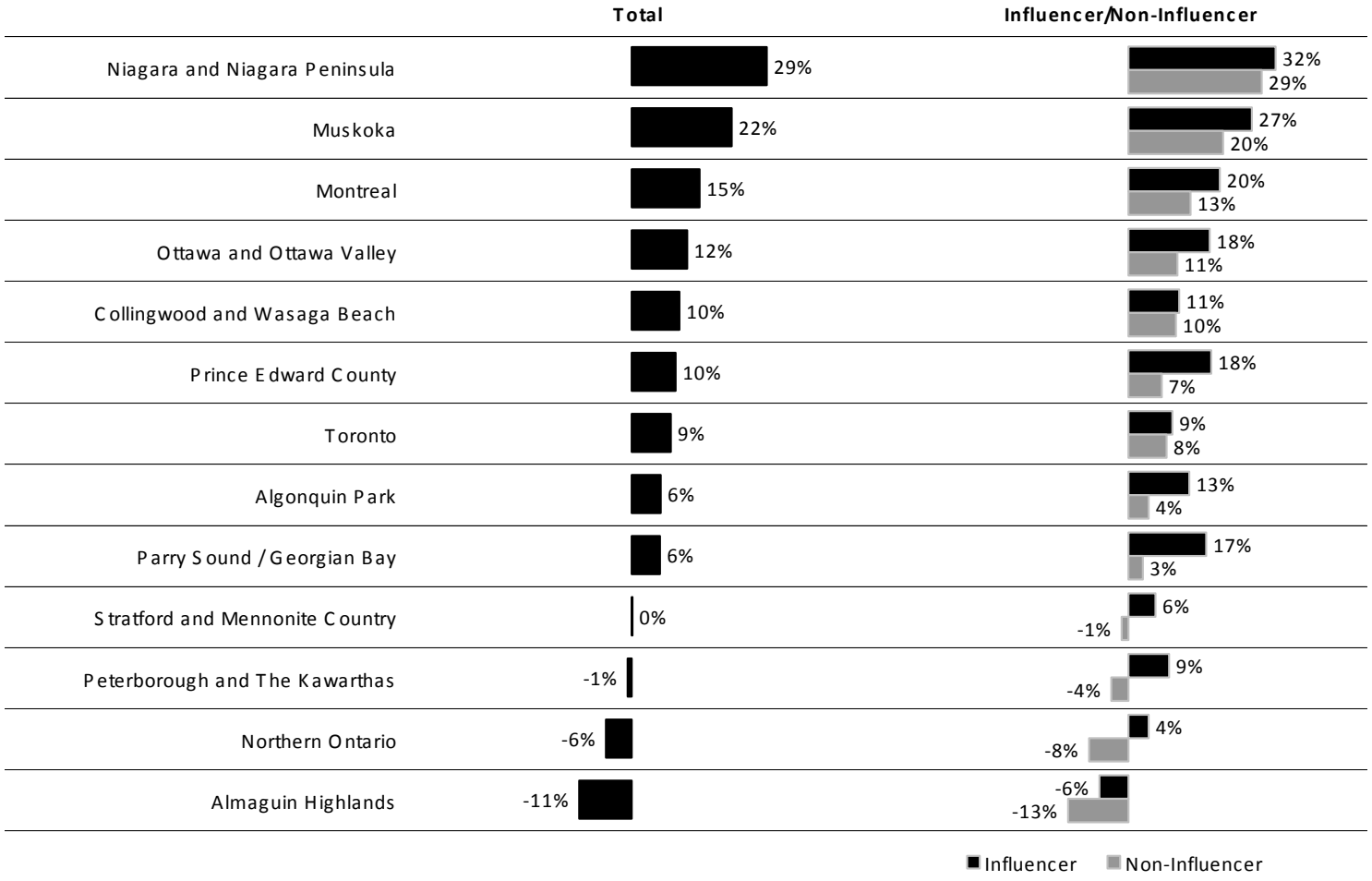
CLOUD AdAgents

DESTINATION APPEAL FOR TORONTO/GTA RESIDENTS

CLOUD AdAgents

Momentum



Base: Total Respondent (n=1230); Influencer (n=274); Influencer (n=956)

Q13: Based on everything you've seen read or heard, please indicate whether each of the following regions is gaining ground, losing ground, or staying the same in terms of popularity as a tourism destination.

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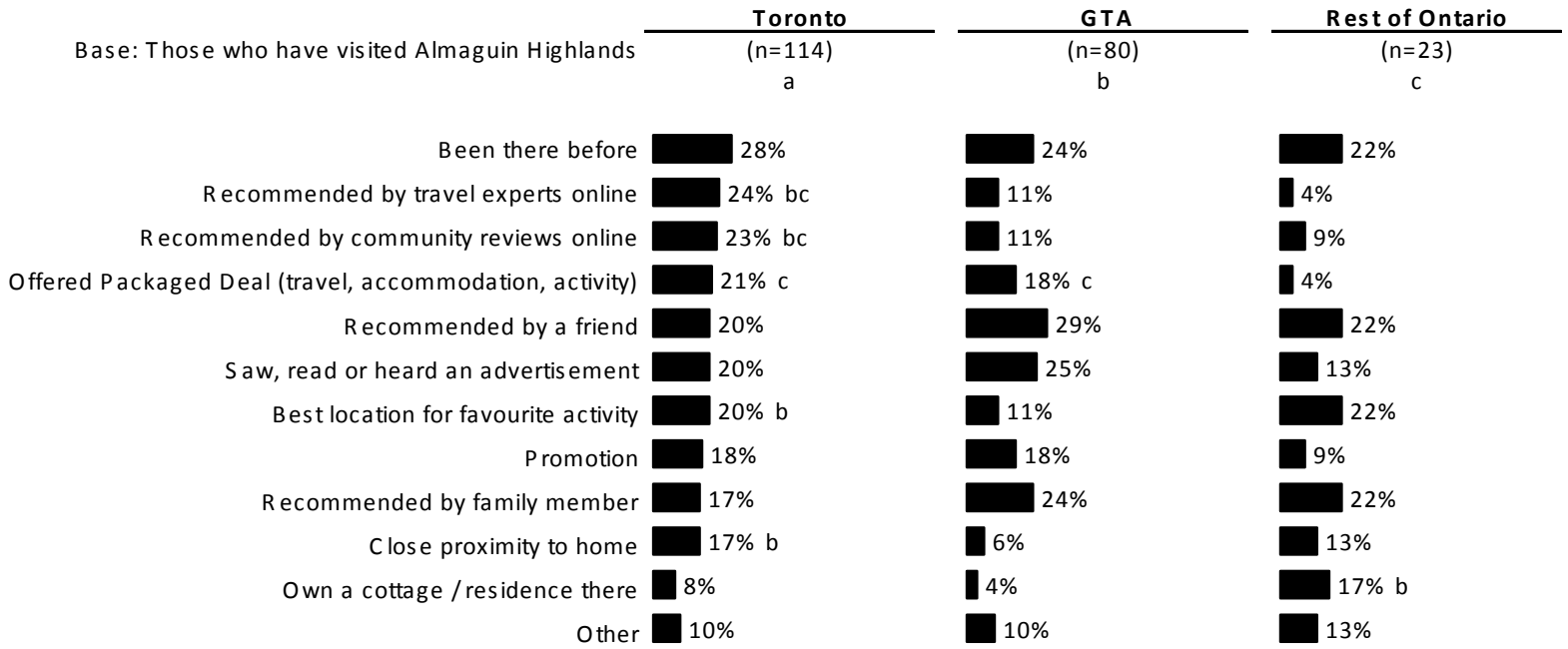
Reasons to Choose Specific Region – By City
Almaguin Highlands



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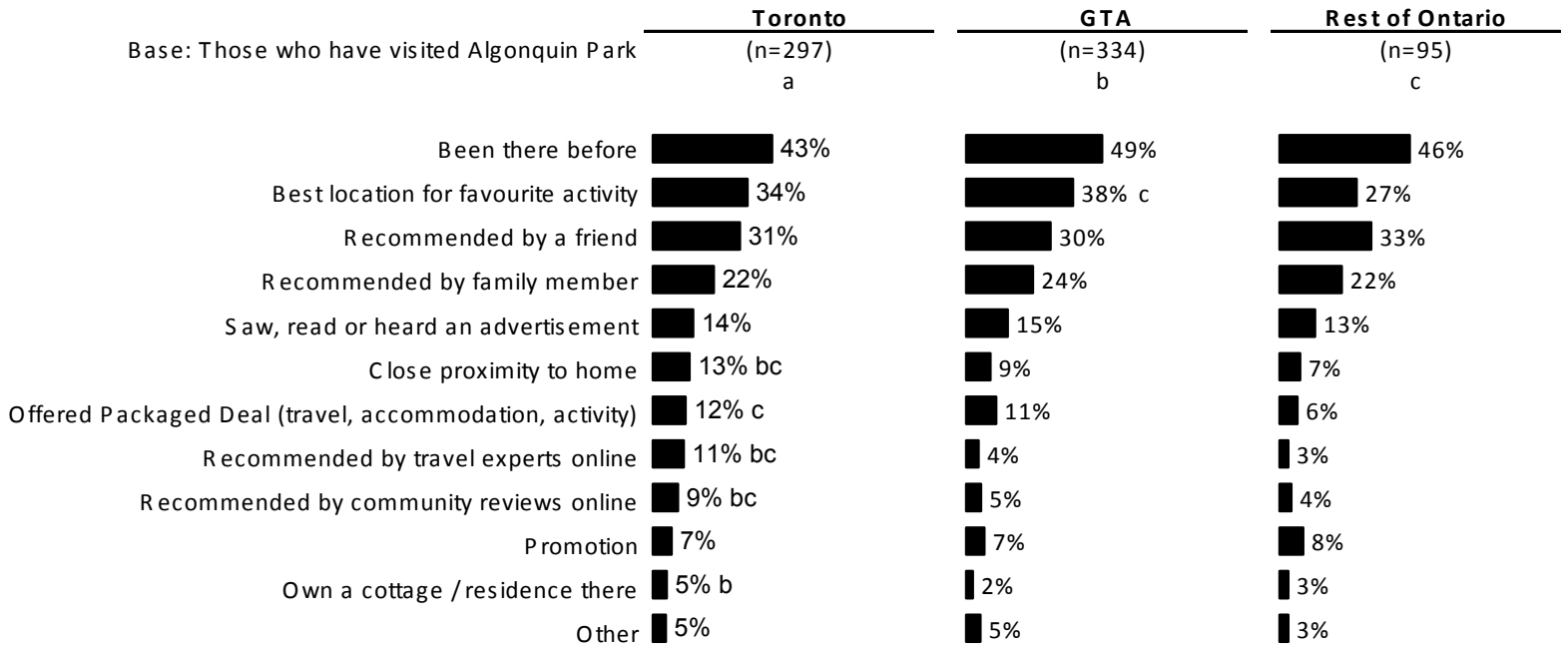
CLOUD AdAgents

Reasons to Choose Specific Region – By City
Algonquin Park



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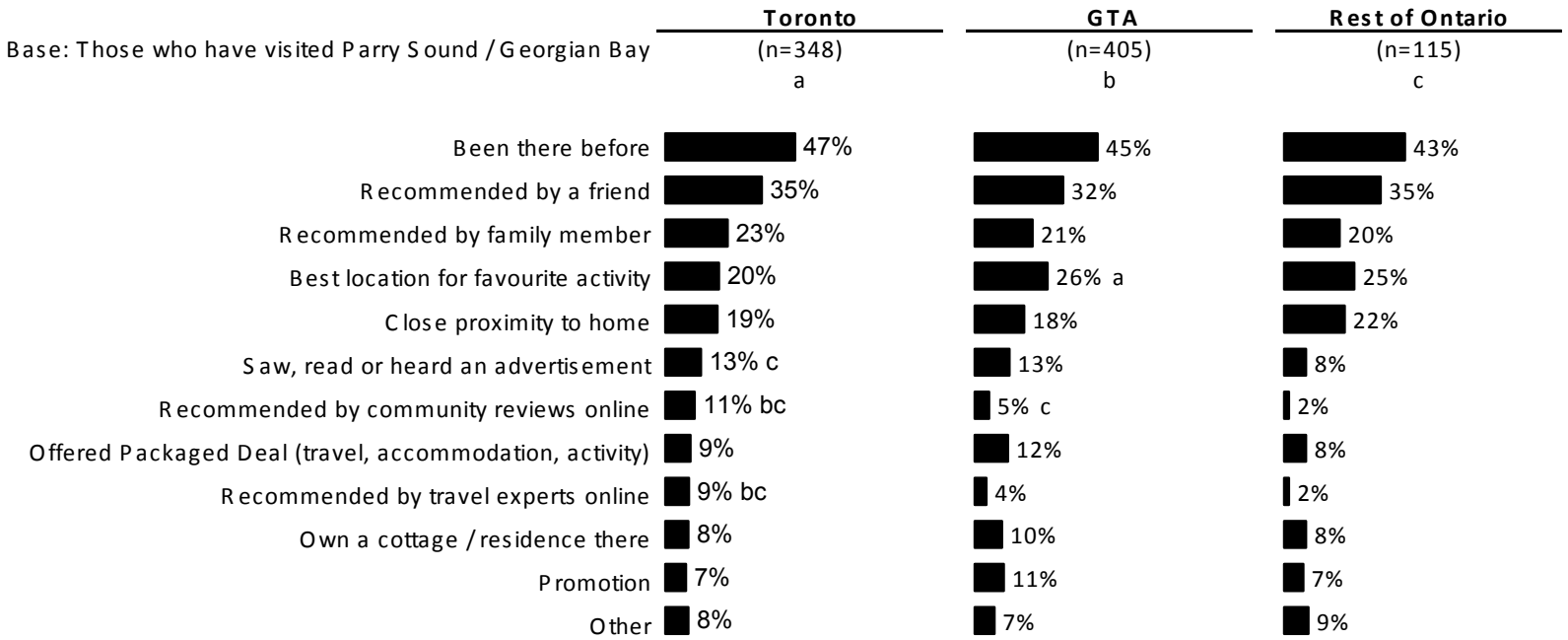
CLOUD AdAgents

Reasons to Choose Specific Region – By City
Parry Sound / Georgian Bay



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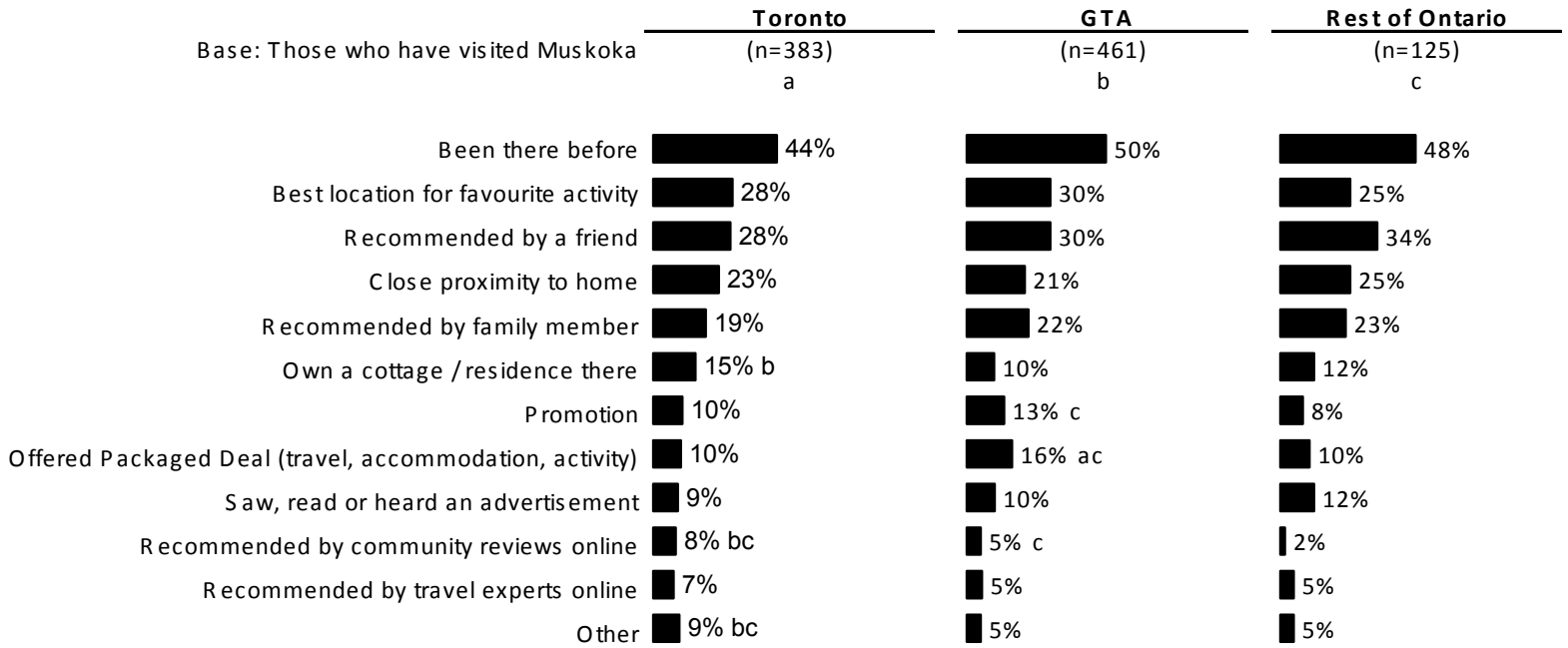
CLOUD AdAgents

Reasons to Choose Specific Region – By City
Muskoka



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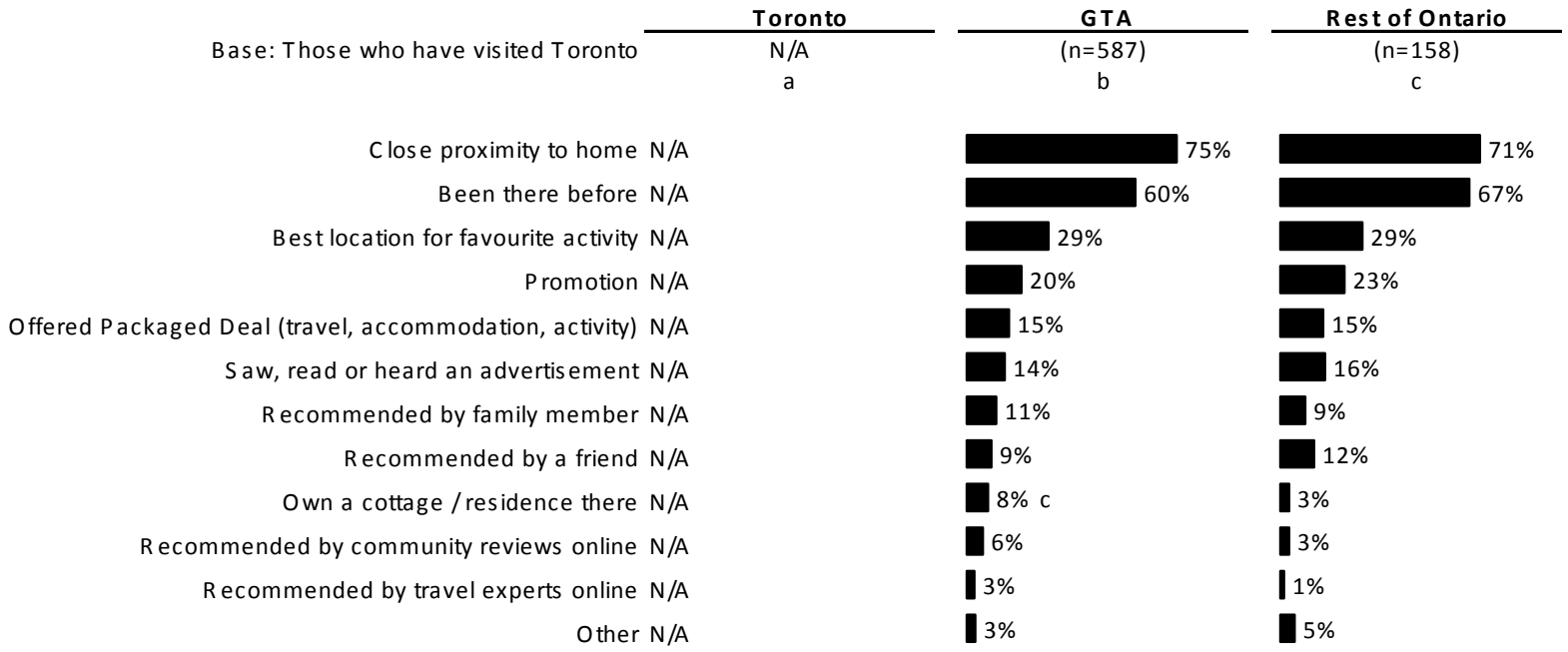
CLOUD AdAgents

Reasons to Choose Specific Region – By City
Toronto



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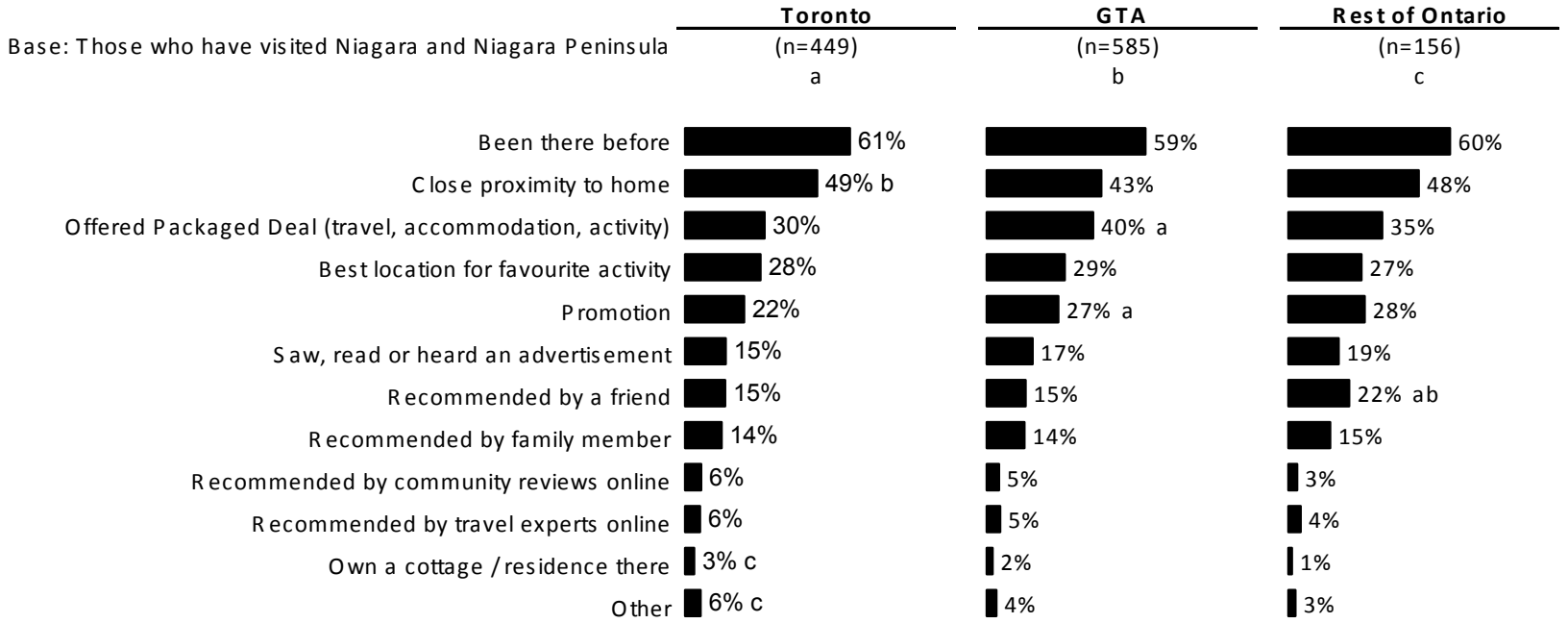
CLOUD AdAgents

