

Explorers' Edge

2016 Brand Research Report

June 29, 2016

Executive Summary

The objective of this survey is to understand the relative standing of the Explorers' Edge (EE) region compared to competing regions in Ontario, based on past visitation behaviour, intent to visit and current perceptions. This is the fourth brand tracking survey over the past 5 years. 505 responses were collected online in March, 2016

- Visitation behaviour:
 - Visitation patterns have changed very little over the five three years. Niagara continues to dominate as the most commonly visited destination with 60% of respondents having visited. It was followed by Muskoka in distant second place. Respondents 35-44 considerably more likely to visit Muskoka and Algonquin Park. Muskoka and Niagara have the highest rate of repeat visits
 - Summer continues to be the most popular season to visit EE, though there are signs of progress with respect to shoulder seasons. Older consumers are slightly likely of all age groups to visit in fall, while younger consumers indicate a slightly higher propensity to visit in winter. Niagara continues to be the least seasonal of all regions
- Awareness/recall & consideration/intent:
 - With unaided recall, Niagara is top of mind, with Muskoka in second place. Algonquin Park is the fifth most mentioned destination, up from previous years. Three sub-regions in EE were not named as destinations
 - Niagara, Muskoka and Collingwood are at the top of travelers' consideration sets – little change year over year in where they intend to visit in the next 9 months. Torontonians and 25-34 year olds are the most likely to include Explorers' Edge sub-regions in their consideration sets
 - Niagara, Hamilton and Muskoka top the list of destinations that respondents intend to visit in the next 12 months. Respondents under 35 and living in Toronto show the greatest intent to visit Explorers' Edge
 - Overall awareness of Explorers' Edge is highest ever at 9%. Prior visitors to EE, travelers 25-44 and residents of Toronto/GTA have highest levels of awareness. Those who are aware of Explorers' Edge associate it with words consistent with our brand positioning. Likelihood to visit the region is the highest in the five years of measurement with younger travelers show the highest level of intent overall

Executive Summary

- Regional perceptions:
 - “Momentum” is one measure of the 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”. Muskoka, Parry Sound and Algonquin are seen to be increasing in popularity while Almaguin Highlands and Port Loring are seen to be doing the opposite
 - As was the case in 2014, EE’s regions score high on vacation decision criteria related to nature and family-friendliness. We do not fare well on others factors such as proximity, accommodations, accessibility, cultural activities, attractions and dining/entertainment and packaged deals
- Consumer travel decision process:
 - A region’s website is still the most important planning tool; digital activities are three of the top five actions taken
 - Places to stay, things to do and places to eat all three rank high in the purchase decision, though where to stay and things to do are slightly more important in the decision process. Younger travelers value dining options more than older ones
 - An assessment of 15 potential motivators to visit the region revealed that local food movements and a multiplicity of outdoor activities are most likely to motivate the decision to visit

Methodology

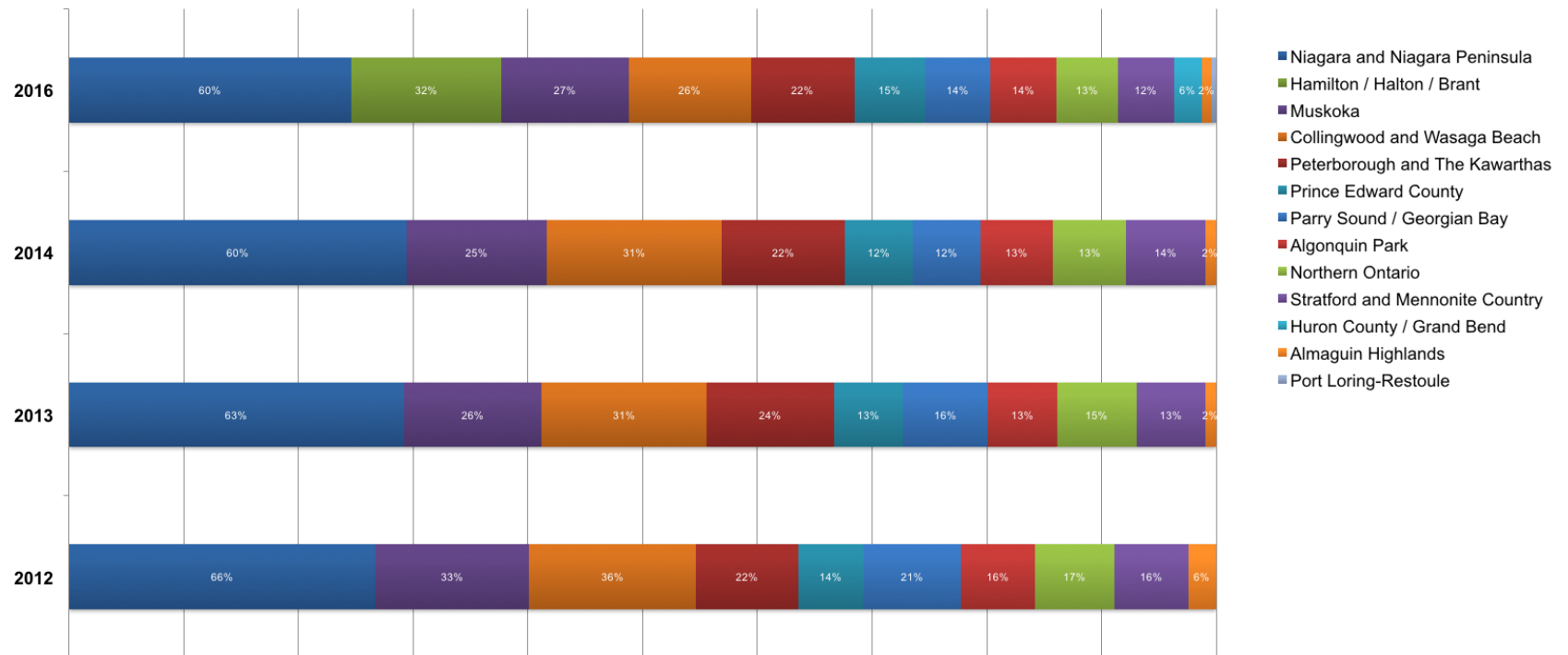
- Online quantitative research survey:
 - The 2016 was in-field from March 23 to March 29 – a total of 505 surveys were completed online
 - Distributed to ensure a quota based on age, income, gender and geographic location
 - Completed by residents of Southwestern Ontario
 - Survey focused on regions considered to be competitive to Explorers' Edge (and excluded those that are not such as Toronto and Ottawa). Caution should be exercised when evaluating the results for Port Loring/Restoule and the Almaguin Highlands due to small sample sizes



