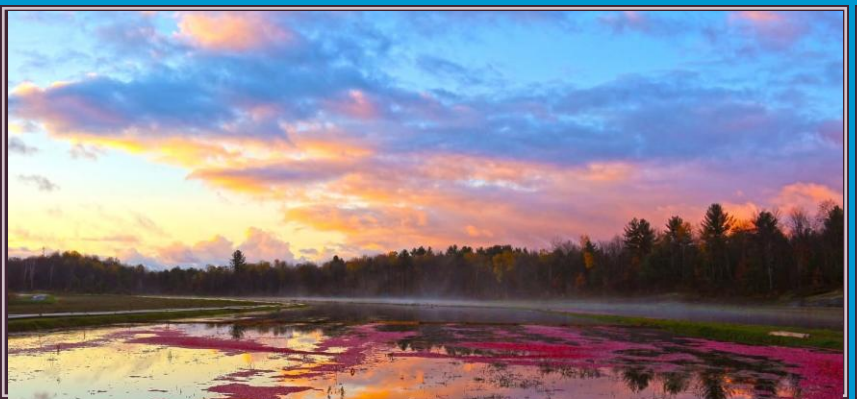
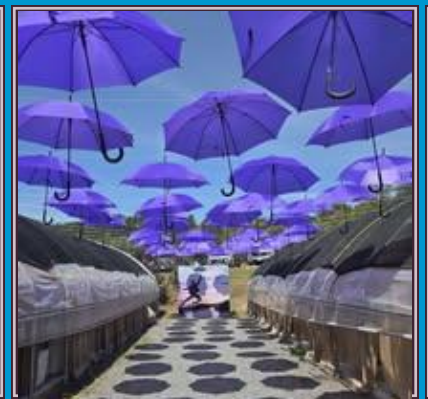
EXPLORERS' EDGE

# COMMUNITY SESSIONS

# 2026

Connect. Share perspectives. Explore opportunities.







## OUR REGION

**Algonquin Park**

**Almaguin Highlands**

**Loring-Restoule**

**Muskoka**

**Parry Sound**

**South Algonquin**

# Land Acknowledgement




We acknowledge that the region we call ‘the Great Canadian wilderness just north of Toronto’ is founded on the traditional lands and waterways of the Anishinabek, Algonquin, Mohawk and Métis peoples, and is part of the Robinson Huron (1850) and Williams (1923) Treaties territory, and the unceded territory of the Algonquins of Ontario.

We further acknowledge that as Canadians, we are all treaty people. Explorers’ Edge staff are committed to the ongoing truth and reconciliation process, including economic reconciliation through tourism development, and we will work diligently to listen, to learn, to take action, and to be respectful towards all First Nations, Métis and Inuit peoples.

# Meet the Explorers' Edge team

Joined today by Peter Coish, Kuration Research — a research and strategy contributor to Explorers' Edge.



**James Murphy**
CEO

james@explorersedge.ca



**Jennifer Montpetit**
Director, Strategic Partnerships & Development

jennifer@explorersedge.ca



**Jake Good**
Brand Narrative Manager

jake@explorersedge.ca



**Rachel Dawson**
Administration & Travel Services Coordinator

rachel@explorersedge.ca

TODAY'S CONVERSATION

# What we'll explore together

One hour, four conversations — and your input shapes what comes next.

## 01

### What we're hearing from tourism businesses

7 min · Your 2026 season

## 02

### What the research is telling us

18 min · Markets, visitors and business performance, with Peter

## 03

### What we're doing to create opportunities

17 min · Partnerships and projects across the region

## 04

### Where we go next — with your input

18 min · 2027–28 priorities and next steps



Passcode

explore

# Canada's tourism economy is still growing, but slowly

### TOURISM SPENDING

**$28.5B**

Q2 2026, up 0.3% from Q1 (real, seasonally adjusted)

### TOURISM JOBS

**699,000**

Jobs from tourism in Q2, up 0.4% vs 0.2% for all jobs

### SHARE OF GDP

**1.77%**

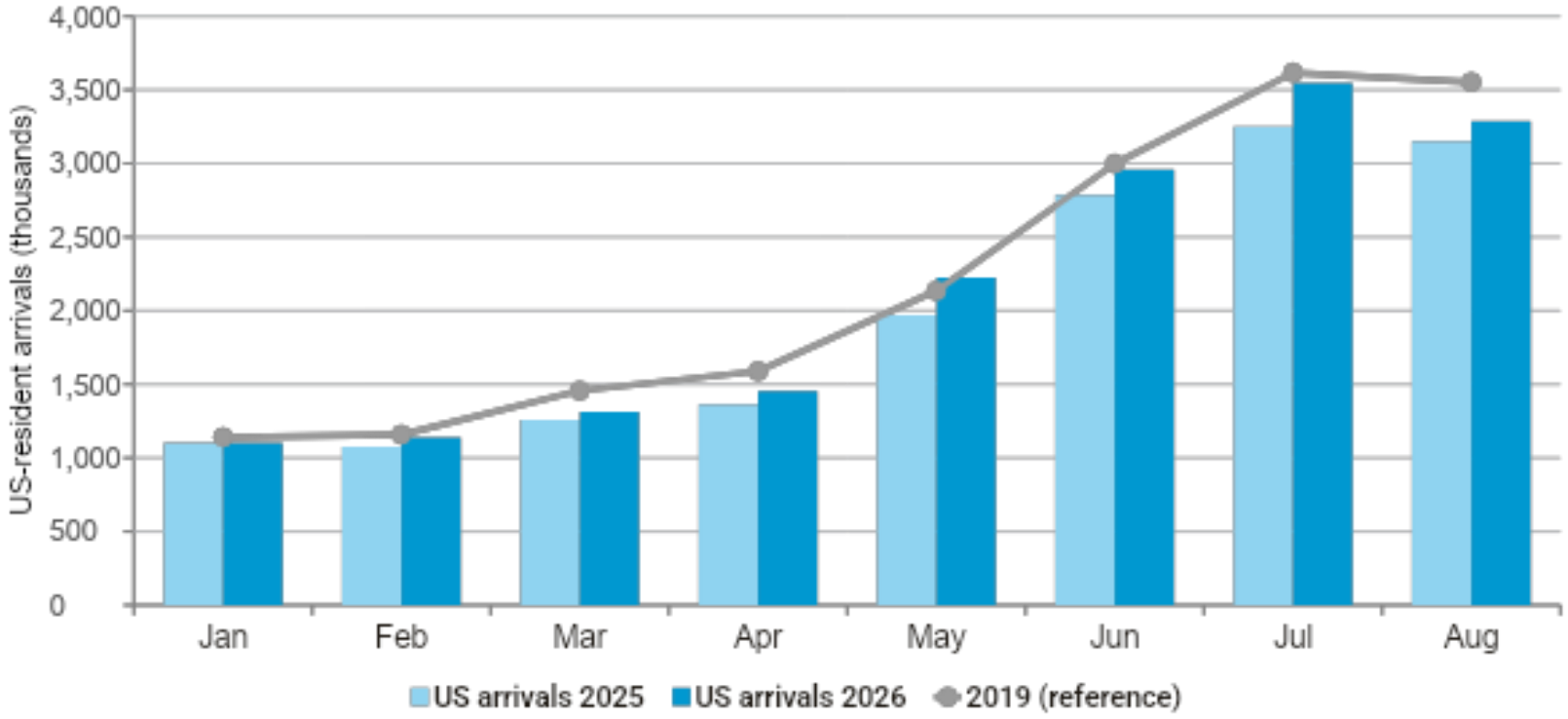
Tourism's share of Canada's nominal GDP in Q2

### INTERNATIONAL SPEND

**+1.0%**

Spending by visitors from abroad in Q2; domestic spending was flat

# Americans came back across the border this year




**WHAT THIS SHOWS**

- January to August 2026: 17.03 million US-resident arrivals.
- Up 6.7% on 2025, with gains in every month except January.
- Still 3.5% below the same months of 2019.
- Preliminary September: +17.2%, partly because Labour Day fell a week later.