Reasons to Choose Specific Region – By City
Niagara and Niagara Peninsula



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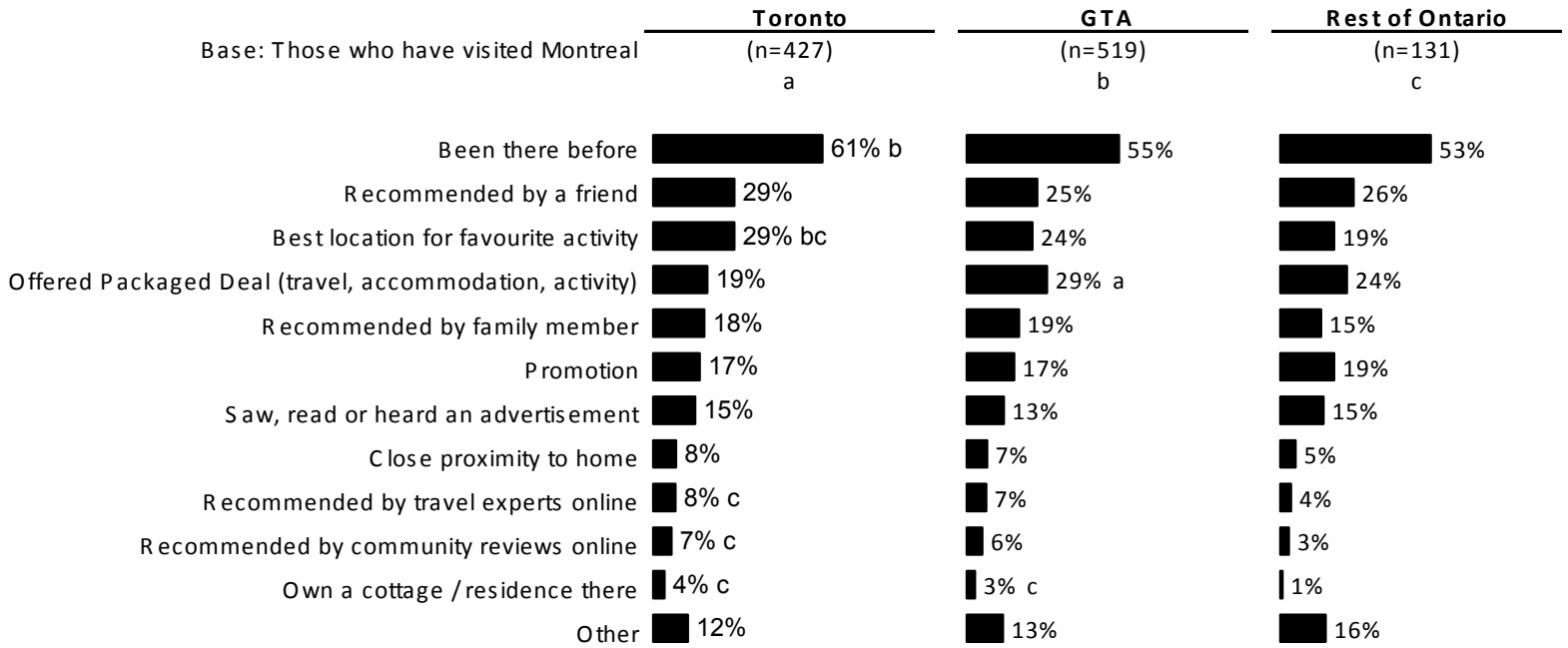
CLOUD AdAgents

Reasons to Choose Specific Region – By City
Montreal



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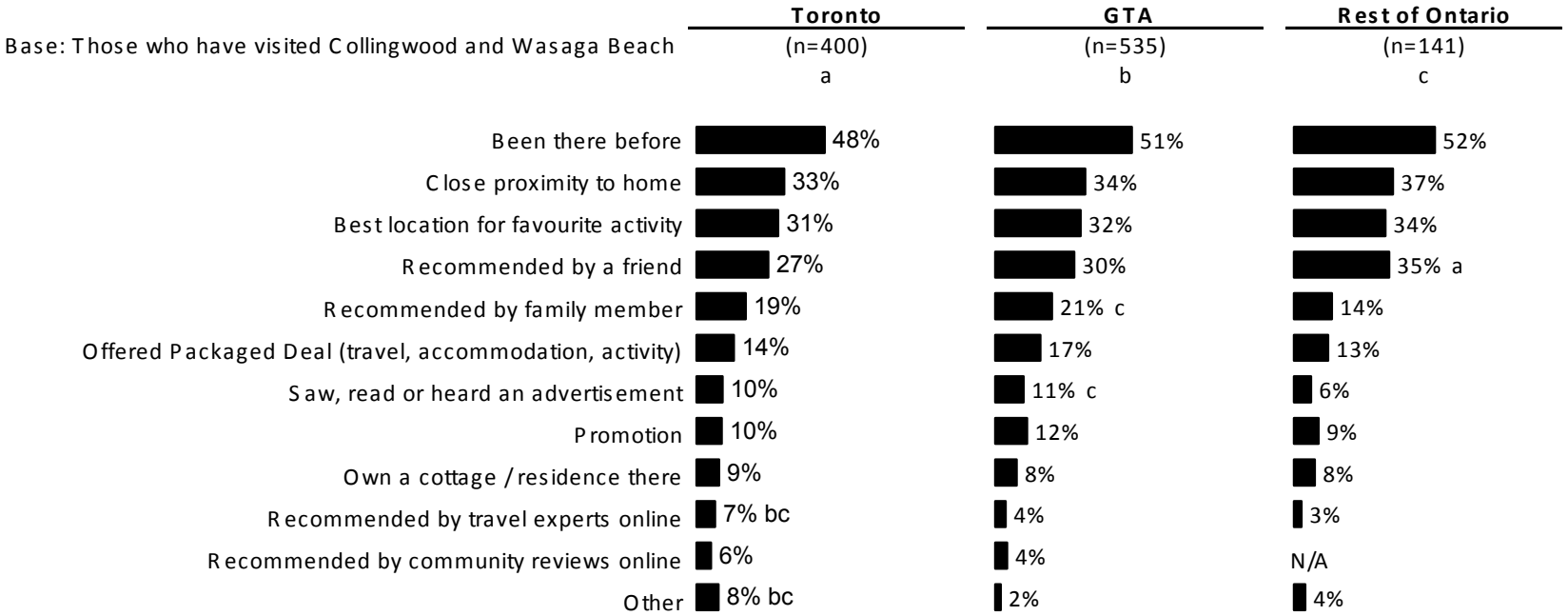
CLOUD AdAgents

Reasons to Choose Specific Region – By City
Collingwood and Wasaga Beach



Q22: Thinking back to the last time you went on vacation to each of the following regions, what made you choose that specific place to go? Please select up to 3.
a/b/c - Lower case letters indicate significance at the 90% level.

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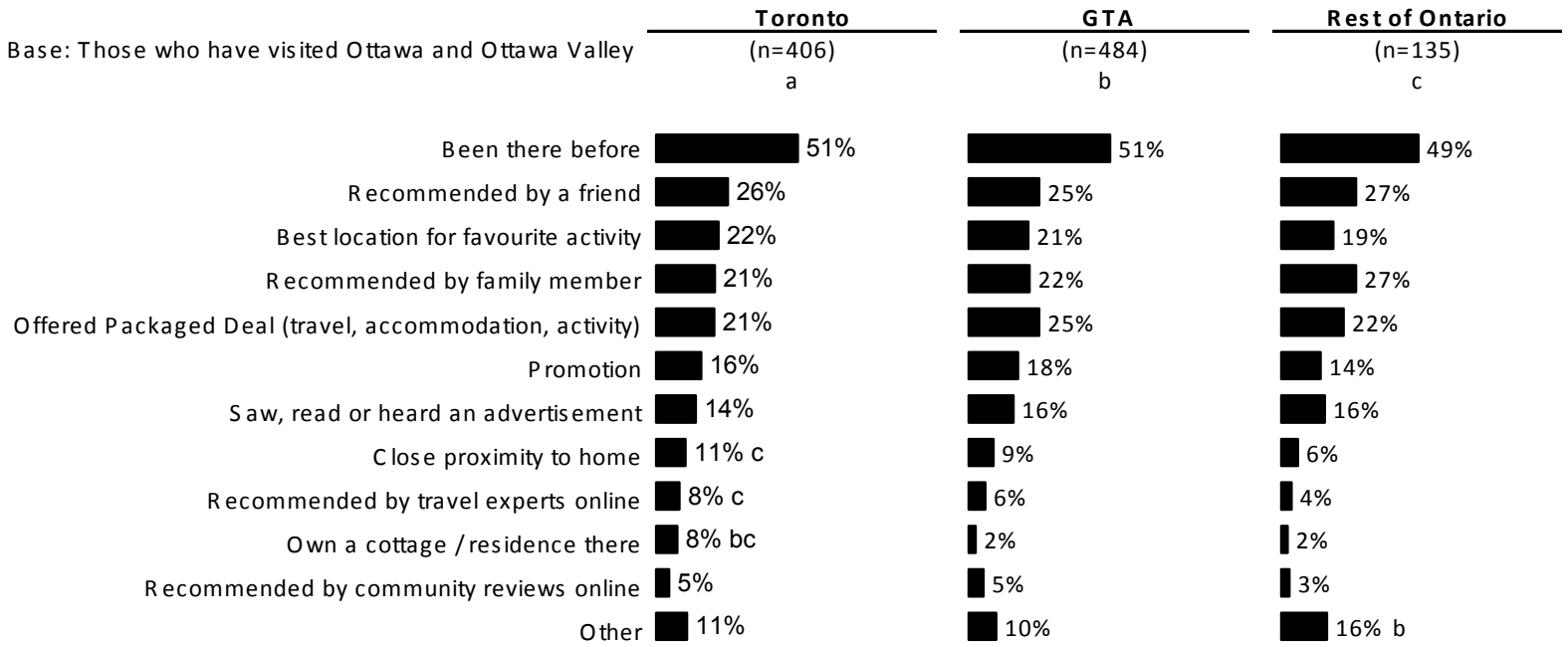
Reasons to Choose Specific Region – By City
Ottawa and Ottawa Valley



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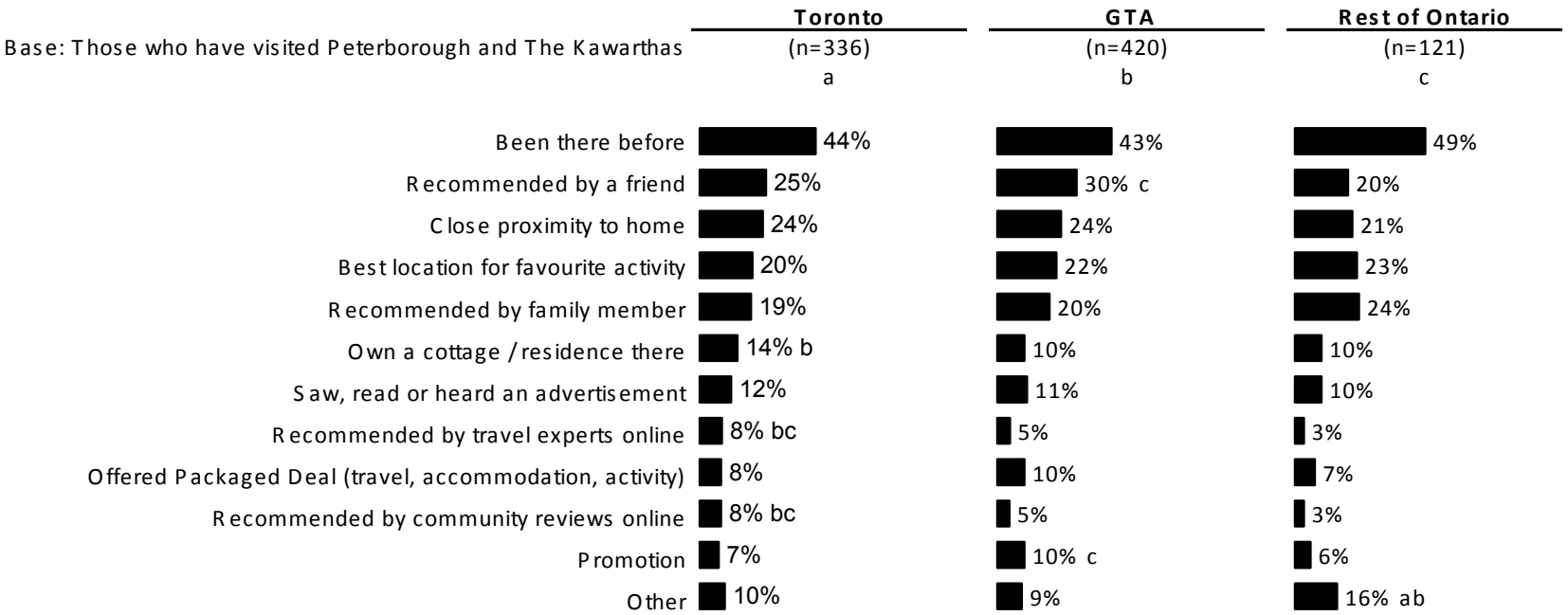
CLOUD AdAgents

Reasons to Choose Specific Region – By City
Peterborough and The Kawarthas



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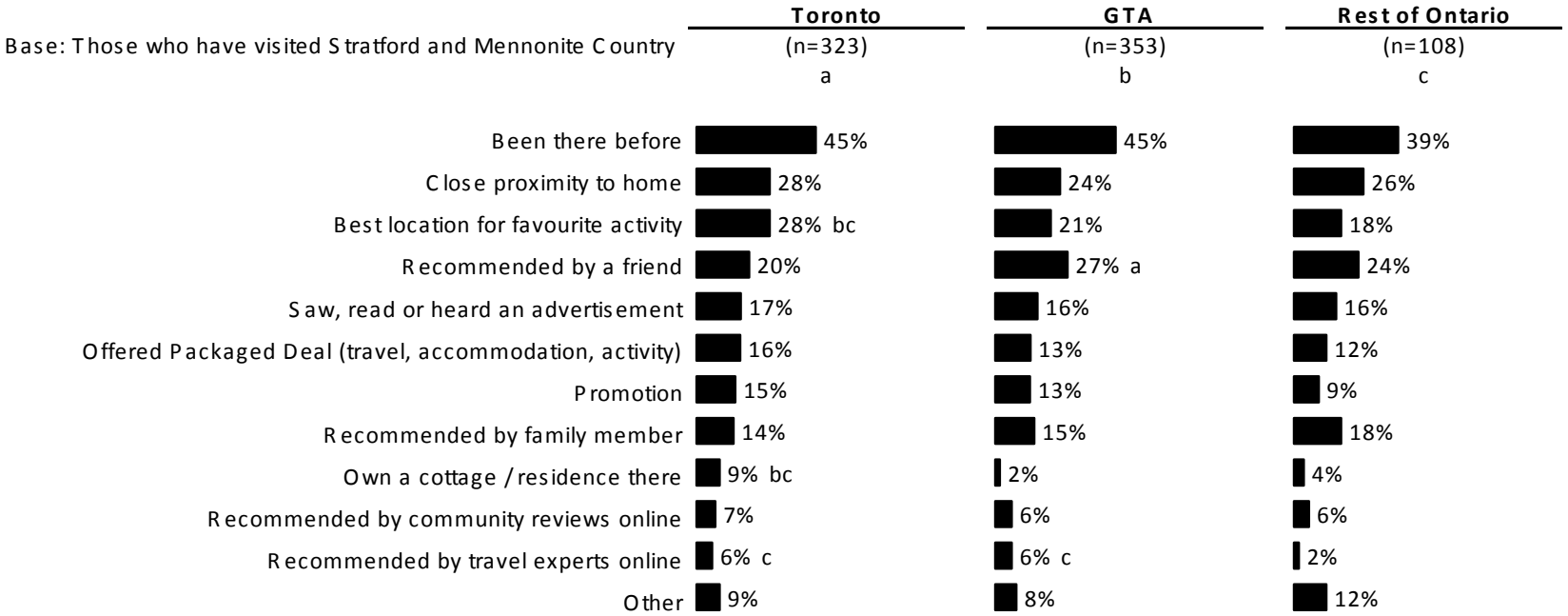
Reasons to Choose Specific Region – By City
Stratford and Mennonite Country



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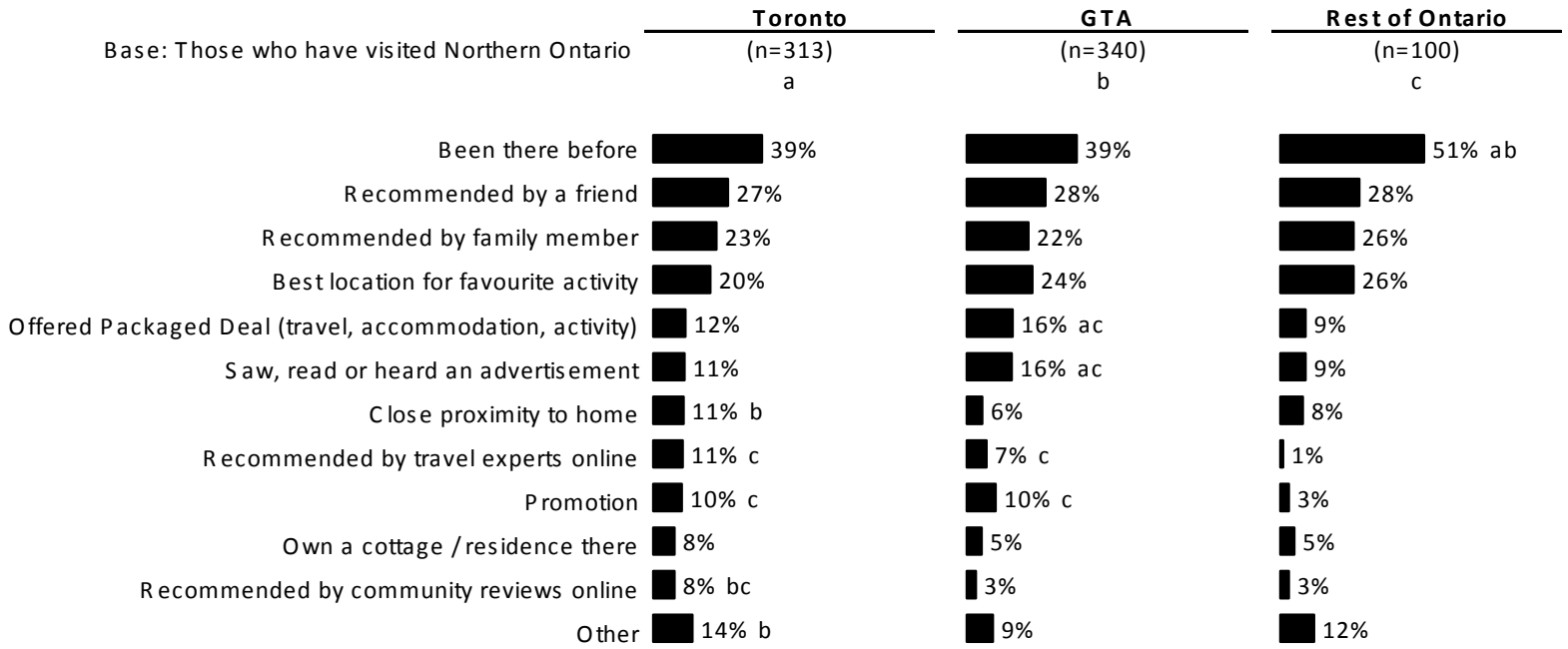
Reasons to Choose Specific Region – By City
Northern Ontario



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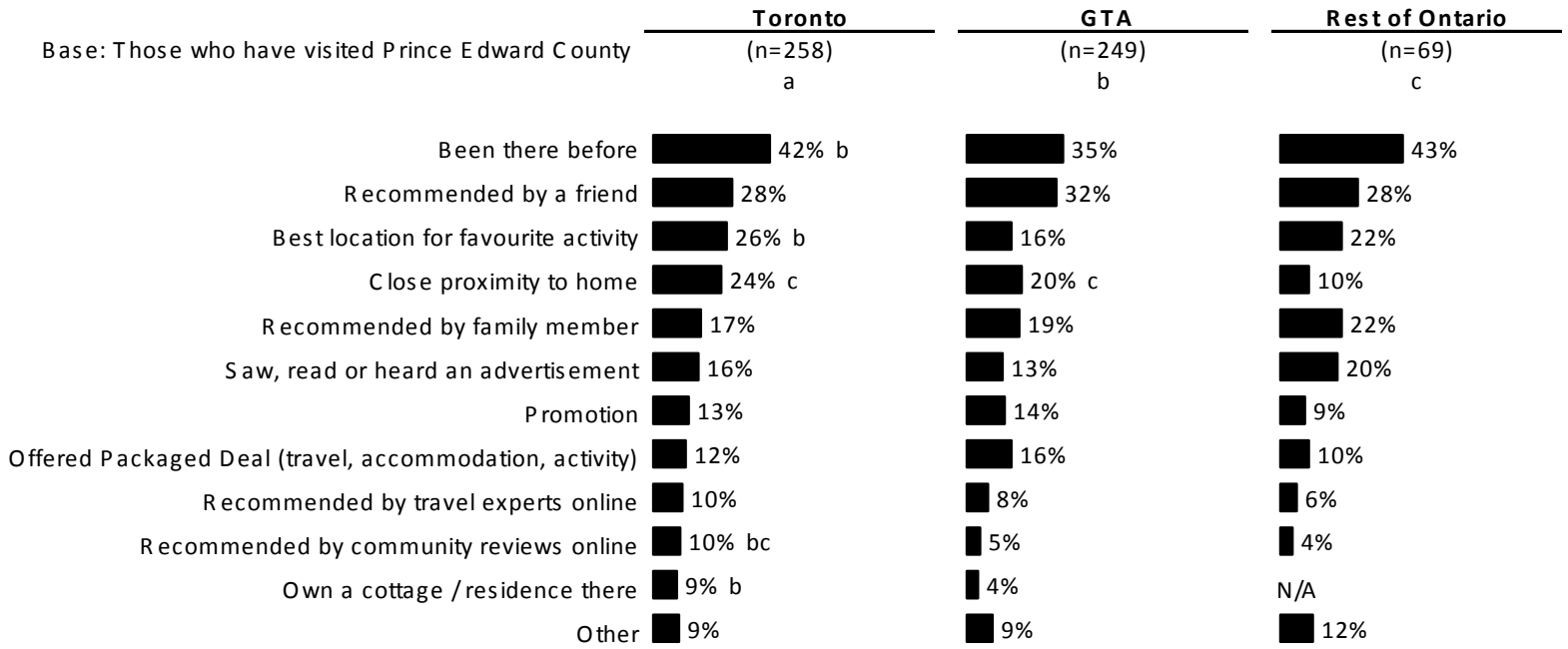
Reasons to Choose Specific Region – By City
Prince Edward County



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REGIONAL DRIVERS

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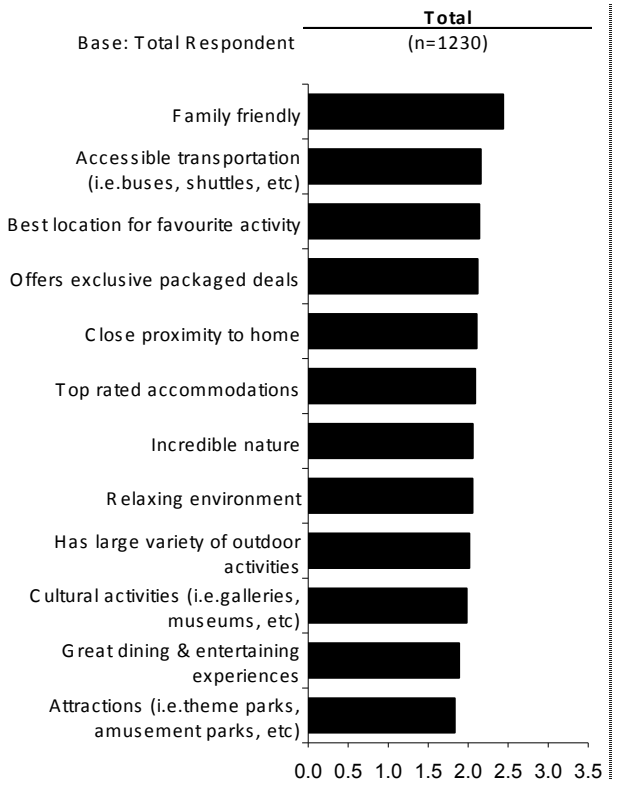
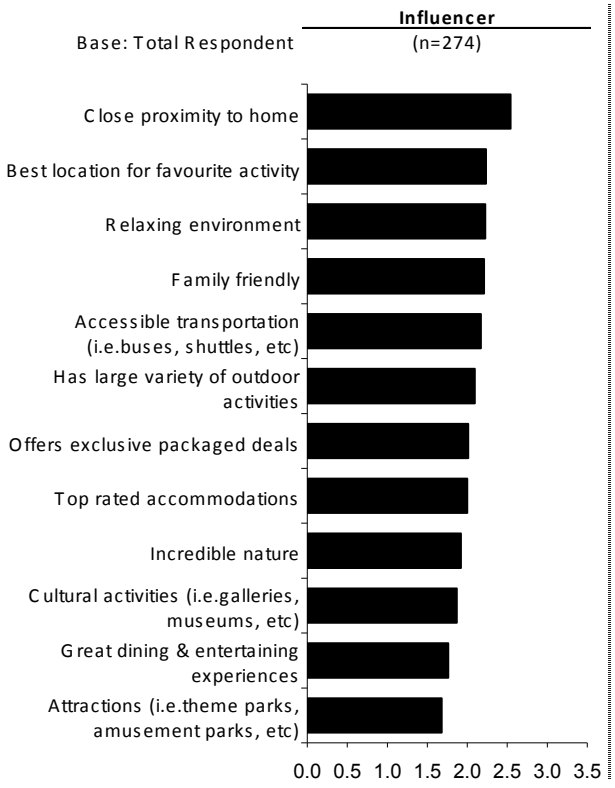
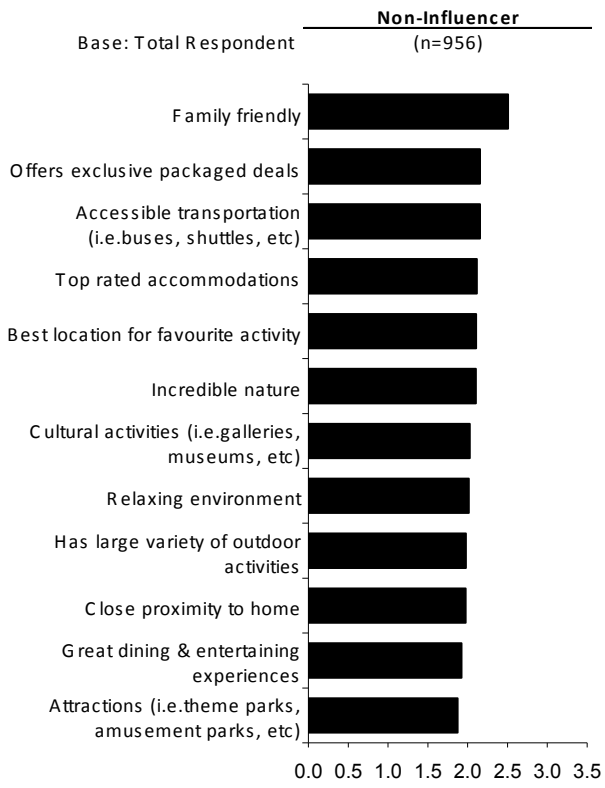
AdAgents

Most Important Belief







Q20b: Based on what you believe is most important when deciding between different tourism regions, please rank your top 3.

