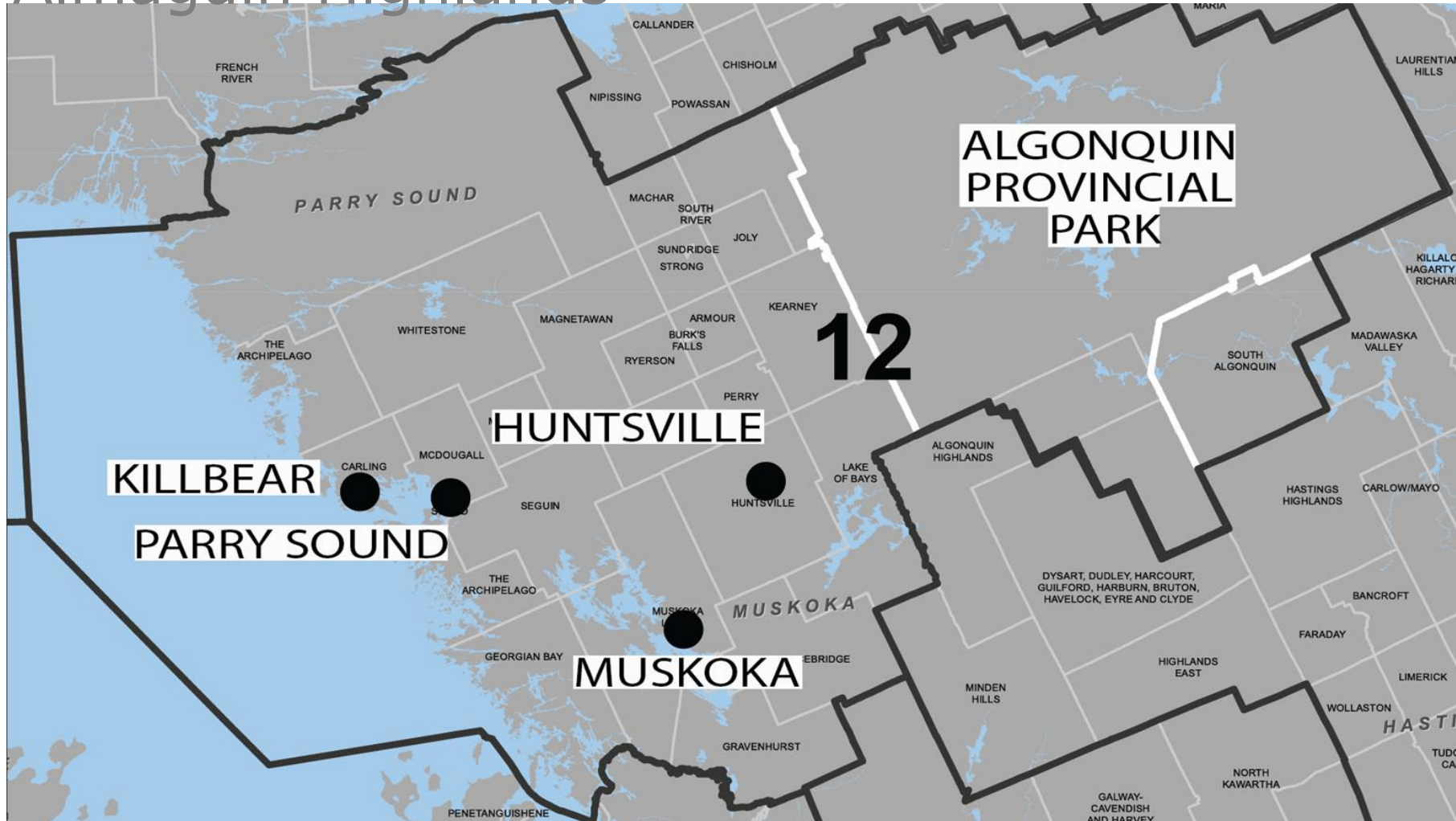


Regional Report — RTO 12, Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands



Study Overview

- The Ontario Tourism Marketing Partnership (OTMPC) is mandated to grow the tourism industry and showcase Ontario provincially, nationally and internationally as a four-season, must-see travel destination. OTMPC contributes to increasing tourism's economic impact by creating new and dynamic marketing initiatives and by enhancing the marketing resources available to all Ontario tourism operators.
- Thirteen Regional Tourism Organizations (RTOs) are responsible for working with tourism partners to enhance and grow tourism products and marketing initiatives for their respective regions.
- In order to support marketing strategy development and maximize marketing effectiveness at both macro and micro level, marketing research was commissioned by OTMPC and RTOs in partnership.
- The research was conducted across Ontario, the main Quebec and Manitoba markets, as well as U.S. near and mid-markets. The research was conducted from mid-April through early June, 2012.
- The survey methodology was primarily a mail survey, but also included online, providing a good cross-section of the travelling population. A detailed description of the methodology is appended.

Study Overview

- A representative cross-section of individuals 18 years or over was captured in the survey. This yielded 50,322 travellers, defined as individuals who took any out-of-town trips of one or more nights away from home for pleasure in the last 12 months.
- Due to the comprehensive nature of the research, the survey was split into two phases -- a main survey, which gathered general travel attitudes as well as trip-specific data, and a return-to-sample (RTS) survey which gathered perceptions of each Ontario Region and the province as a whole.
- This report provides a descriptive overview of the Region's current standing in specific source markets. Response to the following areas of enquiry are used to describe the current situation:
 - The status of the Region on the purchase cycle (Section A);
 - Evaluation of recent trip(s) to the Region (Section B);
 - Perceptions of the Region (Section C);
 - Visitor profiles (Section D);
 - Trip activities in the Region (Section E).

Study Overview

- It is important to note that a separate segmentation report for Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands will follow this descriptive summary. The segmentation will have an analytical and insights focus. It will provide direction on consumer targeting, product development and fine-tuning brand positioning, messaging and overall marketing strategy.

SECTION A – Where Are You On The Purchase Cycle?

ONTARIO
Yours to discover



Section A Overview

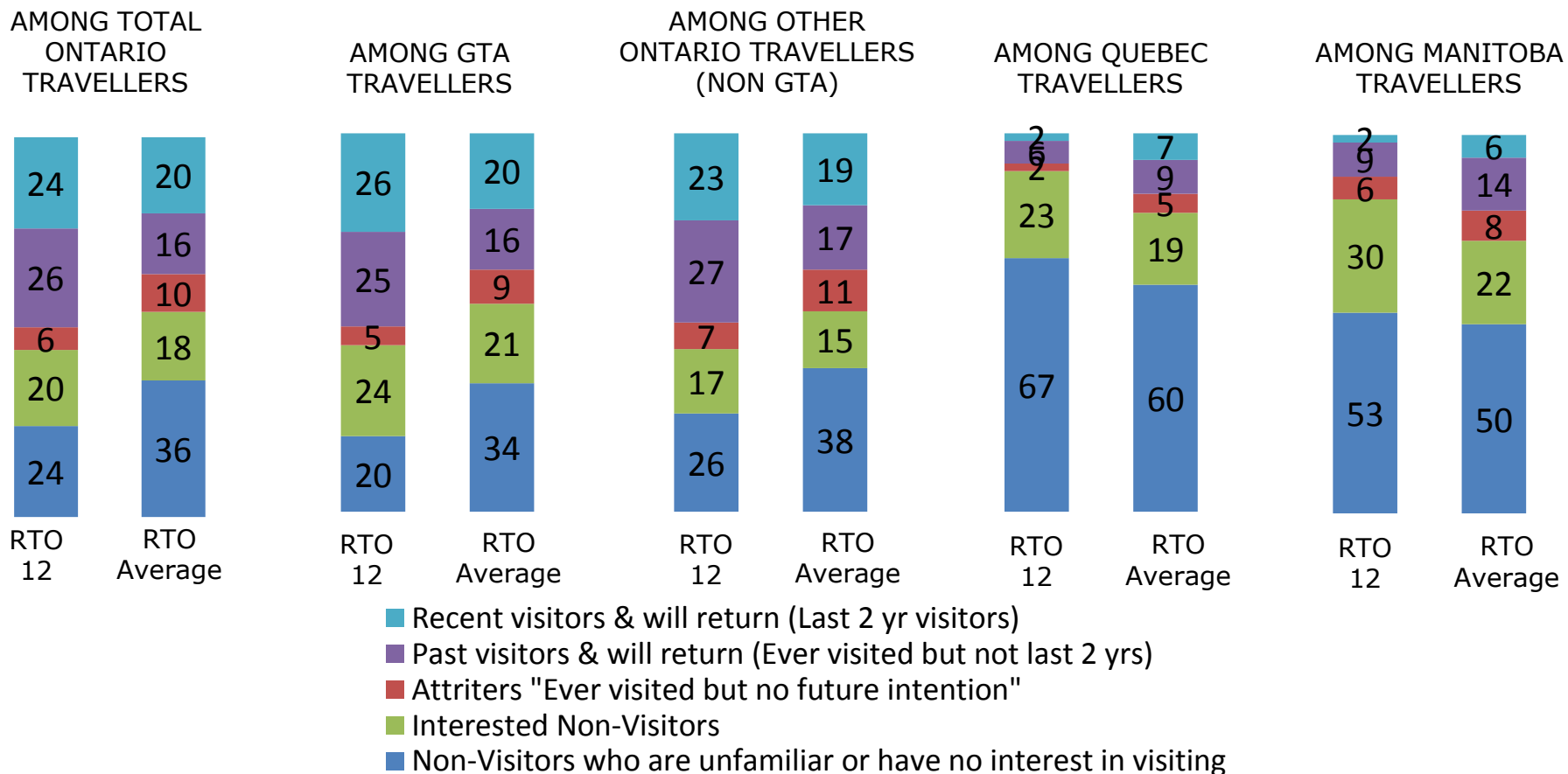
- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands' market development status varies tremendously by source market.
- The situation in the Ontario market suggests that both the GTA and the balance of the province have reached a state of maturity as source markets for Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands. Existing interest levels are high, repeat visitation is common and attrition rates are low. However, attracting entirely new visitors will be challenging. Nevertheless, there are opportunities to draw some new potential visitors by more clearly expressing and differentiating the offer. Similarly, there is some opportunity to increase the rate of repeat visitation among those who have taken a trip to the Region in the past (increasing the rate of visitation among those visiting more than 2 years ago). At the present time, about one-quarter of Ontario travellers who last visited the Region more than two years ago express interest in returning. Converting aspiration to visitation will require reinforcement of the Region's primary benefits that attracted them in the first place, as well as communicating a broader offer beyond that to entice them to return (i.e. offering them something new rather than the same old).

Section A Overview

- In Quebec, the U.S., and to some degree, Manitoba, the Region is at a much more formative market development stage. Large segments of the traveller population in these source markets have limited knowledge or appreciation of the Region and, naturally, are not compelled to visit. Moreover, among those expressing some degree of awareness and interest, a very large proportion (50% or more) have never previously acted on their positive inclination. This, too, suggests limited appreciation and, therefore, insufficient reason to choose Muskoka, Parry Sound & Algonquin Park over other potential destinations in the consideration set.
- Not unexpectedly, these early development challenges are most acute in Quebec and the U.S. Proximity and familiarity are obviously related, implying that extra challenges exist in more distant markets with respect to attracting attention and motivating behaviour.

Awareness, Interest & Visitation (Canadian Markets)

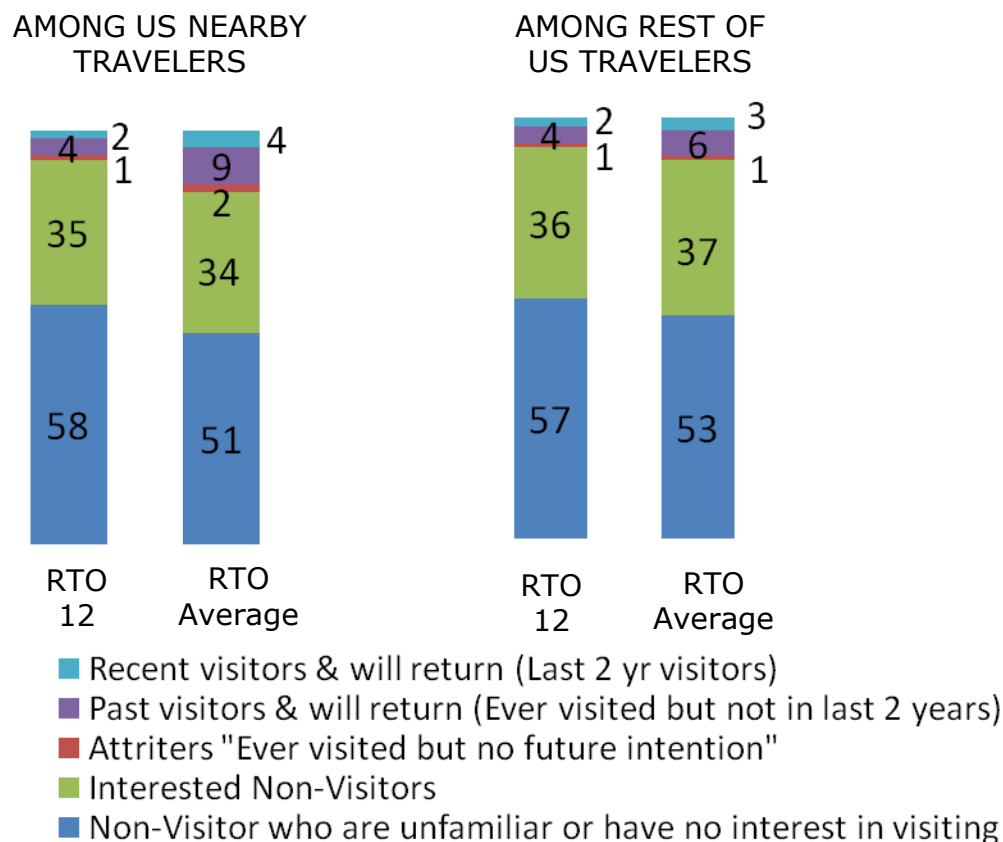
- The proportion of visitors who will return is relatively high among Ontario travellers, particularly those from outside the GTA. The proportions of Quebec and Manitoba travellers who have not visited but would consider doing so are relatively strong, although visitation and repeat visitation levels are low compared to the average Ontario tourism Region



Q8C: Now we would like to know how interested you would be in taking an overnight pleasure trip to each of Ontario's Regions within the next two years. For each Region listed, please select the statement that best describes your current level of interest.
 Q9B: When was the last time you took an overnight pleasure trip to each of the following Regions of Ontario?