**NOTE** StatCan's counts changed in 2025 (airport clearance system added); compare with 2019 cautiously.

# Fall travellers are shopping around

HAVE USED AI TO PLAN TRAVEL

**22%**

Up from 10% in spring 2025. 34% are likely to use AI to plan their next trip.

LOOK FOR DEALS MORE OFTEN

**31%**

Than a few years ago. Deals and packages are the top draw to a new Canadian destination (41%).

# What this means for operators here

PACKAGES

## Package the value

Travellers hunt for deals. Bundle stays, meals and activities at one clear price.

OFF-PEAK

## Build the quiet months

Hotels grew on rate, not rooms. At about 55% occupancy, the quiet months have room.

AI SEARCH

## Be findable by AI

More travellers plan with AI. Keep listings, hours, prices and photos current.

MARKETS

## Welcome new visitors

Americans are back, and Germany and Japan are growing. Make it easy for them to book.

EVENTS

## Plan around events

Big events send visitors past the host city. Have offers ready for the next one.

**Visitors are travelling differently, researching differently and looking more closely at value. Our opportunity is to help regional businesses respond and turn interest into bookings.**

# Strong summer occupancy. Significant opportunity across the rest of the year

| August 2026 | RTO 12 | vs Aug 2025 | Ontario | vs Aug 2025 |
|---|---|---|---|---|
| Occupancy | 82.5% | −0.5 pt (83.0%) | 82.4% | +0.6 pt |
| Average daily rate (ADR) | $319.20 | +1.5% ($314.40) | $244.00 | +4.8% |
| Revenue per available room (RevPAR) | $263.36 | +0.9% ($260.89) | $200.99 | +5.5% |

| January–August 2026 | RTO 12 | vs Jan–Aug 2025 | Ontario | vs Jan–Aug 2025 |
|---|---|---|---|---|
| Occupancy | **54.6%** | +0.3 pt (54.3%) | **68.1%** | 0.0 pt |
| Average daily rate (ADR) | $238.25 | +0.5% ($237.11) | $218.49 | +4.9% |
| Revenue per available room (RevPAR) | $130.12 | +1.1% ($128.70) | $148.69 | +4.9% |

Source: CBRE Hotels' Trends in the Hotel Industry National Market/Operations Report with reproduction and use of information subject to CBRE Limited Disclaimer / Terms of Use as detailed at: https://www.cbre.ca/en/services/invest-finance-and-value/valuation-and-advisory/hotels#disclaimer

# The off-season is still where the region has room to grow

- Last November, each available hotel room earned $62.60, about a quarter of August's $260.89
- Fewer rooms sold and at lower rates: occupancy 39.5% vs 83.0%, average rate $158.64 vs $314.40
- September and October held up better, at $162.11 and $139.37 per available room
- December to March stayed under $70 per room in both years
- Empty rooms in the off-season also mean fewer diners, attraction visits and shoppers in our communities

VISITOR INTELLIGENCE · GEOFENCING

# Where your visitors come from

# Geofencing counts phones in a drawn area, then estimates where they live

WHAT IT IS

## A drawn area

A boundary is drawn around a town. Phones with location services on are counted when they're seen inside it.

WHAT'S COUNTED

## People and visits

Unique visitors are people; daily visits count each day they're seen. Home is where the phone usually is at night.

ITS LIMITS

## Not bookings

Modelled estimates only. No nights stayed, no spending, and no link to your own guests.