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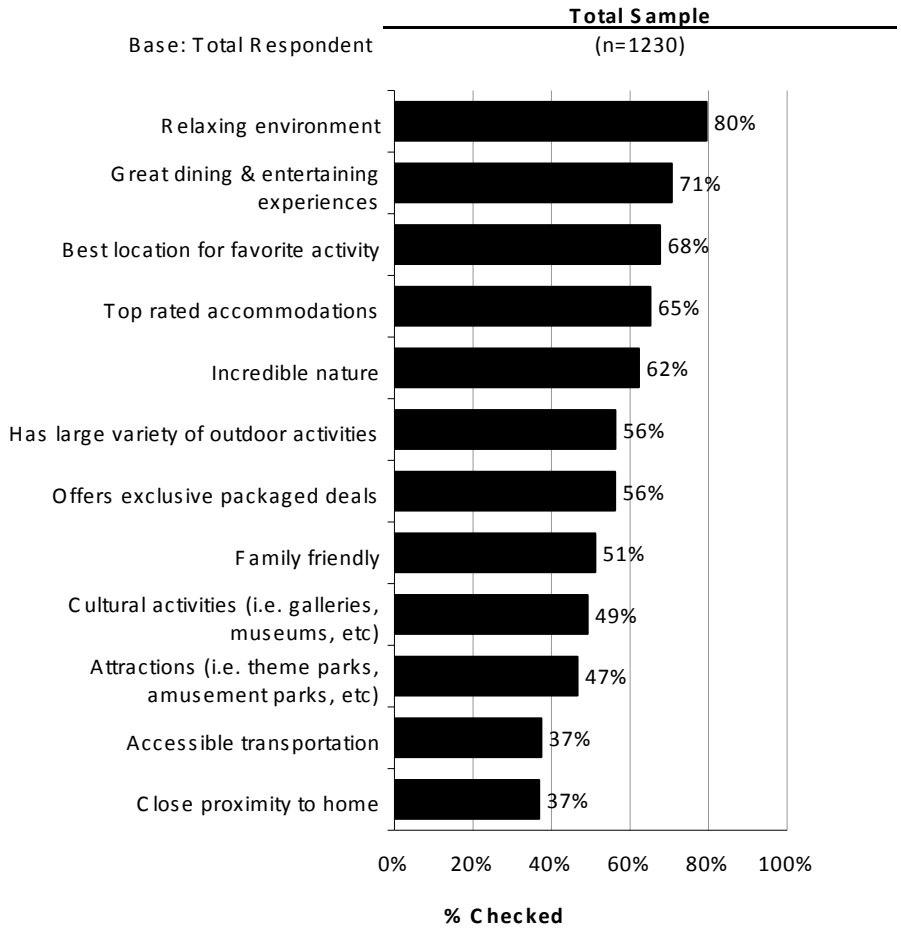
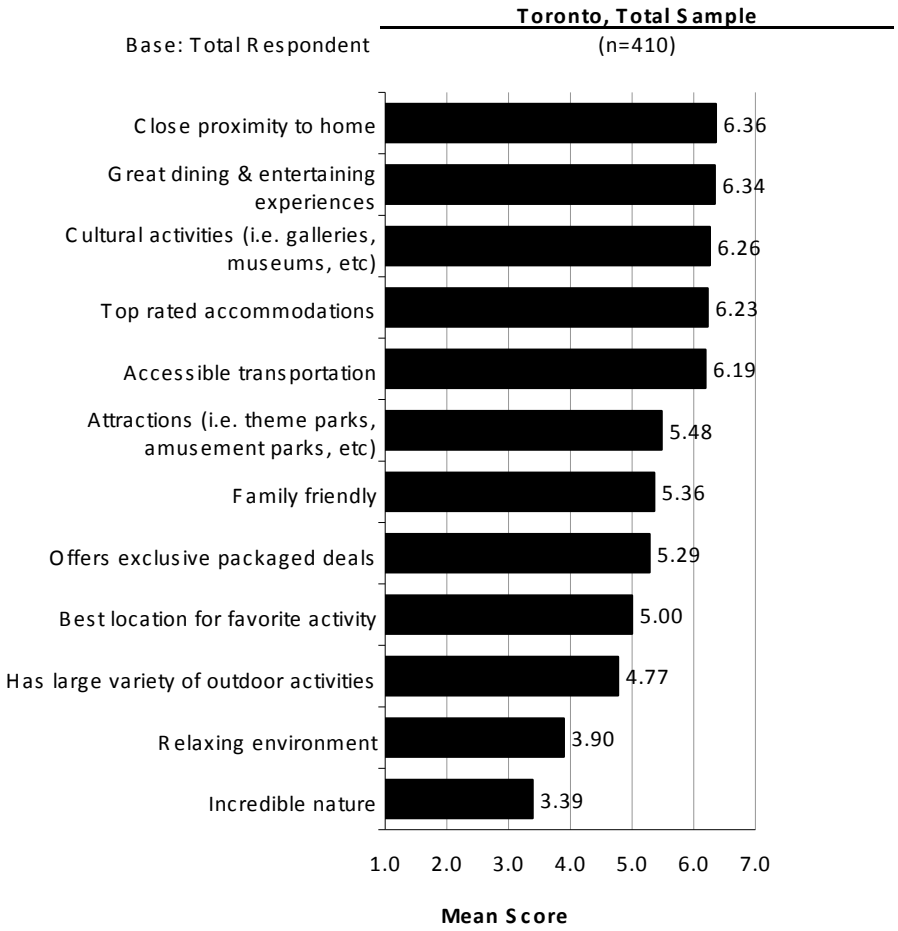
Drivers of Preference & Performance – Toronto





Q20: When deciding between get-away trips among the different tourism regions in Ontario, how important are each of the following to you?
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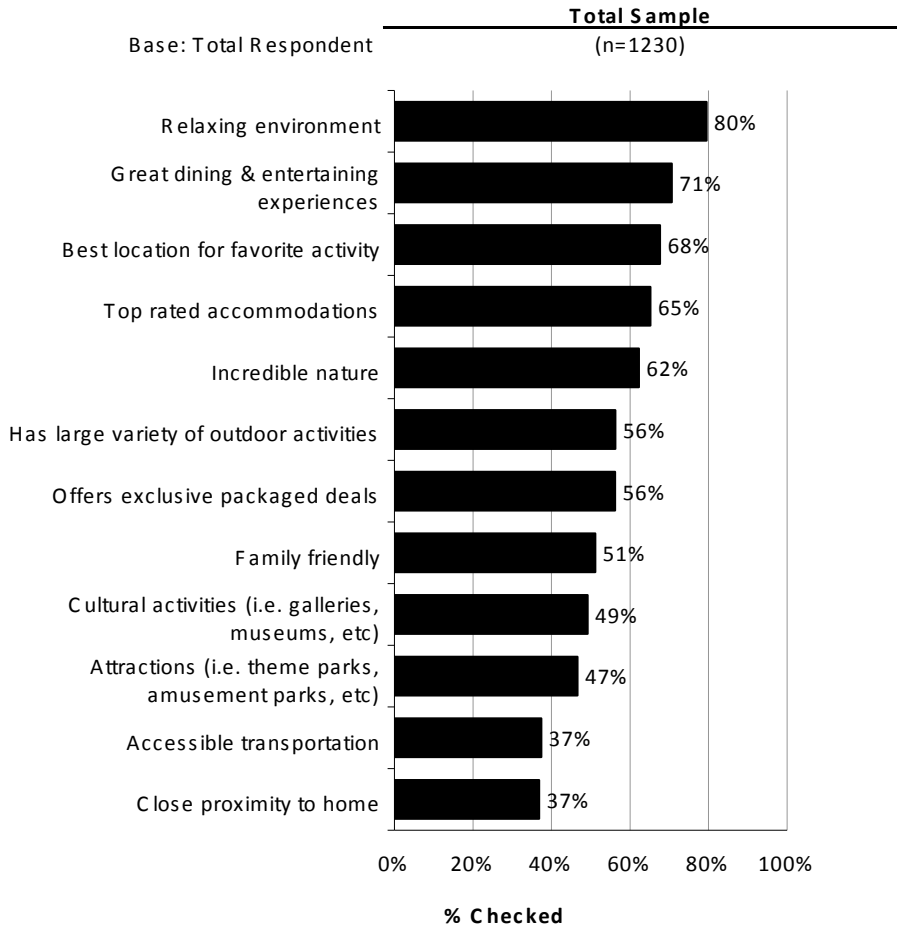
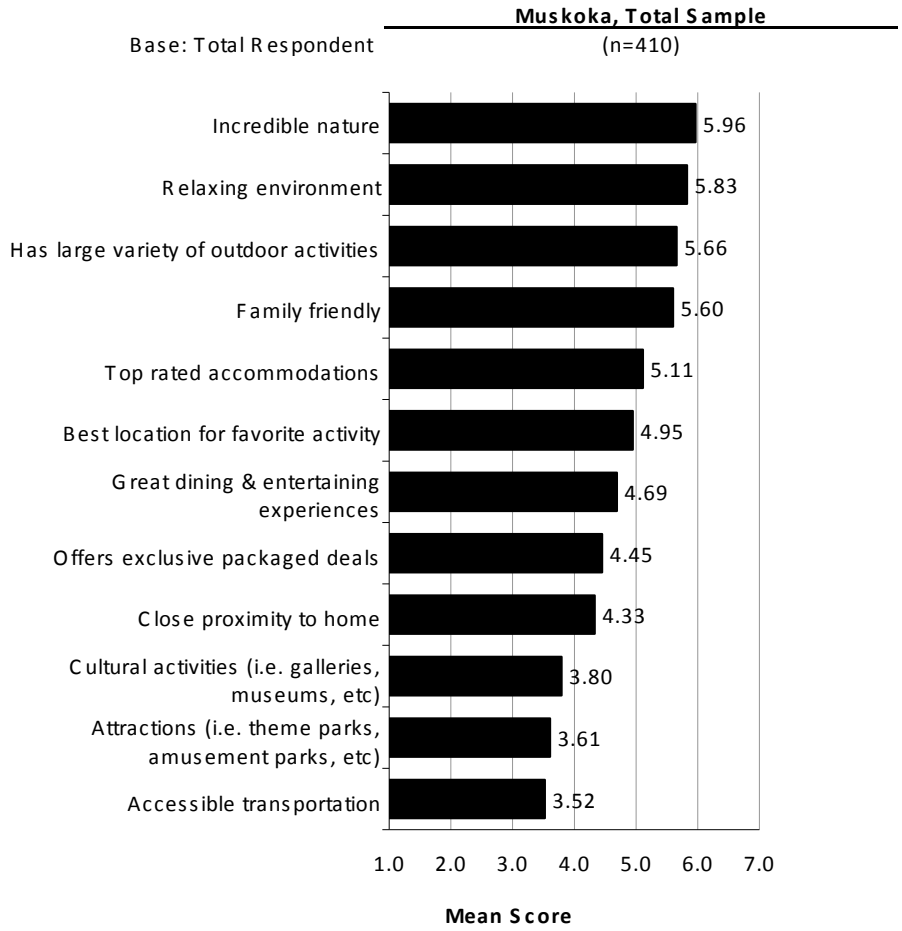
Drivers of Preference & Performance – Muskoka





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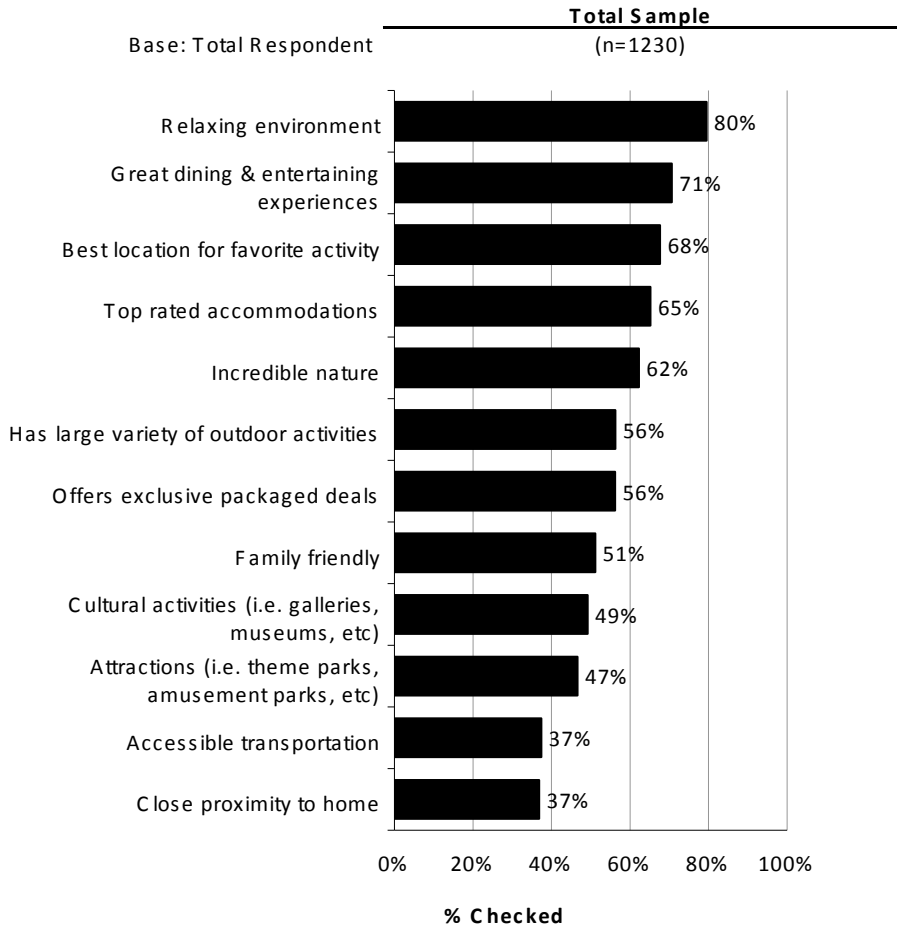
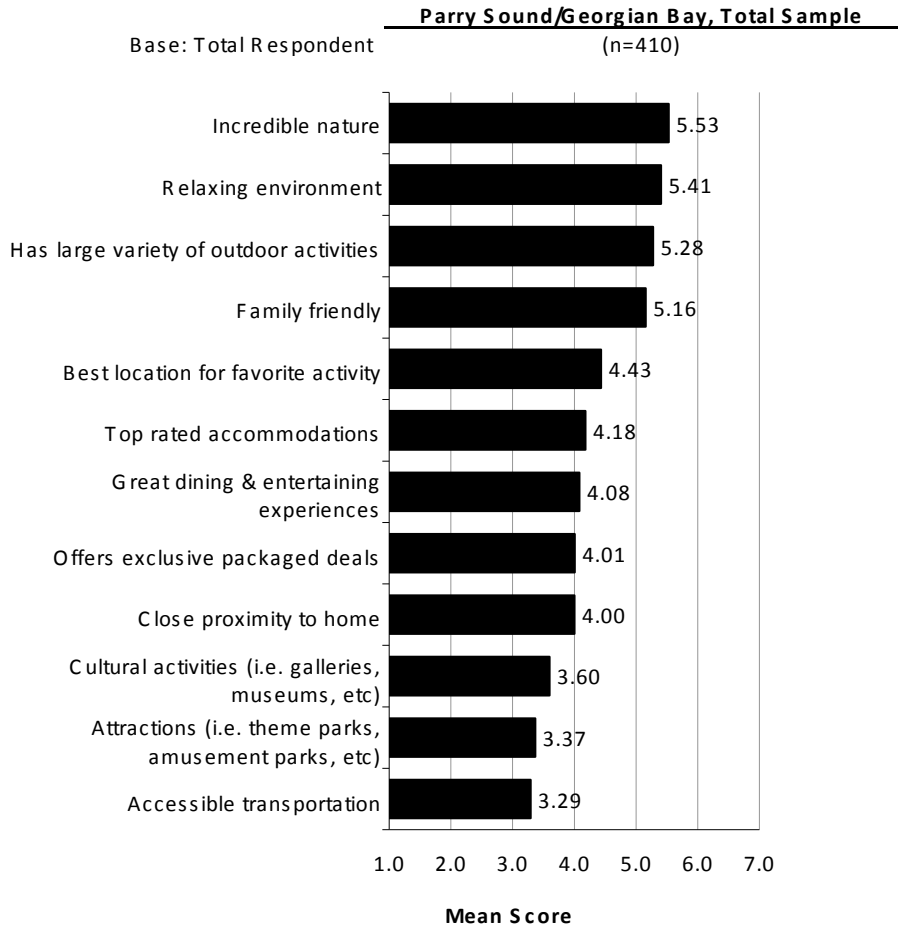
Drivers of Preference & Performance – Parry Sound & Georgian Bay





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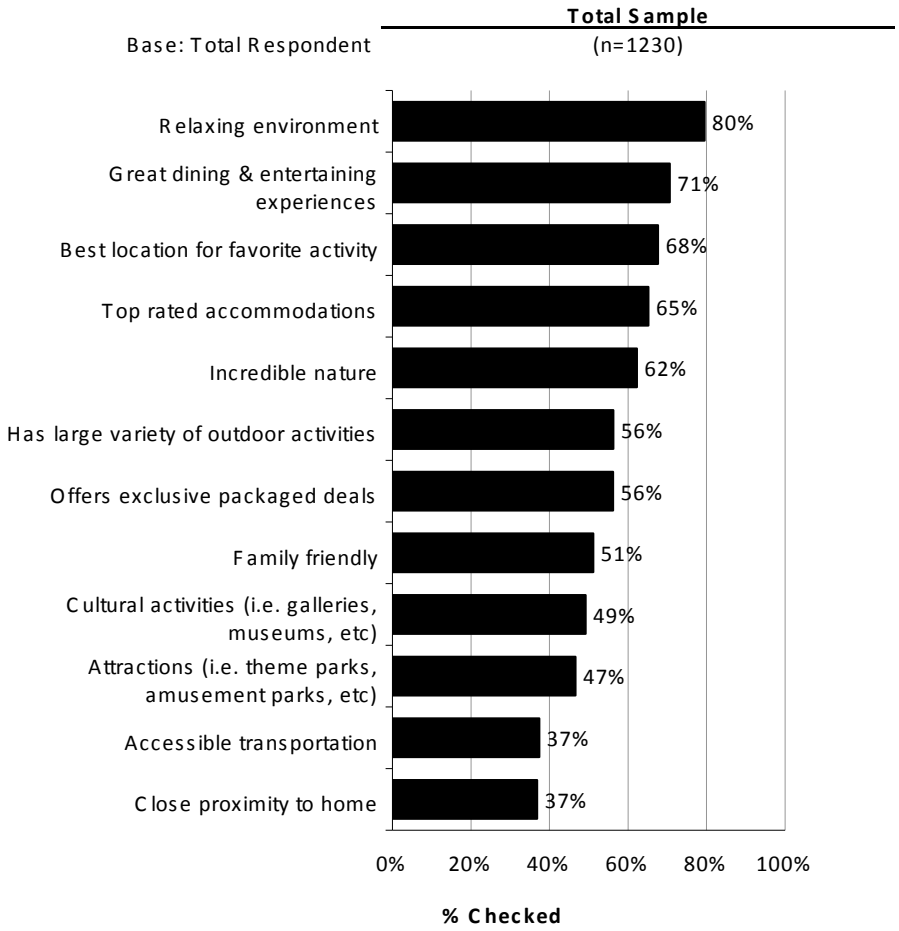
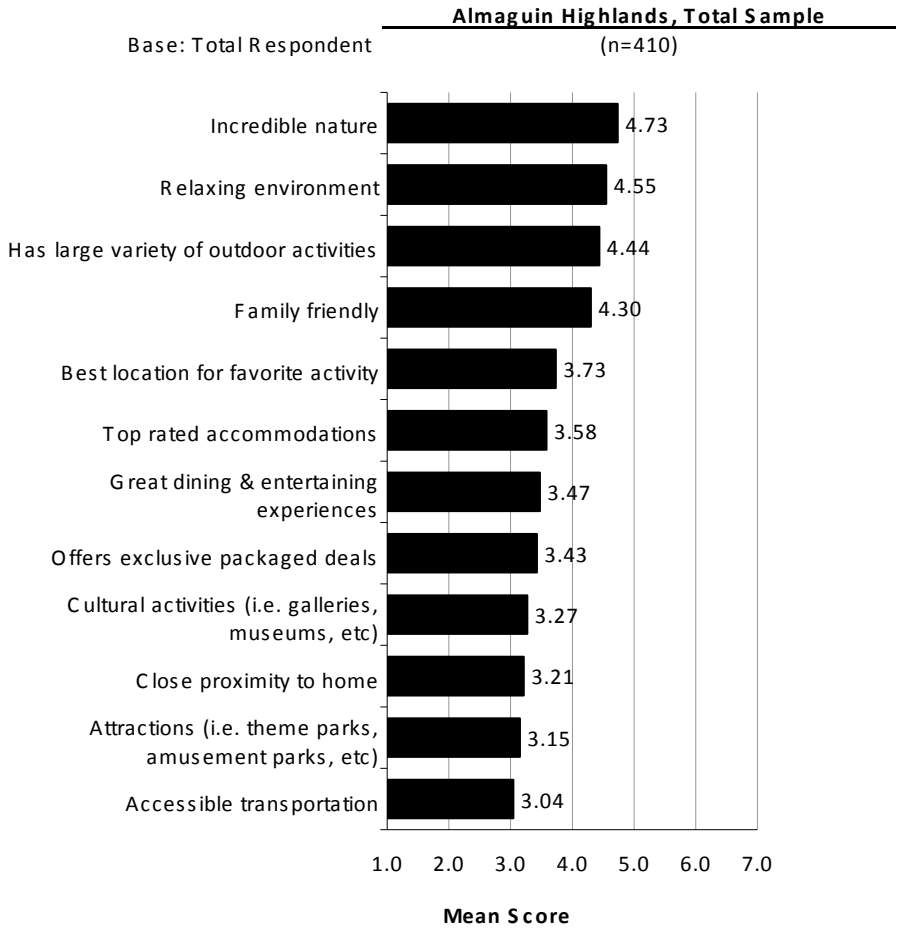
Drivers of Preference & Performance – Almaguin Highlands