Awareness, Interest & Visitation (US Markets)

- U.S. travellers have very low rates of visitation, regardless of source market. The proportion of interested non-visitors, however, matches that of U.S. travellers to the average Ontario tourism Region. Interestingly, the level of interest is just as high among those from the more distant U.S. markets as nearby U.S. markets.



Q8C: Now we would like to know how interested you would be in taking an overnight pleasure trip to each of Ontario's Regions within the next two years. For each Region listed, please select the statement that best describes your current level of interest.
 Q9B: When was the last time you took an overnight pleasure trip to each of the following Regions of Ontario?

Incidence of Visitation and Interest by Source Market

This slide shows the importance of the domestic market as a source of overnight visitors to Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands.

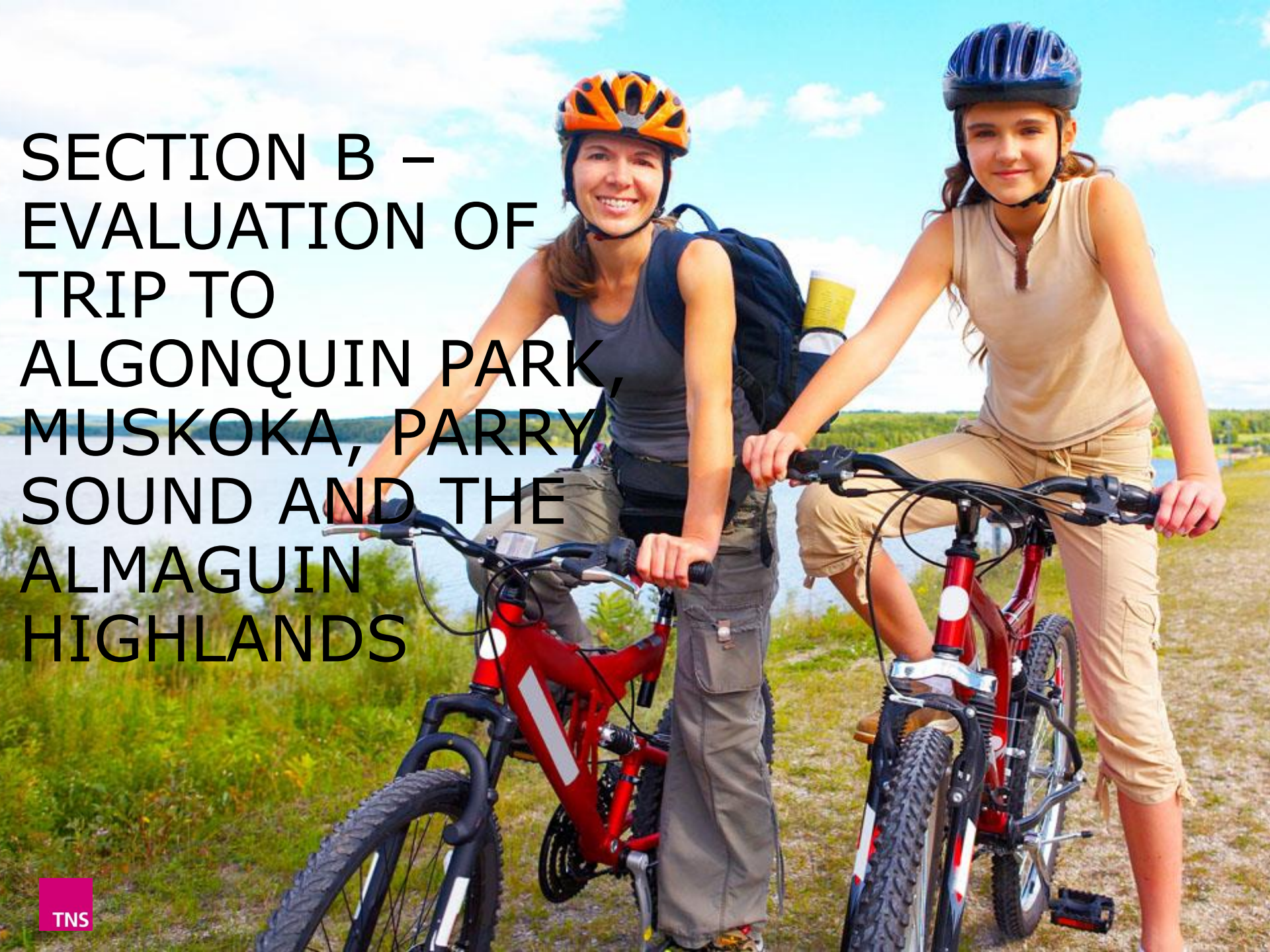
Travellers Residing In...

		Percent of Travellers from each Source Market Stating... Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands				
		Visited ...			Very Interested in Visiting in next 2 years	
		Ever	In Past Two Years	In Past 12 Months		
ONTARIO	%	62	28	19	43	
	- GTA	61	29	20	47	
	- Other Ontario	63	26	19	39	
QUEBEC	%	12	3	2	12	
MANITOBA	%	18	2	1	14	
NEARBY U.S.	%	8	3	1	12	
		- New York	10	4	2	15
		- Ohio	6	2	1	10
		- Pennsylvania	7	1	1	10
OTHER U.S.	%	6	2	1	12	
		- Illinois	8	3	2	14
		- Michigan	8	1	1	12
		- New Jersey	7	1	0	14
		- North Carolina	6	2	1	16
		- Virginia	6	2	0	13

*Data are not shown from the other source markets as sample sizes were below 50 recent visitors in each case.

Q8C: Now we would like to know how interested you would be in taking an overnight pleasure trip to each of Ontario's Regions within the next two years. For each Region listed, please select the statement that best describes your current level of interest.

Q9B: When was the last time you took an overnight pleasure trip to each of the following Regions of Ontario?



**SECTION B –
EVALUATION OF
TRIP TO
ALGONQUIN PARK,
MUSKOKA, PARRY
SOUND AND THE
ALMAGUIN
HIGHLANDS**

Section B Overview

- Satisfaction with Muskoka, Parry Sound & Algonquin Park among visitors to the Region is very high in all Ontario source markets.
- Perceptions of value and likelihood to recommend are also higher than that of the average Ontario tourism Region, especially the latter. Clearly, visitors' expectations are being met or exceeded by their trips to the Region. Positive word of mouth might be leveraged to generate interest among past visitors and non-visitors to help drive traffic to the Region.
- As the Region draws most of its visitors from within Ontario (94%) sample sizes of recent visitors from other source markets are too small for meaningful analysis and these data are not shown.

Evaluation of Trip to Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands – Key metrics

Total Trips Reported by Past 12 Month Visitors to Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands From

	Satisfaction with Trip		Overall Trip Value		Likelihood to Recommend Destination	
	Avg. Score/10	% Rating 9/10	Avg. Score/10	% Rating 9/10	Avg. Score/10	% Rating 9/10
ONTARIO	8.8 (8.7)	62% (59%)	8.4 (8.1)	55% (47%)	8.5 (7.9)	61% (49%)
GTA	8.8 (8.6)	62% (57%)	8.4 (8.0)	55% (45%)	8.6 (8.0)	62% (49%)
Other Ontario	8.8 (8.7)	62% (60%)	8.4 (8.1)	54% (47%)	8.4 (7.9)	60% (48%)

(Average RTO scores are shown in brackets below each score for Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands)

*Data are not shown from the other source markets as sample sizes were below 50 recent visitors in each case.

Q30A: On a scale of 1 to 10, how satisfied were you with this trip overall?

Q31A: On a scale of 0 to 10, where "0" means "extremely low value" and "10" means "extremely high value", how would you rate this trip for value for the money?

Q31B: And, on a scale from 0 to 10, where "0" means "not at all likely" and "10" means "extremely likely", how likely would you be to recommend this destination to your friends/relatives?

SECTION C – PERCEPTIONS OF ALGONQUIN PARK, MUSKOKA, PARRY SOUND AND THE ALMAGUIN HIGHLANDS



Section C Overview

INTRODUCTION

- In this section of the report, we describe Muskoka, Parry Sound & Algonquin Park's image profile as it exists among travellers in each source market who claim to have some degree of familiarity with the Region ("very" or "fairly" familiar). This analysis provides a solid grounding on the Region's overall image, embracing the views of both past visitors and those who have never been, but have some conception of what Muskoka, Parry Sound & Algonquin Park is likely to offer.
- We have included ratings of Ontario as a whole as a point of comparison. This provides some context for assessing the scores achieved by Muskoka, Parry Sound & Algonquin Park, and offers perspective on how the Region fits with the umbrella Ontario brand profile. It should be noted that the scores shown for Ontario are not averages for the Tourism Regions combined, but instead represent ratings assigned to Ontario when considered in its entirety. As a consequence, it is unreasonable to expect any specific Region to meet the standard set by the province on all attributes. We are more interested in the extent of the gap that exists between the Region and the province as a whole.

Section C Overview

ONTARIO TRAVELLERS

Summary

- Overall, the Muskoka, Parry Sound & Algonquin Park Region projects a solid image within the Ontario market. Ratings are elevated around the perceptions related to outdoors and nature. In particular, Ontario travellers give this Region very strong scores on having impressive scenery and agree that it is a great place for enjoying outdoor activities. It is also known for being a great place to enjoy boating. The details of Muskoka, Parry Sound & Algonquin Park's domestic image profile are discussed below.

Accessibility

- Ontario travellers do not seem to have difficulties with accessibility in this Region. Those who are familiar with the Region tend to find getting there, and getting around within the Region to be easy.
- Those who are familiar with the Region also tend to believe it offers appealing travel experiences year-round.

Section C Overview

ONTARIO TRAVELLERS (CONT'D)

Interesting and Unique

- Ontario travellers believe that this Region is a unique place; scores are on par with total Ontario. However, scores for “a place with interesting cities and towns that are worth seeing” and “offers many possibilities to experience something new and different” tend to be suppressed when compared to total Ontario scores. This may be something that the Region can more forcefully demonstrate in their marketing communications or address within their product offer.
- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands can also improve on delivering perceptions of “a destination that excites my curiosity”. This is particularly important for attracting returning visitors who may want to experience new aspects of the Region.

Culture, Arts and Entertainment

- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands receives less robust scores for its culture, arts and entertainment options. Suppressed scores (vs. total Ontario) are noted for its arts and culture offerings (e.g. museums, galleries, theatre etc.) and being a place to experience diverse cultures and ways of life. GTA travellers in particular, are more critical of its lack of diversity than other Ontarians. This may be a facet of judging vs. their own immediate area which is particularly known for diversity.

Section C Overview

ONTARIO TRAVELLERS (CONT'D)

Popular

- Ratings for having fun and recommendation by others are particularly strong and only just below the general Ontario ratings. However, ratings are muted for “a place that offers something for everyone”. There may be some opportunity to broaden the appeal of the Region to suit a wider set of needs. Muted scores on this measure may indicate that a subset of travellers perceive the Region as being somewhat one-dimensional.

Friendly, Safe, and Comfortable

- Ontario travellers judge this Region highly for the friendliness of the people and for being a place to feel safe and comfortable.

Outdoors and Nature

- Ontarians rate this Region extremely high on its outdoors and nature offering. Those who are familiar with the Region agree that it has impressive scenery, is a great place for enjoying outdoor activities and is great for boating. Golf course ratings are also fairly strong. This obviously confirms that the core of the Region’s offer must centre around these features. However, it is clear that there may be some opportunity to dial up awareness of the golf offering.

Section C Overview

ONTARIO TRAVELLERS (CONT'D)

Value and Quality

- Ratings are strong for quality of travel experiences but are less favourable for value for money. This value perception may be driven by the fact that this is perceived to be one of the more expensive Regions to visit within Ontario.

General and Lifestyle

- Overall, Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands receives strong ratings for being a place that can create lasting memories, rest and rejuvenation, and a place enjoyable for a vacation/getaway. Indeed, scores for rest and rejuvenation are stronger than those of Ontario overall which suggests that this is one of the key marketing platforms which is resonating with consumers.
- However, scores tend to be suppressed when it comes to suitable accommodations, a place for a romantic holiday, and a place that suits my personal lifestyle and pleasure travel needs.

Section C Overview

QUEBEC TRAVELLERS

Summary

- Overall, Quebec travellers score Muskoka, Parry Sound & Algonquin Park lower than their Ontario counterparts. To Quebec travellers, this Region projects a somewhat average image.

Accessibility

- Not surprisingly, when compared to Ontario travellers, Quebec travellers provide lower scores when it comes to getting to the Region. Quebec travellers are also less likely to perceive this Region as a year-round destination.

Culture, Arts and Entertainment

- Those who are familiar with the Region believe that it has interesting festivals and fairs, is a great place to experience diverse cultures, and offers an authentic travel experience. Scores for these aspects are at parity with total Ontario, indicating that Quebecers do not feel that these are weaknesses of the Region.

Section C Overview

QUEBEC TRAVELLERS (CONT'D)

Outdoors and Nature

- Quebec travellers are less likely to perceive Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands as standing out for its outdoors and nature offerings; scores are suppressed when compared to Ontarians and tend to come out lower than total Ontario ratings. It would appear that the Region could increase efforts to build awareness of the strong outdoor offer within this source market.

General and Lifestyle

- Overall, Quebec travellers give average scores on this Region's general and lifestyle attributes. Again, this identifies a potential opportunity to promote this aspect alongside the outdoors offer within this source market.

MANITOBA TRAVELLERS

Summary

- Manitoban travellers perceive Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands' image profile similarly to Ontarians. Manitobans clearly recognize that the Region is known for its outdoors and nature offerings, but absolute scores are somewhat suppressed when compared to those of Ontarians. Overall results suggest that Manitobans are not too aware of this Region's offer beyond the outdoors features and there may be some opportunity to promote a more rounded view of offer (i.e. the supporting features that accompany the stunning scenery).