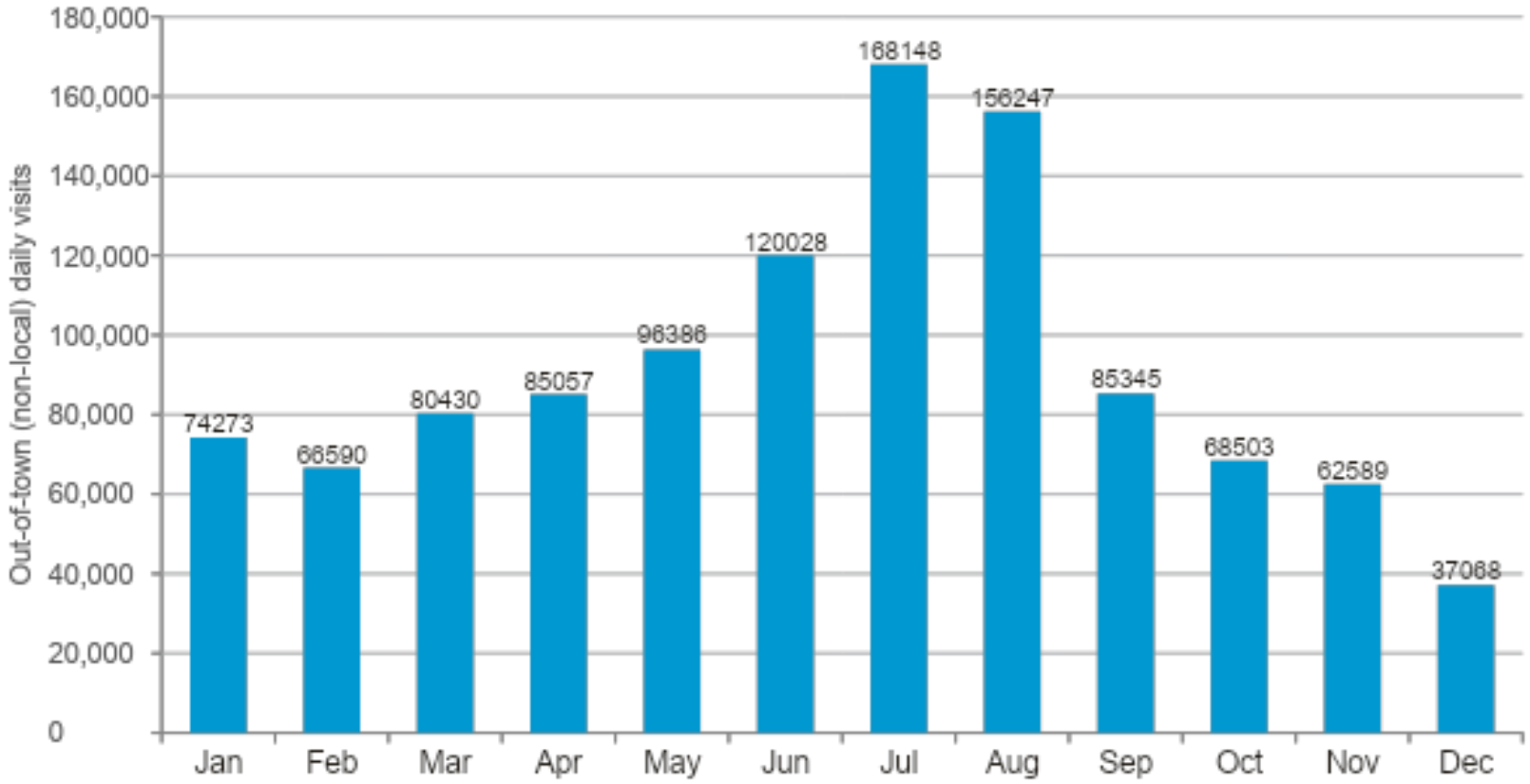
HOW TO USE IT

## Aim your marketing

See which cities and postal areas send visitors, and in which months, then focus your marketing there.

Sources: Central Counties, Visitor Research Program: Geofencing Analysis; 2025 geofence data from Destination Canada via Central Counties; rto12geofencing.netlify.app. Local = under 40 km from home; non-local = 40 km or more.

# Most of Gravenhurst's out-of-town visits happen outside the summer peak




### WHAT THIS SHOWS

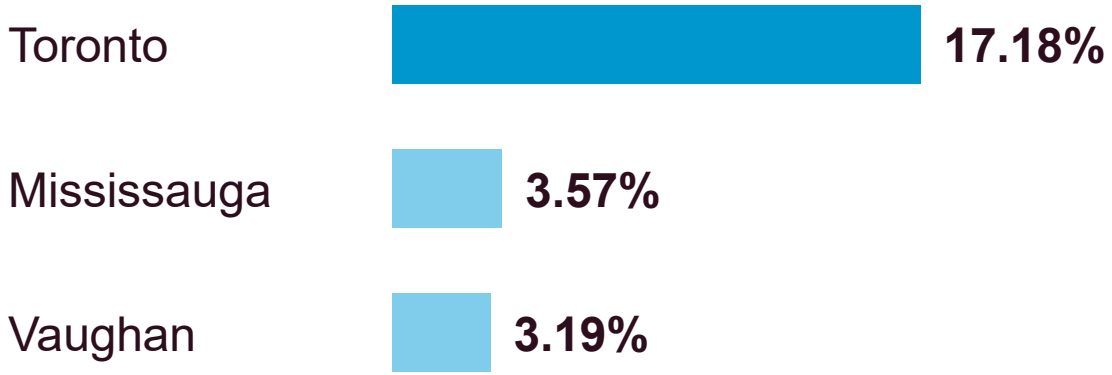
- Out-of-town visits peak in July (168,148) and August, and are lowest in December (37,068).
- June to August held only 40.4% of the year's out-of-town visits.
- May (96,386) was busier than September (85,345).
- Weekend days see 47.7% more out-of-town visits than weekdays.

Source: 2025 Gravenhurst geofence, Destination Canada mobile data via Central Counties (rto12geofencing.netlify.app). Modelled estimates; non-local = home 40 km or more away.