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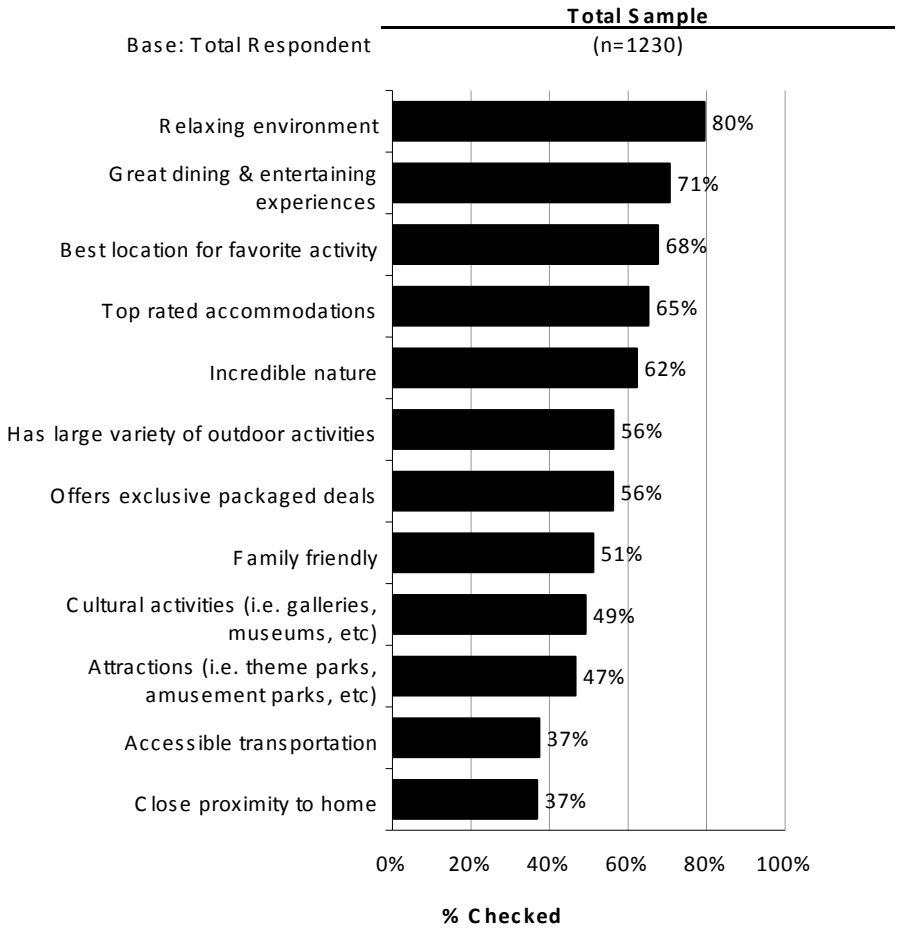
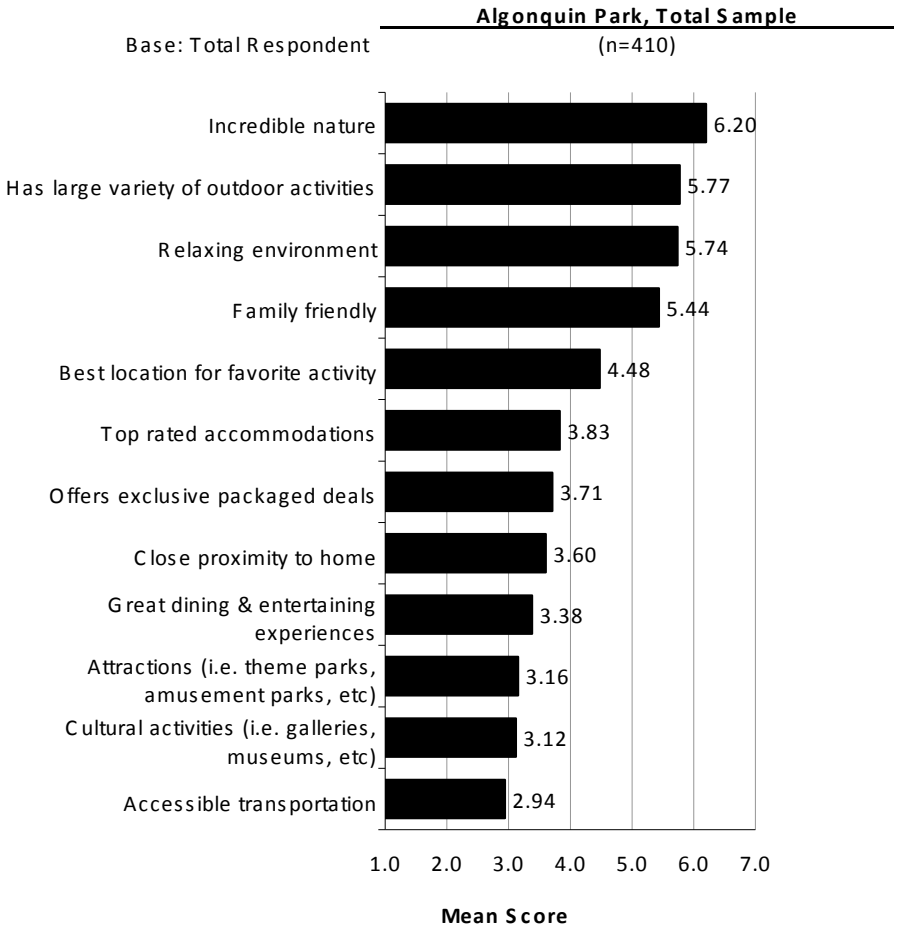
Drivers of Preference & Performance – Algonquin Park





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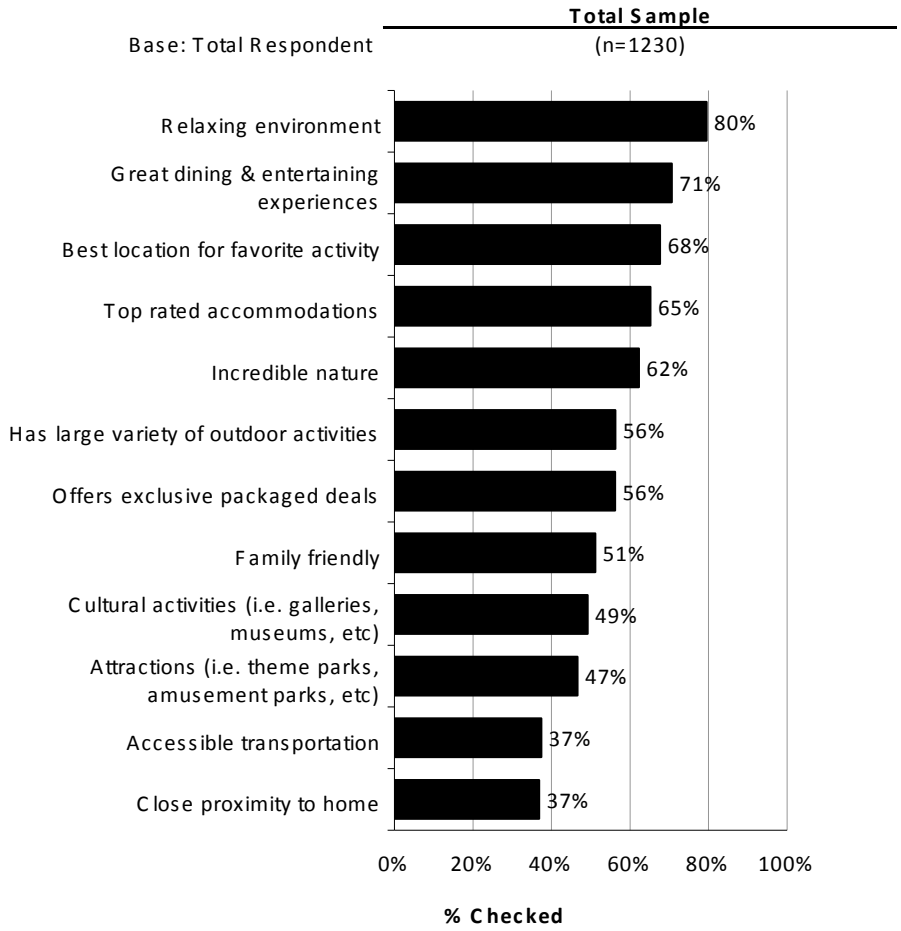
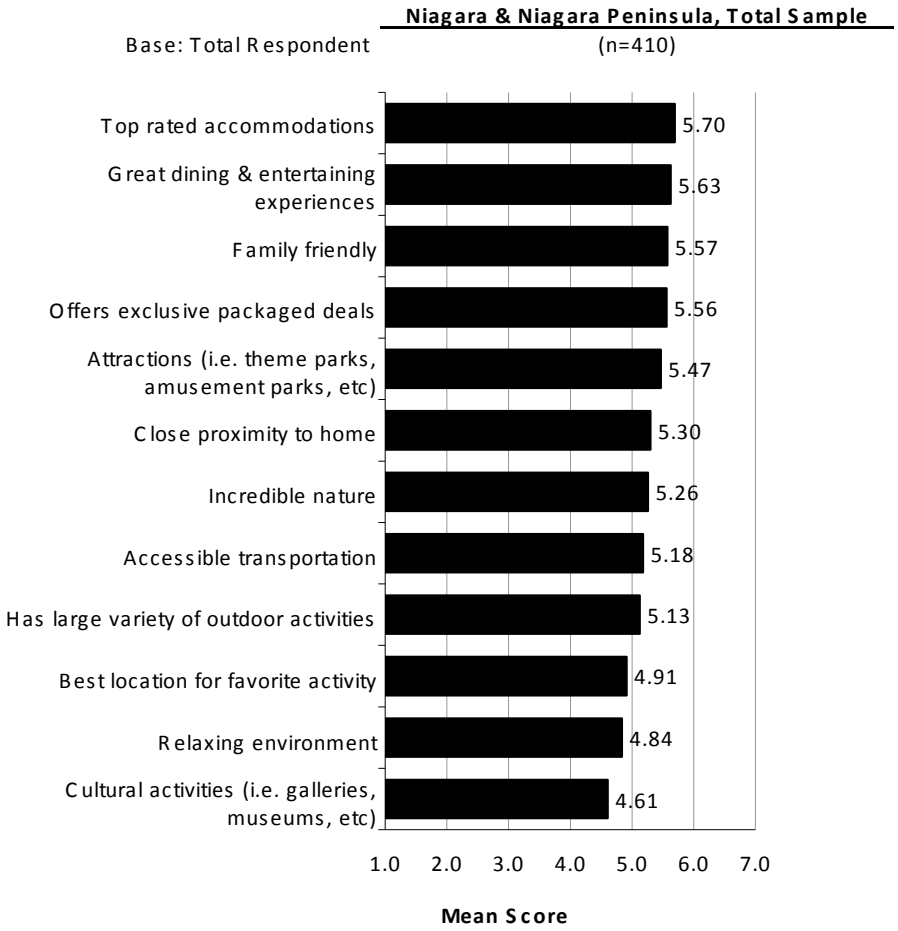
Drivers of Preference & Performance – Niagara and Niagara Peninsula





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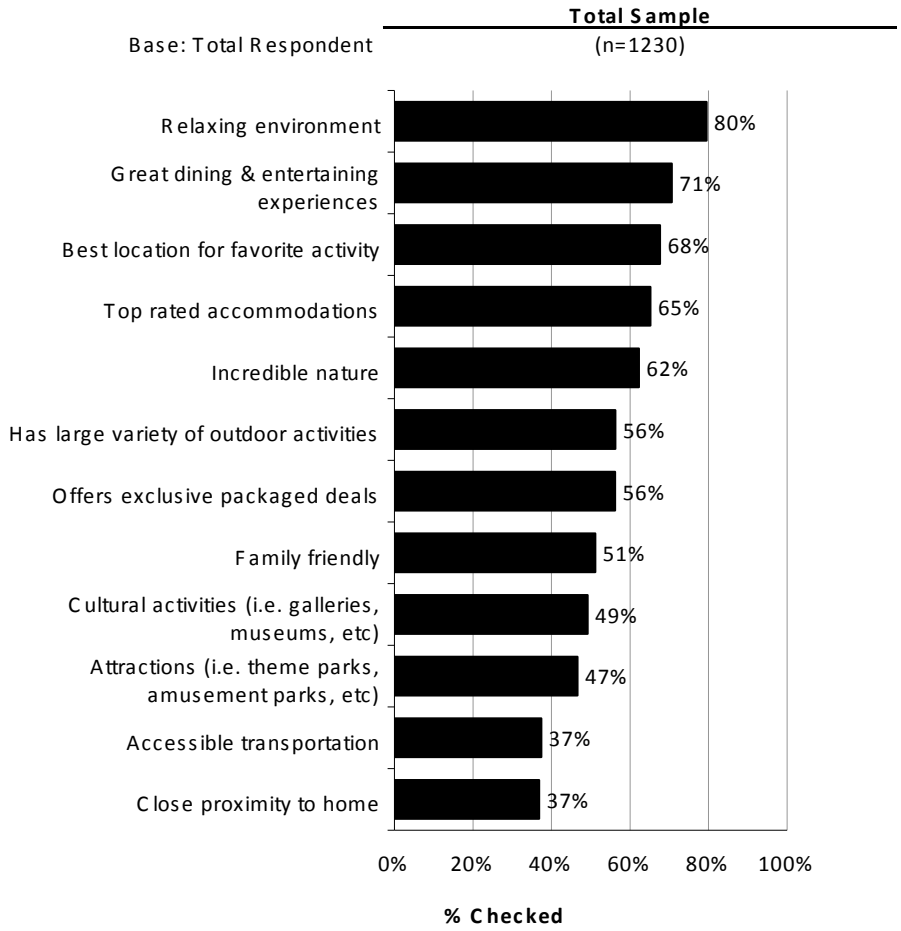
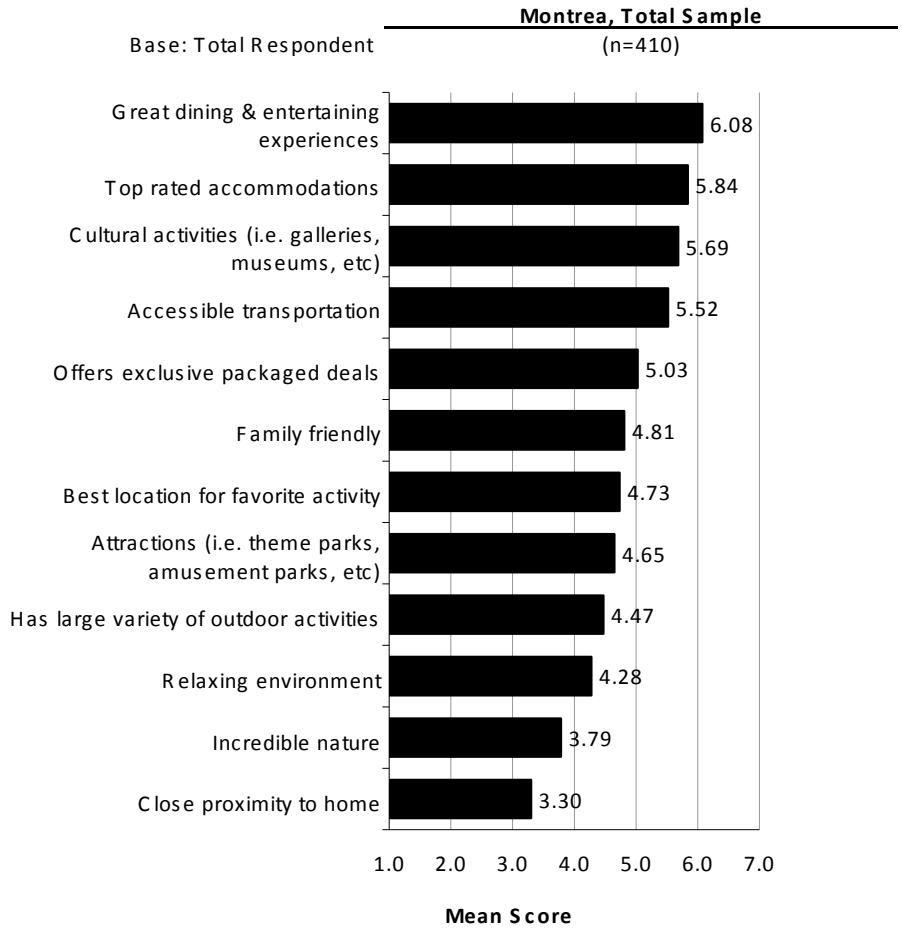
Drivers of Preference & Performance – Montreal





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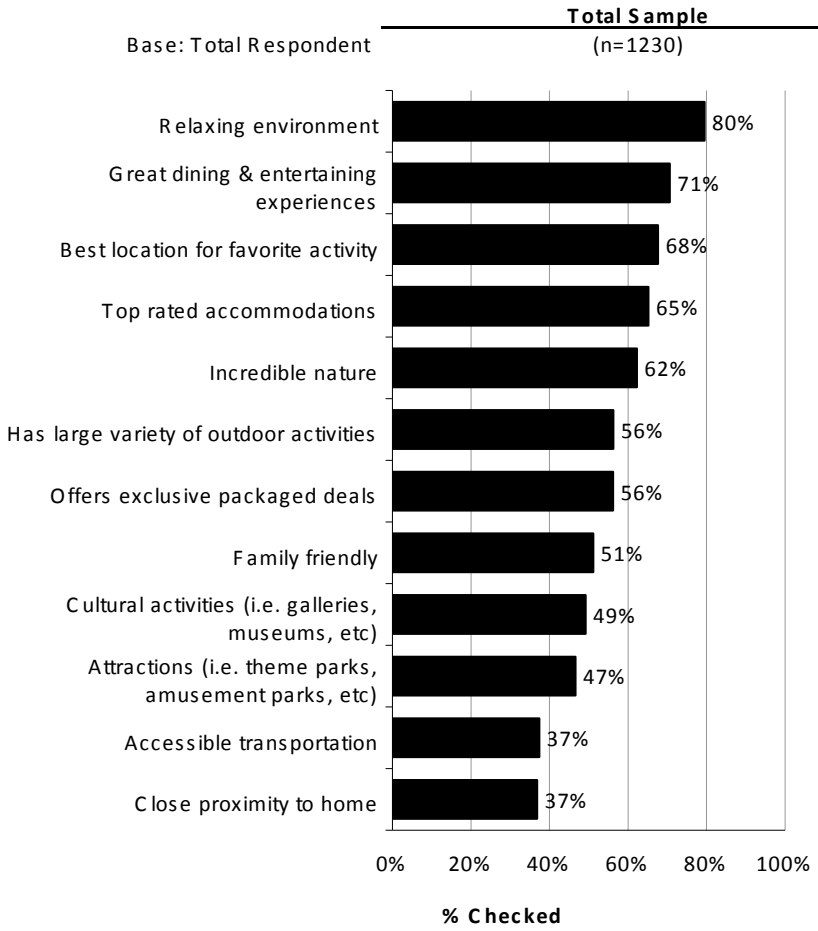
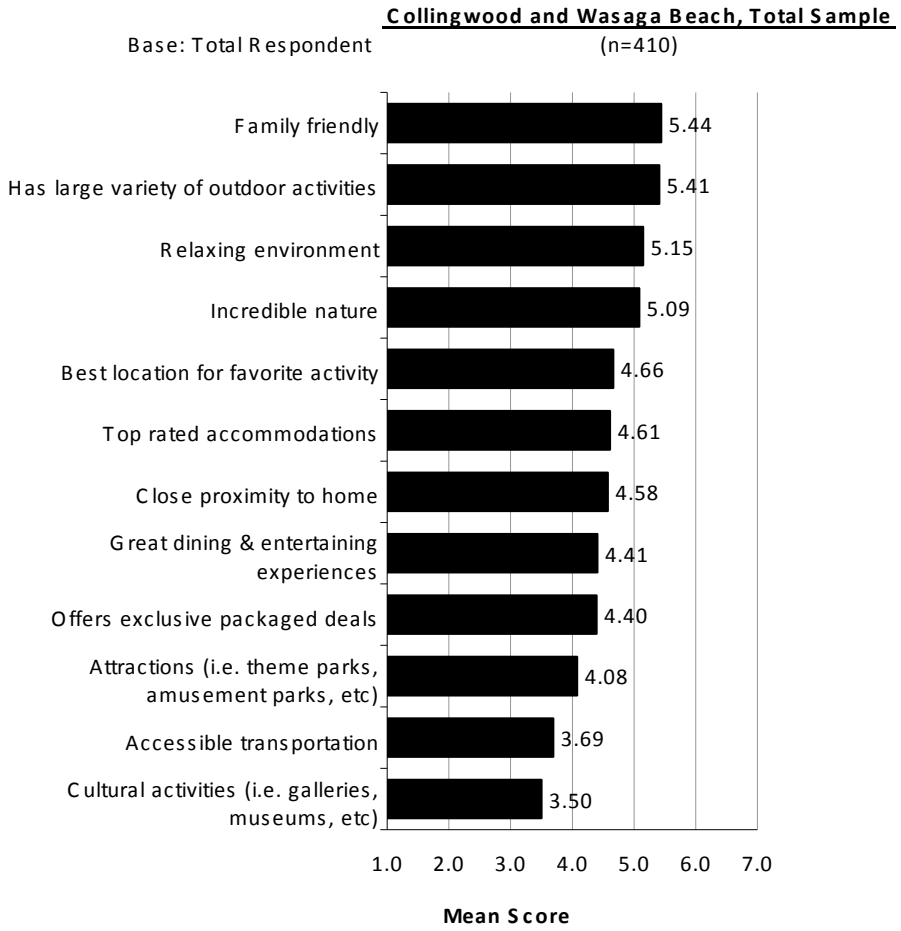
Drivers of Preference & Performance – Collingwood and Wasaga Beach





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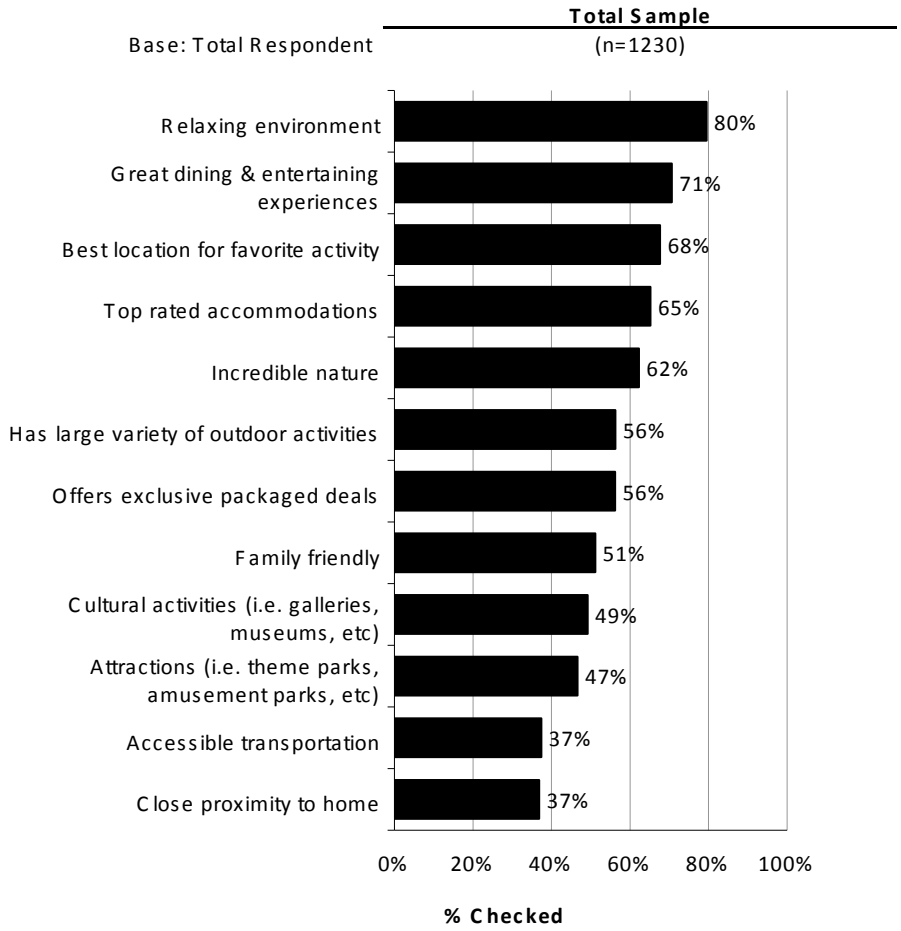
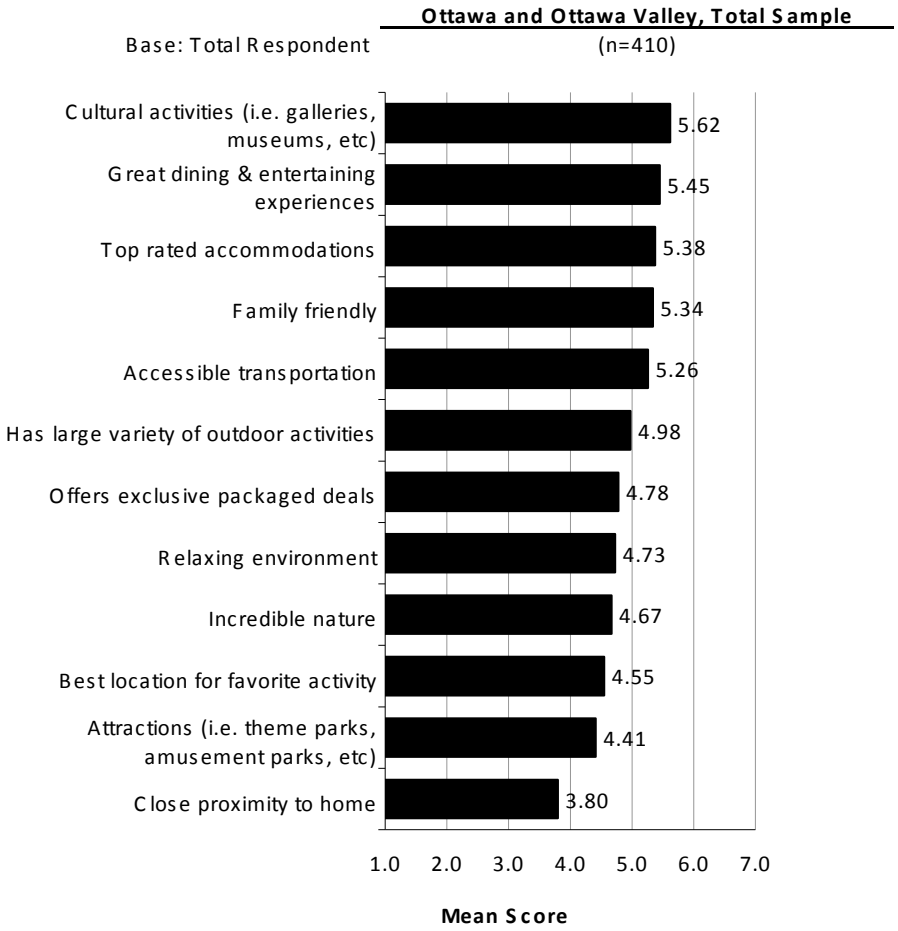
Drivers of Preference & Performance – Ottawa and Ottawa Valley