Visitation Behaviour

Regions Visited Past Year – by Wave

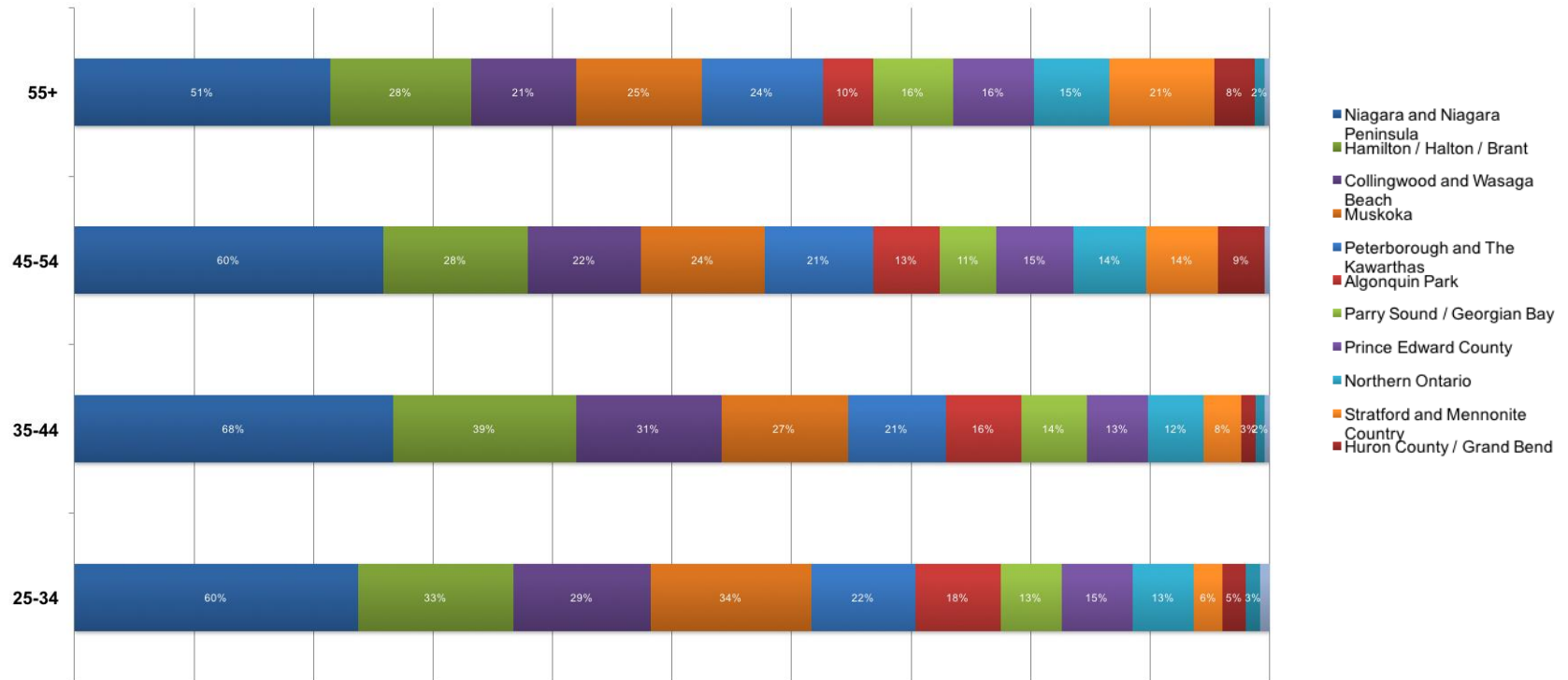
- Visitation patterns have changed very little over the five three years. Niagara continues to dominate as the most commonly visited destination with 60% of respondents having visited. It was followed by Muskoka in second place



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

Regions Visited Past Year – by Age Group

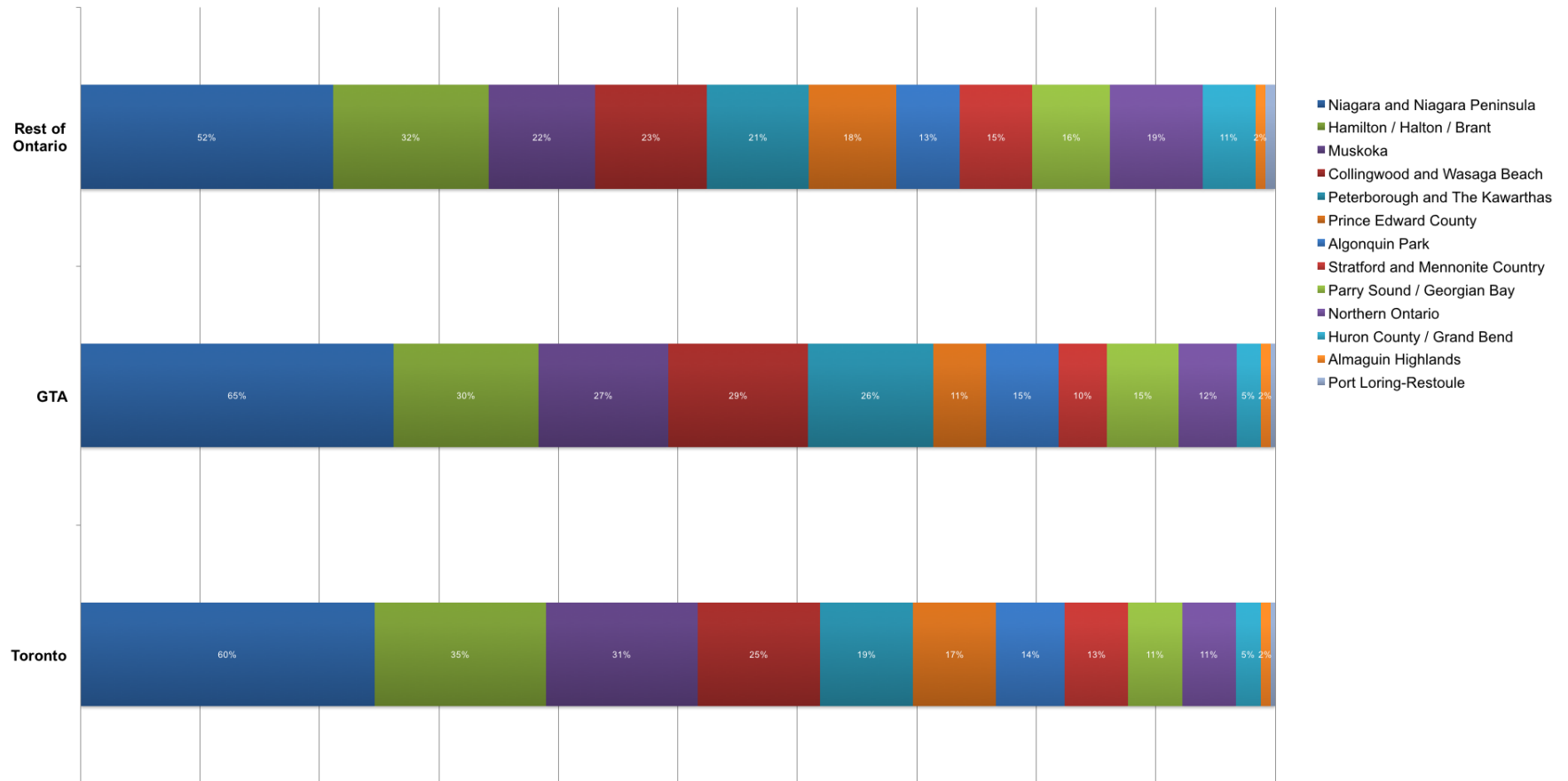
- Respondents 35-44 are considerably more likely to visit Muskoka and Algonquin Park



Q57. Which of the following areas have you visited within the past year?