# Toronto sends the most visitors, and nearby cities like Barrie and Orillia follow

## MORE THAN 100 KM AWAY

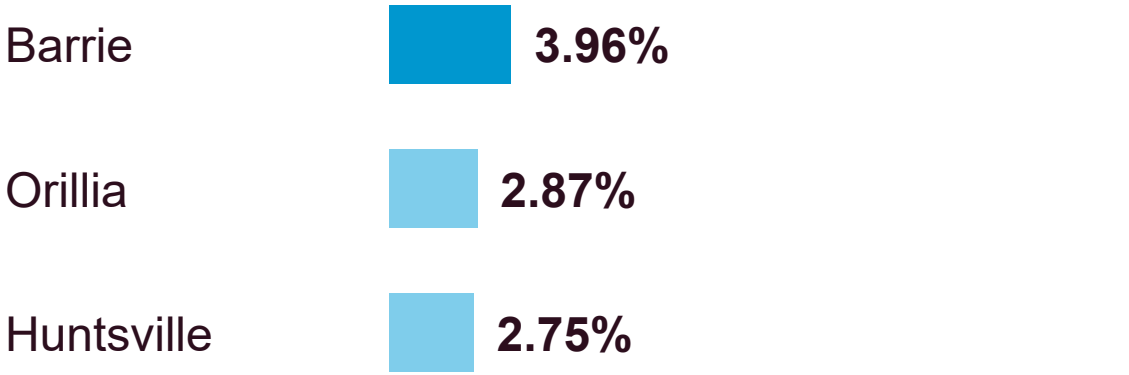
### SHARE OF UNIQUE VISITORS




Also Hamilton 2.48%, Brampton 2.10% and Richmond Hill 1.87%

## 40 TO 100 KM AWAY

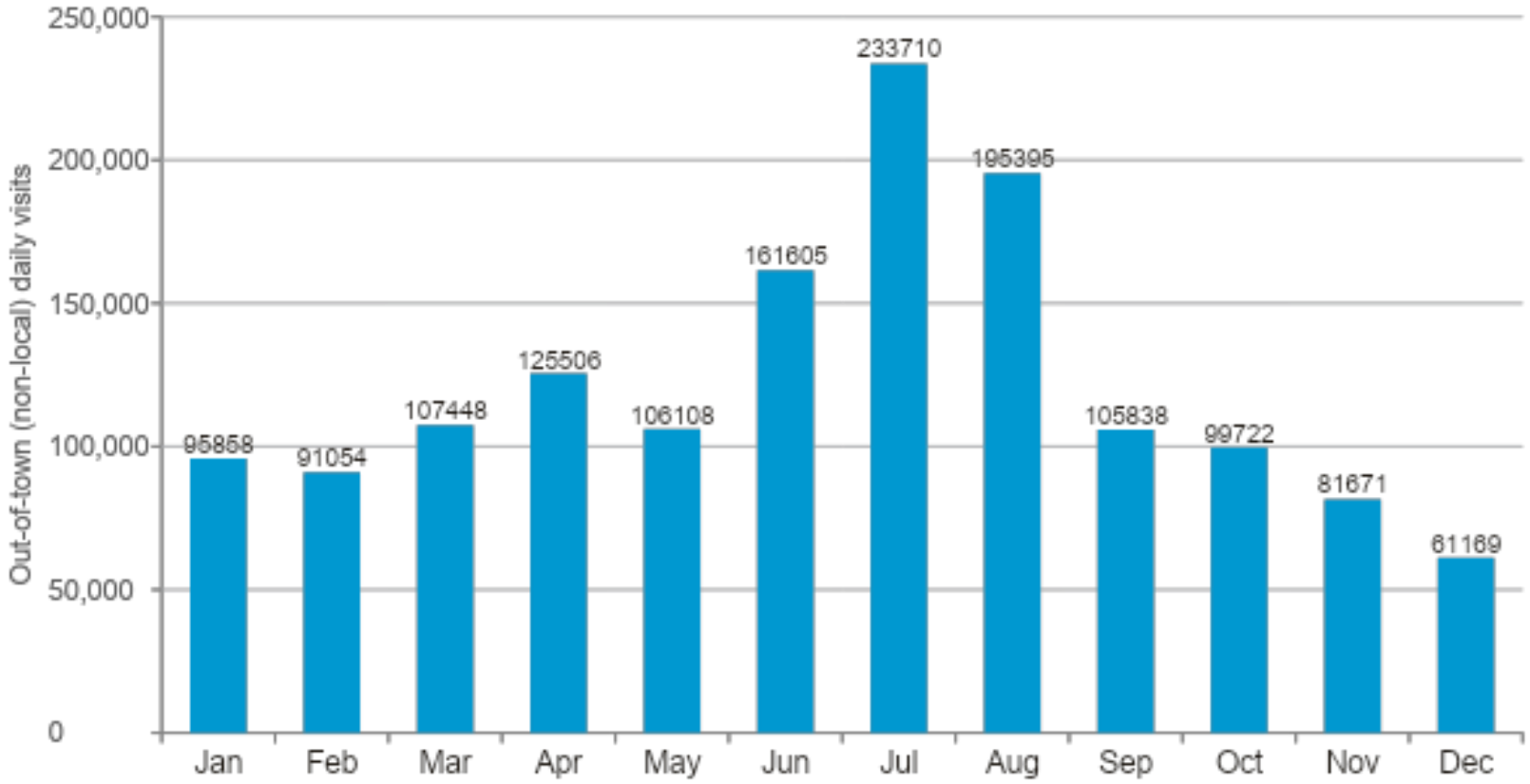
### SHARE OF UNIQUE VISITORS




Gravenhurst, Bracebridge, Muskoka Lakes and Severn are local (under 40 km) and not shown

Source: 2025 Gravenhurst geofence, Destination Canada mobile data via Central Counties (rto12geofencing.netlify.app). Share of all unique visitors; modelled estimates; non-local = home 40 km or more away.

# Huntsville's out-of-town visits run all year, with a spring bump in April




## WHAT THIS SHOWS

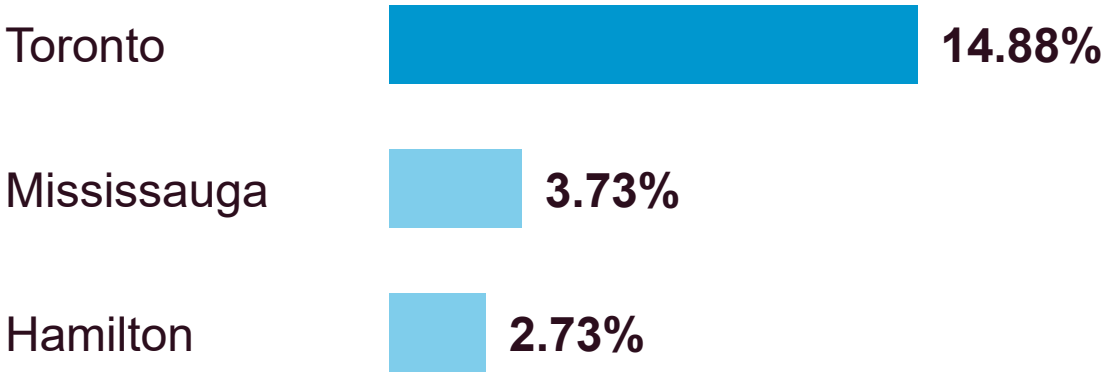
- Out-of-town visits peak in July (233,710) and are lowest in December (61,169).
- April (125,506) was busier than May (106,108) and September (105,838).
- June to August held only 40.3% of the year's out-of-town visits.
- Weekend days see 38.6% more out-of-town visits than weekdays.

Source: 2025 Huntsville geofence, Destination Canada mobile data via Central Counties (rto12geofencing.netlify.app). Modelled estimates; non-local = home 40 km or more away.