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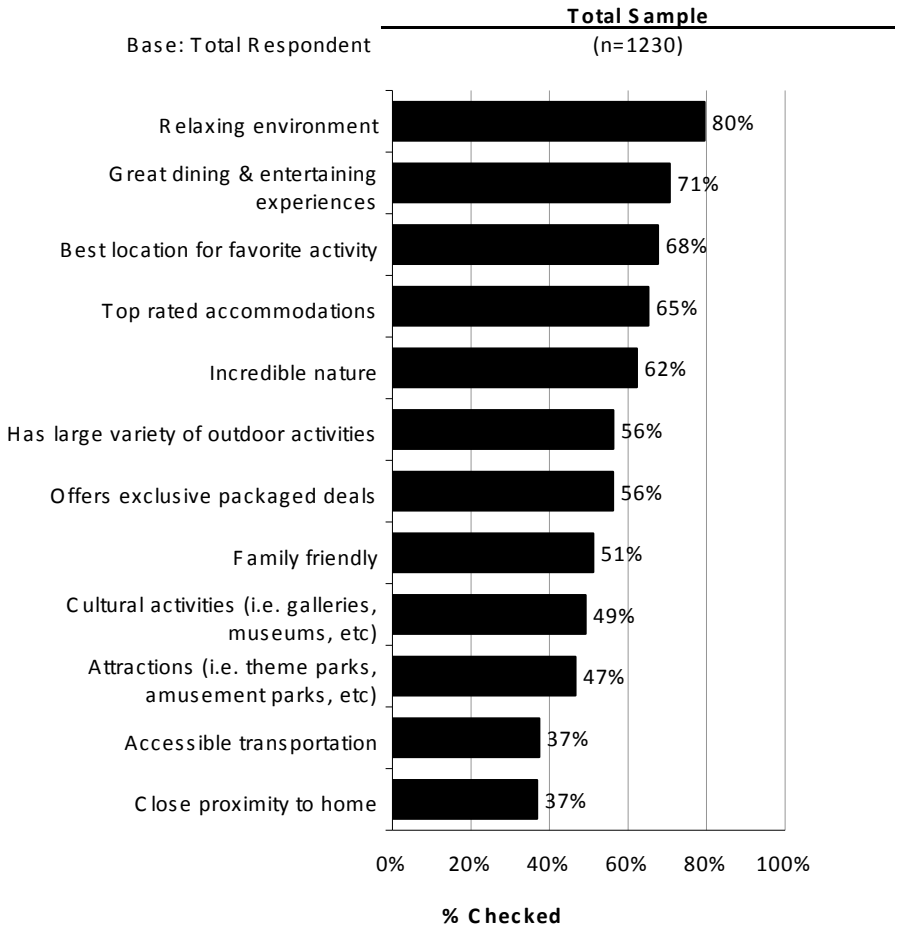
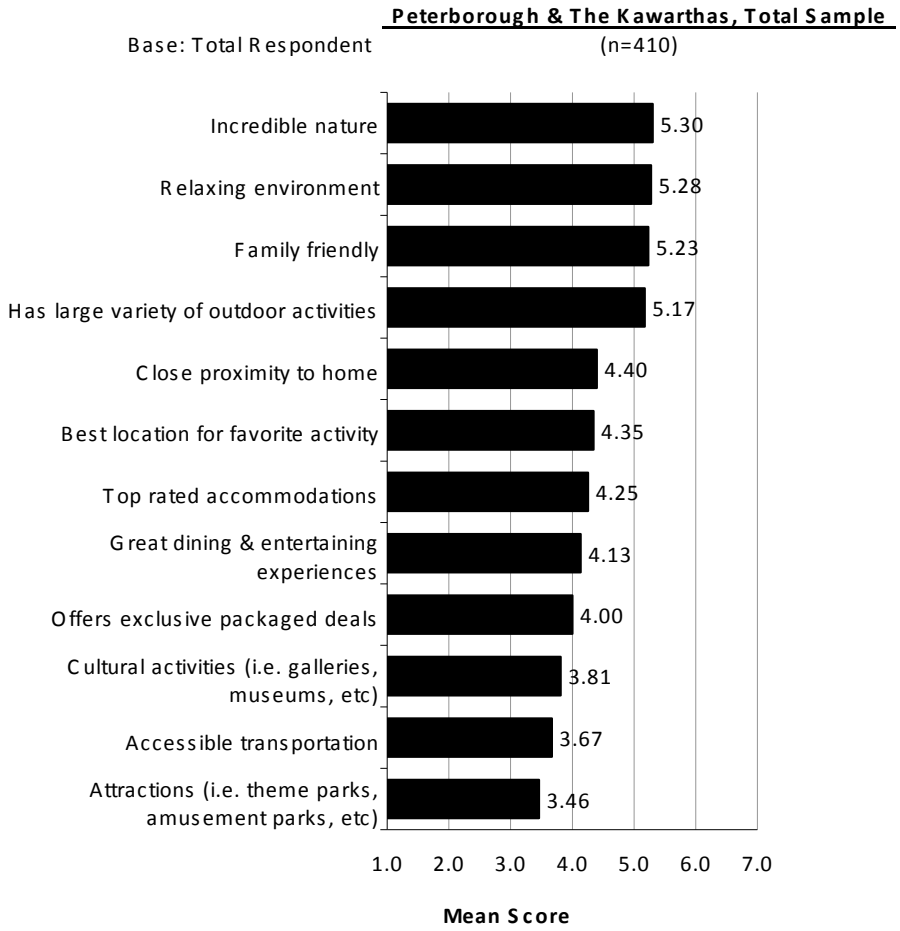
Drivers of Preference & Performance – Peterborough and The Kawarthas





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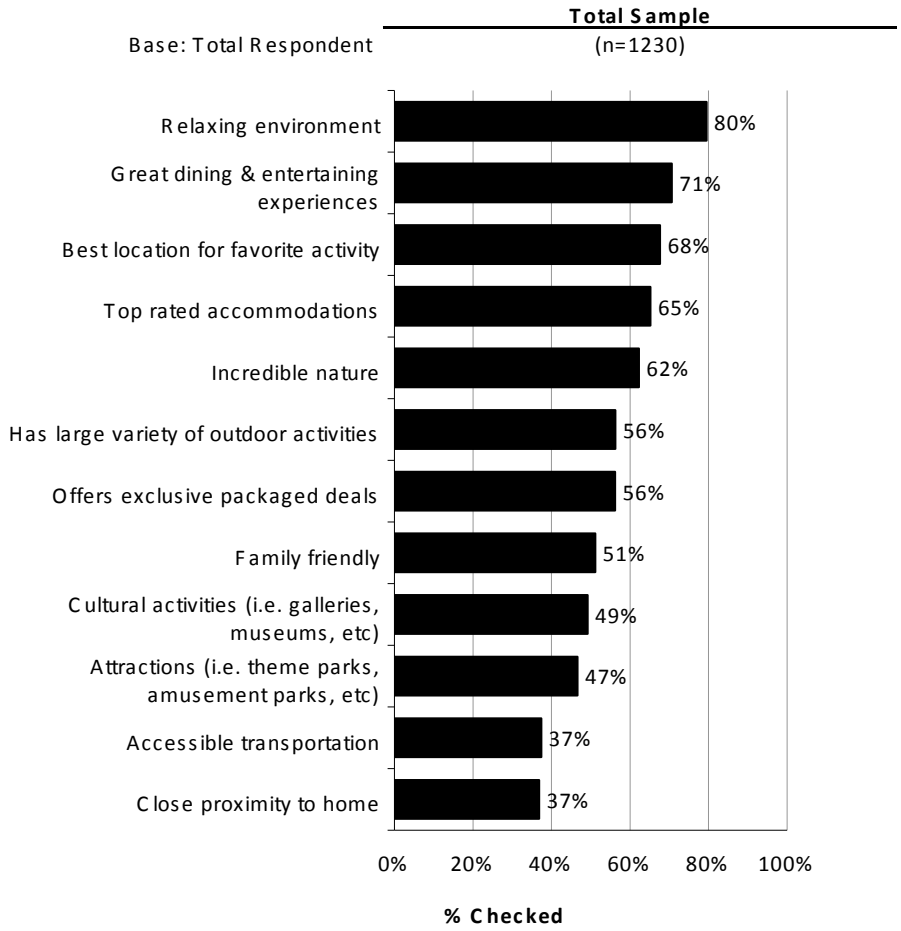
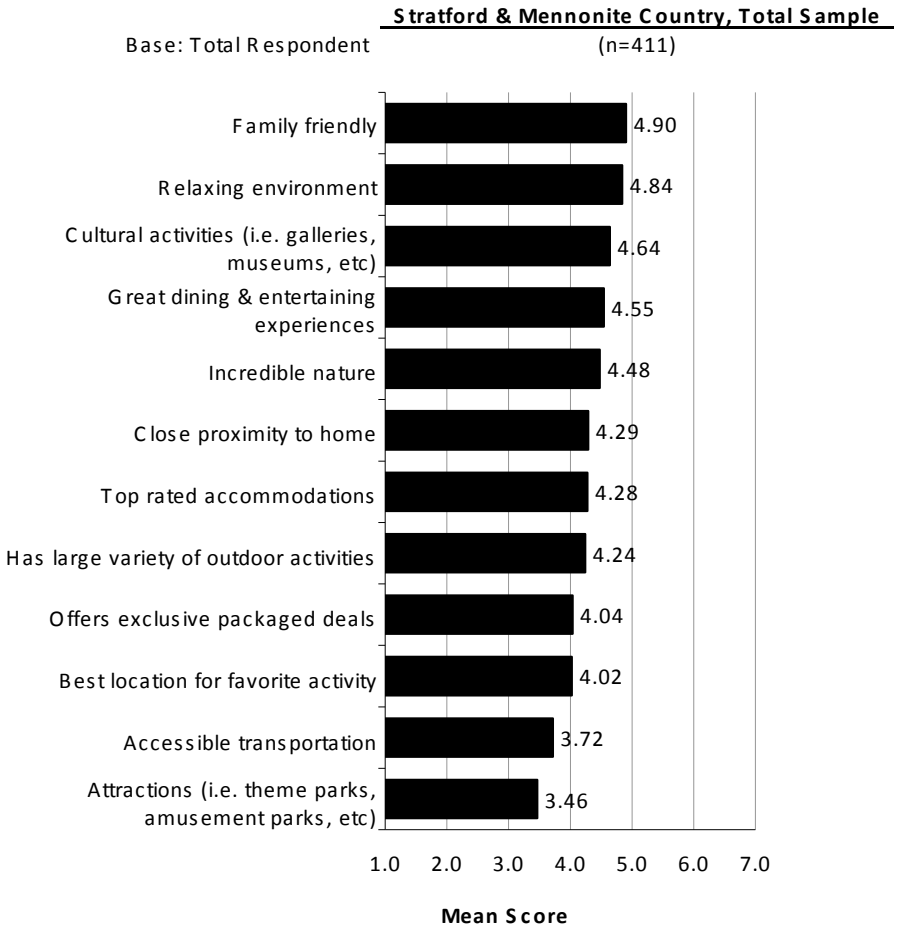
Drivers of Preference & Performance – Stratford and Mennonite Country





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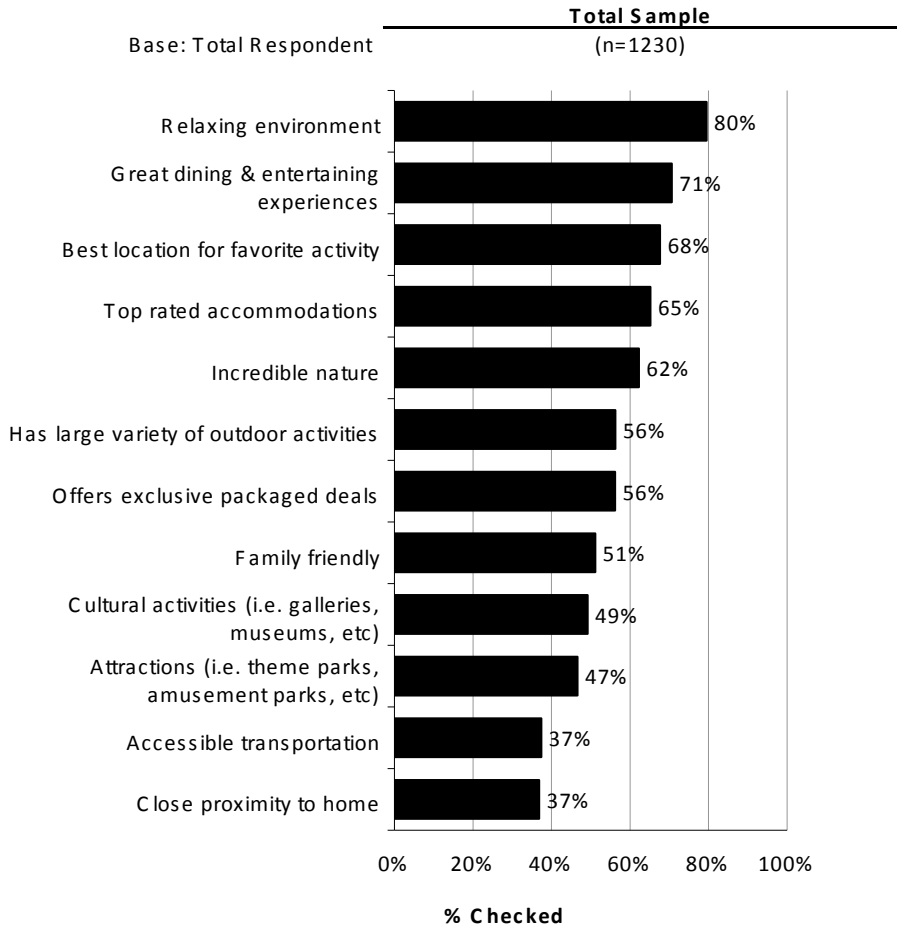
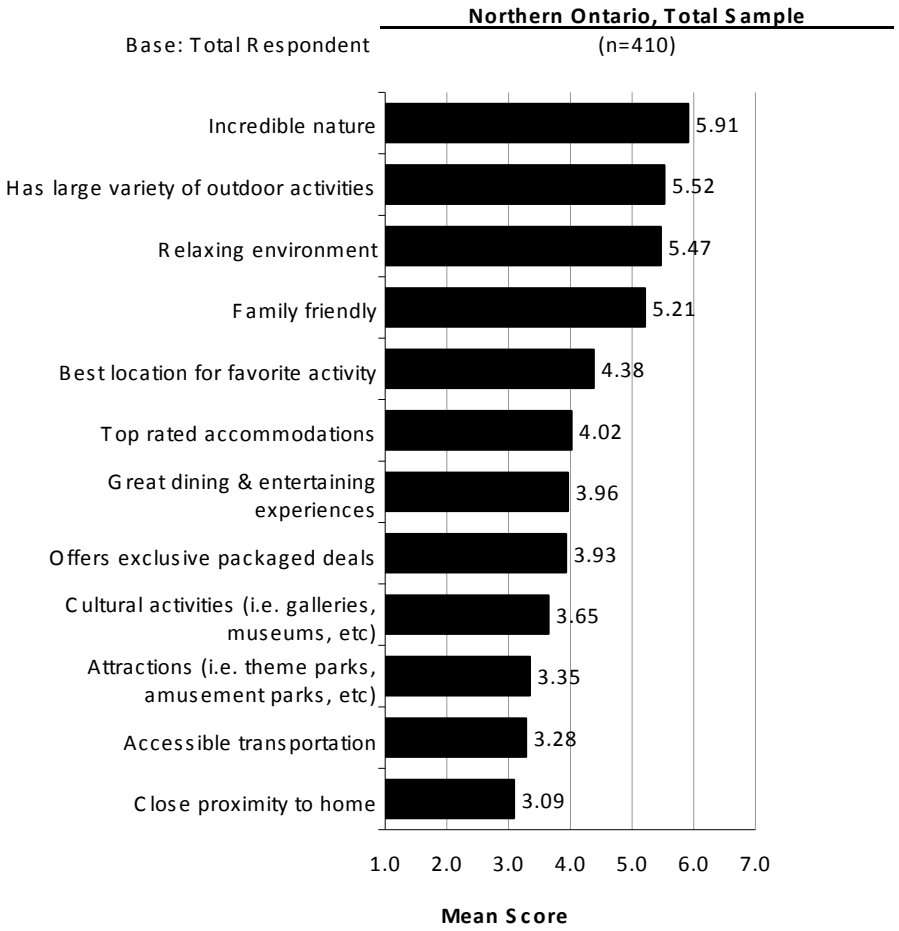
Drivers of Preference & Performance – Northern Ontario





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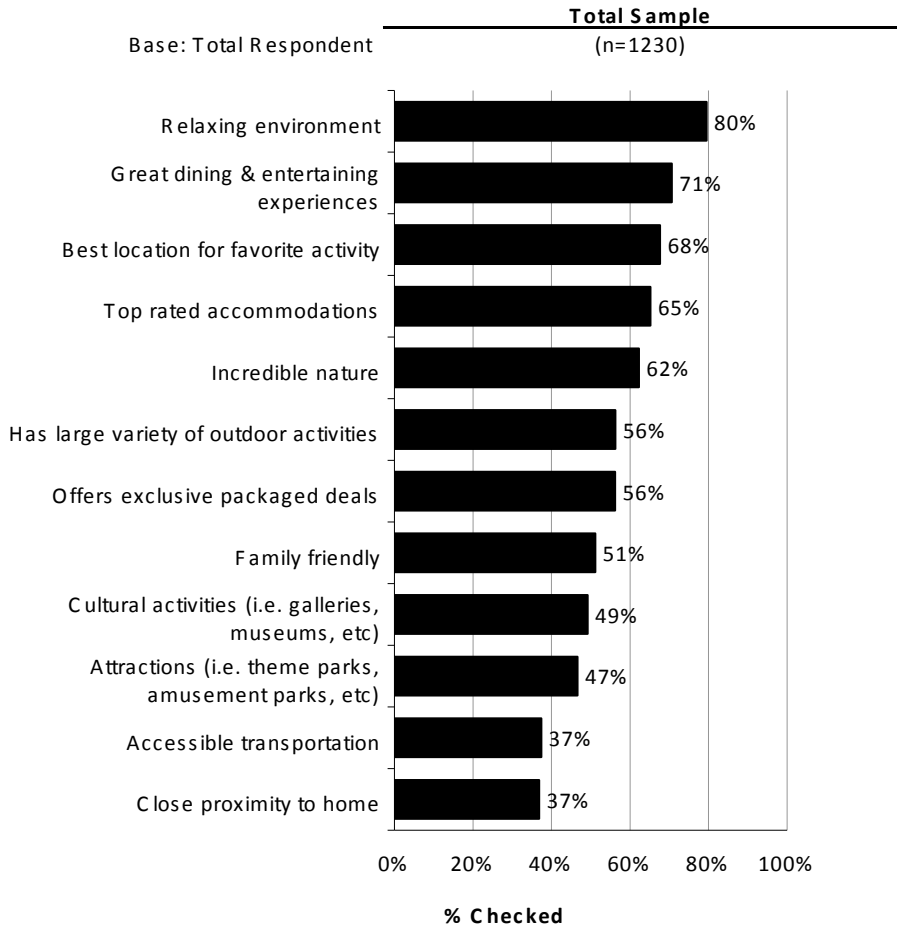
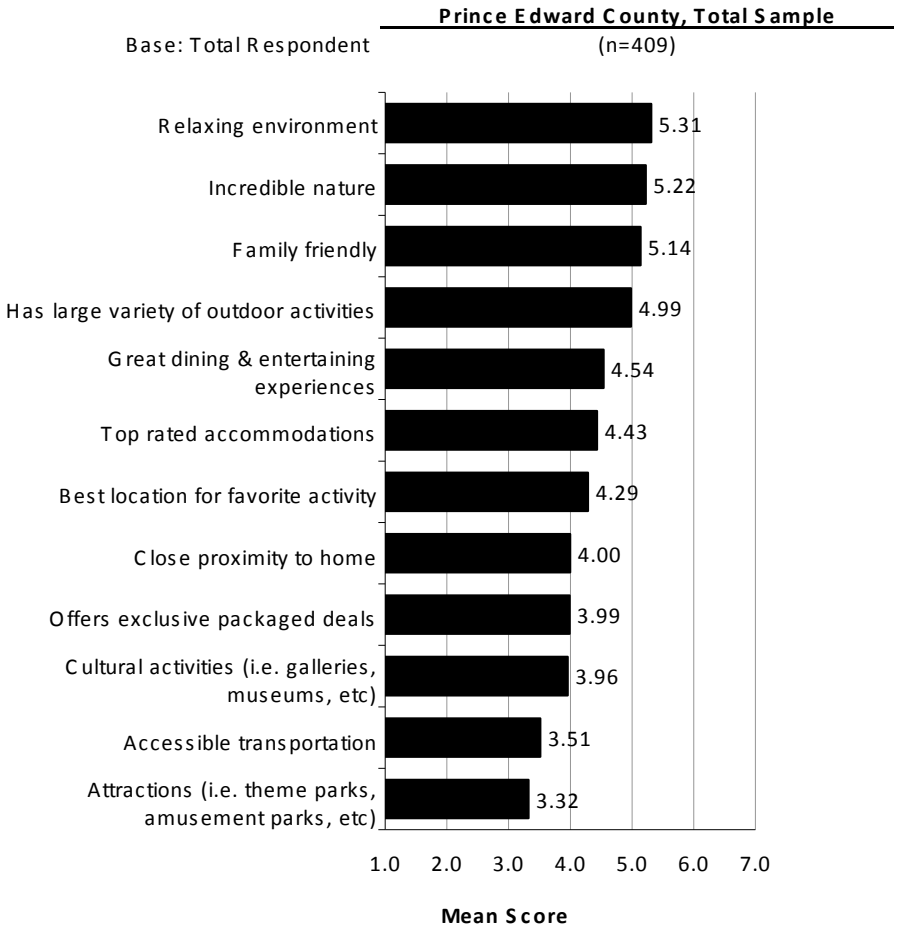
Drivers of Preference & Performance – Prince Edward County





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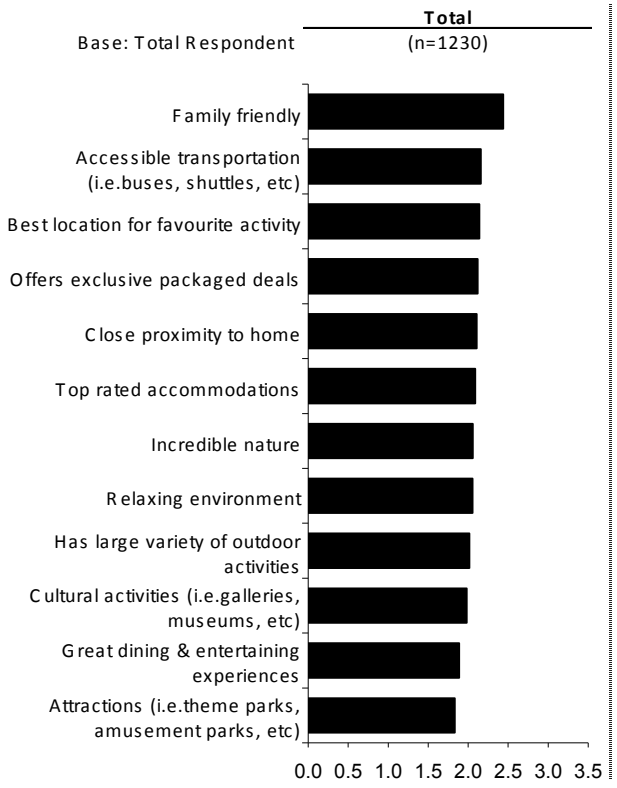
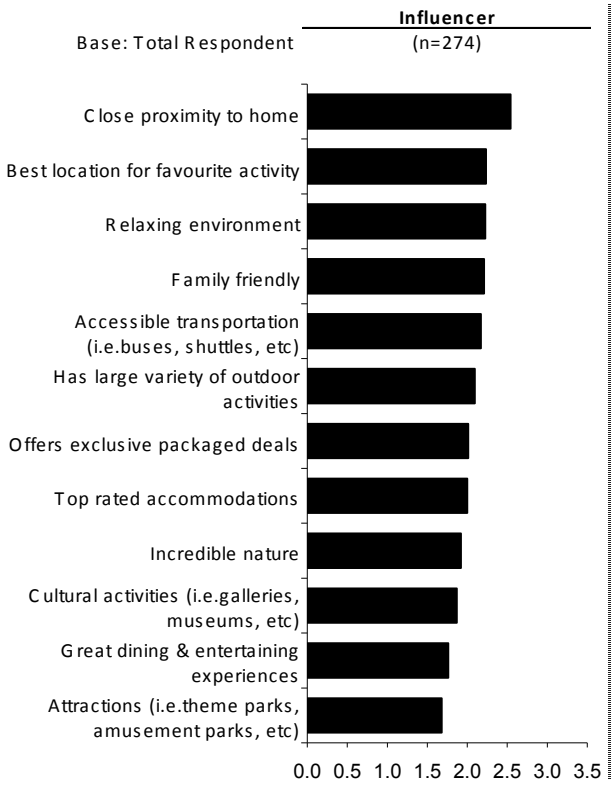
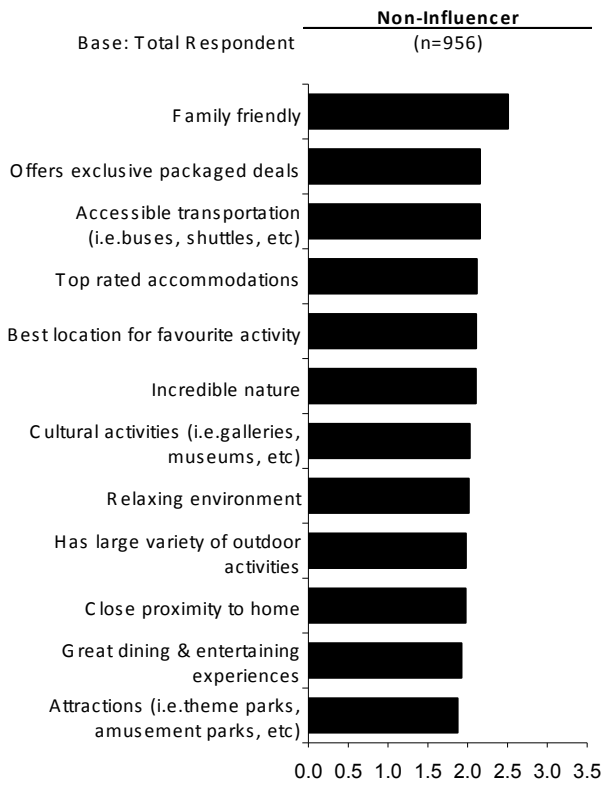
Most Important Belief







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Q20b: Based on what you believe is most important when deciding between different tourism regions, please rank your top 3.