Regions Visited Past Year – by Origin

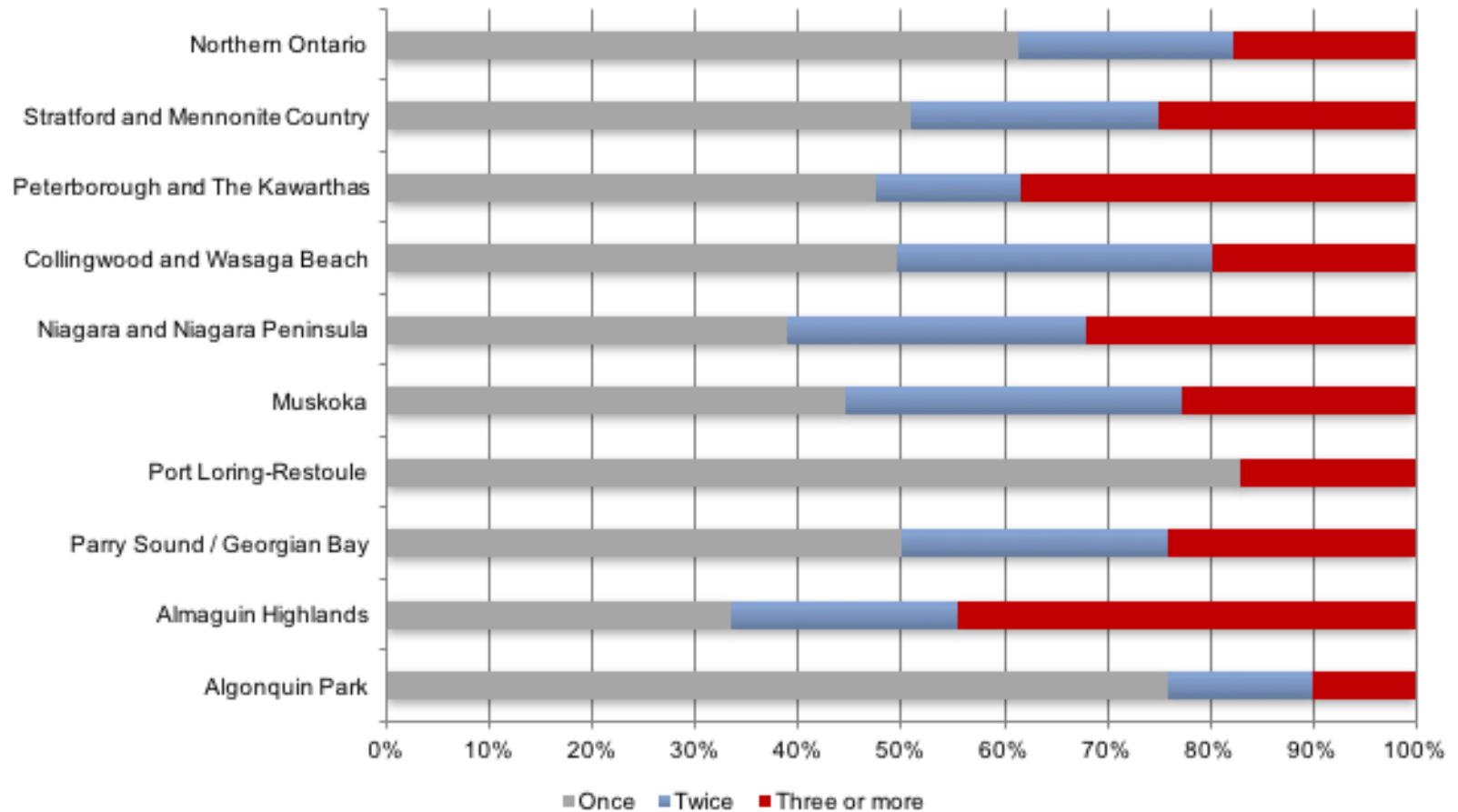
- Respondents from the GTA show the greatest tendency to visit Niagara; those from Toronto are mostly likely to visit Muskoka



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

Frequency of Visit

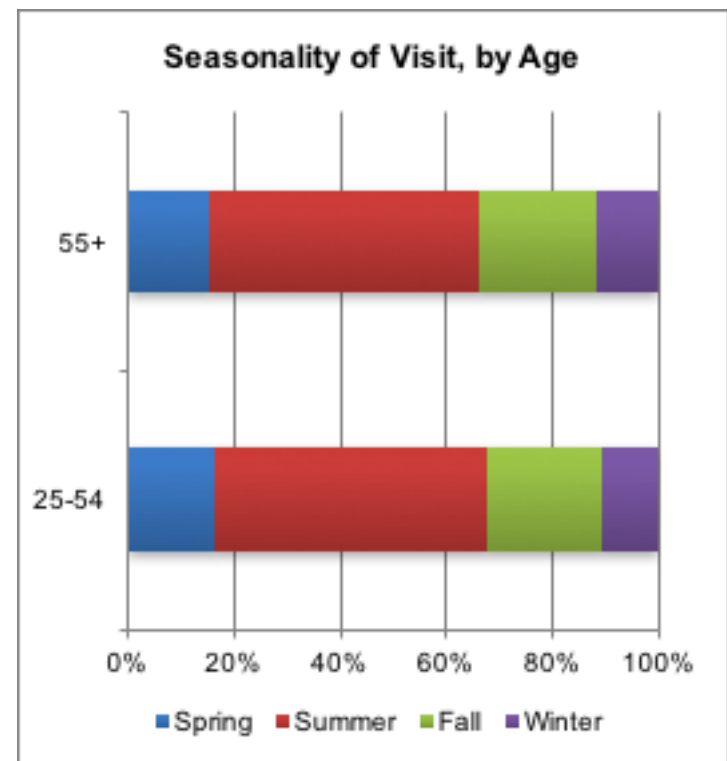
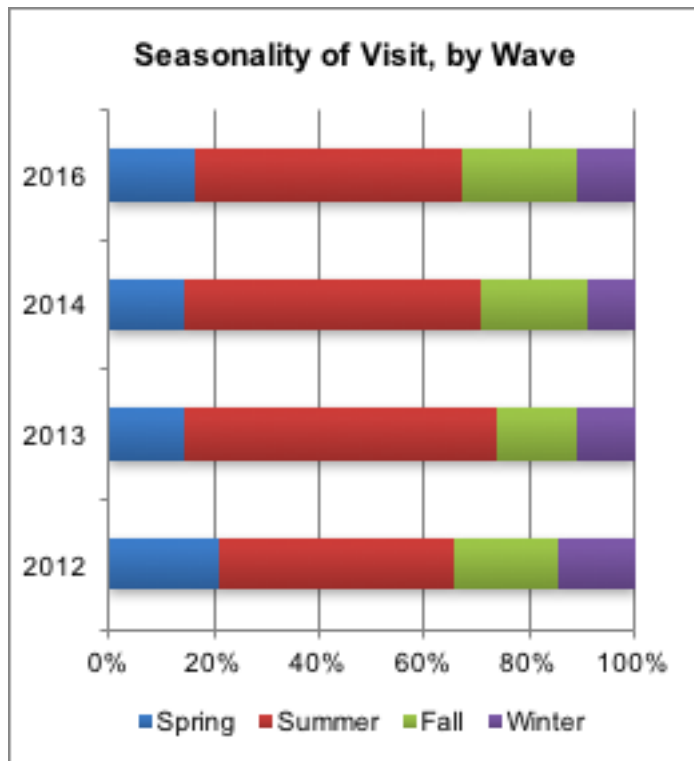
- Muskoka and Niagara have the highest rate of repeat visits



Q1D. How many times in the past year have you visited each of the following regions?