# Huntsville's visitors come mostly from the Toronto area, with Barrie the closest big market

## MORE THAN 150 KM AWAY

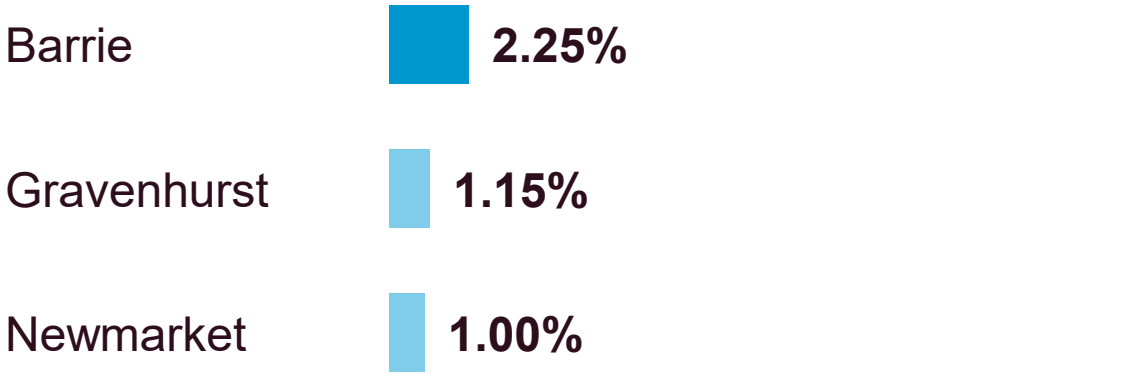
### SHARE OF UNIQUE VISITORS




Toronto visitors lean to summer: 46.0% of their visits, vs 34.2% for Hamilton

## 40 TO 150 KM AWAY

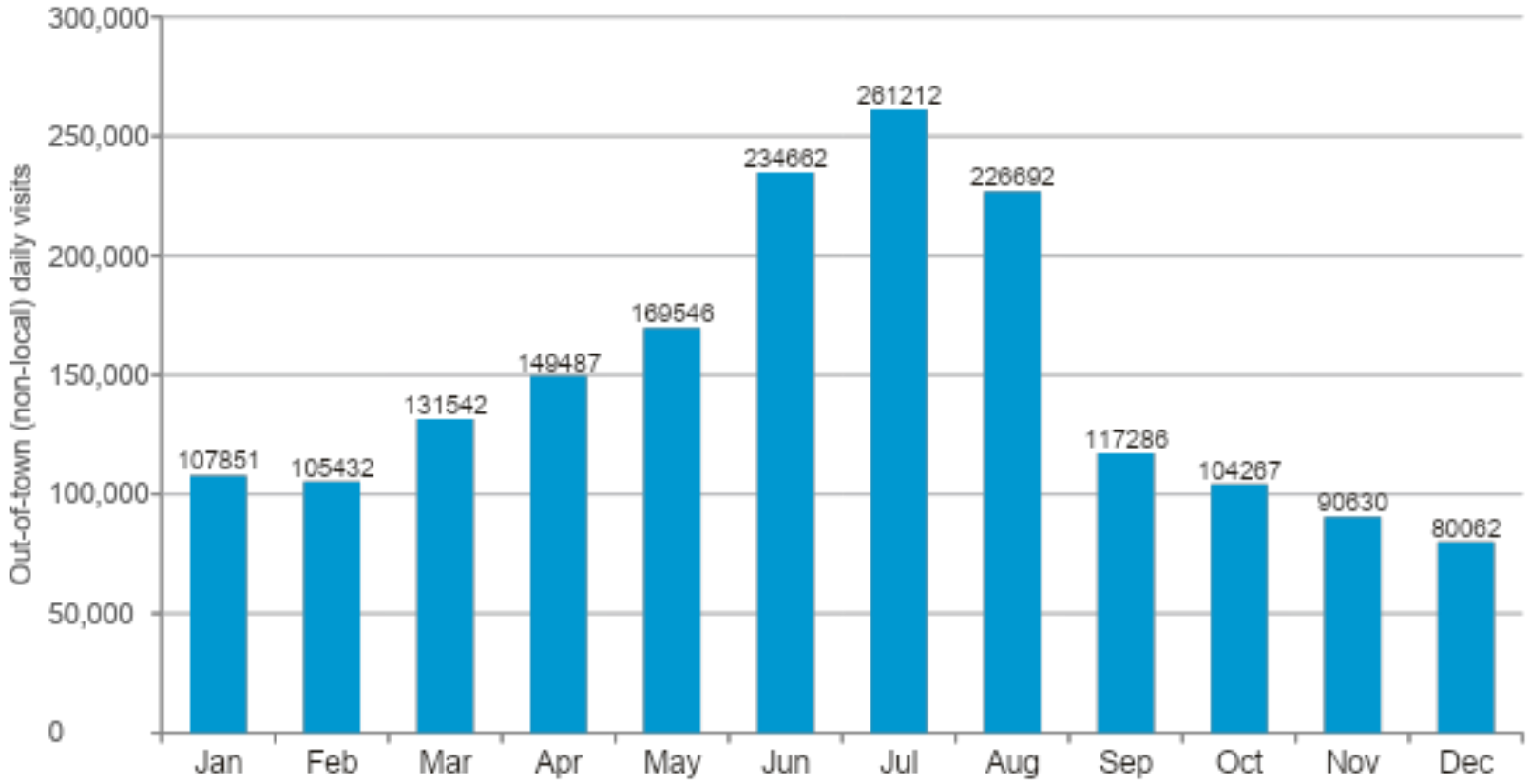
### SHARE OF UNIQUE VISITORS




Huntsville, Bracebridge, Lake of Bays, Perry and Muskoka Lakes are local (under 40 km) and not shown

Source: 2025 Huntsville geofence, Destination Canada mobile data via Central Counties (rto12geofencing.netlify.app). Share of all unique visitors; summer = Jun–Aug; modelled estimates; non-local = home 40 km or more away.

# In June and July, out-of-town visitors outnumber locals in Parry Sound




## WHAT THIS SHOWS

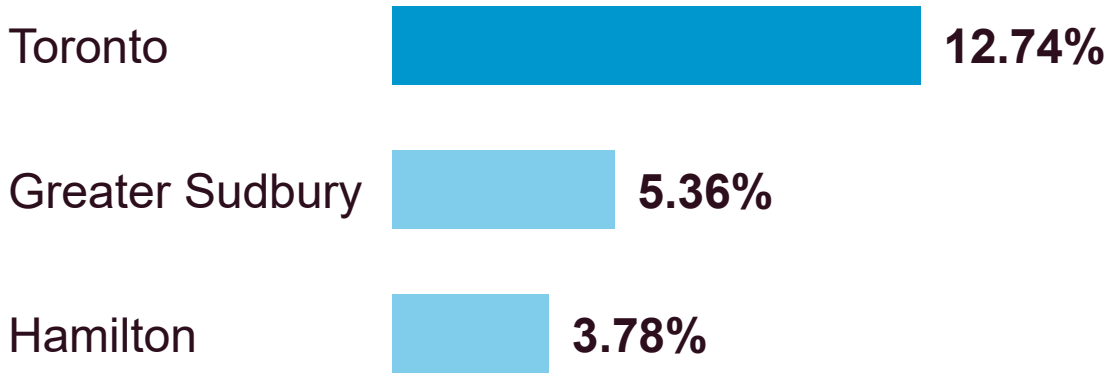
- Out-of-town visits peak in July (261,212) and are lowest in December (80,062).
- In June, 53.1% of all visits were out-of-town; in July, 52.5%.
- June to August held only 40.6% of the year's out-of-town visits.
- Weekend days see 31.6% more out-of-town visits than weekdays.

Source: 2025 Parry Sound geofence (Wasauksing has none of its own), Destination Canada mobile data via Central Counties (rto12geofencing.netlify.app). Modelled estimates; non-local = home 40 km or more away.

# Toronto leads, and Greater Sudbury is Parry Sound's strong second market

## MORE THAN 150 KM AWAY

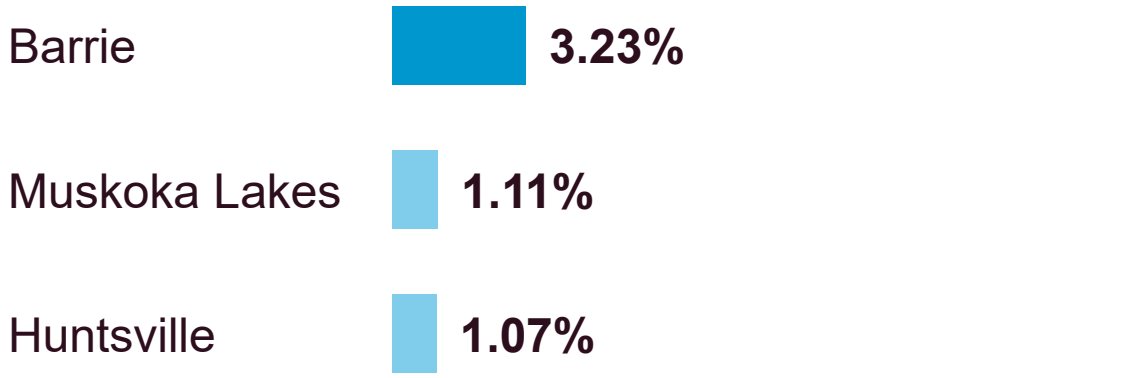
### SHARE OF UNIQUE VISITORS




Greater Sudbury visitors come year-round: only 31.5% of their visits fall in summer