Accessibility

- Similar to Quebec travellers, Manitoba travellers offer less robust scores for accessibility. While they generally agree that the Region offers appealing travel experiences year-round, they are less likely to feel that it is easily accessible or easy to get around once within the Region.

MANITOBA TRAVELLERS (CONT'D)

Interesting and Unique

- Manitoba visitors generally believe that Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands delivers in terms of interesting cities and town, for being unique and for offering many possibilities to experience something new and different.
- Given that features such as boating and golfing generate good awareness, promoting activities such as these could further enhance the Region's perceptions of being interesting, unique and exciting curiosity.

Outdoors and Nature

- Like their Ontario counterparts, Manitobans recognize the Region for its outdoors and nature offerings. The Region is particularly highly rated for impressive scenery and landscapes as well as for being a great place to enjoy boating.

Section C Overview

U.S. NEARBY TRAVELLERS

Summary

- In general, U.S. Nearby travellers' perceptions of Muskoka, Parry Sound & Algonquin Park are fairly strong. Although absolute scores come just under parity when compared to total Ontario, this image profile is a positive one for U.S. Nearby travellers.

Accessible

- Perceptions of ease of access to, and within the Region are generally high for travellers from the Nearby U.S. source markets. Absolute scores come just under parity vs. total Ontario.

Outdoors and Nature

- Travellers from this source market agree that Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands is known for its outdoors and nature offerings. Although ratings are high, they are still somewhat suppressed when compared to those of Ontarians. This suggests that this Region may lack some awareness of its differentiating features vs. other travel destinations. There may be an opportunity to market the uniqueness of the offer a little more strongly here.

U.S. NEARBY TRAVELLERS (CONT'D)

General and Lifestyle

- U.S. Nearby travellers perceive Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands to be a place that can create lasting memories and is a place that is enjoyable for a vacation/getaway.

Section C Overview

TRAVELLERS IN OTHER US MARKETS

Summary

- Perceptions generated by those residing in more distant U.S. source markets are very similar to those of U.S. Nearby travellers. Clearly, these travellers have a positive image profile of Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands.

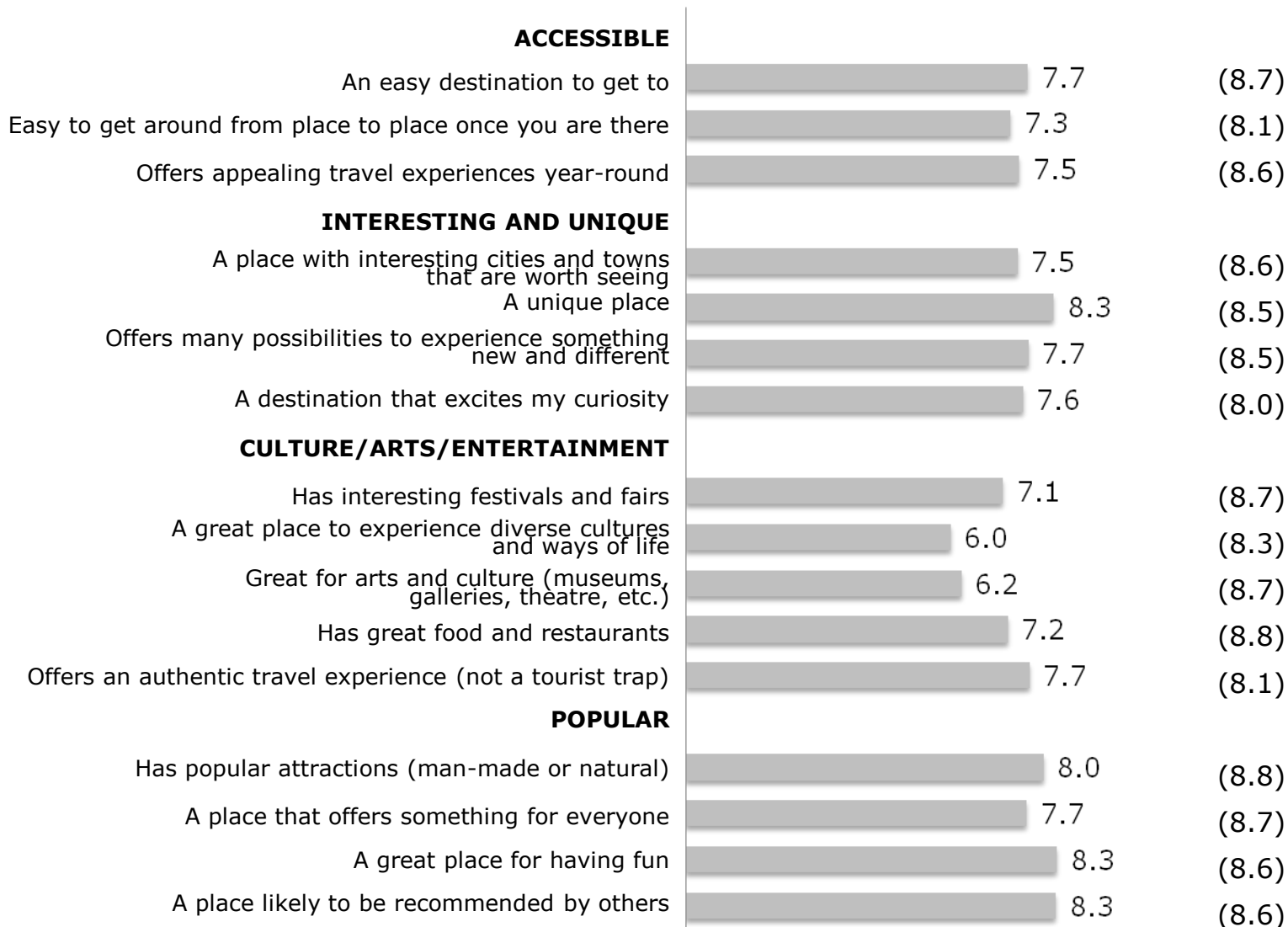
Outdoors and Nature

- Like their U.S. Nearby counterparts, travellers from more distant U.S. source markets also recognize this Region for its outdoors and nature offering. These travellers provide high ratings for having impressive scenery and being a great place for enjoying outdoor activities, although absolute scores tend to be suppressed when compared to those given to Ontario overall. However, just like their Nearby U.S. counterparts, their ratings of the outdoor features are not distinctly higher than those of other features, which supports the notion that the true unique Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands experience could be more heavily promoted within U.S. source markets.

Value and Quality

- Other U.S. travellers give fairly high scores for value and quality; their perceptions are generally aligned with those of U.S. Nearby travellers.

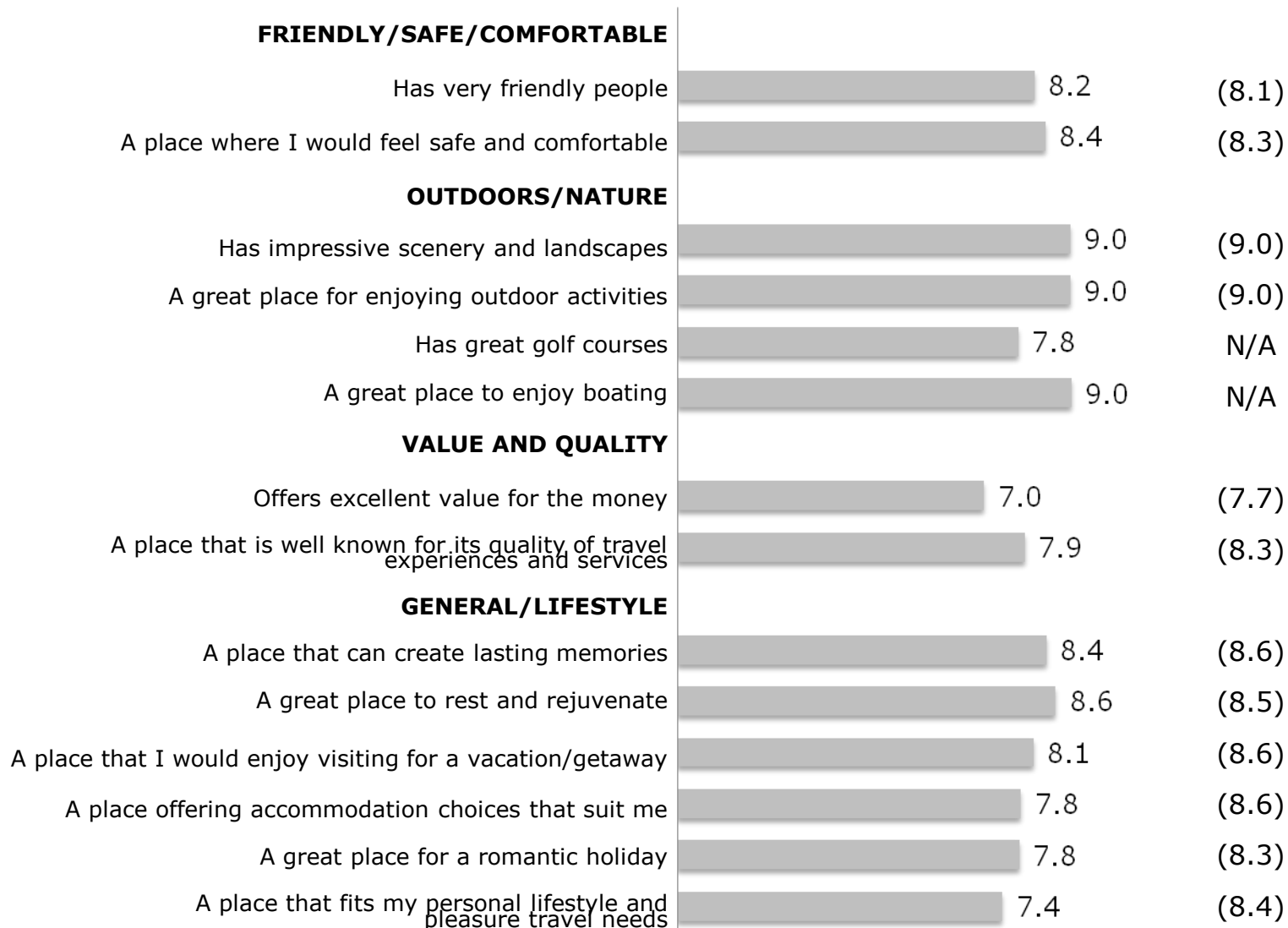
Perceptions of Muskoka, Parry Sound & Algonquin Park among Total Ontario Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

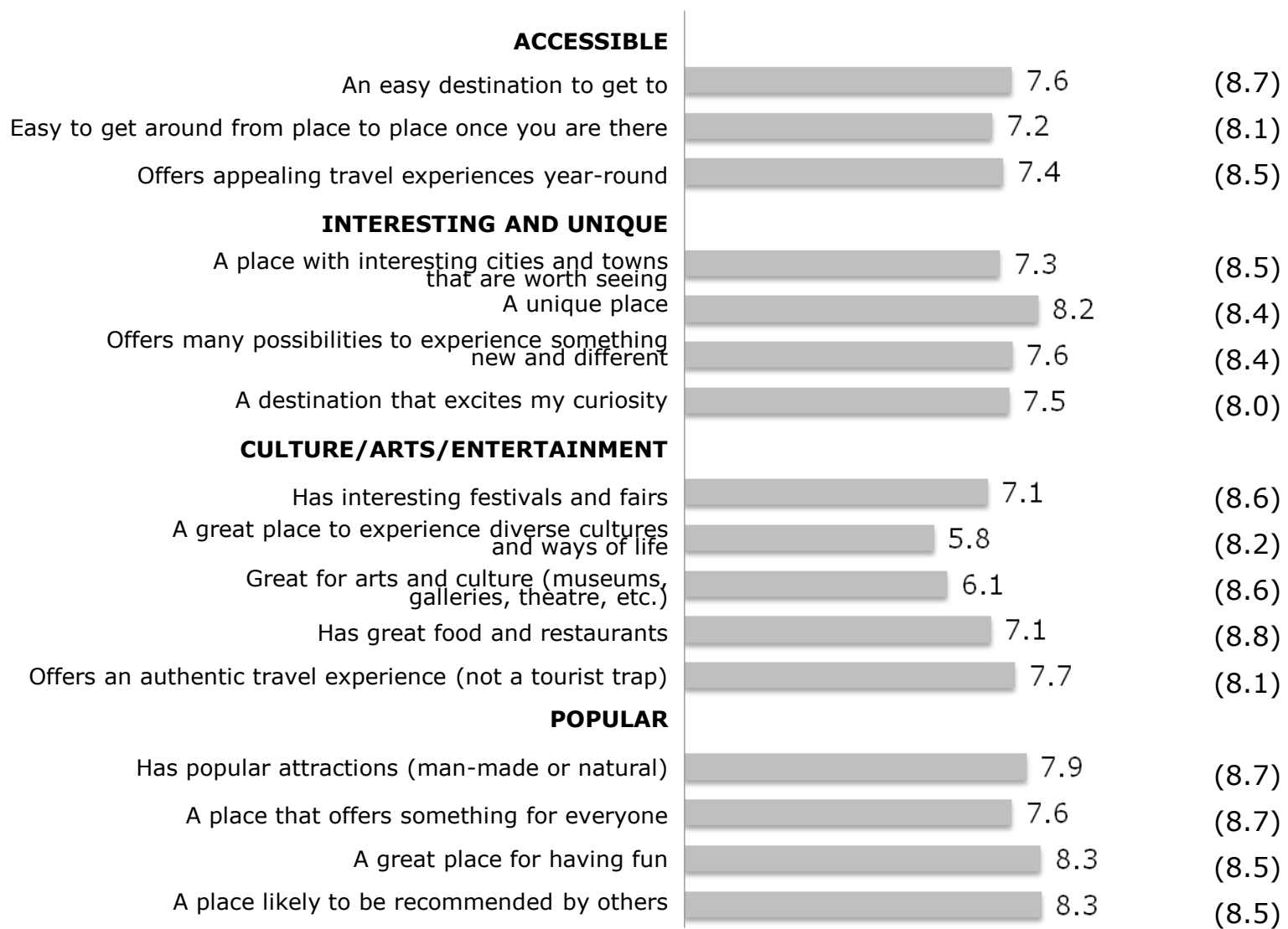
() = OVERALL ONTARIO SCORE

Perceptions of Muskoka, Parry Sound & Algonquin Park among Total Ontario Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