Seasonality of Visits – Explorers' Edge Region

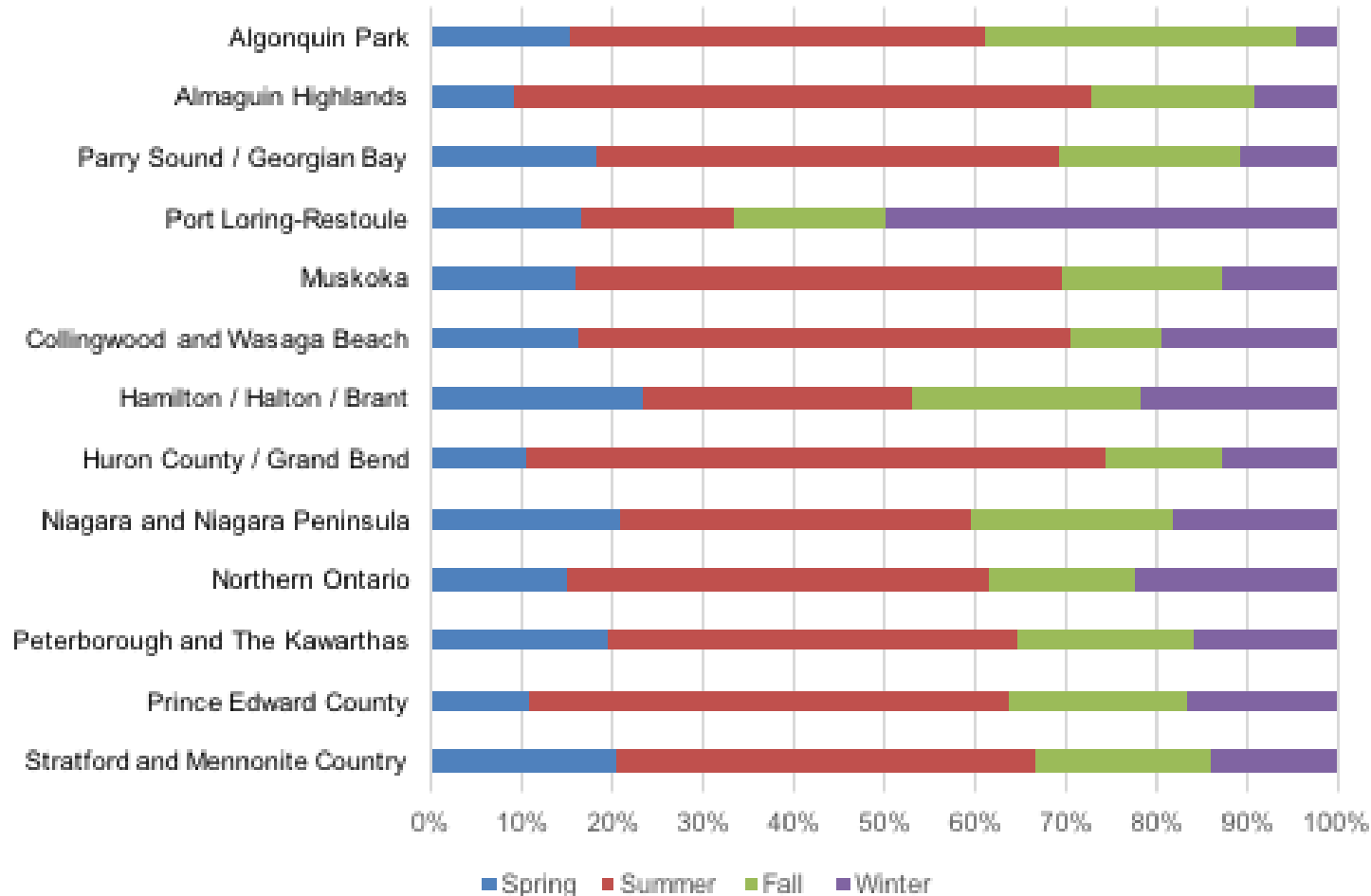
- Summer continues to be the most popular season to visit the region, though there are signs of progress with respect to shoulder seasons. Older consumers are slightly likely of all age groups to visit in fall, while younger consumers indicate a slightly higher propensity to visit in winter



Q3A. During what season(s) have you visited each of the following regions?

Seasonality of Visits

- Niagara continues to be the least seasonal region



Q3A. During what season(s) have you visited each of the following regions?



Awareness/Recall & Consideration/Intent

Destination Mentions Unaided - by Wave

- Niagara is top of mind, with Muskoka is in second place. Algonquin Park is the fifth most mentioned destination in Ontario, up from previous years. Three sub-regions in Explorers' Edge were not named as destinations

Region	2012	2013	2014	2016
Niagara/Stratford	1	1	1	1
Muskoka	2	2	2	2
Ottawa	3	3	3	3
Prince Edward county/Kingston/1000 islands	6	6	5	4
Algonquin	7	8	9	5
Barrie/Collingwood/Blue Mountain	4	4	6	6
Wasaga Beach/Georgian Bay	5	5	4	7
Kawarthas/Peterborough	9	9	11	8
Toronto/GTA	10	11	10	9
Haliburton	12	10	12	10
Northern Ontario	8	7	7	11
London/Kitchener/Waterloo/W. Ontario	11	12	8	12

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

Destination Mentions Unaided - by Origin

- The top three destinations are the same regardless of where respondent lives

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

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

Destination Mentions Unaided - by Age

- The top three destinations are the same regardless of age

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

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

Consideration Set – by Wave

- Niagara, Muskoka and Collingwood are at the top of travelers' consideration sets – little change year over year

Destination	2012	2013	2104	2016
Niagara and Niagara Peninsula	34%	31%	38%	35%
Muskoka	26%	23%	23%	25%
Collingwood and Wasaga Beach	22%	19%	22%	19%
Algonquin Park	17%	12%	15%	16%
Peterborough and The Kawarthas	15%	14%	13%	14%
Almaguin Highlands	17%	11%	11%	12%
Stratford and Mennonite Country	14%	9%	13%	12%
Parry Sound / Georgian Bay	18%	15%	15%	11%
Northern Ontario	16%	10%	13%	11%
Hamilton / Halton / Brant	N/A	N/A	N/A	11%
Huron County / Grand Bend	N/A	N/A	N/A	10%
Port Loring-Restoule	N/A	N/A	N/A	9%

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?
 Percentage represent total respondents who said it was "The only choice I would consider" and "My preferred choice but I would consider other alternatives".