## 40 TO 150 KM AWAY

### SHARE OF UNIQUE VISITORS



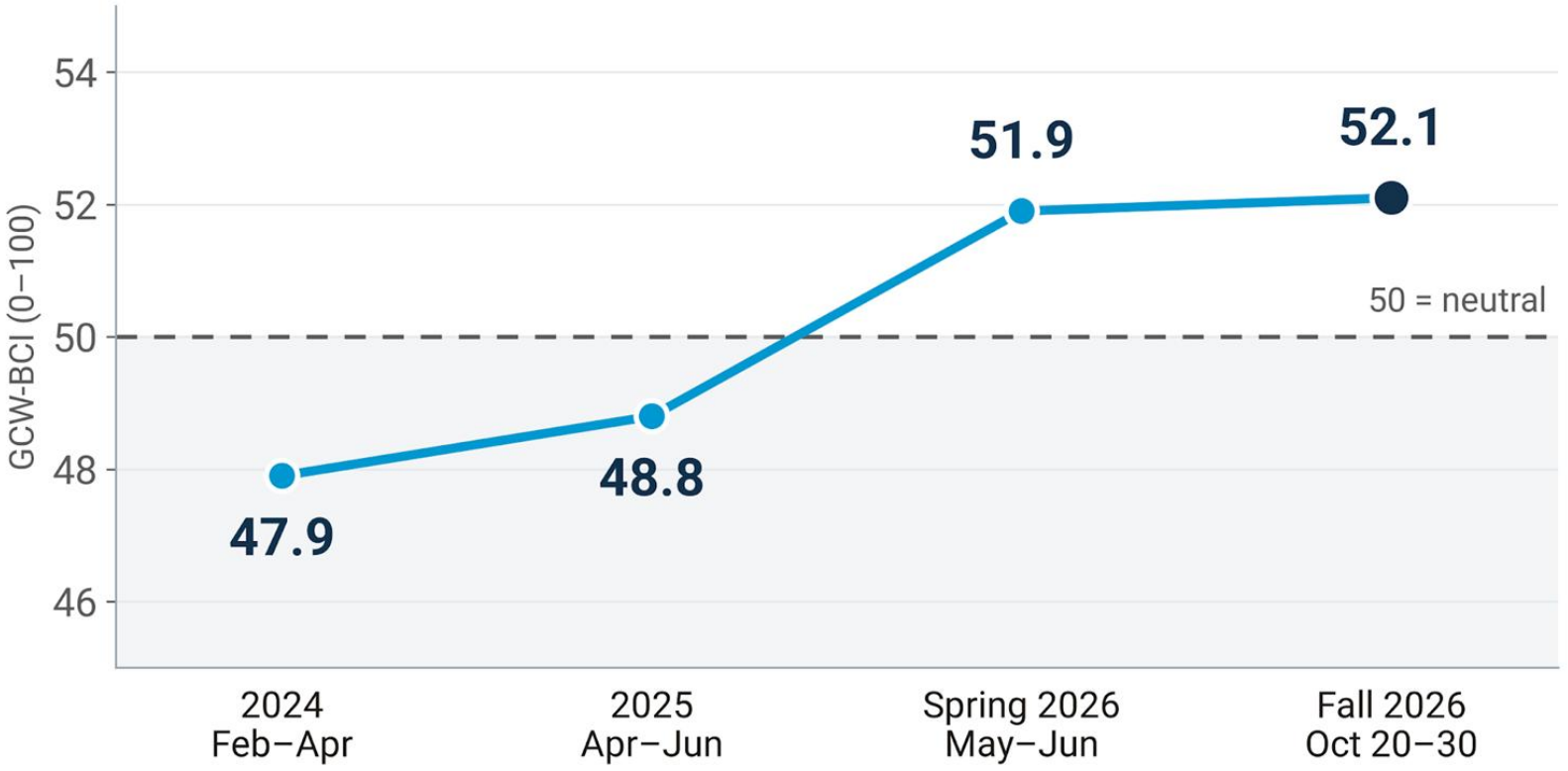

Parry Sound, Seguin, McDougall and McKellar are local (under 40 km) and not shown

Source: 2025 Parry Sound geofence (Wasauksing has none of its own), Destination Canada mobile data via Central Counties (rto12geofencing.netlify.app). Share of all unique visitors; summer = Jun–Aug; modelled estimates; non-local = home 40 km or more away.

BUSINESS CONFIDENCE

# Business Confidence Index

# Confidence held its gains through the 2026 season, but didn't climb further




### LEVEL WITH SPRING

Fall 2026 reads 52.1, against 51.9 in spring: inside the index's ±3-point stability band.

### ABOVE NEUTRAL

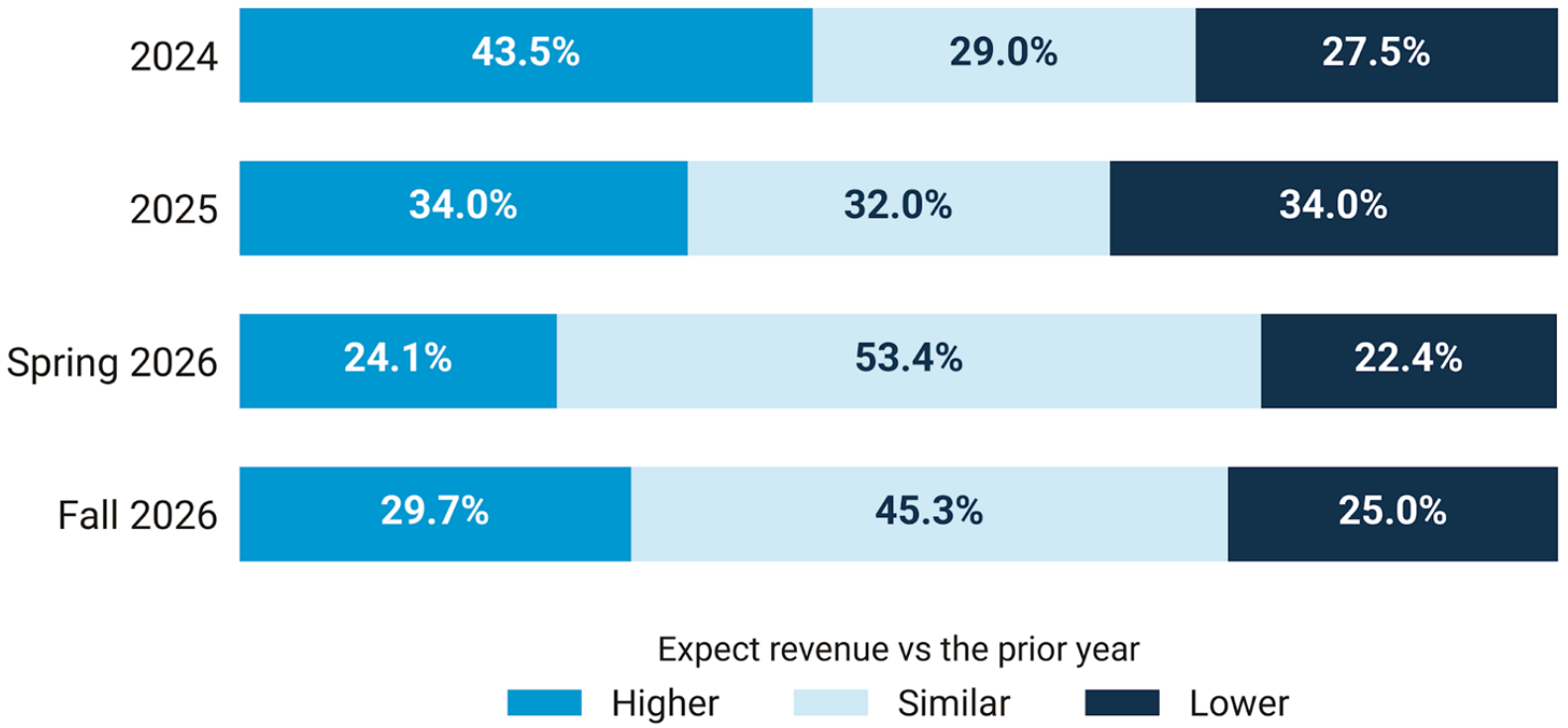
Both 2026 readings sit above 50, after 47.9 in 2024 and 48.8 in 2025.