Perceptions of Muskoka, Parry Sound & Algonquin Park among GTA Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

() = OVERALL ONTARIO SCORE

Perceptions of Muskoka, Parry Sound & Algonquin Park among GTATravellers Familiar with Region—Average Score

FRIENDLY/SAFE/COMFORTABLE

Has very friendly people	8.1	(8.0)
A place where I would feel safe and comfortable	8.3	(8.3)

OUTDOORS/NATURE

Has impressive scenery and landscapes	8.9	(8.9)
A great place for enjoying outdoor activities	8.9	(8.9)
Has great golf courses	7.7	N/A
A great place to enjoy boating	8.9	N/A

VALUE AND QUALITY

Offers excellent value for the money	6.9	(7.6)
A place that is well known for its quality of travel experiences and services	7.8	(8.2)

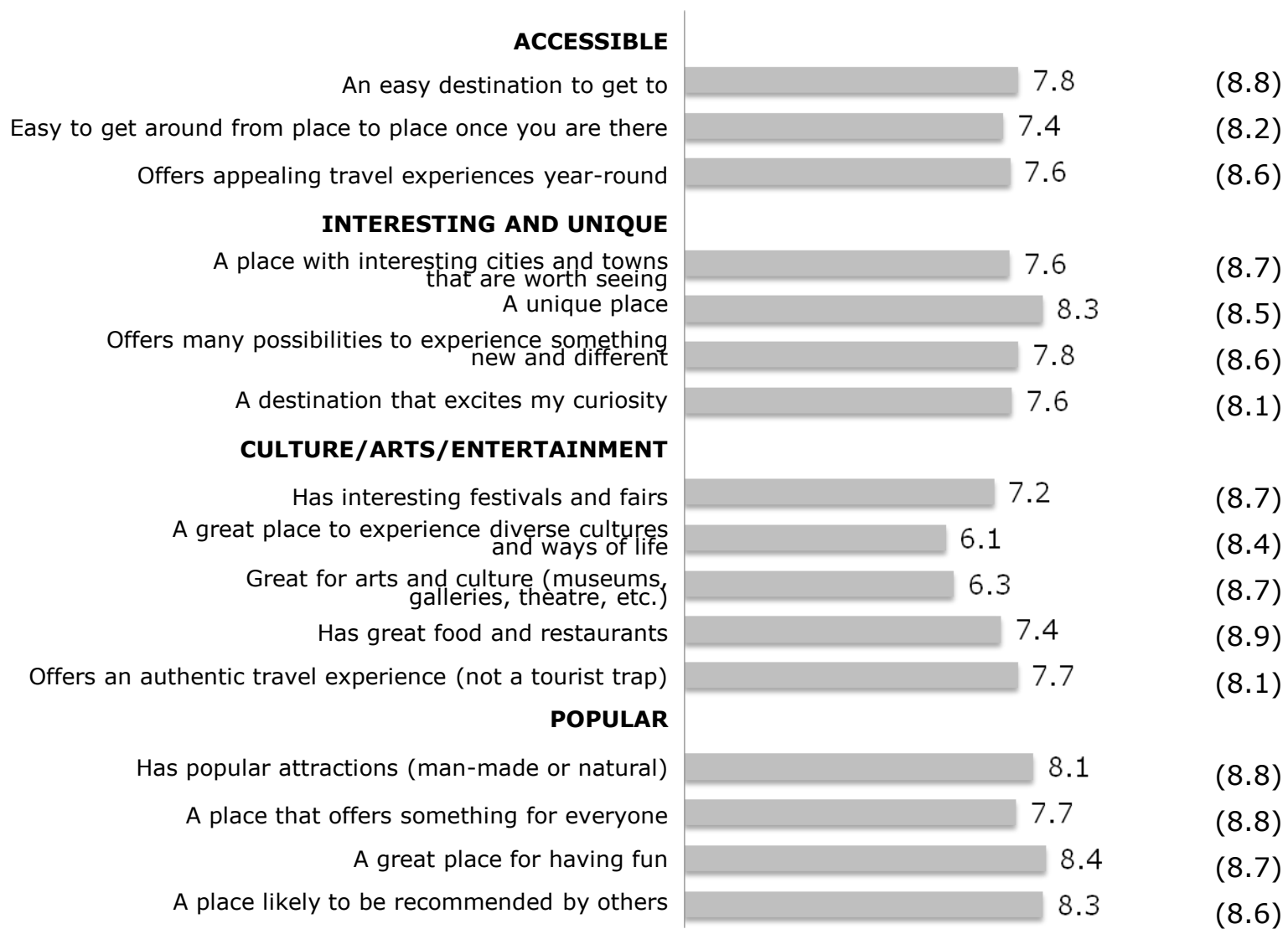
GENERAL/LIFESTYLE

A place that can create lasting memories	8.4	(8.6)
A great place to rest and rejuvenate	8.6	(8.4)
A place that I would enjoy visiting for a vacation/getaway	8.1	(8.5)
A place offering accommodation choices that suit me	7.7	(8.5)
A great place for a romantic holiday	7.7	(8.2)
A place that fits my personal lifestyle and pleasure travel needs	7.3	(8.3)



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

Perceptions of Muskoka, Parry Sound & Algonquin Park among Other Ontario Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

() = OVERALL ONTARIO SCORE

Perceptions of Muskoka, Parry Sound & Algonquin Park among Other Ontario Travellers Familiar with Region—Average Score

FRIENDLY/SAFE/COMFORTABLE

Has very friendly people	8.2	(8.2)
A place where I would feel safe and comfortable	8.5	(8.4)

OUTDOORS/NATURE

Has impressive scenery and landscapes	9.0	(9.1)
A great place for enjoying outdoor activities	9.0	(9.1)
Has great golf courses	7.8	N/A
A great place to enjoy boating	9.0	N/A

VALUE AND QUALITY

Offers excellent value for the money	7.1	(7.8)
A place that is well known for its quality of travel experiences and services	8.0	(8.4)

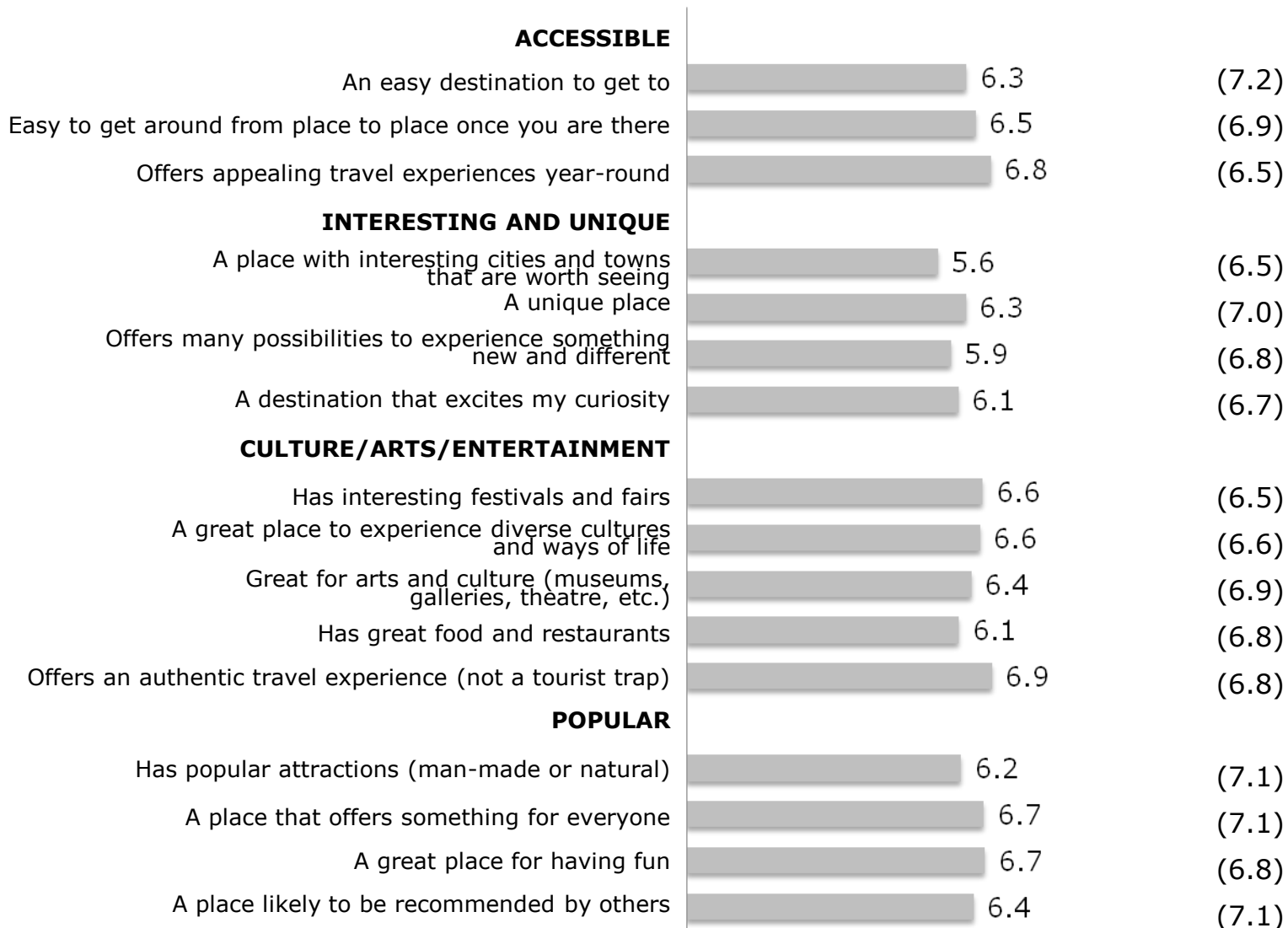
GENERAL/LIFESTYLE

A place that can create lasting memories	8.5	(8.7)
A great place to rest and rejuvenate	8.7	(8.6)
A place that I would enjoy visiting for a vacation/getaway	8.2	(8.6)
A place offering accommodation choices that suit me	7.9	(8.6)
A great place for a romantic holiday	7.8	(8.3)
A place that fits my personal lifestyle and pleasure travel needs	7.5	(8.5)



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

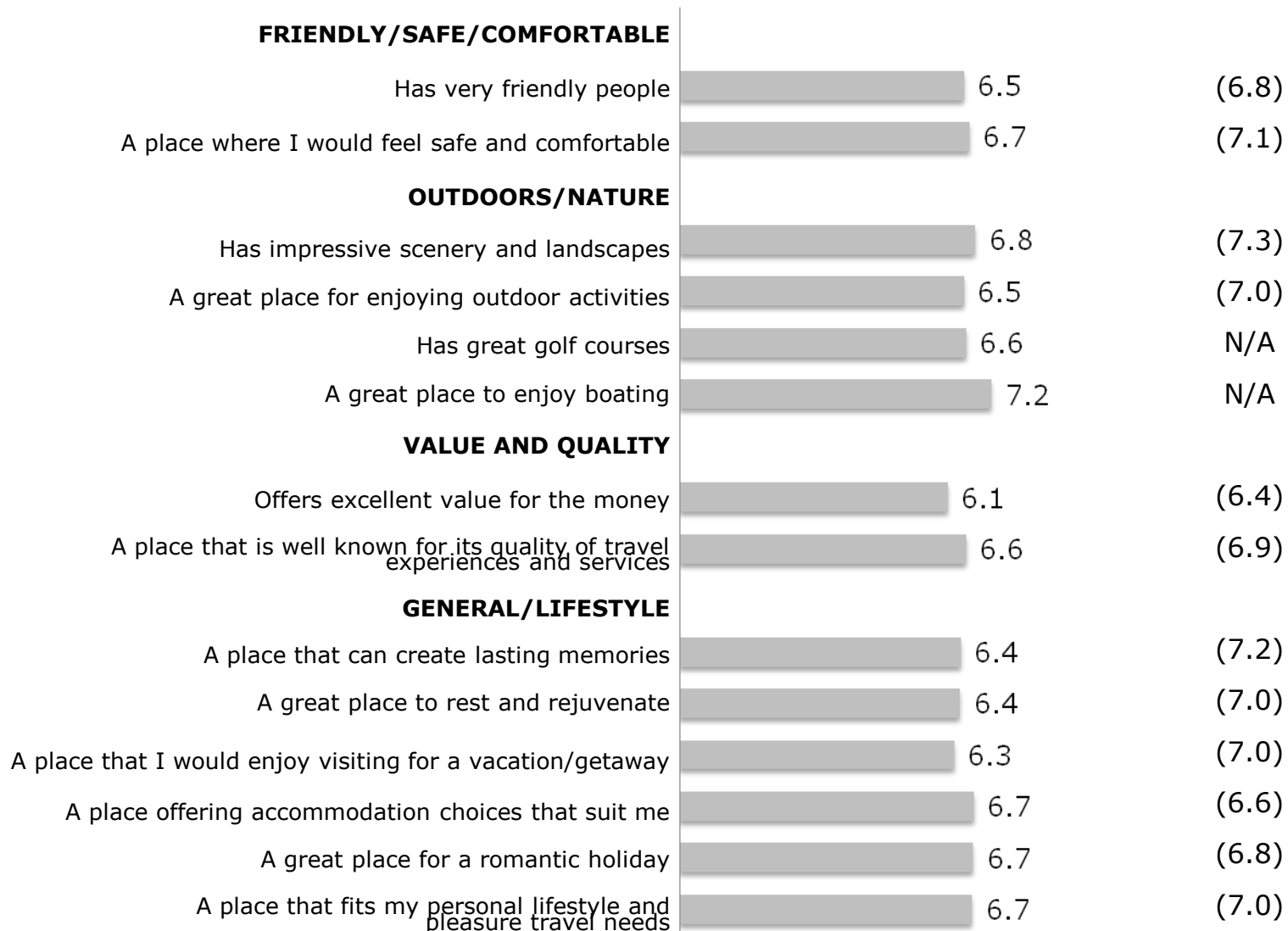
Perceptions of Muskoka, Parry Sound & Algonquin Park among Quebec Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