Consideration Set – by Origin

- Torontonians are the most likely to include Explorers' Edge sub-regions in their consideration sets

Destination	Toronto	GTA	Rest of Ontario
Niagara and Niagara Peninsula	36%	43%	20%
Muskoka	30%	25%	19%
Collingwood and Wasaga Beach	21%	20%	15%
Algonquin Park	20%	15%	13%
Almaguin Highlands	19%	7%	9%
Port Loring-Restoule	16%	6%	4%
Stratford and Mennonite Country	15%	11%	9%
Peterborough and The Kawarthas	14%	14%	13%
Huron County / Grand Bend	14%	7%	10%
Parry Sound / Georgian Bay	13%	12%	9%
Northern Ontario	13%	8%	13%
Hamilton / Halton / Brant	12%	9%	12%

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".

Consideration Set – by Age

- 25 to 34 year olds are most likely to include Explorers' Edge sub-regions in their consideration sets

Destination	25-34	35-44	45-54	55+
Niagara and Niagara Peninsula	41%	41%	32%	25%
Muskoka	42%	22%	23%	17%
Collingwood and Wasaga Beach	34%	19%	18%	10%
Algonquin Park	27%	15%	10%	13%
Hamilton / Halton / Brant	15%	11%	10%	8%
Almaguin Highlands	30%	10%	6%	5%
Stratford and Mennonite Country	10%	10%	9%	18%
Northern Ontario	14%	9%	10%	13%
Huron County / Grand Bend	23%	8%	8%	5%
Parry Sound / Georgian Bay	19%	7%	10%	12%
Port Loring-Restoule	16%	7%	8%	5%
Peterborough and The Kawarthas	22%	6%	12%	17%

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".

Intention to Visit

- Not surprisingly, Niagara, Hamilton and Muskoka top the list of destinations that respondents intend to visit in the next 12 months. Respondents under 35 and living in Toronto show the greatest intent to visit Explorers' Edge

Region	All	Toronto	GTA	Rest of Ontario	25-34	35-44	45-54	55+
Niagara and Niagara Peninsula	67%	68%	69%	62%	64%	73%	60%	68%
Hamilton / Halton / Brant	44%	44%	41%	50%	51%	46%	41%	41%
Muskoka	41%	45%	40%	38%	46%	39%	42%	38%
Collingwood and Wasaga Beach	39%	38%	41%	38%	44%	43%	37%	33%
Peterborough and The Kawarthas	32%	36%	33%	28%	36%	31%	30%	34%
Stratford and Mennonite Country	28%	26%	28%	31%	22%	21%	24%	44%
Parry Sound / Georgian Bay	26%	24%	27%	26%	26%	31%	19%	24%
Algonquin Park	26%	28%	27%	20%	35%	28%	24%	17%
Prince Edward County	25%	31%	22%	24%	27%	27%	22%	25%
Northern Ontario	21%	21%	19%	23%	18%	23%	21%	20%
Huron County / Grand Bend	17%	17%	13%	24%	19%	14%	16%	19%
None of the above	10%	11%	10%	9%	7%	9%	17%	8%
Almaguin Highlands	8%	10%	8%	6%	10%	10%	4%	7%
Port Loring-Restoule	6%	8%	5%	3%	8%	6%	4%	4%

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

Explorers' Edge Aided awareness is Growing

- Overall awareness of Explorers' Edge is highest ever at 9%
- People who have visited EE before, travelers 25-44 and residents of Toronto/GTA have highest levels of awareness

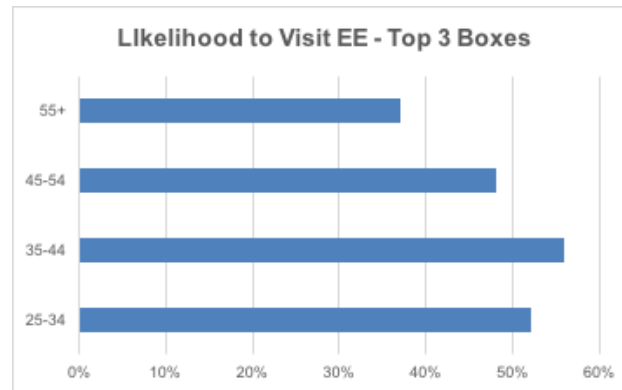
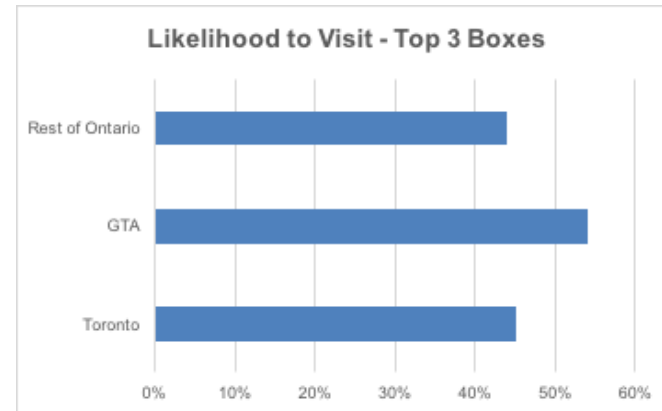
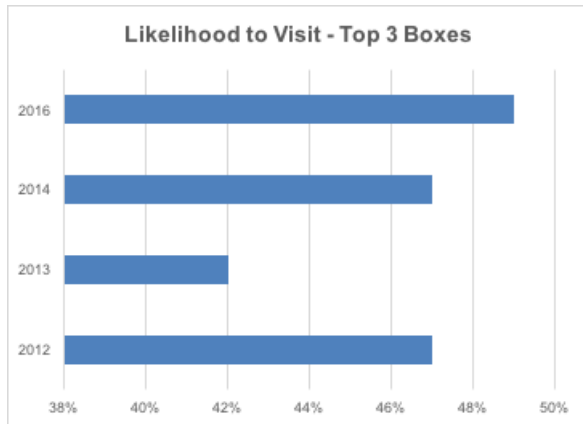
					Visited EE				Never Visited EE				Toronto/GTA				Rest of Ontario			
	2012	2013	2014	2016	2012	2013	2014	2016	2012	2013	2014	2016	2012	2013	2014	2016	2012	2013	2014	2016
Aware	6%	7%	7%	9%	8%	8%	11%	13%	3%	6%	5%	6%	6%	8%	8%	10%	4%	4%	4%	7%
Unaware	94%	93%	93%	91%	92%	92%	89%	87%	97%	94%	95%	94%	94%	92%	92%	90%	96%	96%	96%	93%

	25-34				35-44				45-54				55+			
	2012	2013	2014	2016	2012	2013	2014	2016	2012	2013	2014	2016	2012	2013	2014	2016
Aware	5%	10%	10%	12%	11%	8%	8%	11%	2%	6%	9%	9%	3%	3%	1%	4%
Unaware	95%	90%	90%	88%	89%	92%	92%	89%	98%	94%	91%	91%	97%	97%	99%	96%

Q37A. Are you familiar with the Ontario tourism region called Explorers' Edge?