### REGIONAL MIX

Muskoka operators were less confident than in spring, others more. At spring's regional mix, fall reads 50.9.

Source: Great Canadian Wilderness Business Confidence Index, Fall 2026 update, October 2026. Index 0–100, 50 = neutral; six questions asked in every wave. Fall wave n=64 (Oct 20–30, 2026), margin of error about ±12 pts.

# More Operators Expect Higher Receipts this Year




## WHAT THIS SHOWS

- Expect higher revenue: 43.5% in 2024, a low of 24.1% in spring, 29.7% this fall.
- Expect similar: 29.0% in 2024, 45.3% this fall.
- Lack of staff as a limit: 34.8% in 2024, 18.0% in 2025.
- No effect from U.S. tariffs: 12% in 2025, 28.6% this fall.

Source: Great Canadian Wilderness Business Confidence Index, Fall 2026 update, October 2026. Share of operators answering; n=69 (2024), 50 (2025), 58 (spring 2026), 64 (fall 2026); margin of error about ±12–14 pts. Staffing limit not asked in 2026.

# Accommodation Operators Ran Below Capacity

| Business type (operators answering) | Ran below capacity | Revenue for 2026 against 2025 |
|---|---|---|
| **Accommodation (16)** | 14 of 16 (88%) | 4 higher · 7 lower |
| **Food and beverage (10)** | 2 of 10 (20%) | 4 higher · 0 lower |
| **Experience provider (10)** | 6 of 10 (60%) | 3 higher · 2 lower |
| **Attraction, museum or gallery (8)** | None of 8 (0%) | 5 higher · 1 lower |

**Across all 64 operators: 42.2% say the year went better than last, 15.6% worse, yet revenue is near flat and half ran below capacity.**

Source: Great Canadian Wilderness Business Confidence Index, Fall 2026 update, October 2026 (Table 2). Fall wave n=64, margin of error about ±12 pts; groups of 8–20 are directional. Not shown: other, mainly retail (20): 10 below capacity, 3 higher, 6 lower.

# Operators are most hopeful about next season, and winter is the weak spot

EXPLORERS' EDGE

**2027 SEASON OUTLOOK**

## 65.6%

optimistic about next season, against 12.5% pessimistic: the most positive forward reading in the series

**WINTER 2026–27 OUTLOOK**

## 19.1%

optimistic among operators open in winter, against 31.0% pessimistic : the only net-negative outlook in the survey

The fall season came in balanced: 26.9% optimistic and 23.1% pessimistic among operators open in the fall, short of the 34.5% and 15.5% expected in spring.

VISITOR EXIT SURVEY

# Gravenhurst, Bracebridge, Huntsville, Parry Sound, Muskoka Lakes

# Our visitors are loyal Ontarians, mostly on short trips

WHO WE HEARD FROM

## 418 visitors

Exit surveys in five communities, April to November 2026.

REPEAT VISITORS

## 89% had been before

Only about 1 in 10 was a first-time visitor.

WHERE THEY'RE FROM

## 73% from across Ontario

A quarter were local. Just 2% came from outside Ontario.

LENGTH OF STAY

## Half stay 1–3 nights

A quarter were day trips. About 1 in 5 stayed more than a week, mostly at cottages.

Source: Explorers' Edge Visitor Exit Surveys, 2026 (n=418): Bracebridge 245, Muskoka Lakes 65, Parry Sound 45, Gravenhurst 38, Huntsville 25. Pooled results; Bracebridge (mostly Muskoka Marathon participants) is 59% of responses.

# Visitors leave happy, and nearly all would recommend us

### SATISFIED WITH THEIR OVERALL EXPERIENCE

**93%**

Customer service (91%) and cleanliness (91%) also scored highly.

### LIKELY TO RECOMMEND THE COMMUNITY

**94%**

71% said they were very likely to recommend it to others.

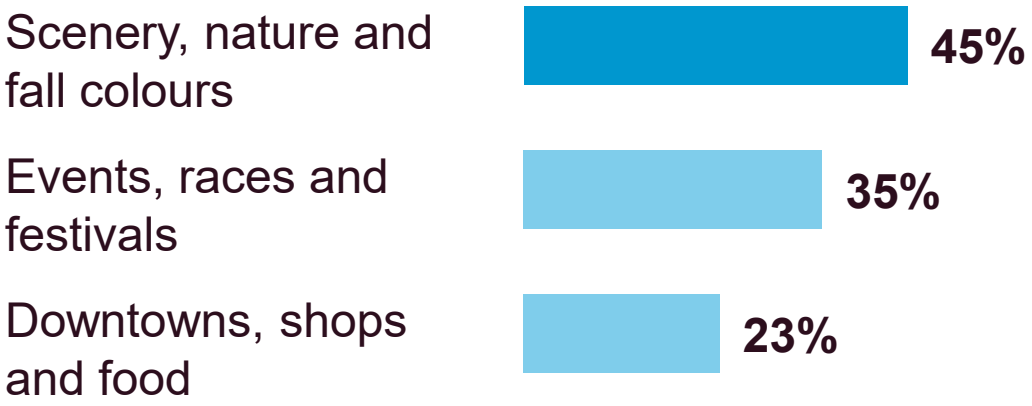
**Lowest-rated, though still strong: signage and tourism information (86%) and restaurants (86%).**

Source: Explorers' Edge Visitor Exit Surveys, 2026 (n=418): Bracebridge 245, Muskoka Lakes 65, Parry Sound 45, Gravenhurst 38, Huntsville 25. Pooled results; Bracebridge (mostly Muskoka Marathon participants) is 59% of responses. Satisfied = satisfied or very satisfied, excluding "not applicable".

# Scenery and events bring visitors in; parking and dining choice need work

## WHAT VISITORS ENJOYED MOST

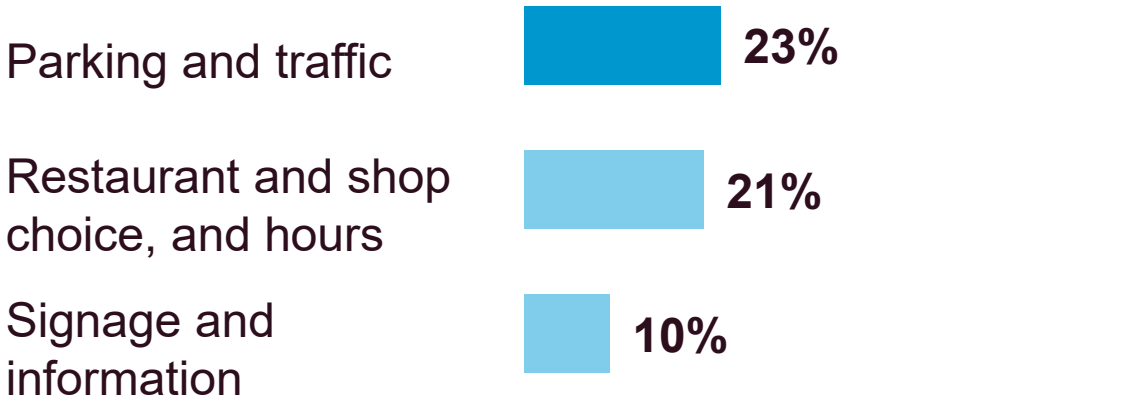
SHARE OF COMMENTS




Events were the main reason for the trip for about a third of respondents (37%).