DESTINATION BARRIERS

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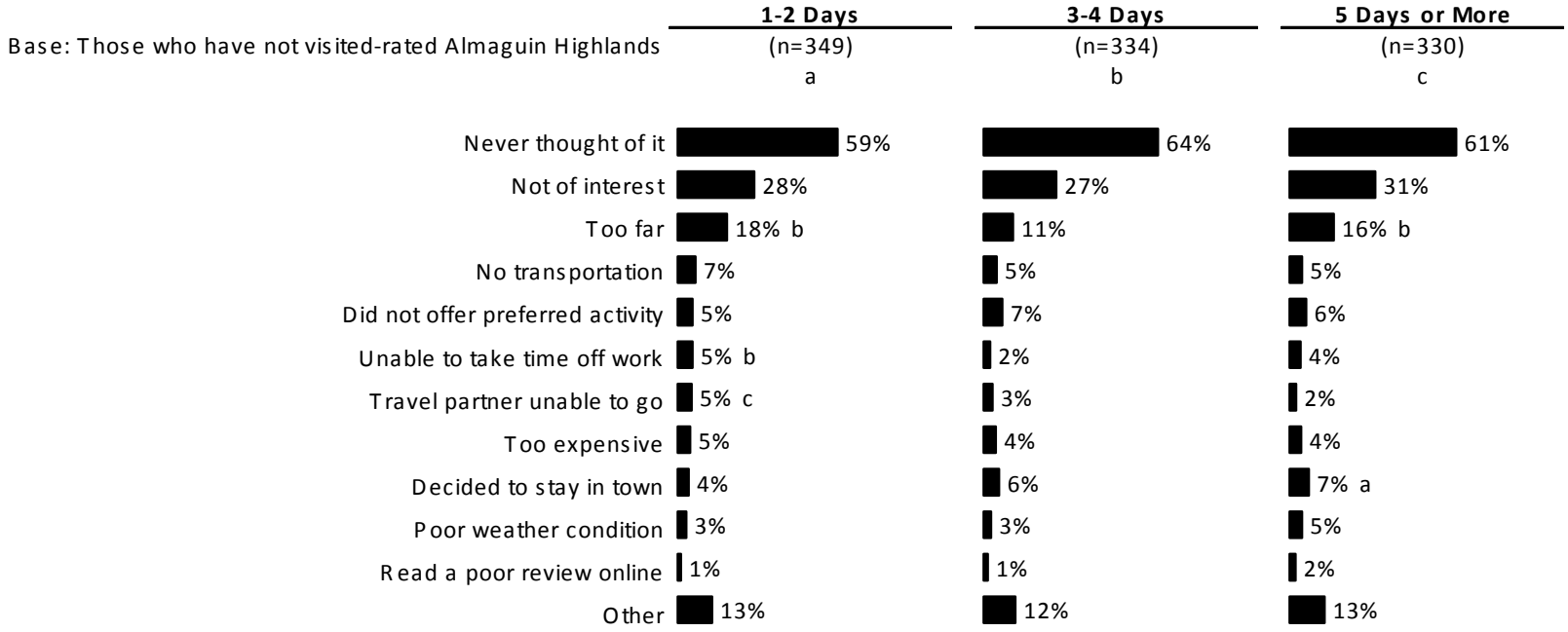
Barriers – Almaguin Highlands



Q23: What do you believe has prevented you in the past from visiting each of the following regions?
a/b/c - Lower case letters indicate significance at the 90% level.

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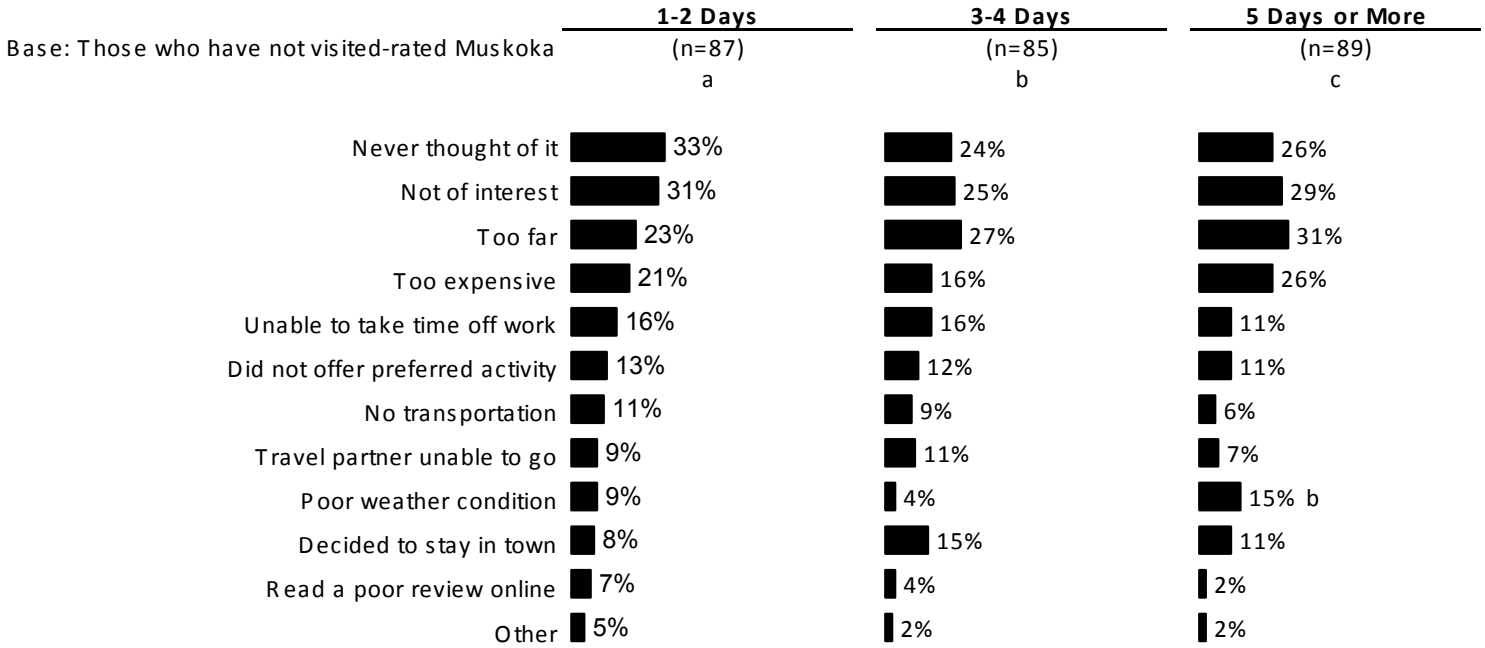
Barriers – Muskoka



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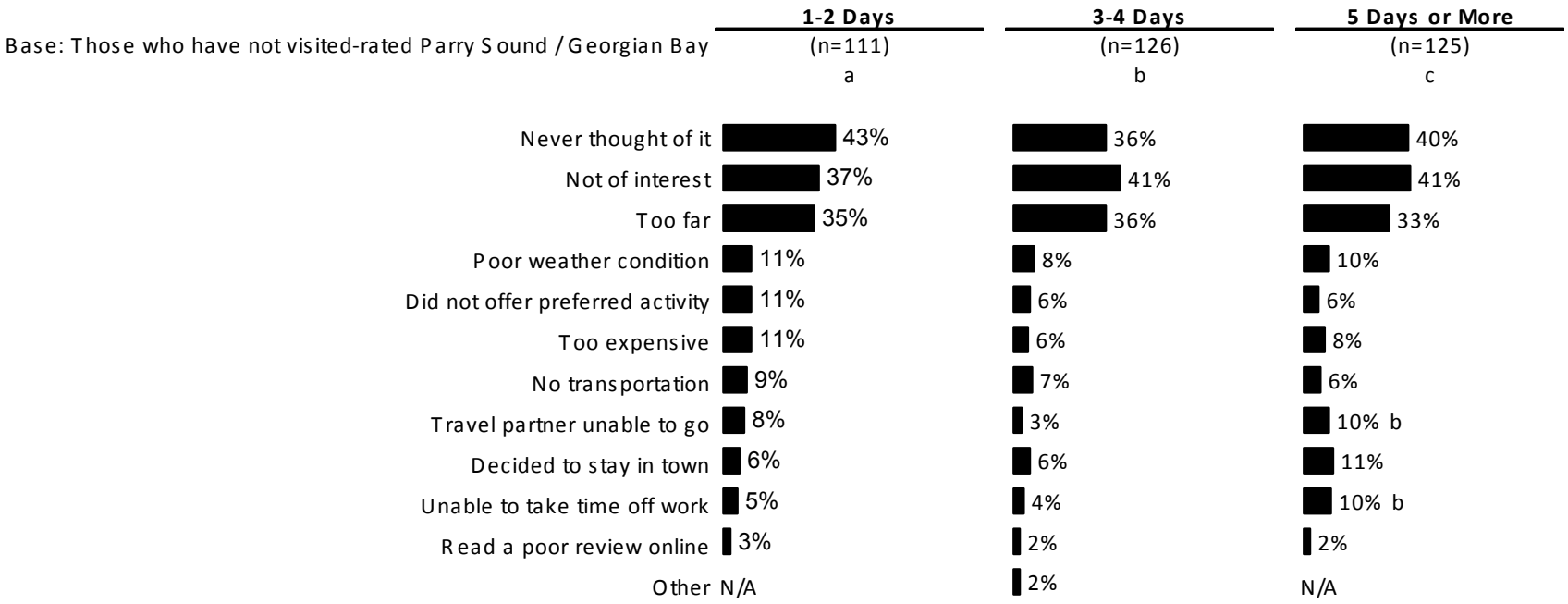
Barriers – Parry Sound / Georgian Bay



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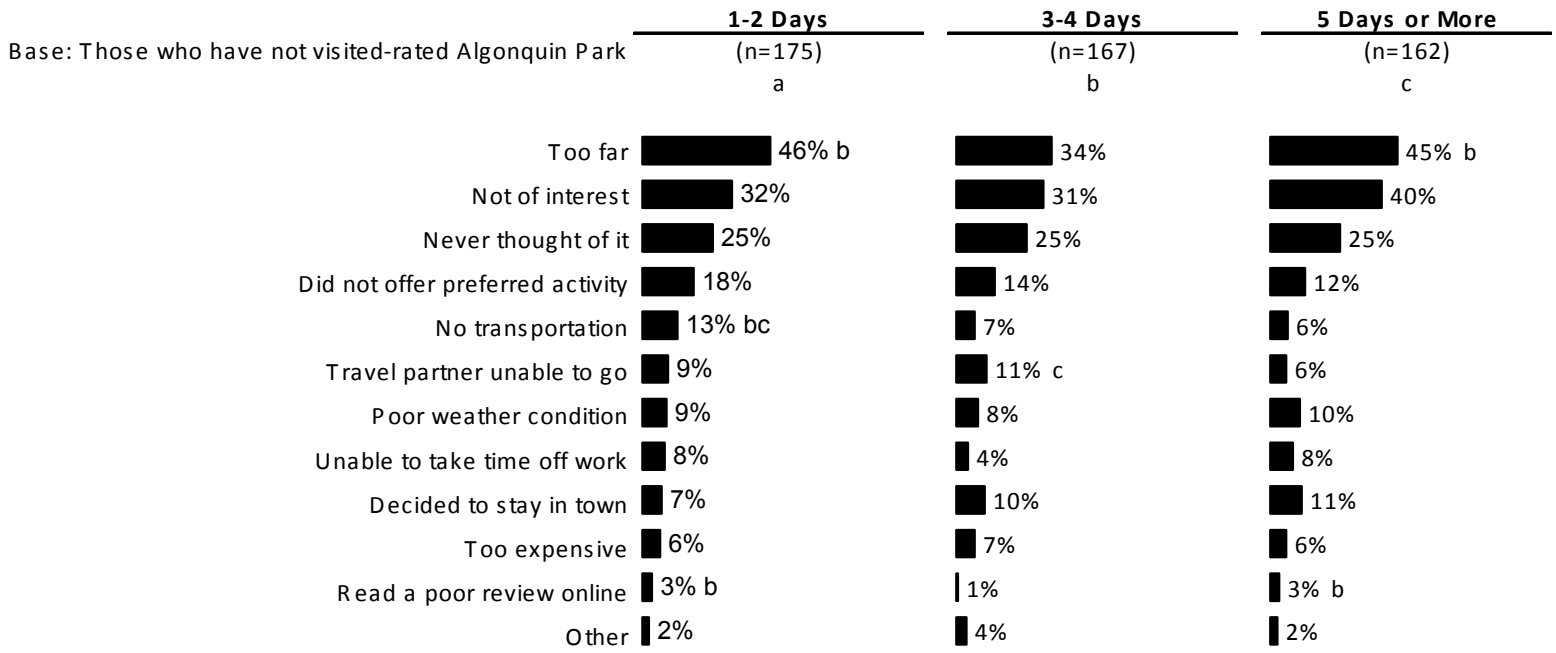
Barriers – Algonquin Park



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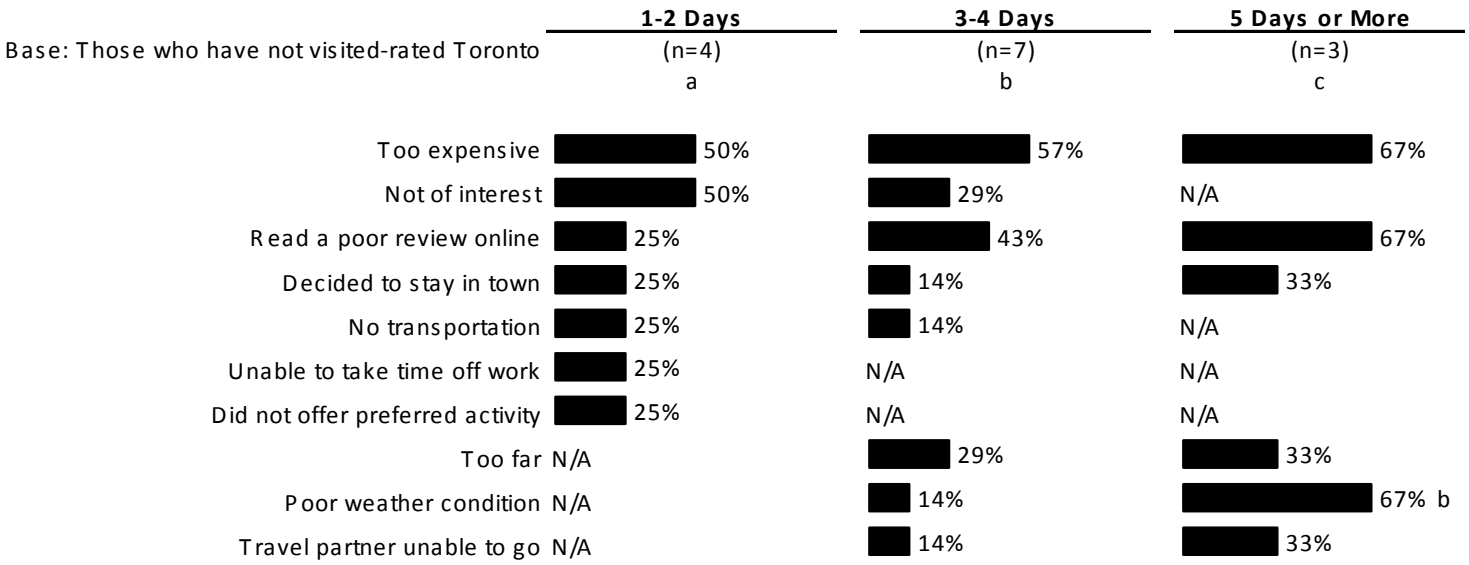
Barriers – Toronto



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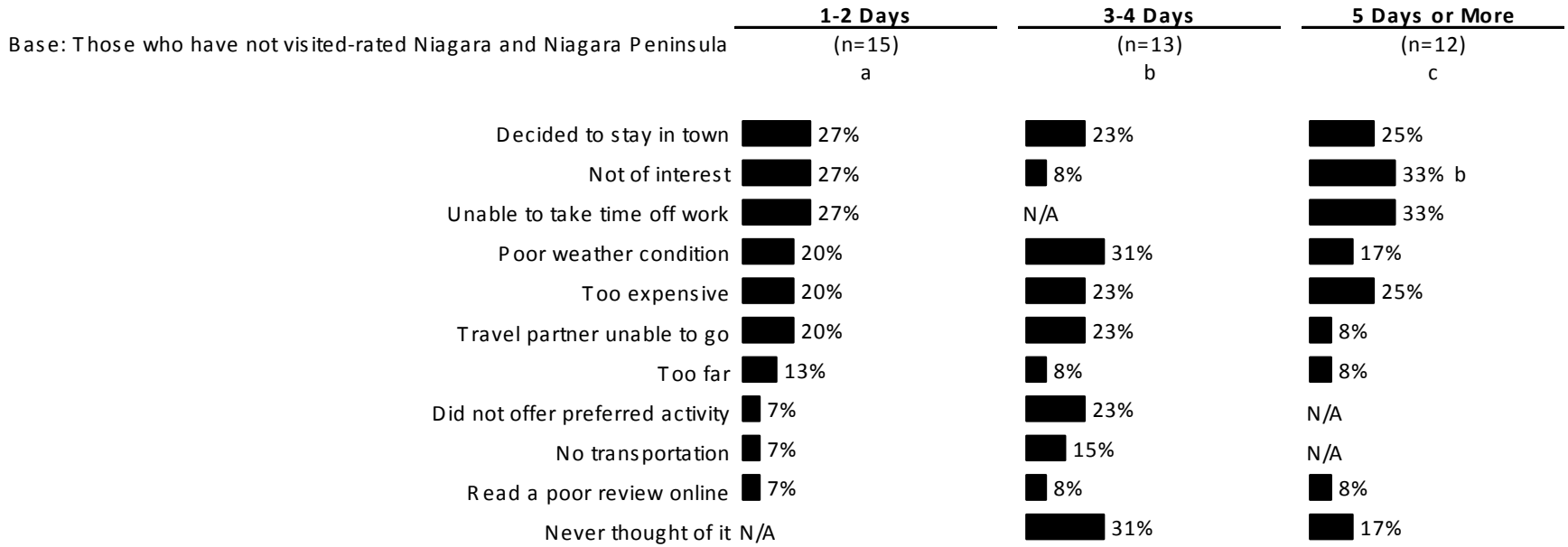
Barriers – Niagara and Niagara Peninsula



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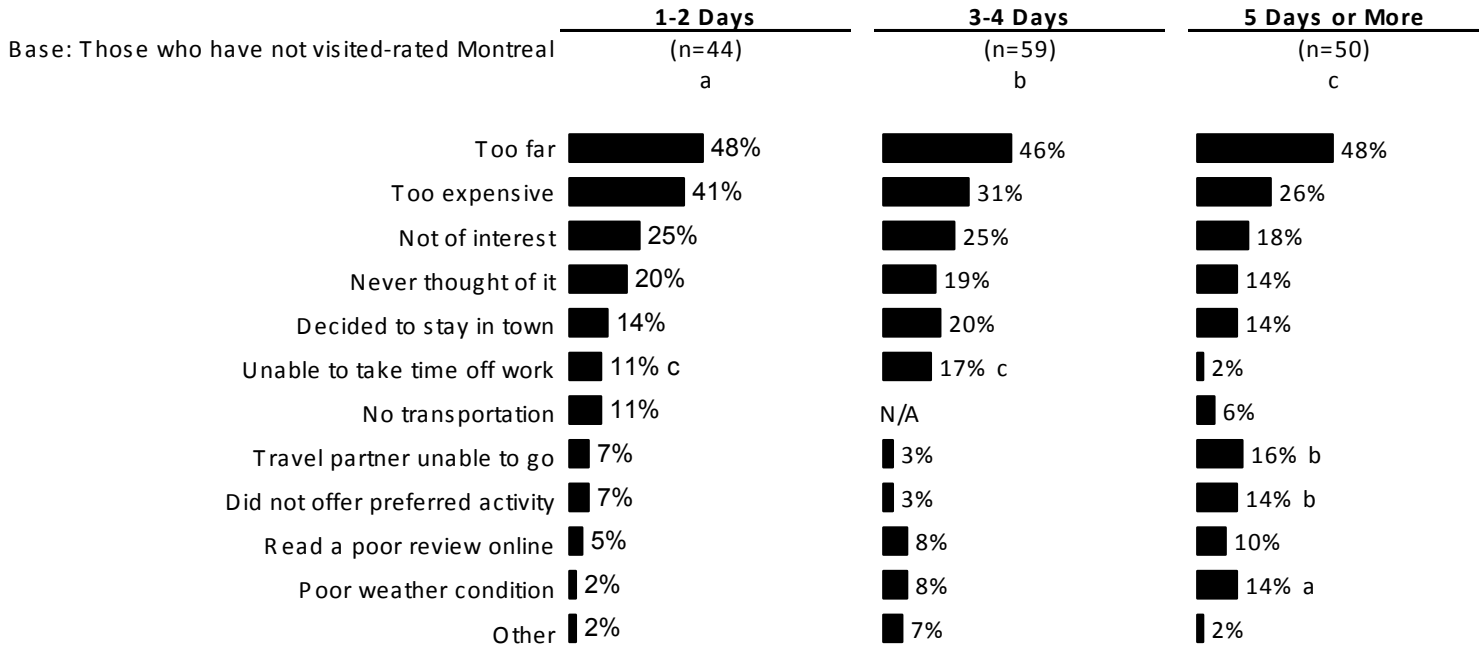
Barriers – Montreal



Q23: What do you believe has prevented you in the past from visiting each of the following regions?
a/b/c - Lower case letters indicate significance at the 90% level.

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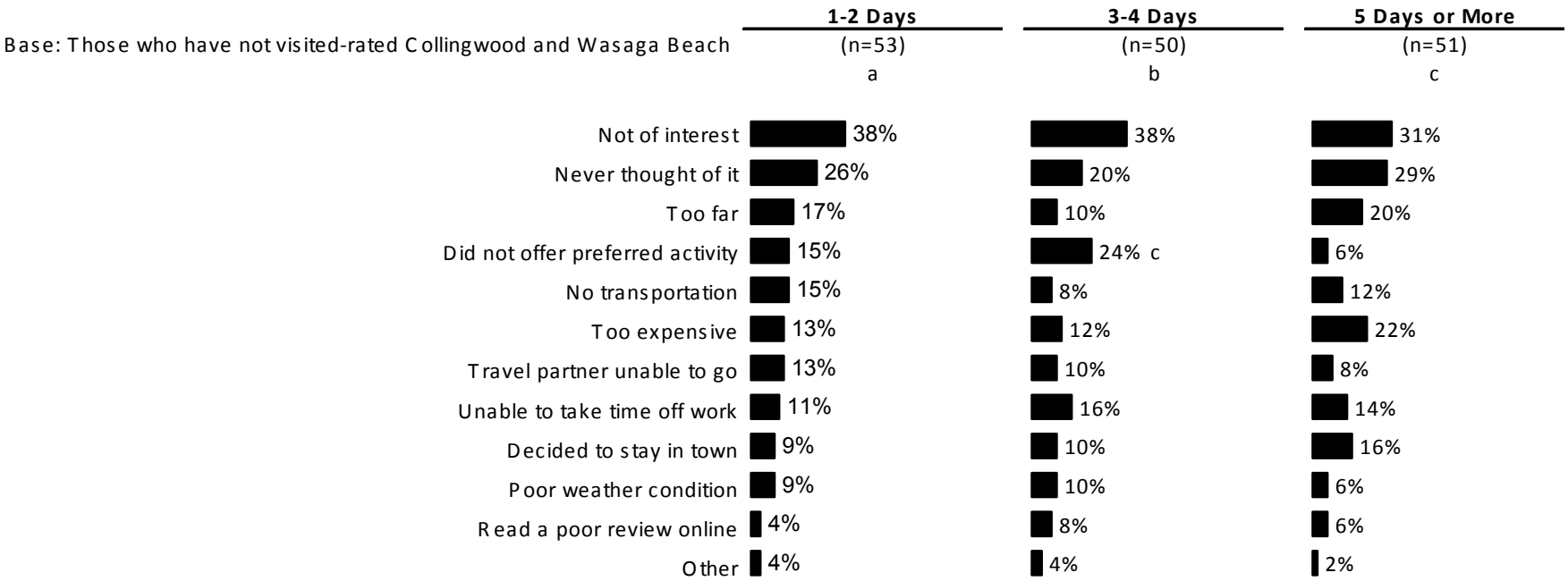
Barriers – Collingwood and Wasaga Beach



Q23: What do you believe has prevented you in the past from visiting each of the following regions?
a/b/c - Lower case letters indicate significance at the 90% level.