Likelihood to Visit EE

- Likelihood to visit the region is the highest in the five years of measurement. Younger travelers show the highest level of intent.



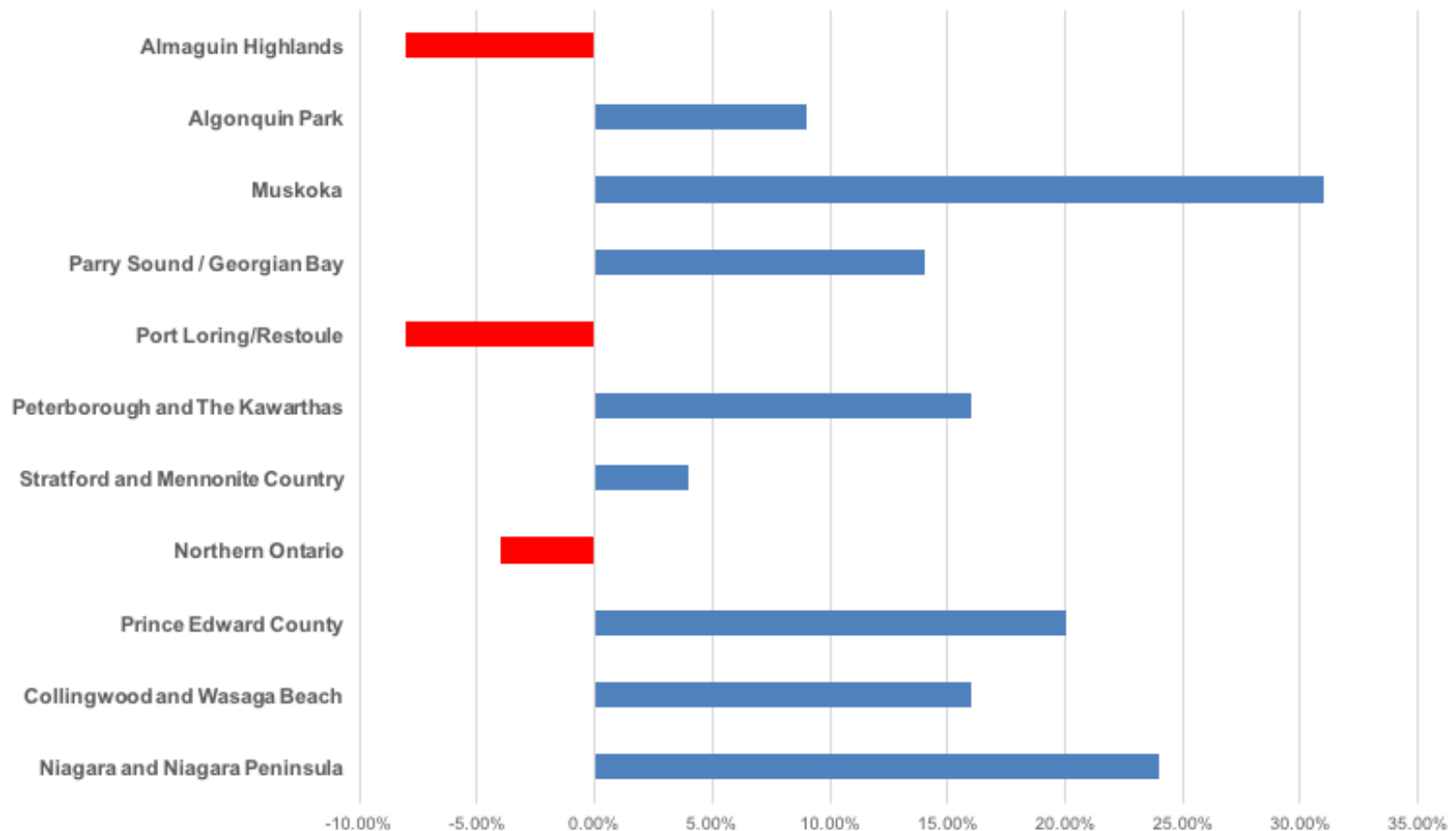
Q38A. Explorers' Edge is a region in Ontario consisting of Muskoka, Algonquin Park, Parry Sound / Georgian Bay Port Loring-Restoule and Almaguin Highlands that offers several incredible outdoor activities. On a scale of 1 to 10, with 10 being the highest, how interested are you in visiting this region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



Regional Perceptions

Muskoka Has the Greatest Perceived “Momentum”

- 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”. Muskoka, Parry Sound and Algonquin are seen to be increasing in popularity. Almaguin Highlands and Port Loring are not seen as having momentum, which is no doubt related to their low awareness



Regional Performance Based on Key Decision Criteria

- As was the case in 2014, EE's regions score high on vacation decision criteria related to nature and family-friendliness. We do not fare well on others factors such as proximity, accommodations, accessibility, cultural activities, attractions and dining/entertainment and packaged deals

Criterion	Algonquin Park	Almaguin Highlands	Parry Sound / Georgian Bay	Port Loring-Restoule	Muskoka	Niagara and Niagara Peninsula	Collingwood and Wasaga Beach	Stratford and Mennonite Country	Prince Edward County	Peterborough and The Kawarthas	Northern Ontario	Hamilton / Halton / Brant	Huron County / Grand Bend
Close proximity to home	30%	21%	21%	23%	34%	60%	46%	48%	31%	37%	18%	63%	30%
Has large variety of outdoor activities	77%	44%	57%	45%	77%	62%	75%	42%	60%	54%	71%	41%	59%
Best location for favorite activity	48%	26%	38%	27%	60%	60%	52%	40%	44%	34%	40%	34%	41%
Top rated accommodations	45%	22%	43%	29%	64%	74%	59%	57%	51%	40%	34%	43%	38%
Accessible to me (i.e., by car, bus, etc)	27%	21%	13%	18%	24%	66%	35%	33%	34%	26%	25%	55%	24%
Family friendly	82%	43%	56%	47%	71%	75%	77%	67%	61%	63%	60%	55%	62%
Offers exclusive packaged deals	26%	25%	34%	25%	47%	76%	48%	49%	43%	28%	28%	31%	31%
Cultural activities (i.e. galleries, museums, etc)	42%	22%	24%	24%	43%	51%	28%	61%	46%	32%	29%	47%	30%
Incredible nature	86%	49%	62%	51%	84%	66%	71%	45%	69%	63%	77%	38%	61%
Relaxing environment	77%	47%	60%	50%	87%	66%	74%	69%	66%	60%	74%	37%	64%
Attractions (i.e. theme parks, amusement parks, etc)	42%	21%	31%	23%	37%	71%	52%	33%	36%	29%	25%	35%	32%
Great dining & entertaining experiences	35%	28%	37%	30%	56%	66%	45%	51%	51%	38%	35%	52%	38%

Q21FA. How well do you think each of the following tourism regions would perform on each criteria? ? (10 point scale, top 3 boxes reported)