## WHAT COULD BE BETTER

SHARE OF COMMENTS




Roads and construction also came up in about 1 in 10 comments, and many said “nothing to change”.

Source: Explorers’ Edge Visitor Exit Surveys, 2026 (n=418). Themes coded from open-ended comments (333 on what they enjoyed, 288 on what to improve or problems faced); a comment can mention more than one theme.

# What the exit surveys tell us

LOYALTY

## They come back

89% had visited before. Only about 1 in 10 was a first-timer.

EXPERIENCE

## They leave happy

93% were satisfied overall and 94% would recommend us.

EVENTS

## Events drive trips

37% came for an event, from marathons to the Cranberry Festival.

GETTING AROUND

## Ease the pinch points

Parking, traffic and signage top the list of fixes, especially at events.

MORE TO DO

## More places to spend

Visitors want more restaurant and shop choice, and longer hours.

**Visitors love the region and keep coming back. Our opportunity is to reach new visitors, make events easier to enjoy, and give people more reasons to stay and spend, year-round.**

# Events fill our streets, but most event visitors leave before they spend

GONE WITHIN A NIGHT

**65%**

of out-of-town event visitors were day trips or one-night stays, vs 39% of other visitors.

SHOPPING SPEND

**About half**

Event visitors spent about half as much on shopping, and about 40% less on attractions, as other visitors.

SLIDO · OPEN TEXT · #CODE

**What would it take to turn an event day trip into an extra night, and get those visitors spending with your business?**

Source: Explorers' Edge Visitor Exit Surveys, 2026; out-of-town respondents only (n=315; 123 named an event as the reason for their trip). Spending estimated from the midpoints of reported spending ranges.

# Turning research, relationships and investment into business opportunity

TRANSPORTATION AND VISITOR ACCESS

# Getting visitors here, and turning the trip into a booking

Three examples of how better access is opening new business opportunities.

FLIXBUS

### Coach connections

Toronto–Muskoka–North Bay and Toronto–Parry Sound–Sudbury, now year-round.

GREAT LAKES CRUISING

### Waterways

Utilizing the great lakes for international travel access.

PACKAGES

### Transportation + tourism product

Connect getting here with where to stay, what to see and what to do, in one offer.

**The question for you: where can we connect transportation and tourism products into something visitors can actually book?**



PILOT PARTNERSHIP

# MAT: Positive lessons from a new model

The pilot connects municipal tourism investment more directly to local destination development.

## A practical example of collaboration.

Tourism investment, business needs and visitor behaviour, working as one system.

01 **Visitor intelligence and exit surveys**

02 **Direct business engagement and workshops**

03 **Marketing and product-development opportunities**

04 **Municipal investment aligned with measurable results**

05 **Next: Gravenhurst business workshop, November 16**

THE LESSON

## Investment can be tied to measurable destination development.

**What can we learn from this approach that could benefit other communities across our region?**

REGENERATIVE TRAVEL AGENCY

# Packaging the Great Canadian Wilderness

Our travel agency turns interest in the region into experiences visitors can actually book.

## From awareness to bookings.

Profits are reinvested in our communities, socially, culturally and environmentally.

01 **Small-group, fully guided day packages**

02 **Culture, Cranberries & Culinary Excellence**

03 **Heroes, History, Heritage & a True Taste of Muskoka**

04 **Spreading visits beyond the busiest places**

05 **Next: more packages with operators across the region**

THE PRINCIPLE

## Net-positive outcomes, not just less impact.

**Could your business be part of a package that visitors can book?**

# Being present in Indigenous communities

Meaningful destination development starts with relationships, respect and Indigenous communities defining their own priorities and opportunities.

**Show up** — Ongoing relationships with First Nations partners.

**Listen** — Communities define their own priorities.

**Participate** — The canoe build: learning together.

**Build** — Indigenous Youth Tourism Entrepreneurship Journey.






## WHAT THIS INFORMS

- Destination development
- Reconciliation
- Partnership
- The role Explorers' Edge should play next

# A more welcoming and inclusive destination

Research, engagement and business readiness are turning inclusion into visible, practical action.

## From intention to visible, practical action.

Research shows where we stand.

Dialogue builds understanding.
Accreditation makes welcome visible.

Rainbow Registered
Arc-en-ciel Officiel

**01**

### Research: CQCC destination assessment

A destination audit that identifies opportunities and barriers to inclusion across the region.

**02**

### Engagement: Diva Dialogues

Regional conversations that bring in local voices.

**NEXT: NOVEMBER 24 · ZOOM · 7–9 P.M.**




**03**

### Business readiness: Rainbow Registered

CQCC accreditation and related supports help businesses demonstrate meaningful inclusion.

*Sources: Explorers' Edge, Diva Dialogues; CQCC, destination assessment and Rainbow Registered.*

2027–28 PRIORITIES

# Shape the next chapter

# What we are thinking about for 2027–28

An emerging direction — not a finished plan.

01 Stronger business performance and year-round demand

02 Transportation and regional connectivity

03 Trails, waterways and experience development

04 Indigenous relationships and inclusive destination development

05 **Research, collaboration and measurable outcomes**

***These are starting points for discussion, not decisions already made.***

YOUR INPUT

## Shapes it

Community input will help determine how these directions become priorities and projects.

**Next: tell us what matters most on Slido.**

THANK YOU

# Thank you — here’s what happens next

Our commitment: what we’ll do with your input, and how you can stay involved.

01 We’ll bring your input to our November planning session

02 We’ll keep developing the 2027–28 business plan, due January 22, 2027

03 Stay involved: research Zoom — details to follow

04 Stay involved: inclusion conversation on Zoom, November 24

05 **Stay involved: Winter Tourism Summit, January 15, 2027**

HOW YOUR INPUT IS USED

Today’s Slido rankings, concerns and suggestions will be summarized for an organizational planning discussion.

**The session is an important step, not the final decision.**

EXPLORERS' EDGE

KEEP THE CONVERSATION GOING

# Stay connected

Questions, ideas or partnership opportunities? Reach out to the team.


**James Murphy**
CEO
james@explorersedge.ca

**Jennifer Montpetit**
Strategic Partnerships & Development
jennifer@explorersedge.ca

**Rachel Dawson**
Administration & Travel Services
rachel@explorersedge.ca

**Jake Good**
Brand Narrative Manager
jake@explorersedge.ca


**Have an idea, an opportunity or a challenge we should know about?**
**We want to hear from you.**