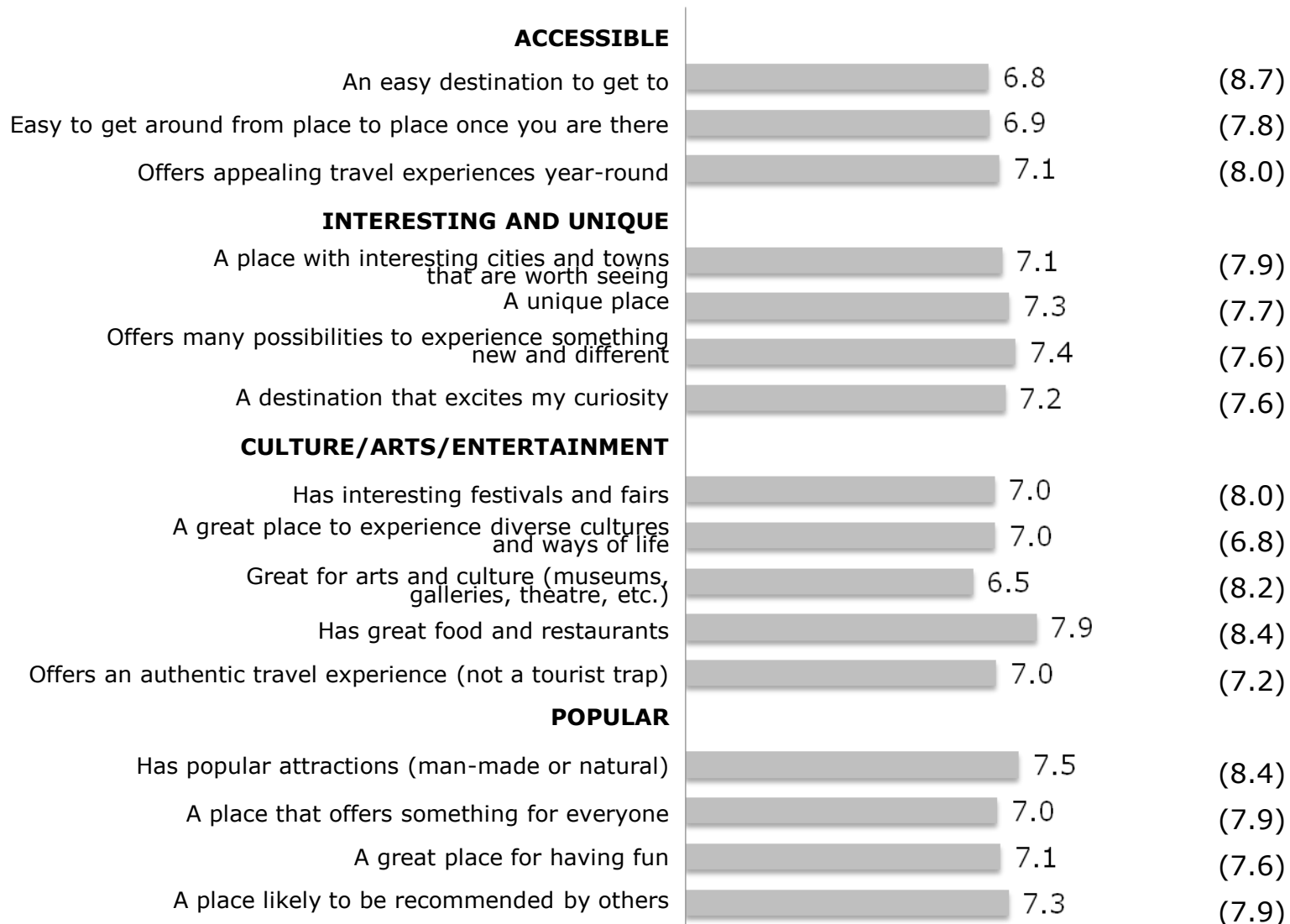


Perceptions of Muskoka, Parry Sound & Algonquin Park among Quebec Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

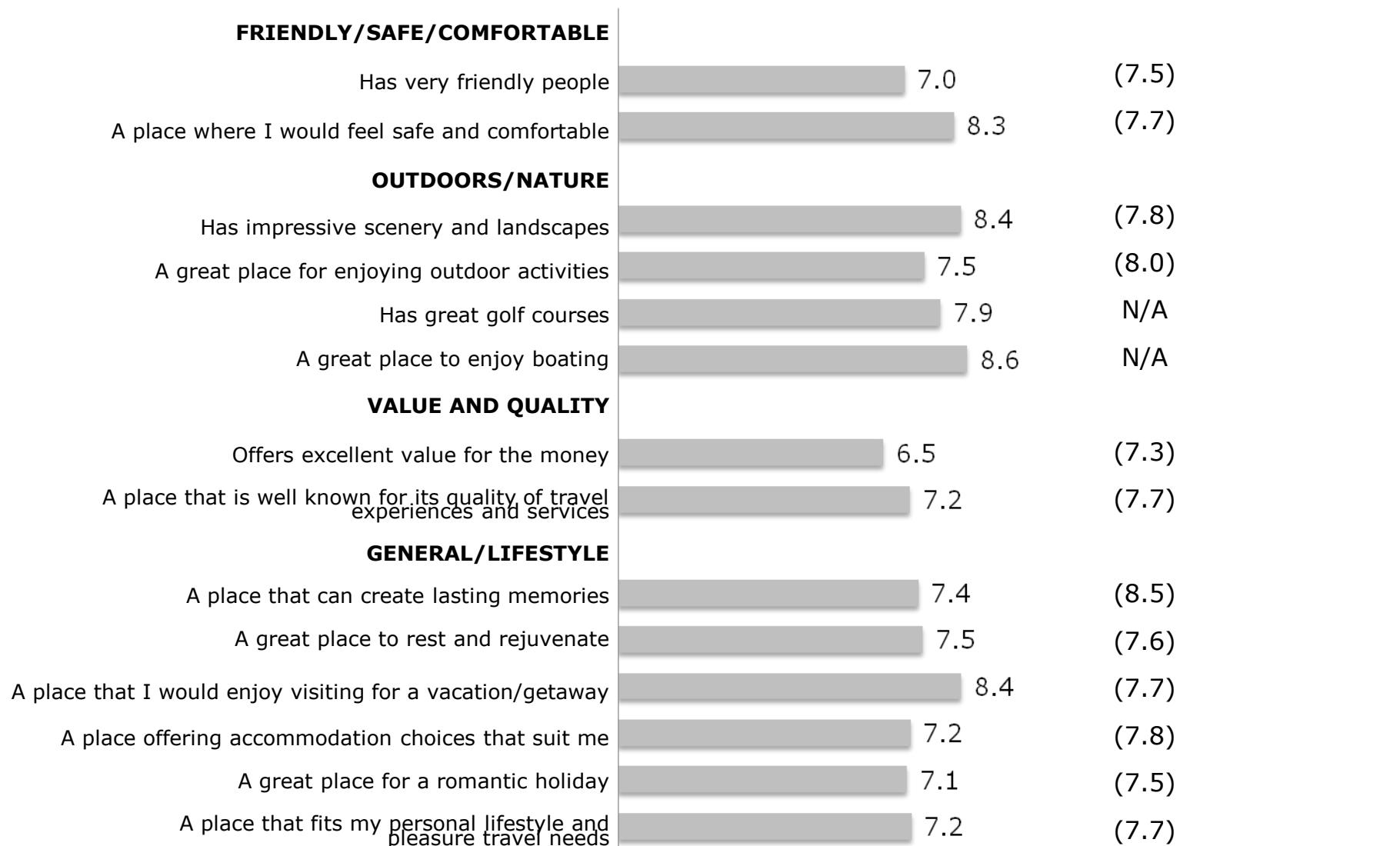
Perceptions of Muskoka, Parry Sound & Algonquin Park among Manitoba Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.



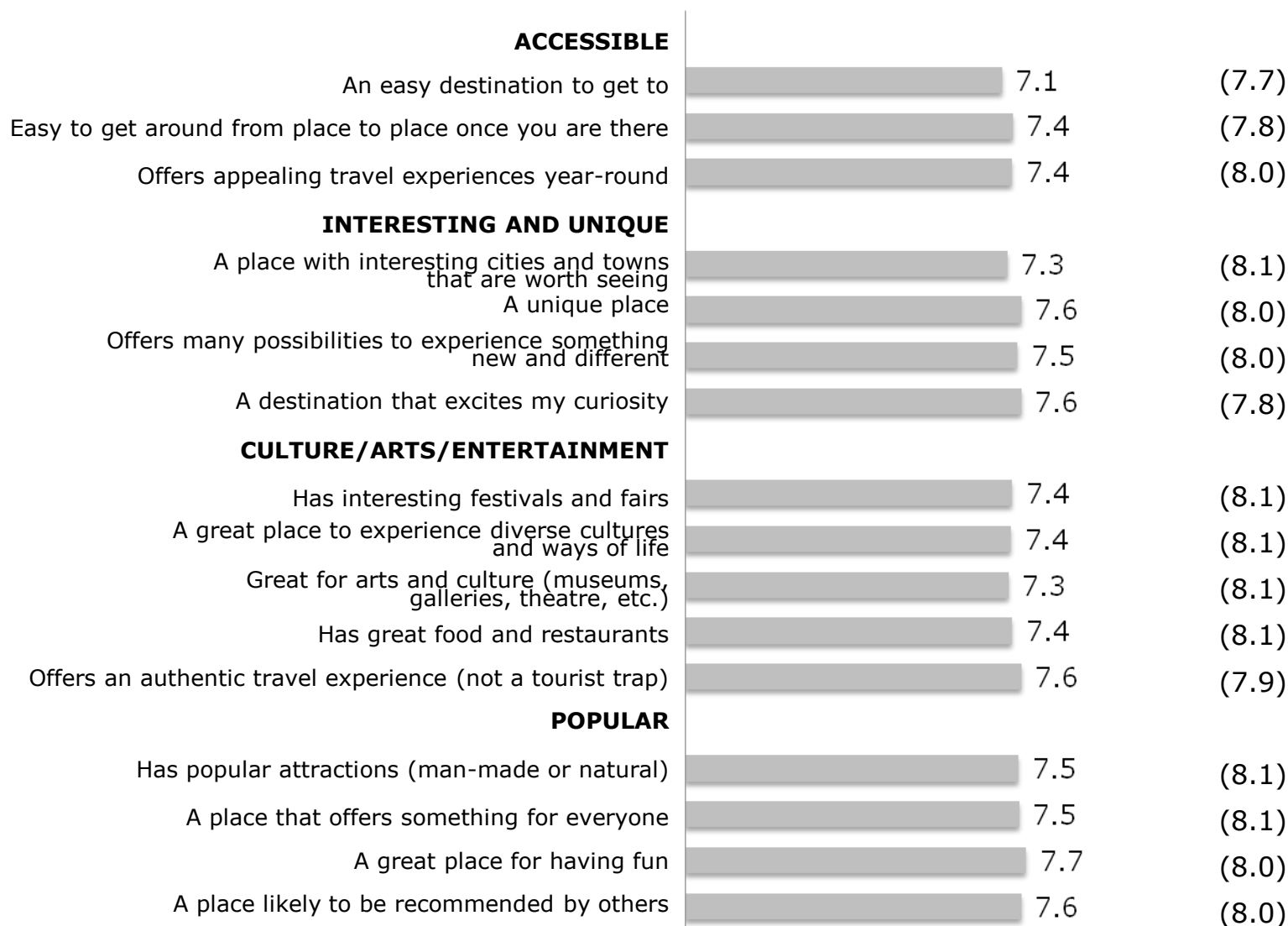
Perceptions of Muskoka, Parry Sound & Algonquin Park among Manitoba Travellers Familiar with Region—Average Score



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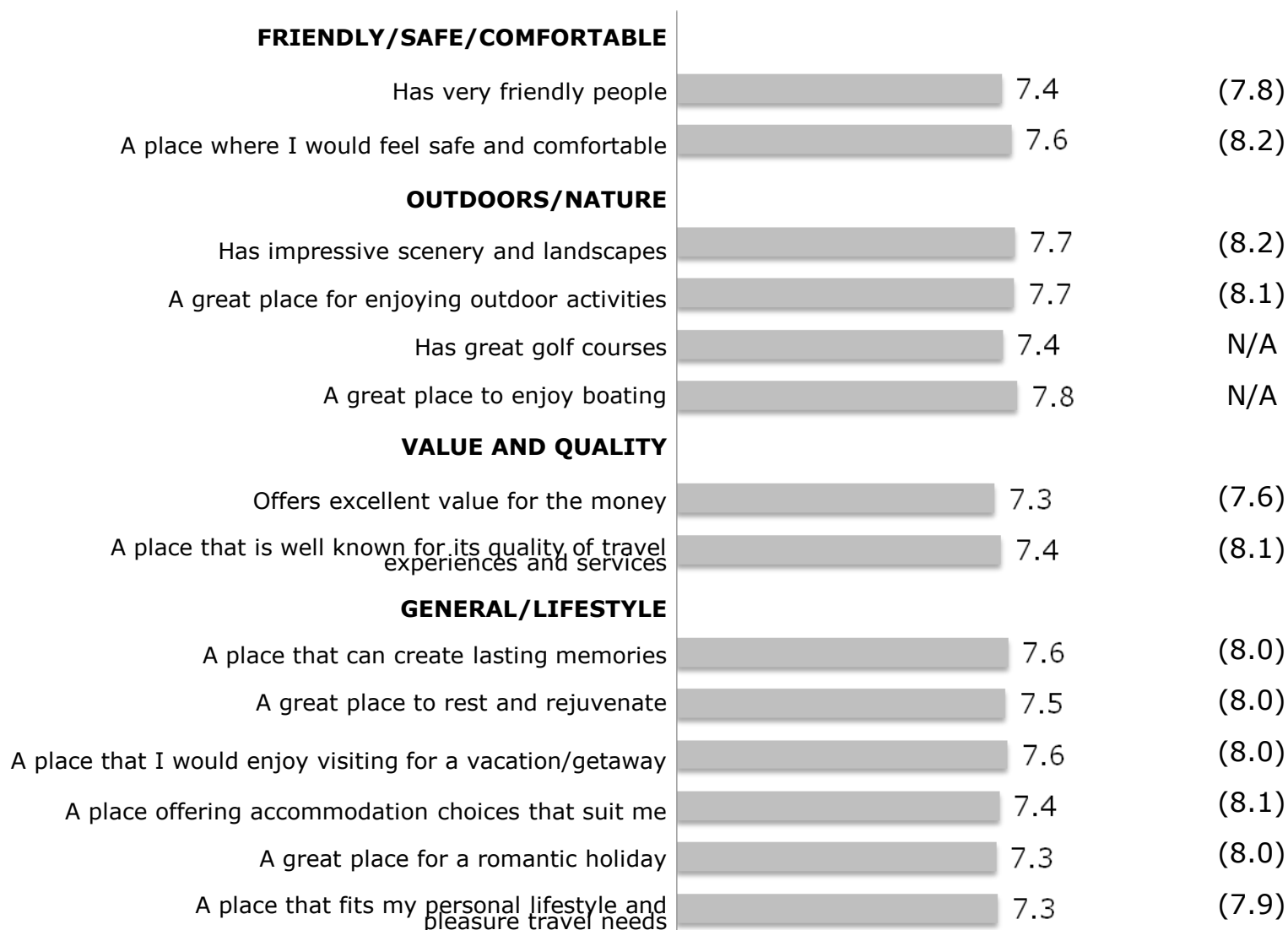
Perceptions of Muskoka, Parry Sound & Algonquin Park among U.S. Nearby Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