Impediments to Visit

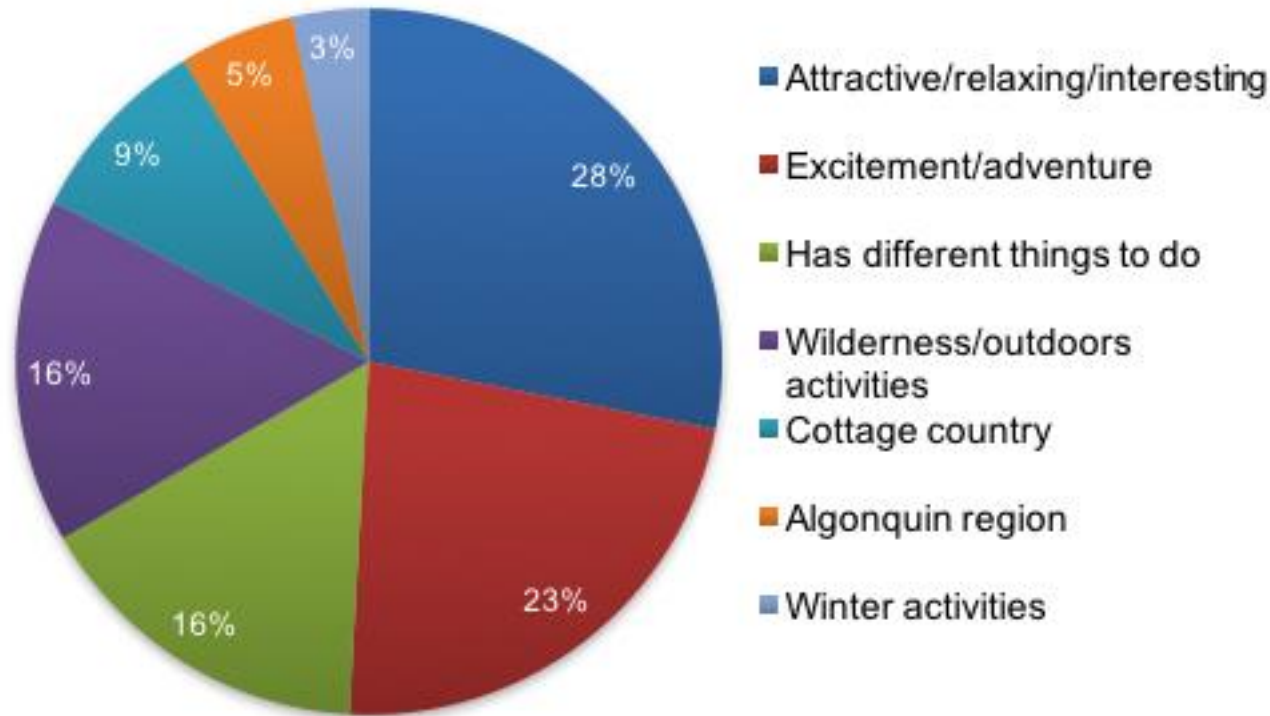
- Awareness (as evidenced by the “Never thought of it”) is the biggest impediment to consideration
 - Lack of interest also leads visitors elsewhere
 - Perceptions of distance remains an issue, compared to competitors like Niagara and Collinwood
 - Muskoka is still seen as expensive

Reason	Niagara and Niagara Peninsula	Collingwood and Wasaga Beach	Peterborough and The Kawarthas	Stratford and Mennonite Country	Northern Ontario	Prince Edward County	Hamilton / Halton / Brant	Huron County / Grand Bend	Explorers' Edge				
									Almaguin Highlands	Algonquin Park	Muskoka	Parry Sound / Georgian Bay	Port Loring- Restoule
Did not offer preferred activity	13%	15%	14%	16%	10%	10%	10%	9%	7%	15%	13%	12%	8%
Never thought of it	12%	25%	44%	45%	32%	49%	35%	49%	61%	25%	26%	40%	53%
No transportation	11%	14%	10%	8%	11%	8%	11%	8%	6%	9%	12%	10%	6%
Not of interest	16%	34%	46%	44%	37%	36%	41%	36%	32%	37%	31%	39%	36%
Poor weather condition	21%	13%	7%	7%	11%	5%	5%	5%	4%	10%	11%	9%	4%
Read a poor review online	13%	6%	5%	4%	3%	3%	9%	4%	2%	2%	4%	5%	3%
Too expensive	22%	15%	6%	9%	8%	10%	8%	7%	5%	8%	25%	9%	5%
Too far	16%	21%	23%	44%	53%	26%	23%	25%	19%	47%	35%	36%	26%

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

Explorers' Edge Brand Associations

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



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



Purchase Decision Process

Digital is critical for vacation planning

- A region's website is still the most important planning tool; digital activities are three of the top five actions taken

Activity	All	25-34	35-44	45-54	55+
Visit the regions website	1	1	1	1	1
Talk to friends	2	2	3	3	3
Search for information on sites like Google, Yahoo! or MSN	3	3	4	4	4
Visit travel sites like expedia, travelocity, etc	4	4	2	2	2
Talk to family members	5	5	6	6	6
Browse tourism brochures, pamphlets, etc	6	6	5	5	5
Read online blogs/reviews posted by people	7	7	10	10	10
Read online blogs/reviews posted by travel experts	8	8	8	8	8
Browse online advertisements	9	9	13	13	13
Look for videos on youtube	10	10	14	14	14
Talk to a tourism representative	11	12	9	9	9
Look on Facebook	12	13	7	7	7
Look for travel packages	13	14	11	11	11
Look for discounted prices only	14	16	12	12	12
Read Twitter posts	15	17	15	15	15

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

Stay/Eat/Do – Relative Importance of Each

- Not surprising to see all three rank high, though where to stay and things to do are slightly more important in the decision process. Younger travelers value dining options more than older ones

Factor	All	Toronto	GTA	Rest of Ontario	25-34	35-44	45-54	55+
Where to Stay	84%	80%	87%	83%	77%	83%	90%	84%
Things to Do	88%	85%	91%	88%	89%	88%	90%	88%
Where to Eat	72%	73%	72%	70%	84%	68%	72%	65%

Q21-16B. How important are each of the following to your choice of travel destination? (10 point scale, top 3 boxes reported)

Key Destination Selection Motivators

- Food and a multiplicity of outdoor activities are most likely to motivate the decision to visit