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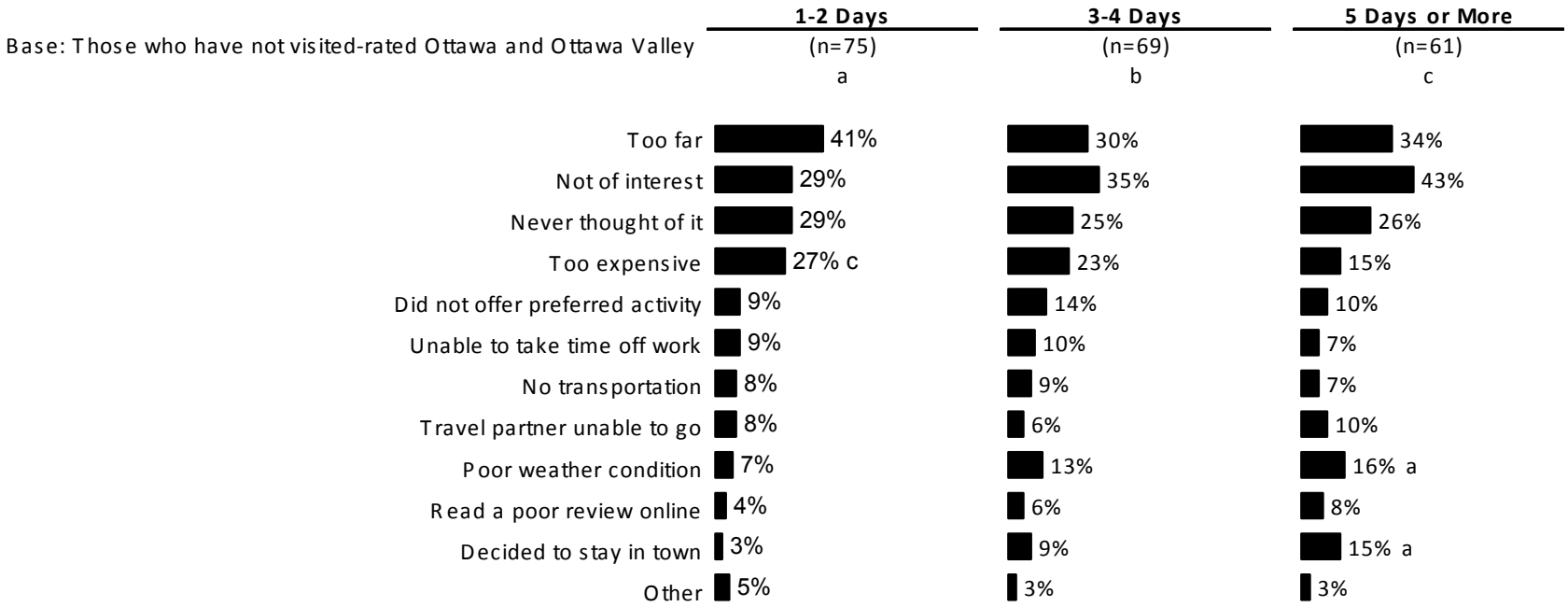
Barriers – Ottawa and Ottawa Valley



Q23: What do you believe has prevented you in the past from visiting each of the following regions?
a/b/c - Lower case letters indicate significance at the 90% level.

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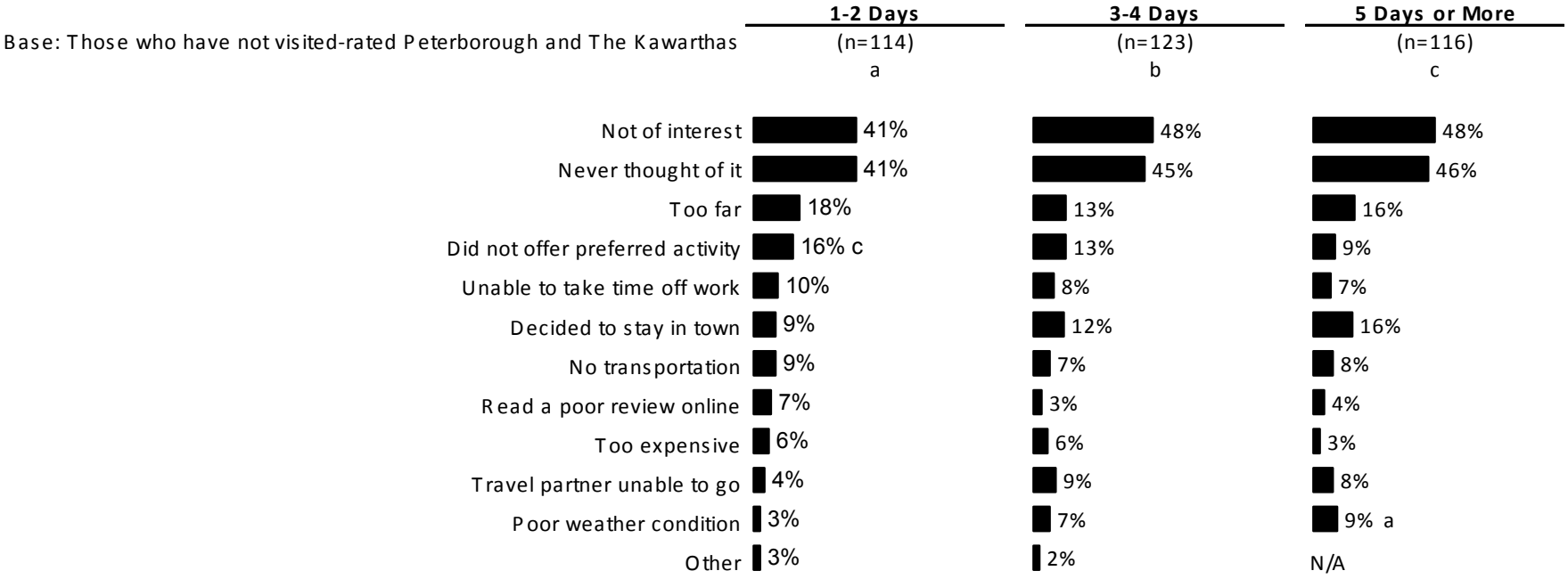
Barriers – Peterborough and The Kawarthas



Q23: What do you believe has prevented you in the past from visiting each of the following regions?
a/b/c - Lower case letters indicate significance at the 90% level.

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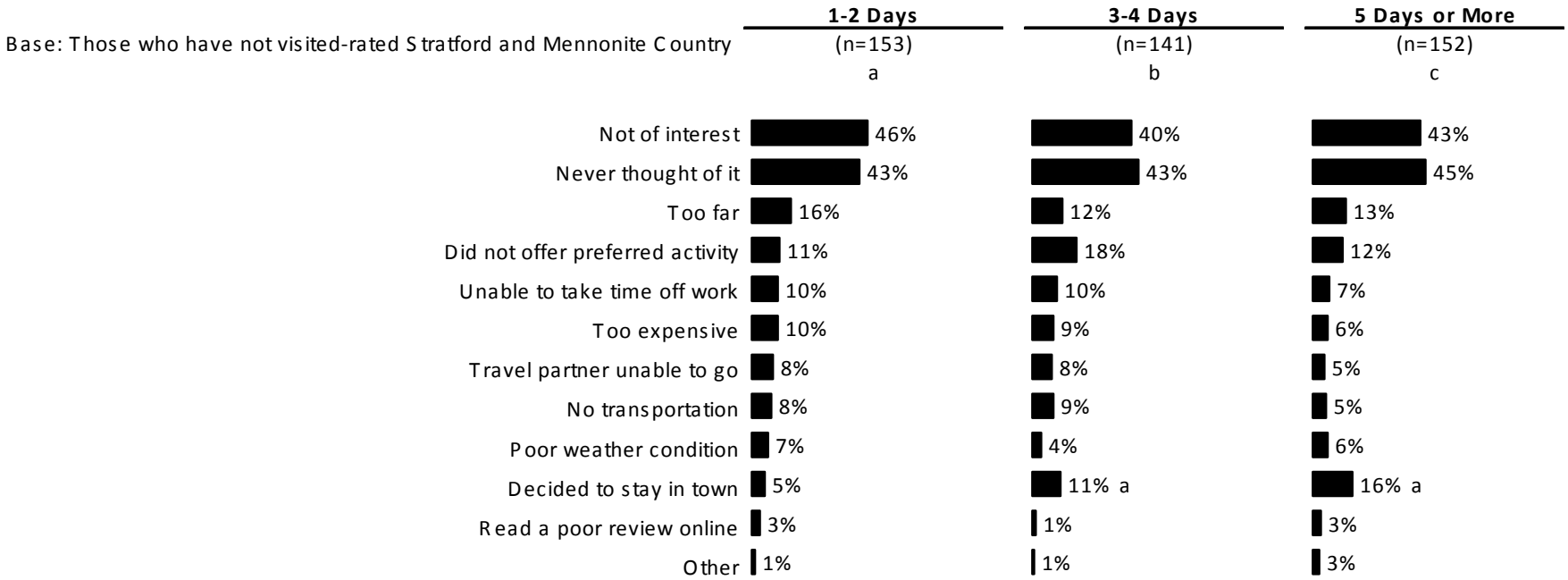
Barriers – Stratford and Mennonite Country



Q23: What do you believe has prevented you in the past from visiting each of the following regions?
a/b/c - Lower case letters indicate significance at the 90% level.

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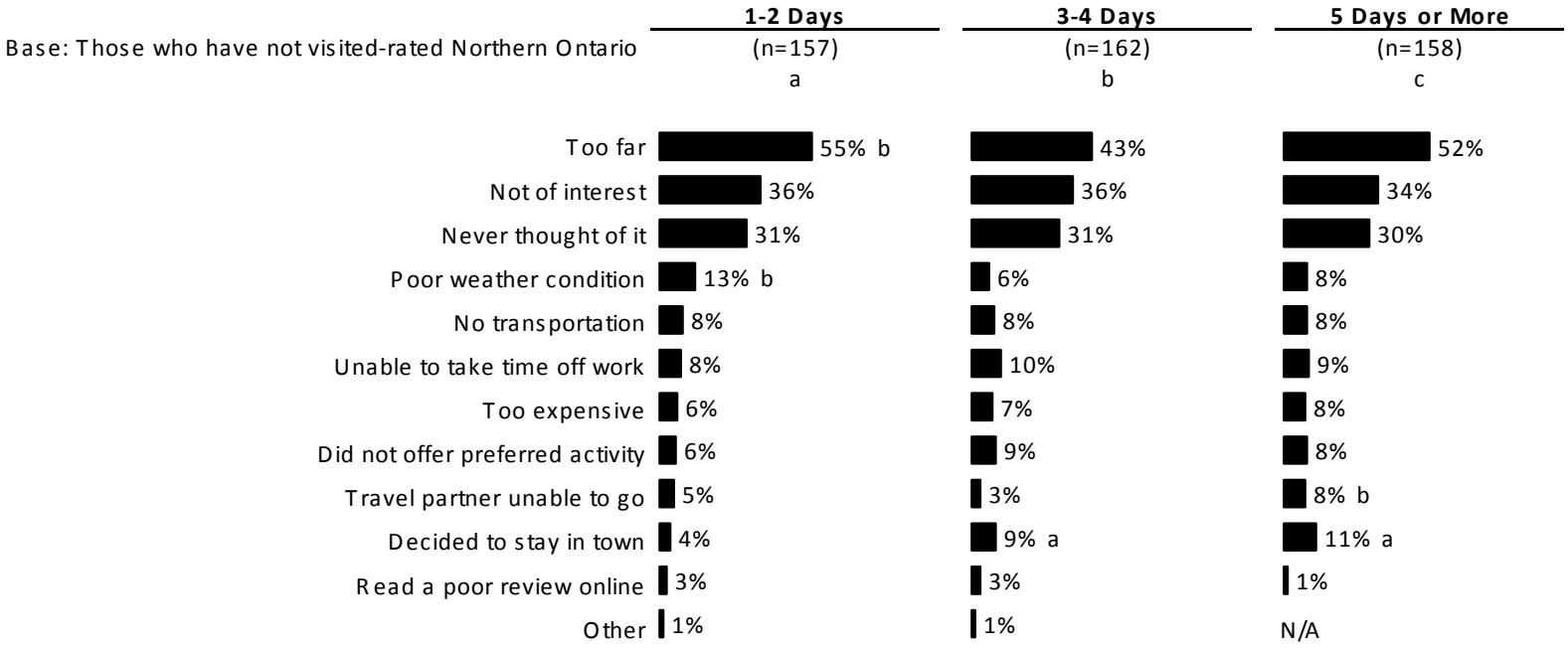
Barriers – Northern Ontario



Q23: What do you believe has prevented you in the past from visiting each of the following regions?
a/b/c - Lower case letters indicate significance at the 90% level.

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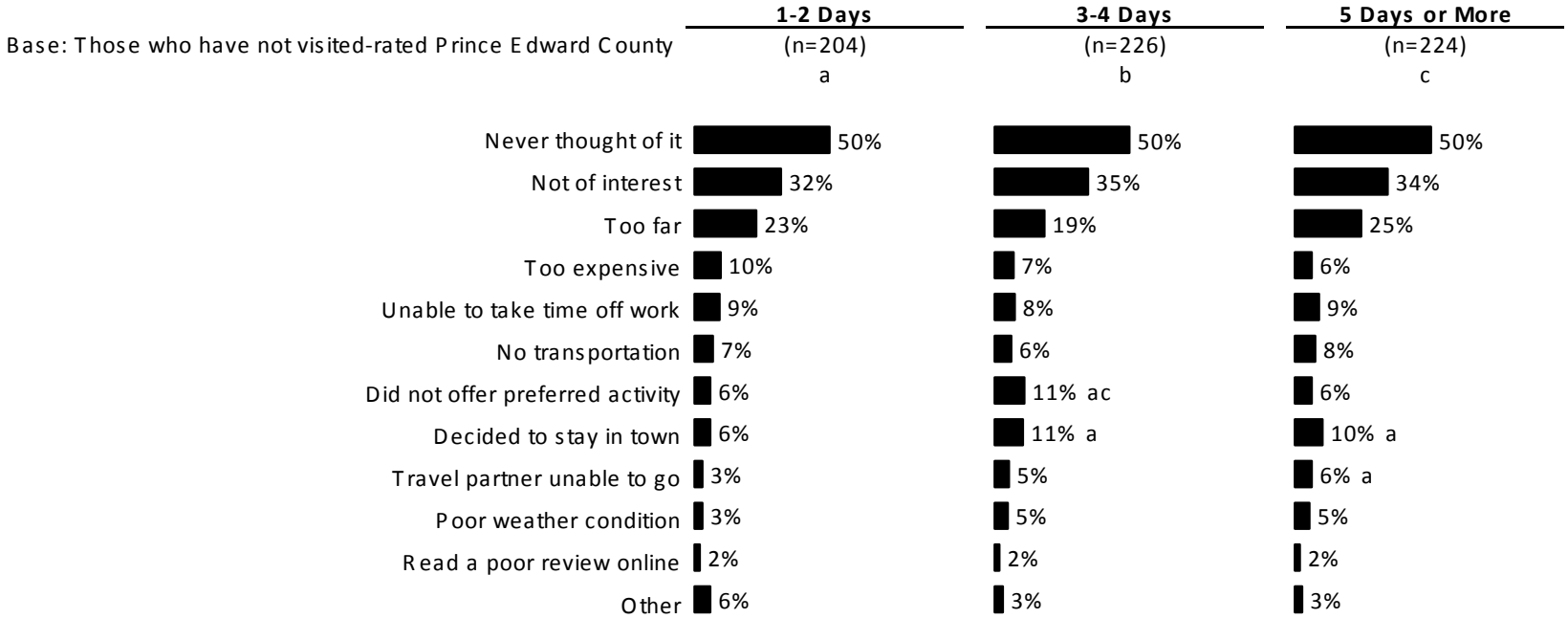
Barriers – Prince Edward County



Q23: What do you believe has prevented you in the past from visiting each of the following regions?
a/b/c - Lower case letters indicate significance at the 90% level.

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ON- & OFF-LINE VACATION PLANNING

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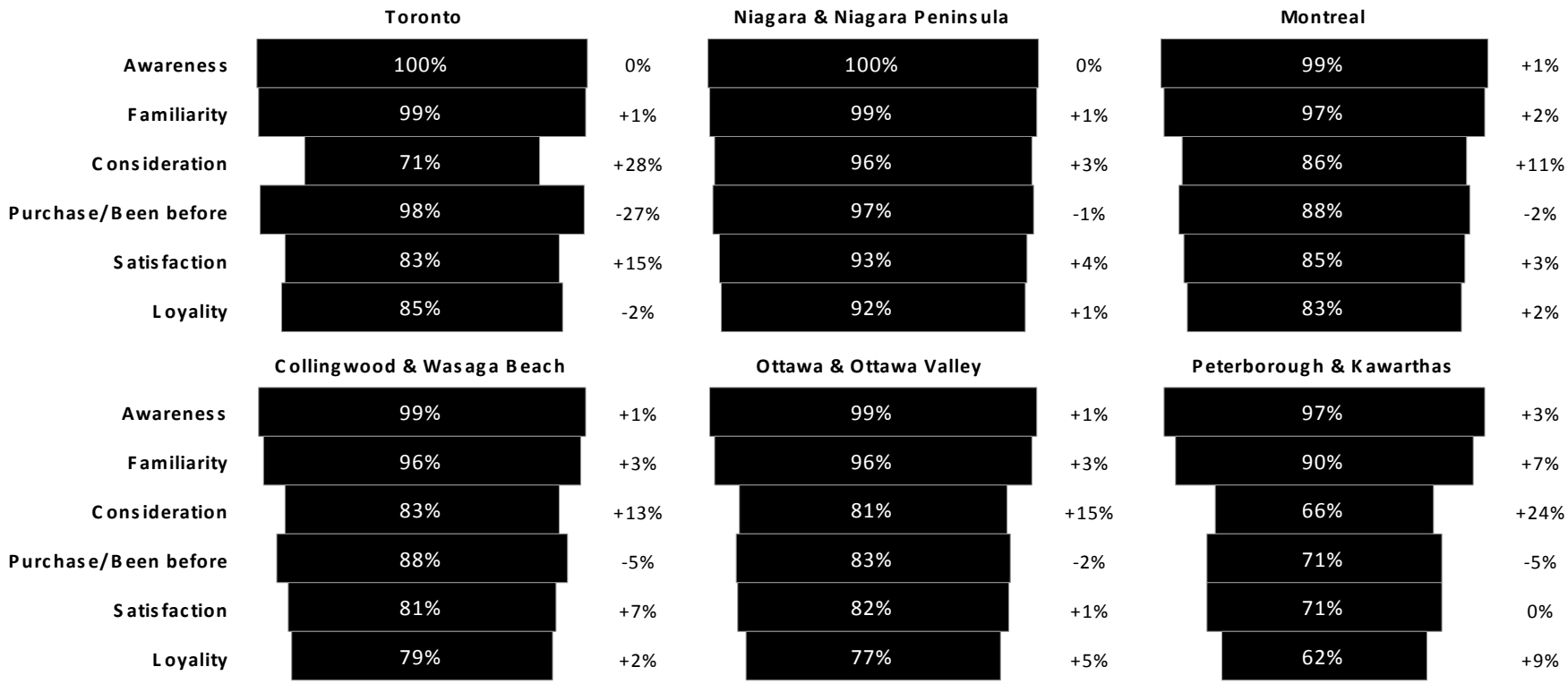
Funnel Chart



Base: Total Respondent (n=1230)

Q9: Which of the following statements best describes your experience with each tourism region.

Q10: Imagine you wanted to go on a vacation / get-away in Ontario or nearby, which statement best describes how you feel about each region?

Q11: Overall, how satisfied are you with your vacation / get-away in each region?

Q12: How likely are you to recommend the following region to your friends or family?

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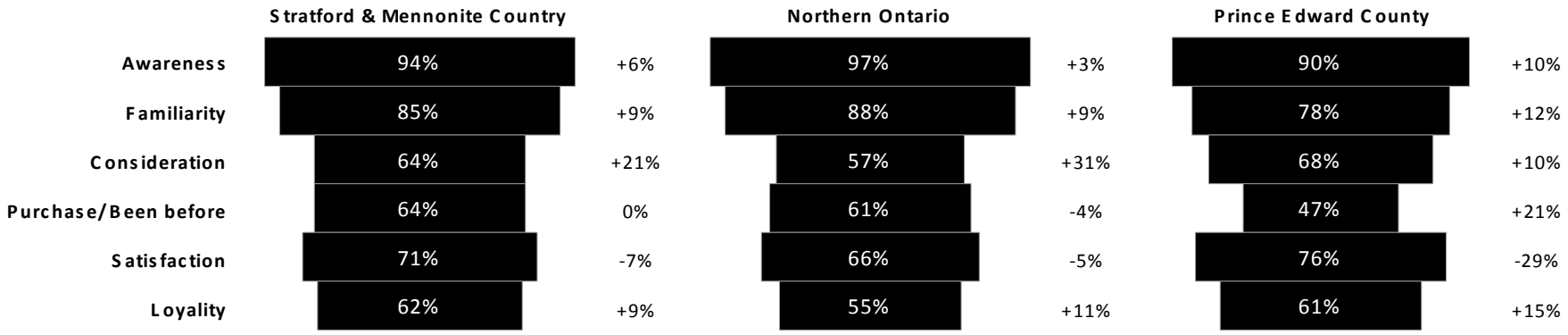
Funnel Chart (Cont' d)



Base: Total Respondent (n=1230)

Q9: Which of the following statements best describes your experience with each tourism region.

Q10: Imagine you wanted to go on a vacation / get-away in Ontario or nearby, which statement best describes how you feel about each region?

Q11: Overall, how satisfied are you with your vacation / get-away in each region?

Q12: How likely are you to recommend the following region to your friends or family?

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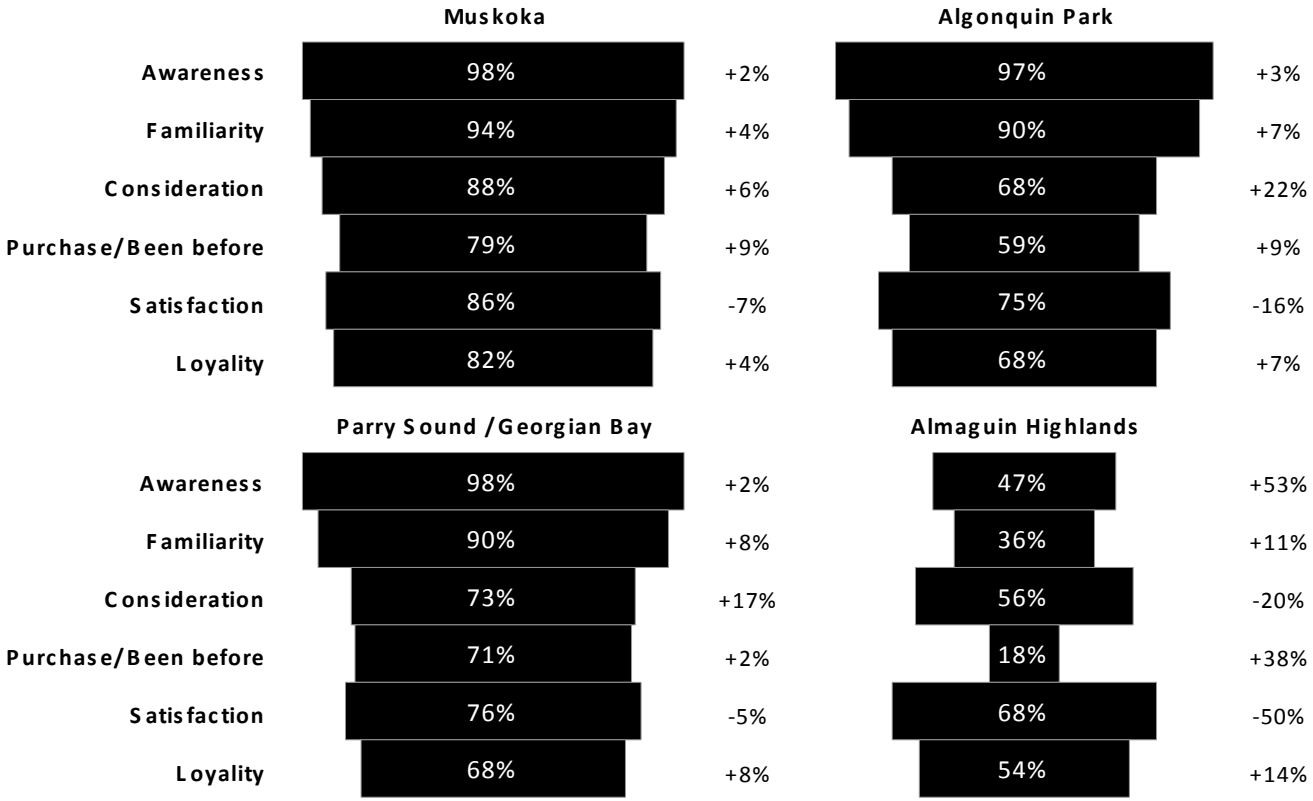
Funnel Chart – EE Region



Base: Total Respondent (n=1230)

Q9: Which of the following statements best describes your experience with each tourism region.