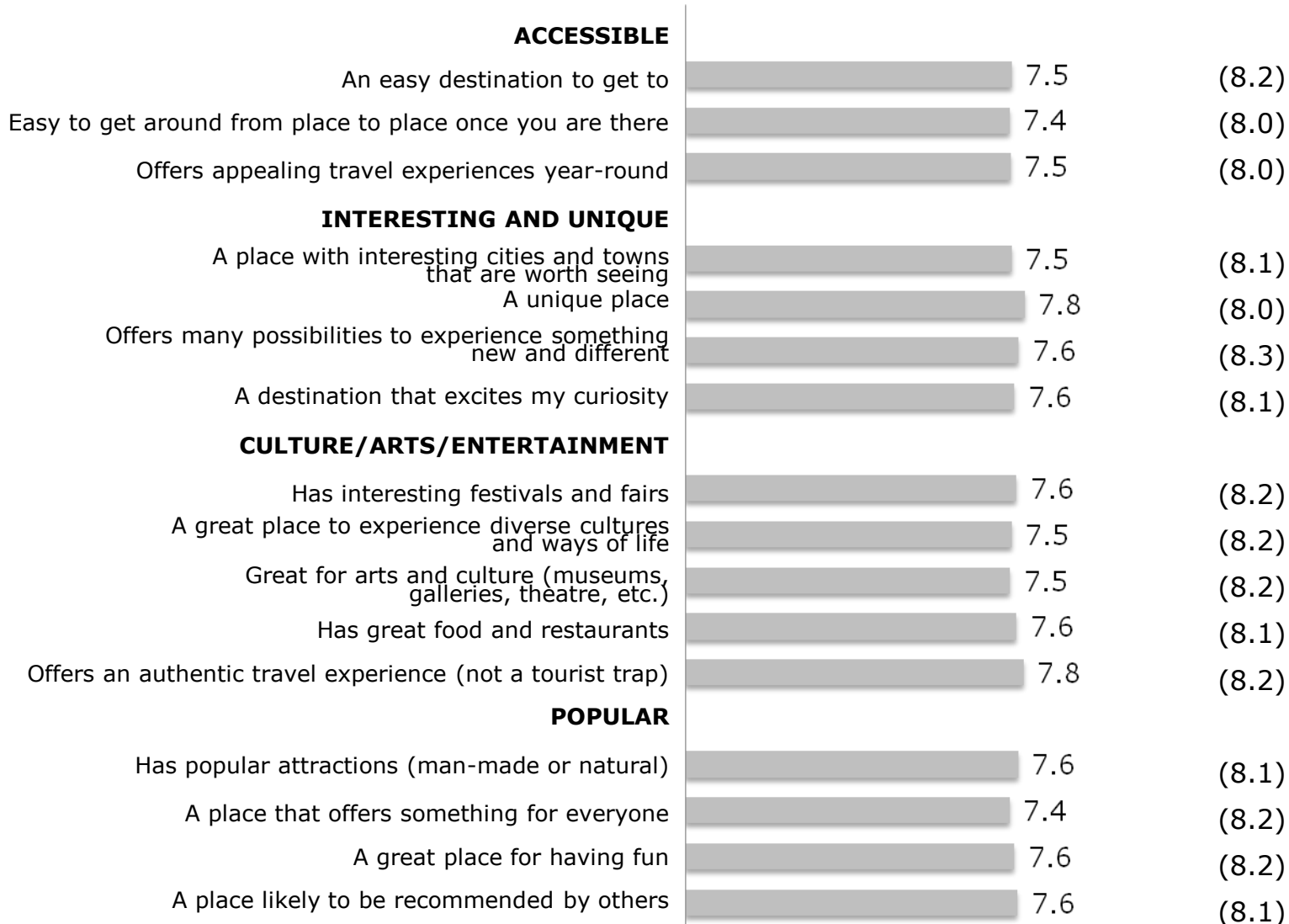
() = OVERALL ONTARIO SCORE

Perceptions of Muskoka, Parry Sound & Algonquin Park among U.S. Nearby Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.

Perceptions of Muskoka, Parry Sound & Algonquin Park among Other U.S. Travellers Familiar with Region—Average Score



Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.



Perceptions of Muskoka, Parry Sound & Algonquin Park among Other U.S. Travellers Familiar with Region—Average Score

FRIENDLY/SAFE/COMFORTABLE

Has very friendly people	7.7	(8.2)
A place where I would feel safe and comfortable	7.7	(8.1)

OUTDOORS/NATURE

Has impressive scenery and landscapes	7.8	(8.3)
A great place for enjoying outdoor activities	7.8	(8.2)
Has great golf courses	7.5	N/A
A great place to enjoy boating	7.8	N/A

VALUE AND QUALITY

Offers excellent value for the money	7.4	(7.9)
A place that is well known for its quality of travel experiences and services	7.5	(8.2)

GENERAL/LIFESTYLE

A place that can create lasting memories	7.8	(8.3)
A great place to rest and rejuvenate	7.6	(8.2)
A place that I would enjoy visiting for a vacation/getaway	7.5	(8.2)
A place offering accommodation choices that suit me	7.5	(8.3)
A great place for a romantic holiday	7.5	(8.1)
A place that fits my personal lifestyle and pleasure travel needs	7.6	(8.1)

Q2: We would like you to rate this Region for a number of specific characteristics. Please use the scale from 1 to 10 shown below where 1 means Does Not Apply At All and 10 means Applies Completely.



SECTION D – VISITOR PROFILES



Section D Overview

- Demographically, Muskoka, Parry Sound & Algonquin Park visitors fit the general traveller norm apart from a slight skew away from singles, and toward couples with no children, higher incomes and college or university graduates. In terms of having children, they match the typical overnight traveller with about one-third having any children under 18.
- Within Ontario, those from the GTA show a slight skew toward the middle age group (35-54), and a fairly strong skew to higher household incomes, while those from other Ontario markets show a slight skew toward females.

Household Composition- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands Visitors from Ontario

Algonquin Park, Muskoka,
Parry Sound and the
Almaguin Highlands
VISITORS
(visited past 12 months)

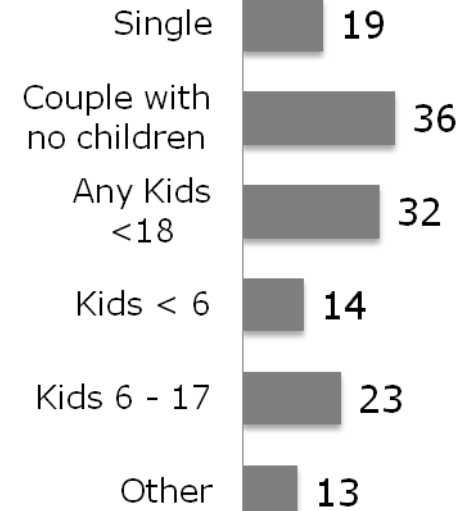
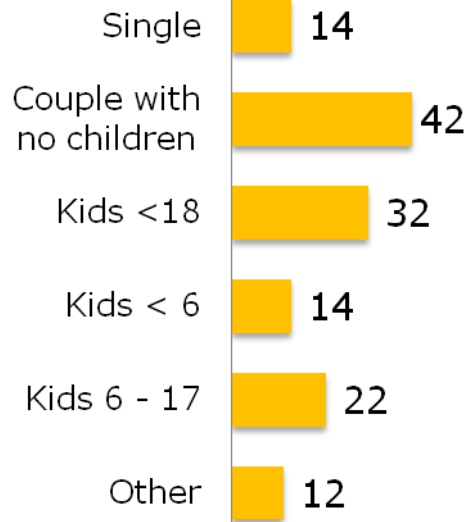
TOTAL TRAVELLING
POPULATION

Average
number of
people in
household

2.7

2.7

Composition
of household



Household Composition- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands Visitors- From the GTA

Algonquin Park, Muskoka,
Parry Sound and the
Almaguin Highlands
VISITORS
(visited past 12 months)

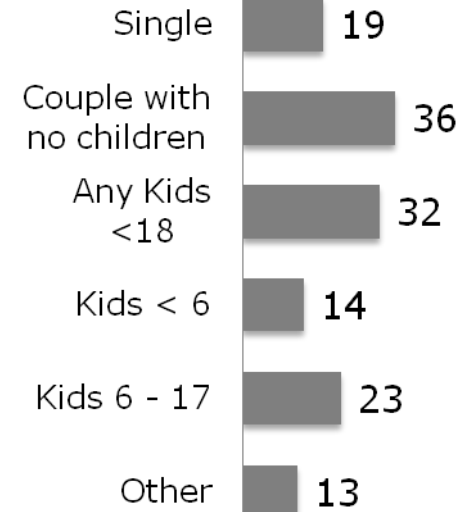
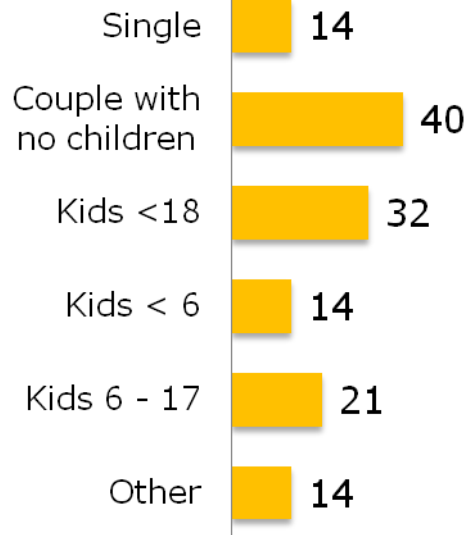
TOTAL TRAVELLING
POPULATION

Average
number of
people in
household

2.6

2.7

Composition
of household



Household Composition- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands Visitors- From Other Ontario

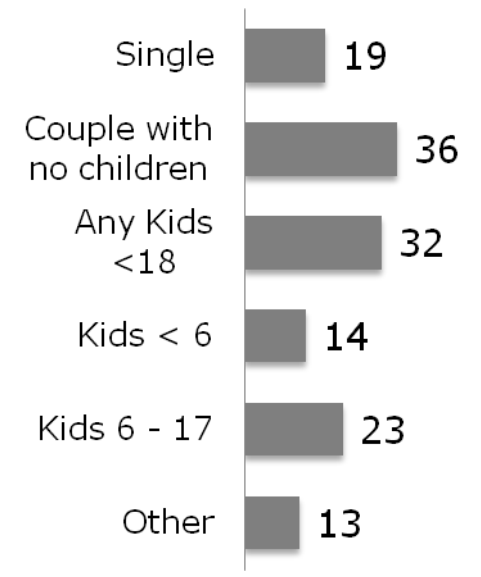
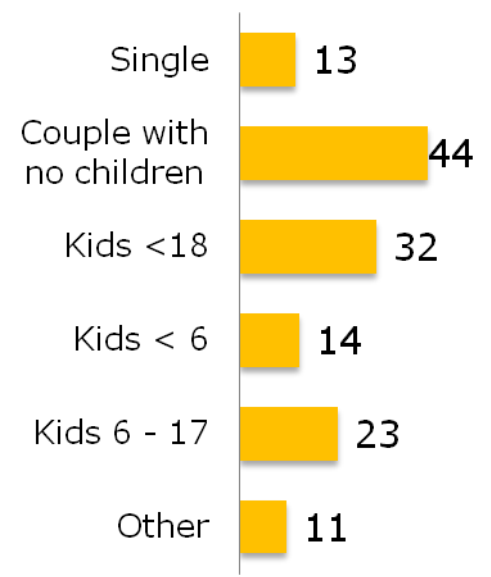
Algonquin Park, Muskoka,
Parry Sound and the
Almaguin Highlands
VISITORS
(visited past 12 months)

TOTAL TRAVELLING
POPULATION

Average number of people in household

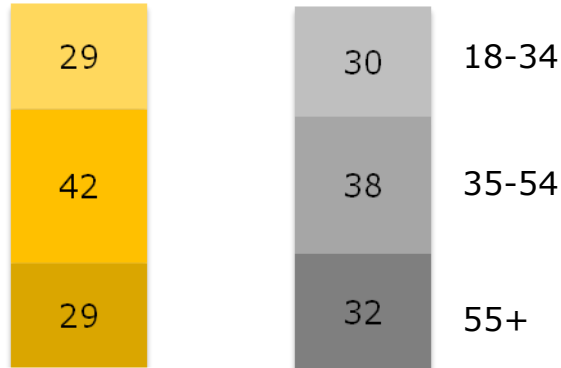


Composition of household



Demographic Profile- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands Visitors- From Ontario