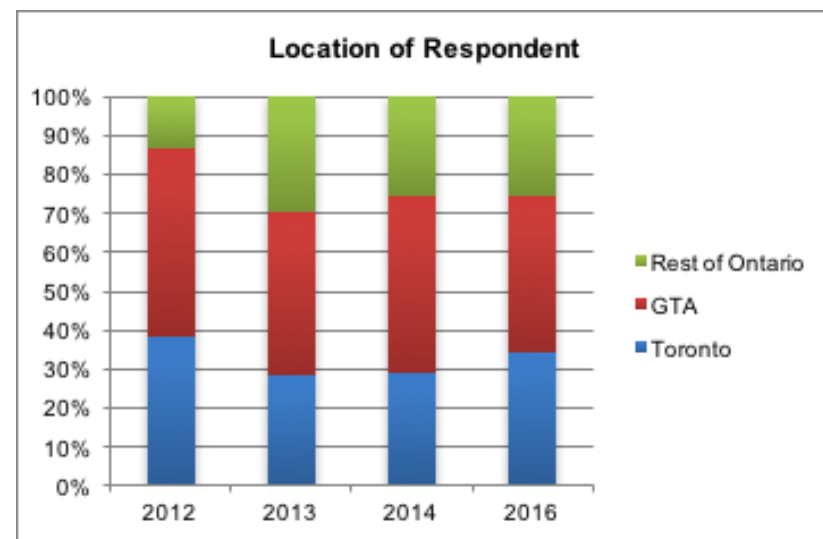
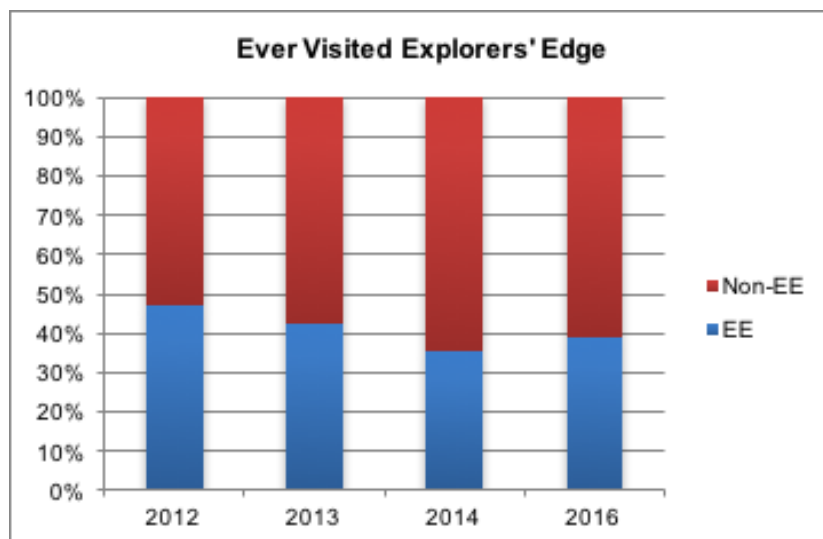
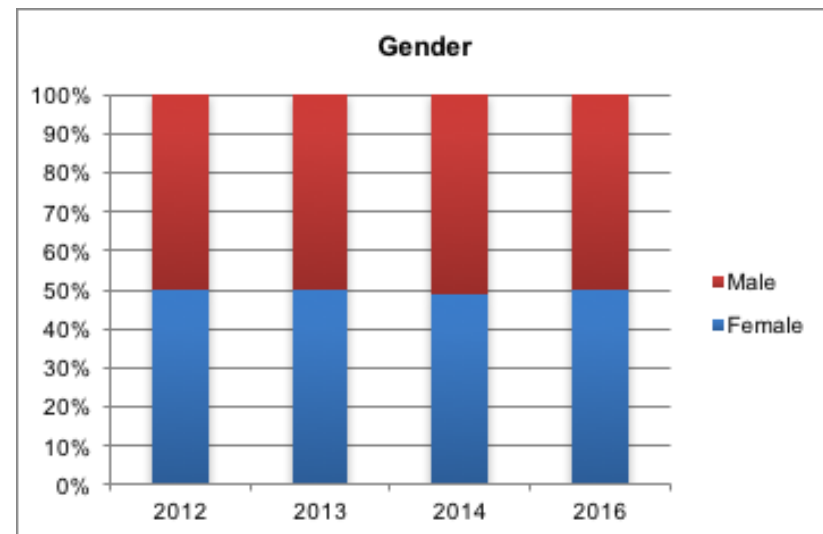
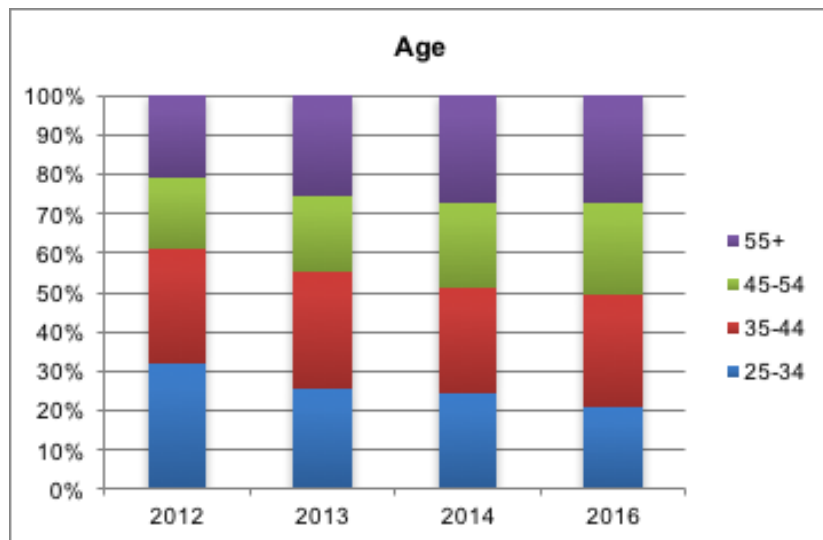
Motivator	All	Toronto	GTA	Rest of Ontario	25-34	35-44	45-54	55+
Local food movement – trying craft brews and wines, locally grown produce, as well as dishes by innovative chefs	66%	70%	63%	64%	68%	66%	69%	61%
A resort with multiple activities available, such as paddling, nature trails, cycling, campfires, dogsledding, skiing, snowshoeing	62%	63%	66%	56%	68%	70%	59%	52%
Trails for a variety of activities, from hiking to biking, from skiing to snowshoeing	54%	56%	55%	49%	65%	65%	51%	36%
An outfitter that offers canoe, kayak or paddling rentals and lessons	43%	45%	47%	35%	57%	51%	44%	23%
A museum or heritage site such as a pioneer village	43%	44%	44%	40%	40%	46%	41%	44%
A resort with a waterpark	42%	42%	49%	29%	48%	54%	45%	21%
A park that offers interpretive or educational programs and events	40%	44%	43%	32%	41%	46%	41%	35%
An outdoor art gallery that features replica murals of Group of Seven paintings	36%	42%	37%	25%	39%	44%	31%	29%
An outdoor rink on a lake or an ice trail for skating	32%	36%	37%	20%	42%	41%	30%	18%
On and off road cycling	30%	38%	30%	18%	44%	35%	26%	15%
An artist's studio	28%	31%	30%	18%	33%	36%	24%	18%
A fishing spot for a particular species of fish	26%	25%	29%	25%	37%	26%	26%	19%
A championship golf course	26%	28%	25%	24%	33%	23%	21%	26%
A managed ATV trail	24%	28%	25%	17%	42%	28%	19%	10%
A sporting event such as a half-marathon or cycling tour	21%	28%	24%	8%	39%	28%	10%	11%

QX. How likely are each of the following to motivate you to select a particular travel destination? (? (10 point scale, top 3 boxes reported)



Respondent Profiles

Respondent Profiles



Respondent Profiles