Q10: Imagine you wanted to go on a vacation / get-away in Ontario or nearby, which statement best describes how you feel about each region?

Q11: Overall, how satisfied are you with your vacation / get-away in each region?

Q12: How likely are you to recommend the following region to your friends or family?

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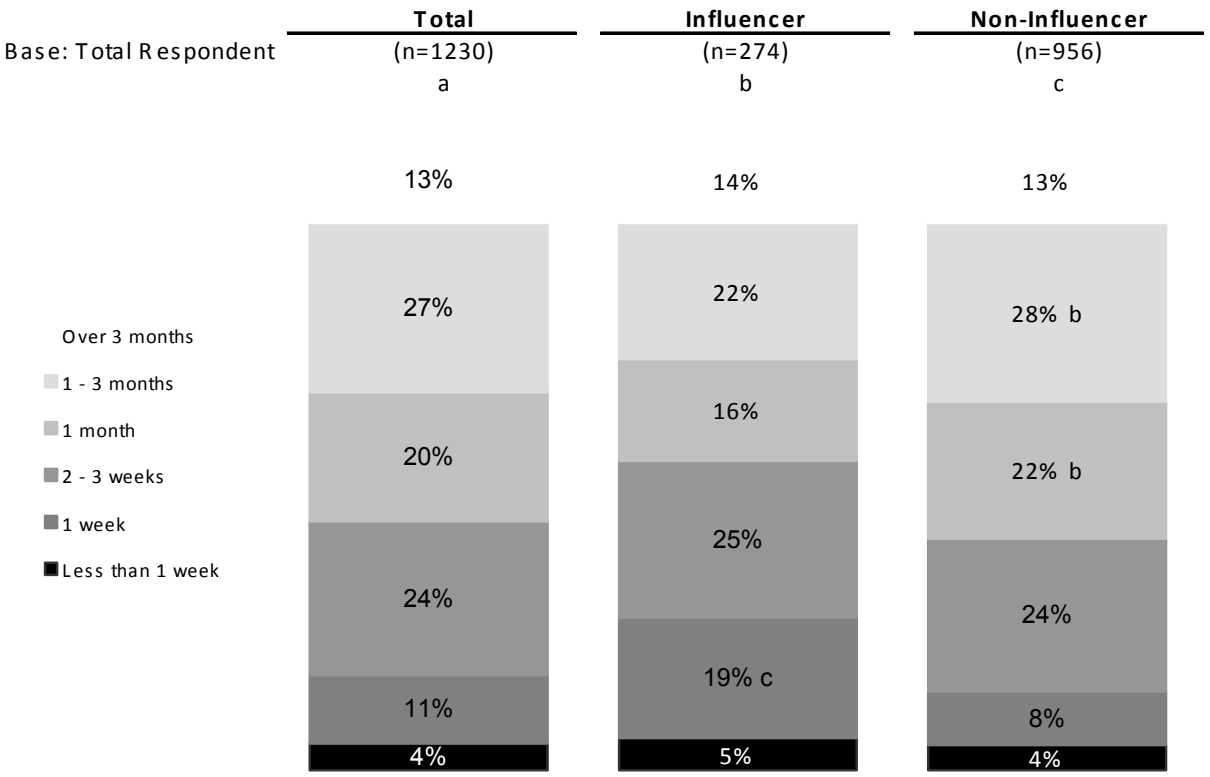
Duration of Advance Plan – Total & Influencer/Non-Influencer



Q16: When considering going on a [[PIPE HVAC]], how far in advance do you normally plan?
b/c - Lower case letters indicate significance at the 90% level.

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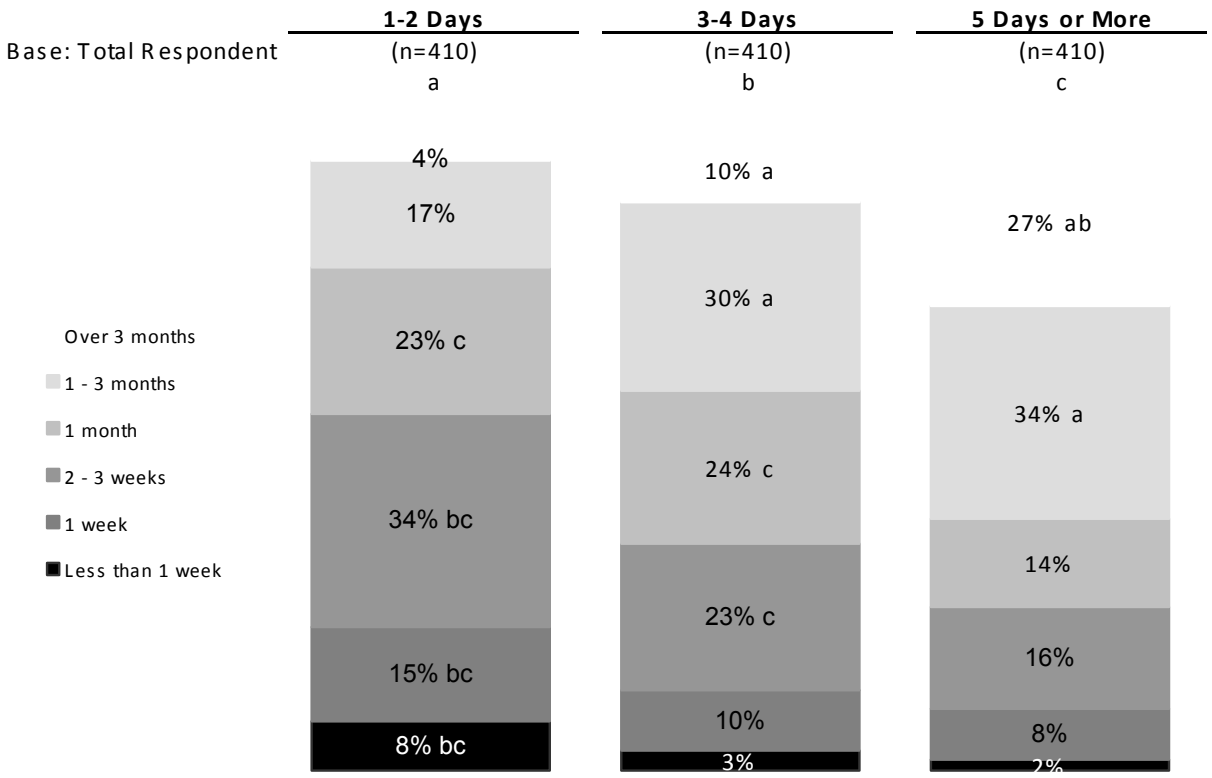
Duration of Advance Plan – Visitation Duration



Q16: When considering going on a [[PIPE HVAC]], how far in advance do you normally plan?
a/b/c - Lower case letters indicate significance at the 90% level.

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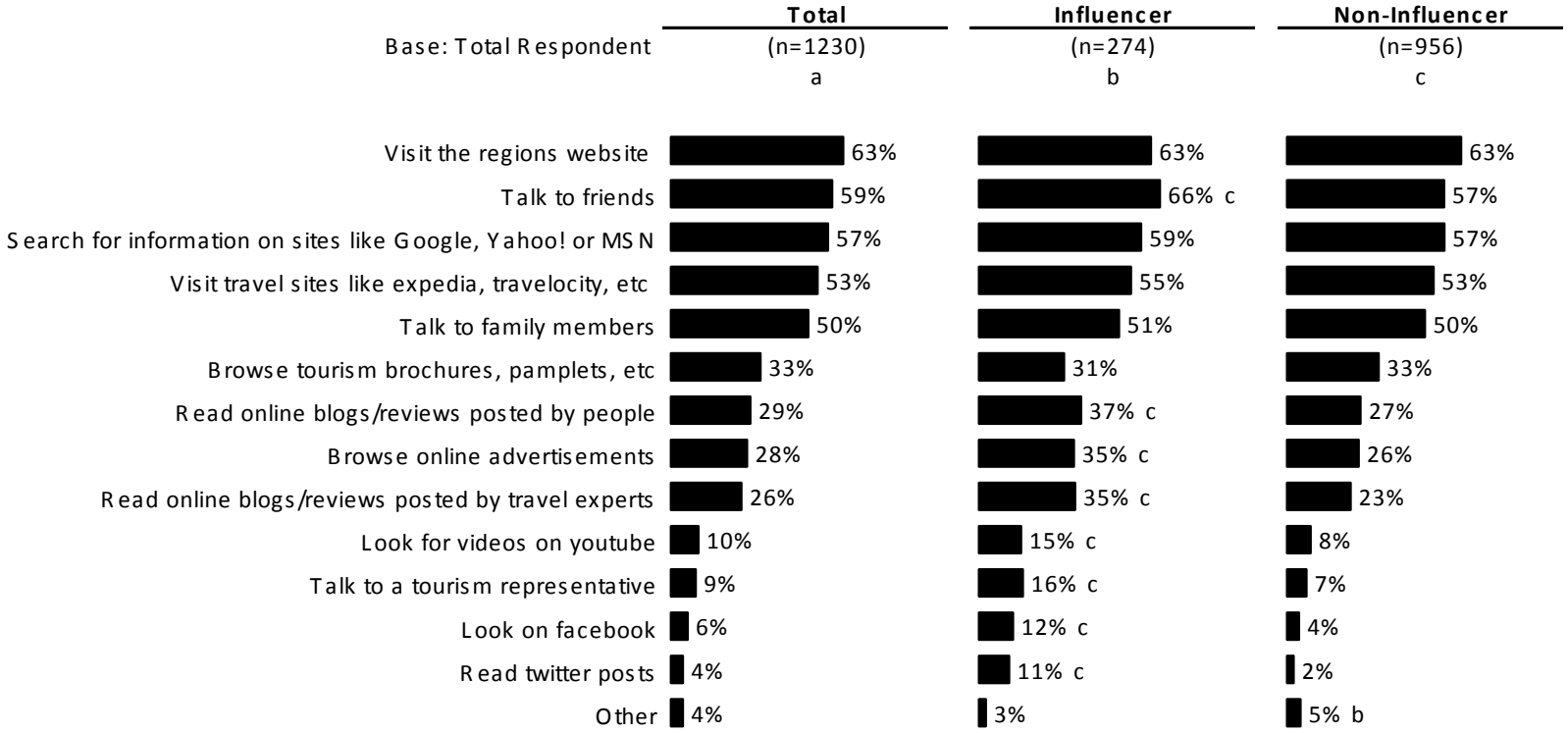
Actions for Planning – Total & Influencer/Non-Influencer



Q17: When planning a [[PIPE HVAC]], please indicate which actions you typically do. Please select all that apply.
b/c - Lower case letters indicate significance at the 90% level.

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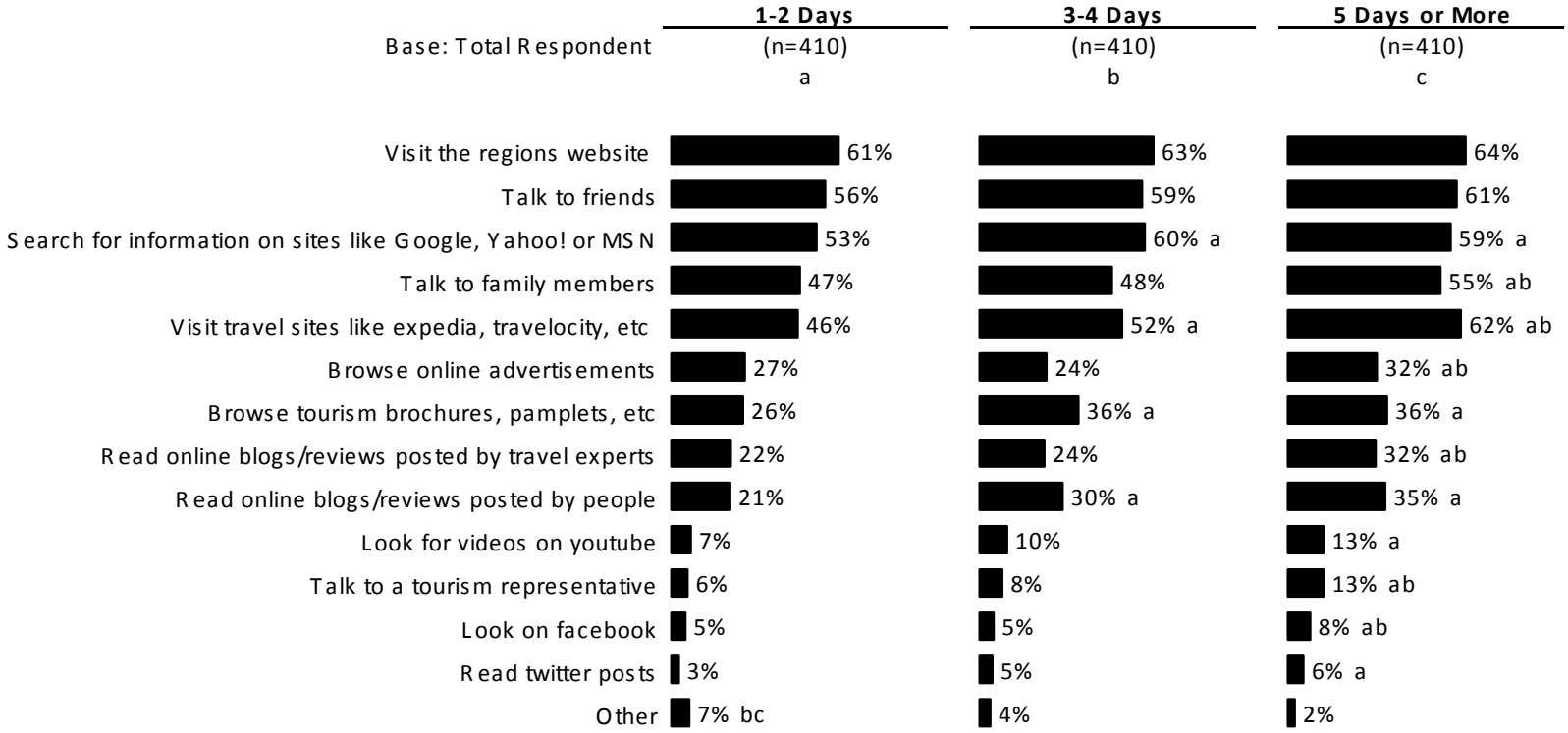
Actions for Planning – Visitation Duration



Q17: When planning a [[PIPE HVAC]], please indicate which actions you typically do. Please select all that apply.
a/b/c - Lower case letters indicate significance at the 90% level.

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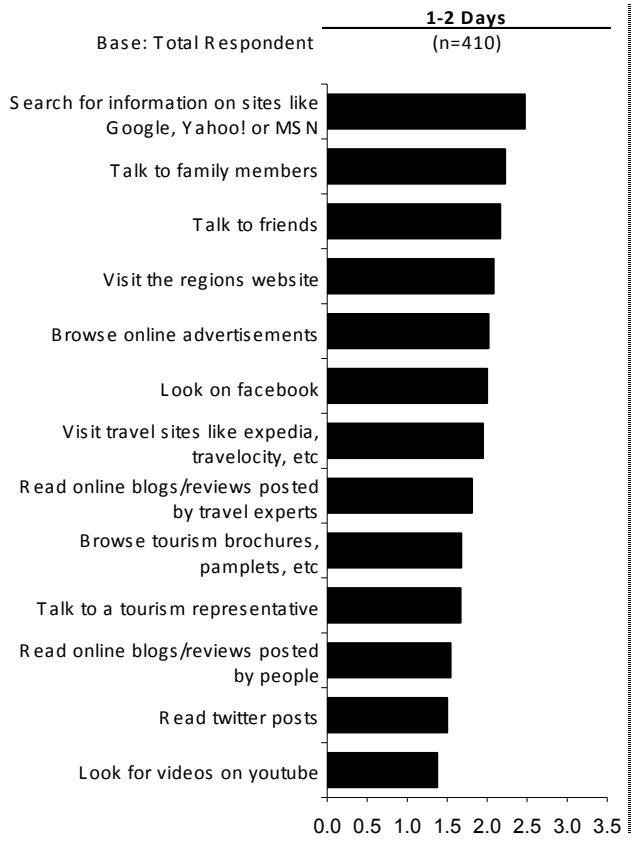
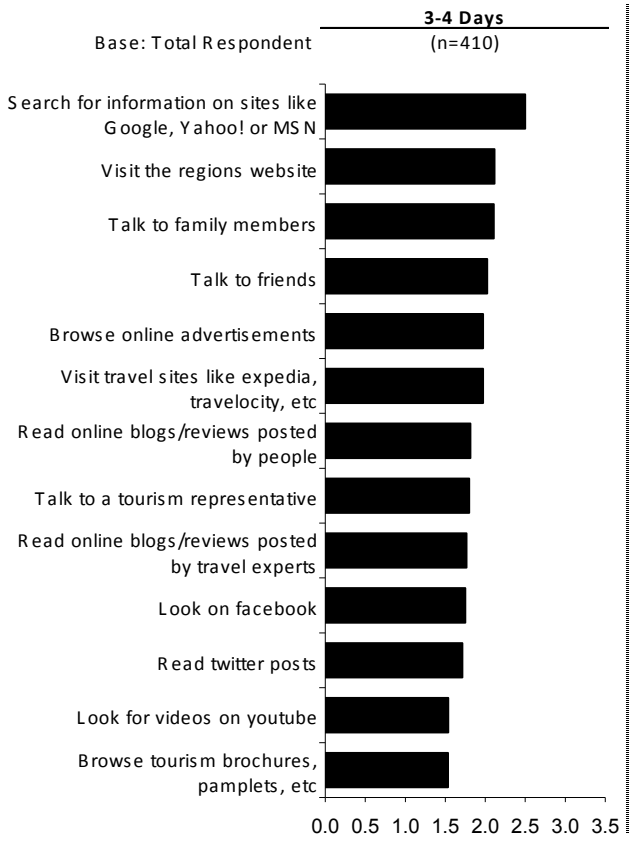
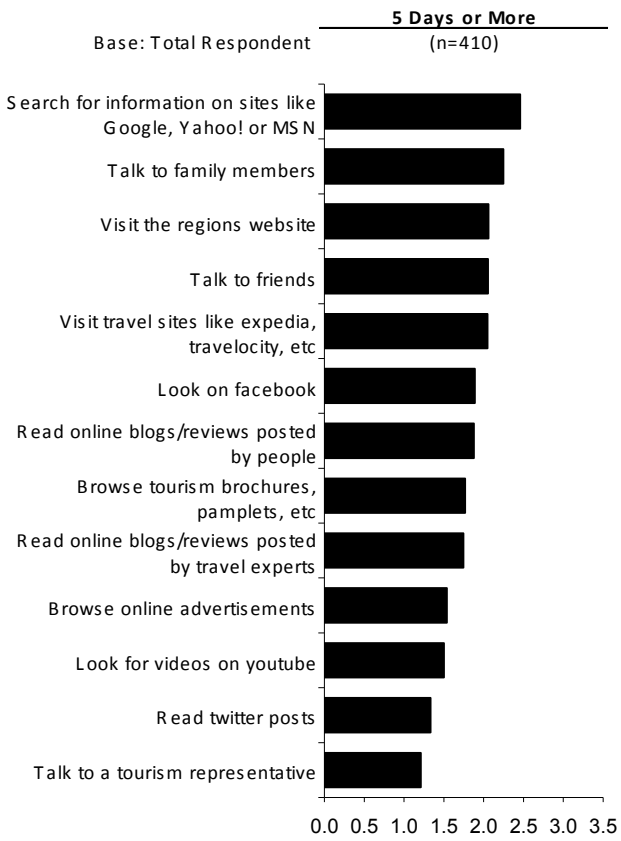
Order of Actions







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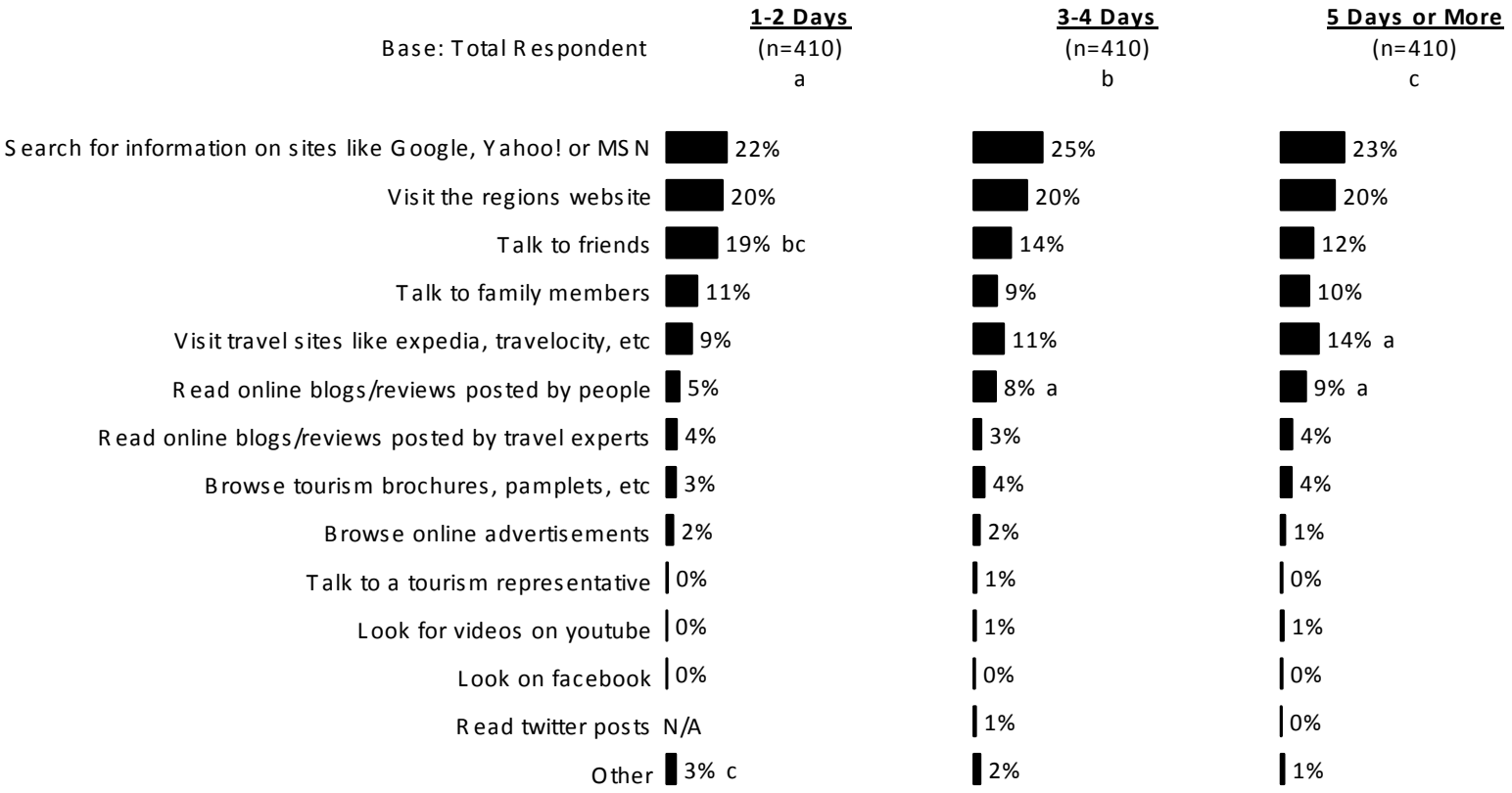
Q18: You have indicated that you do the following actions. In which order would you typically do them?

Order of Actions



Q19: Out of the actions you selected, what do you think will help you the most when deciding between alternative destinations.
a/b/c - Lower case letters indicate significance at the 90% level.

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