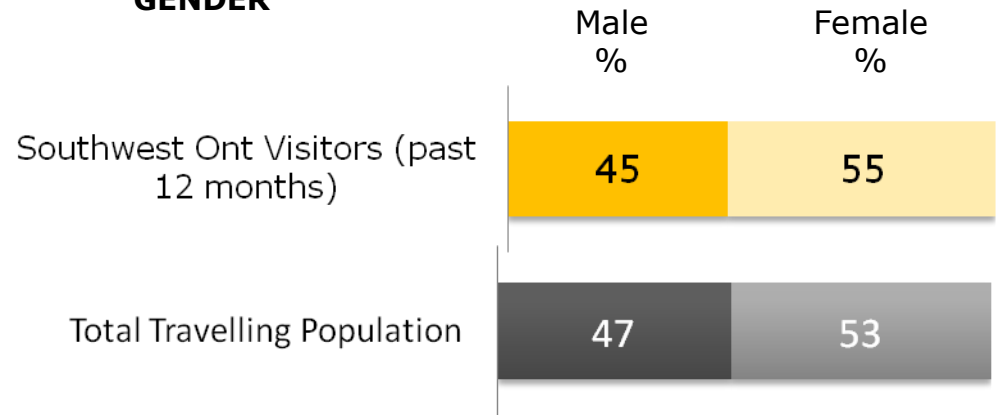
AGE %



Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (visited past 12 months)

Total Travelling Population

GENDER



HOUSEHOLD INCOME

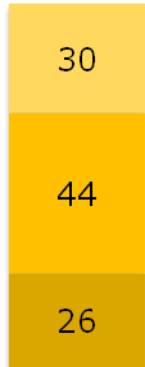
Income Category	Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (visited past 12 months)	Total Travelling Population
Up to \$39,999	11%	22%
\$40,000 to \$79,999	31%	35%
\$80,000 to \$99,999	14%	12%
\$100,000 to \$149,999	17%	14%
\$150,000 +	10%	8%
Average	\$95,000	\$80,000

EDUCATION LEVEL

Education Level	Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (visited past 12 months)	Total Travelling Population
High school grad./ Some college	34%	40%
College/University grad.	51%	38%
Masters degree or higher	10%	18%

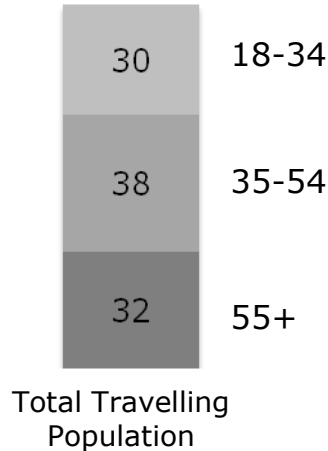
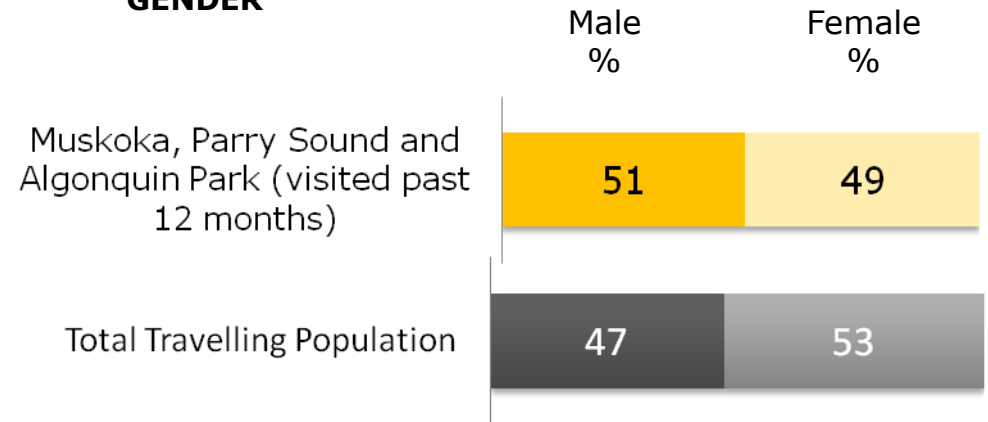
Demographic Profile- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands Visitors- From the GTA

AGE %



Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (visited past 12 months)

GENDER



Total Travelling Population

HOUSEHOLD INCOME

Income Category	Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (visited past 12 months)	Total Travelling Population
Up to \$39,999	8%	22%
\$40,000 to \$79,999	33%	35%
\$80,000 to \$99,999	15%	12%
\$100,000 to \$149,999	17%	14%
\$150,000 +	12%	8%
Average	\$102,000	\$80,000

EDUCATION LEVEL

High school grad./
Some college

31%

40%

College/University grad.

50%

38%

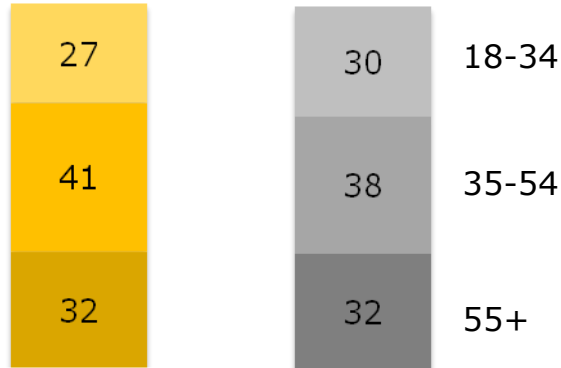
Masters degree
or higher

15%

18%

Demographic Profile- Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands Visitors- From Other Ontario

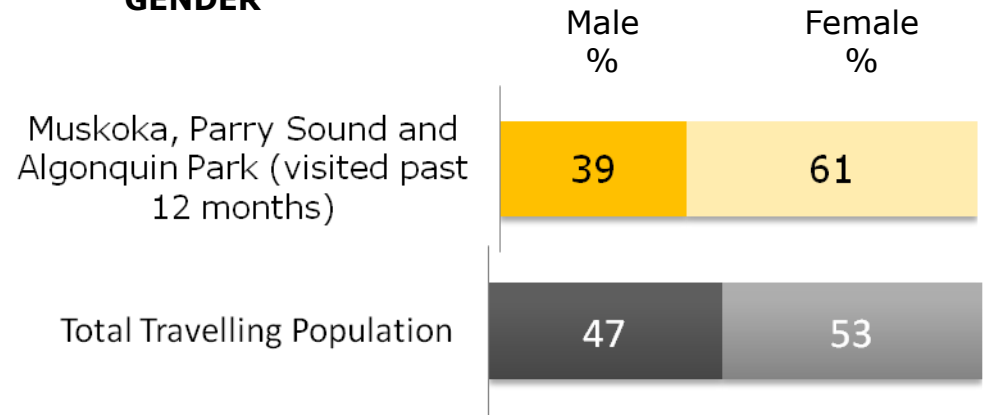
AGE %



Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (visited past 12 months)

Total Travelling Population

GENDER



EDUCATION LEVEL

High school grad./
Some college

College/University grad.

Masters degree
or higher

TNS

Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (visited past 12 months)

Total Travelling Population

HOUSEHOLD INCOME

Income Category	Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (visited past 12 months)	Total Travelling Population
Up to \$39,999	14%	22%
\$40,000 to \$79,999	29%	35%
\$80,000 to \$99,999	13%	12%
\$100,000 to \$149,999	17%	14%
\$150,000 +	9%	8%
Average	\$89,000	\$80,000

SECTION E –
TRIP ACTIVITIES IN ALGONQUIN PARK,
MUSKOKA, PARRY SOUND AND THE
ALMAGUIN HIGHLANDS



Section E Overview

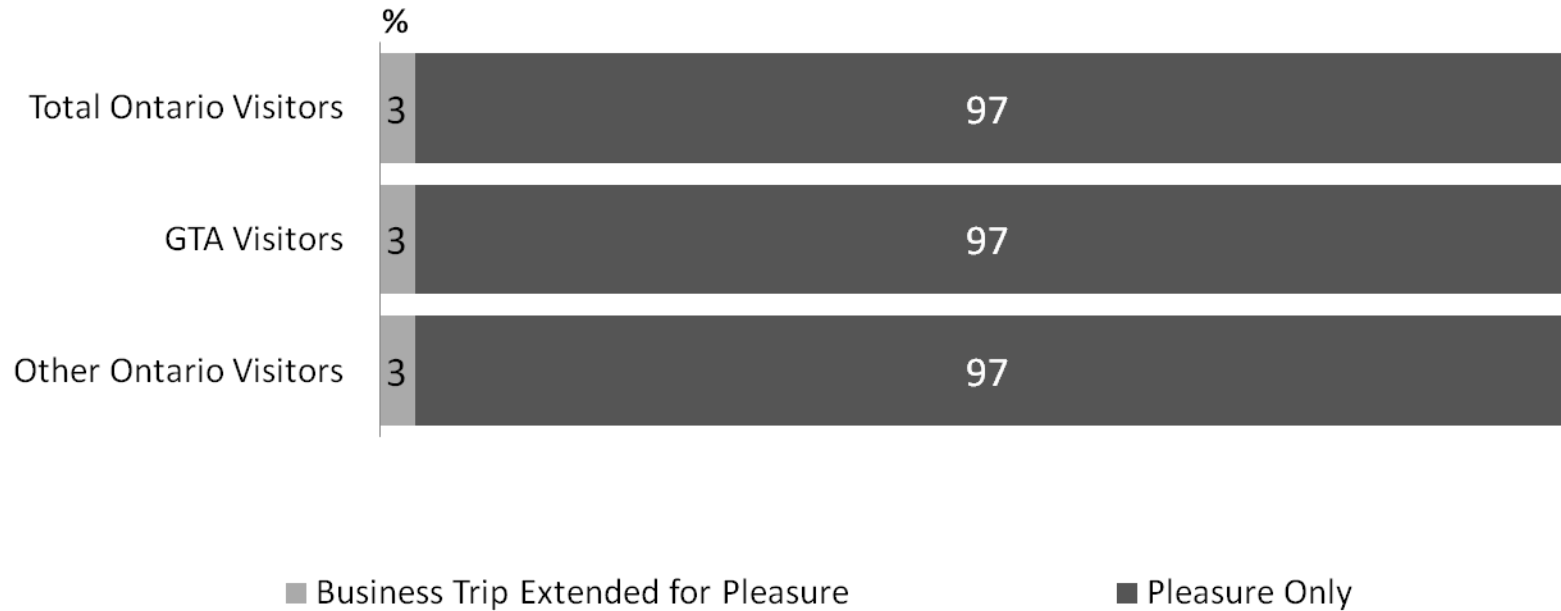
- As one might expect, pleasure travel is the primary driver of trips to Muskoka, Parry Sound & Algonquin Park from all Ontario source markets. Beyond this, however, there is evidence of a strong, VFR/family event component. In fact, this often emerges as the primary trip “activity” in these markets.
- Business trips extended for pleasure are relatively insignificant.
- Planning and booking rates for the Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands are generally high. Nine out of ten overnight trips involved some degree of planning, and more than seven out of ten included a booking. Planning typically occurs within two months of the departure date, with the lion’s share occurring one month or less in advance. There would appear to be little lag between planning and booking.
- The planning and booking cycles do not vary by source market.

Section E Overview

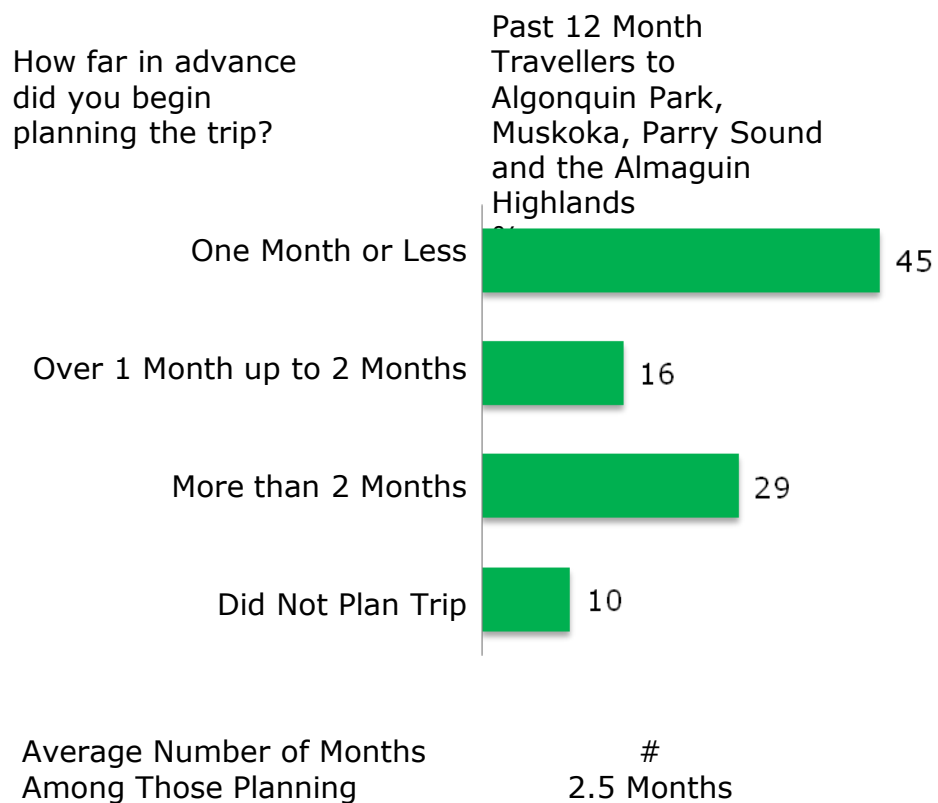
- Accommodation choices tend to align with trip purpose. At the top of the list, cottages and homes of friends or relatives are relatively popular. In terms of paid accommodation, a very wide variety is mentioned, including hotels, rental cottages, campgrounds, resorts and motels. The choices of accommodation do not differ significantly between travellers from the GTA and elsewhere in Ontario.
- There are a few themes with regard to activity selection that define the Muskoka, Parry Sound & Algonquin Park travel experience.
 - There is a major focus on the outdoors, with camping, fishing, summer beach experiences, hiking/climbing, kayaking/canoeing and boating/sailing achieving a high degree of prominence within the activity set.
 - Also related to the outdoors, there is a secondary focus on observing nature, either through visiting national or provincial nature parks, or through niche activities such as wildlife or bird-watching.
 - There is also a desire to sightsee and experience the Region through visiting small towns and villages with the usual accompanying shopping and dining.

Extended Business Trips Taken to Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands (Total Trips Reported by Past 12 Month Visitors)

PERCENT OF TRAVELLERS FROM EACH SOURCE MARKET STATING...

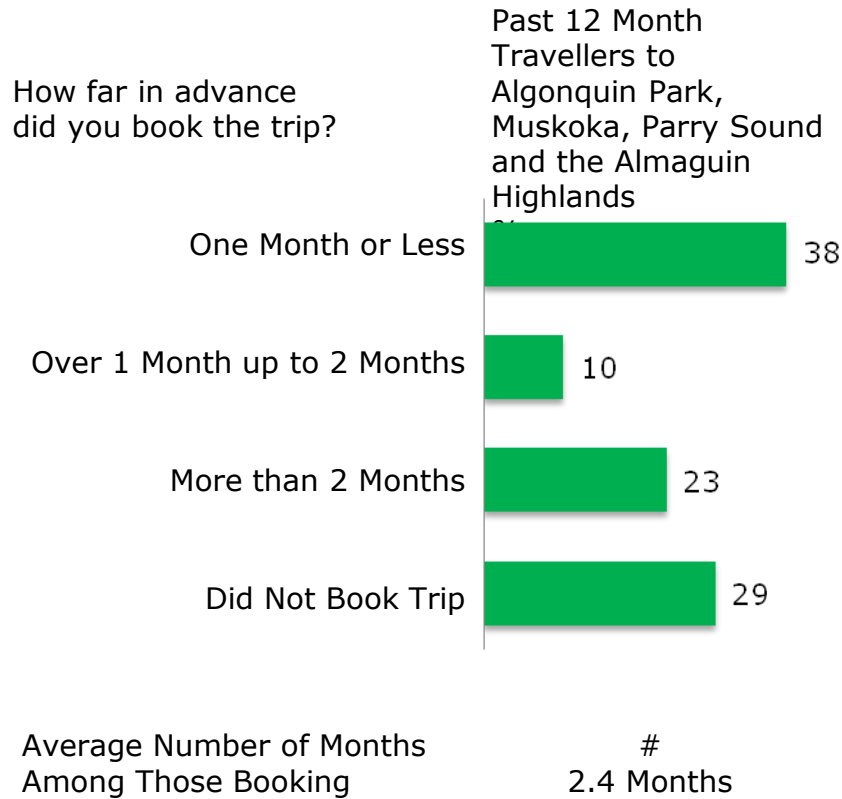


The Planning Cycle for Trips To Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands - Among Past 12 Month Visitors to the Region



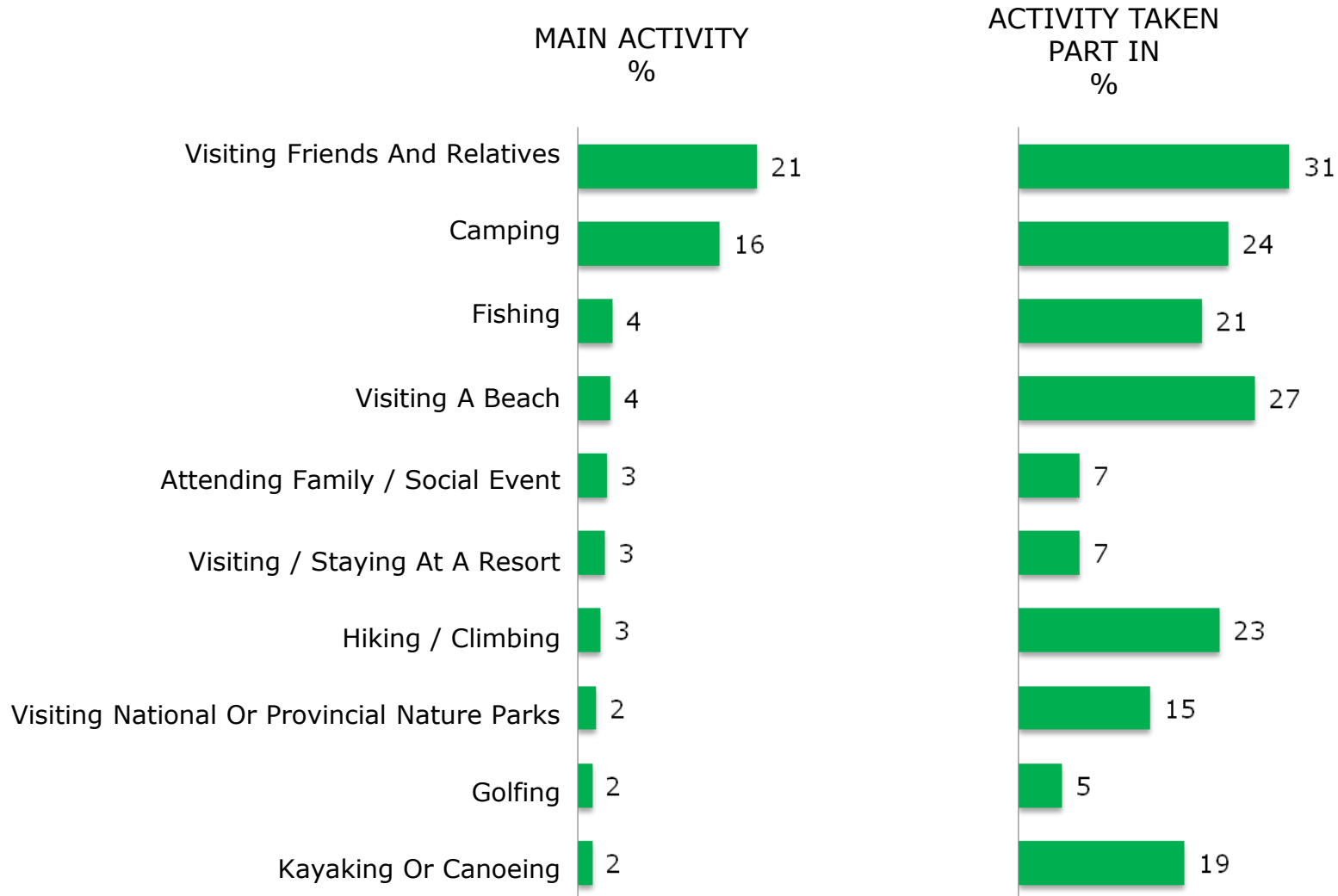
Past 12 month travellers from...	
GTA	Other Ontario
%	%
47	39
16	19
29	31
9	11
# 2.4	# 2.7

The Booking Cycle for Trips To Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands - Among Past 12 Month Visitors to the Region



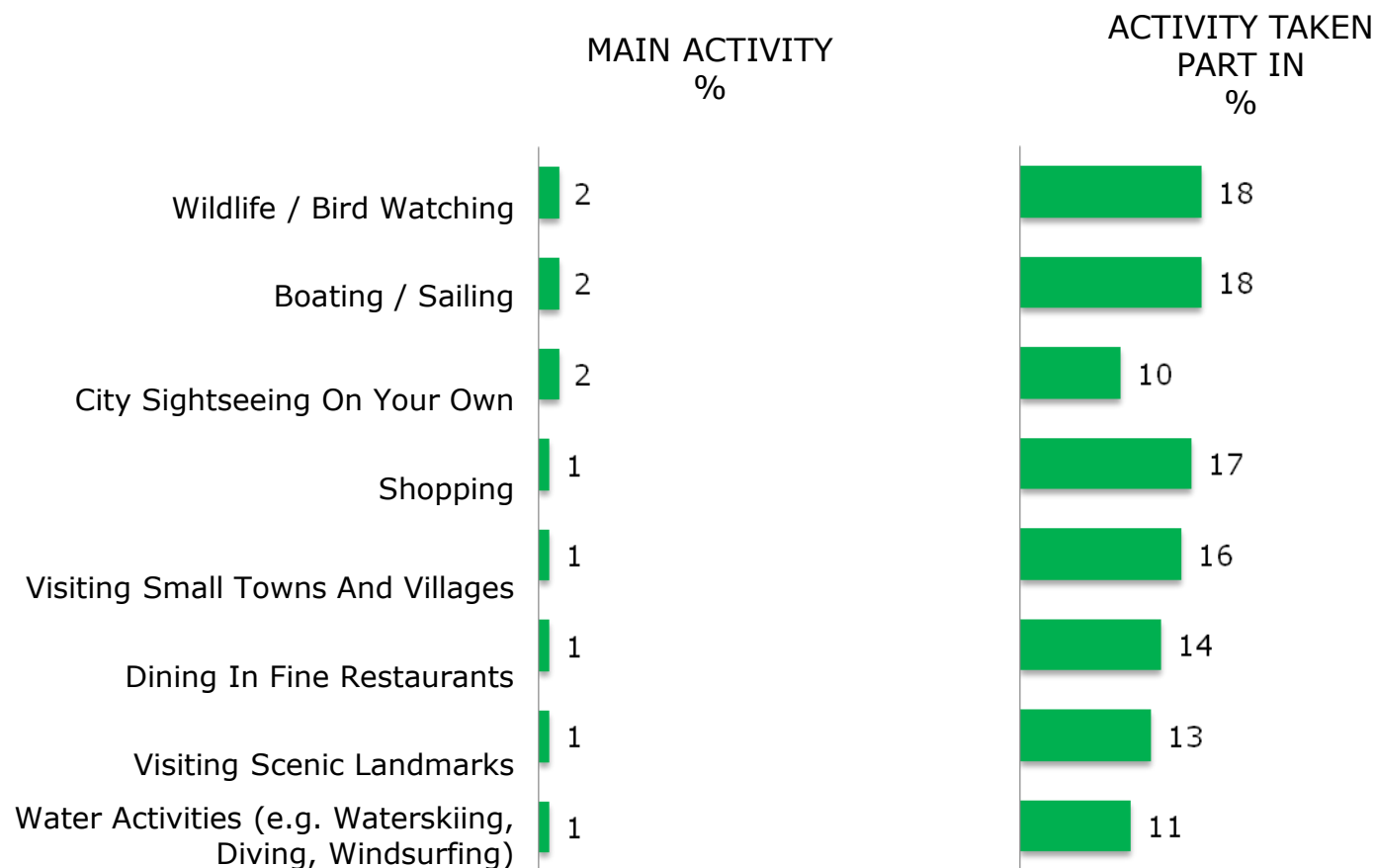
Past 12 month travellers from...	
GTA	Other Ontario
%	%
39	33
8	11
24	25
29	31
# 2.4	# 2.6

Activities in Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands - Total Trips Reported by Past 12 Month Ontario Visitors



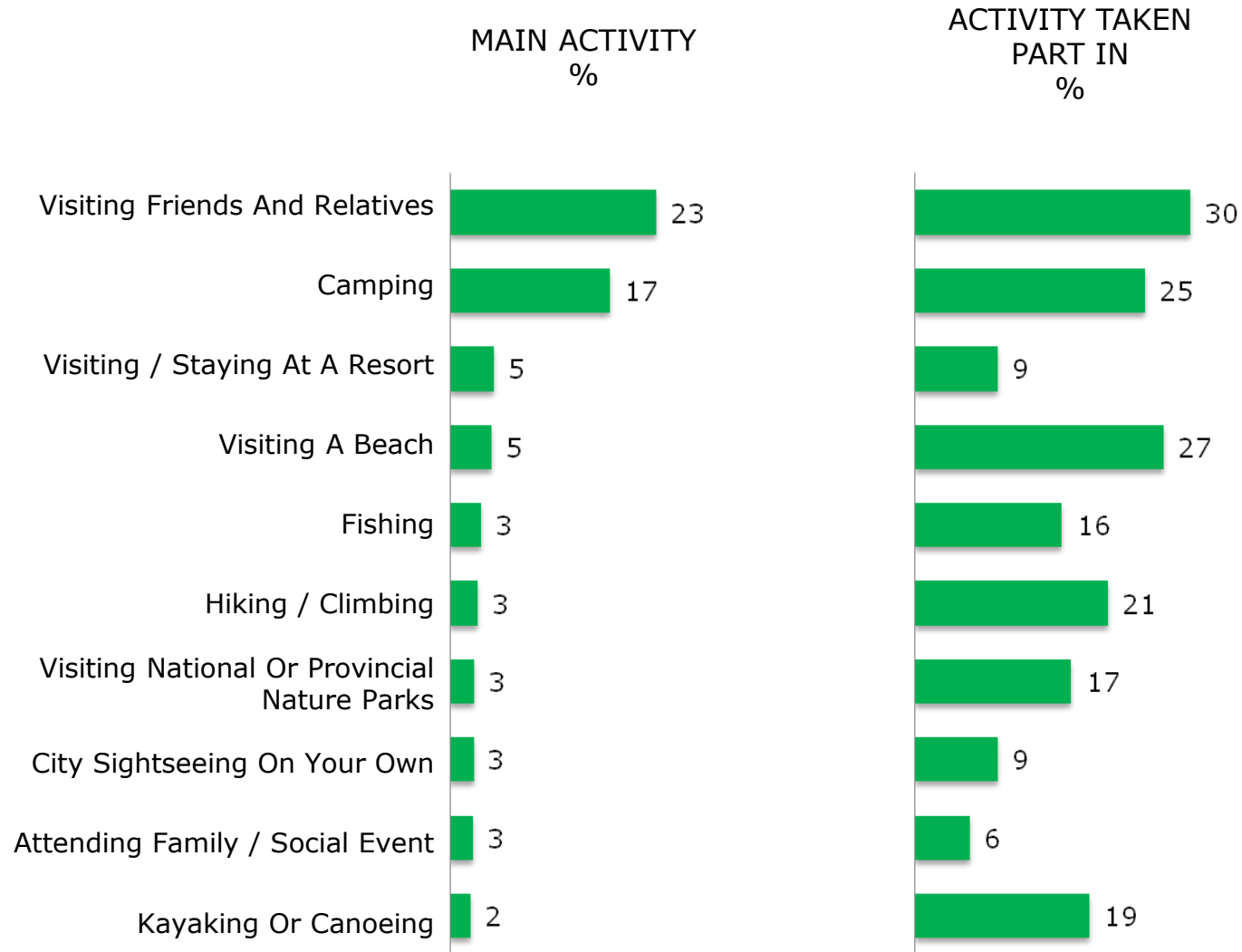
Q32A: Which one, if any, of these activities was the MAIN REASON for taking this trip?
 Q32B: In which of the following activities did you TAKE PART while on this trip?

Activities in Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands - Total Trips Reported by Past 12 Month Ontario Visitors (Con't.)



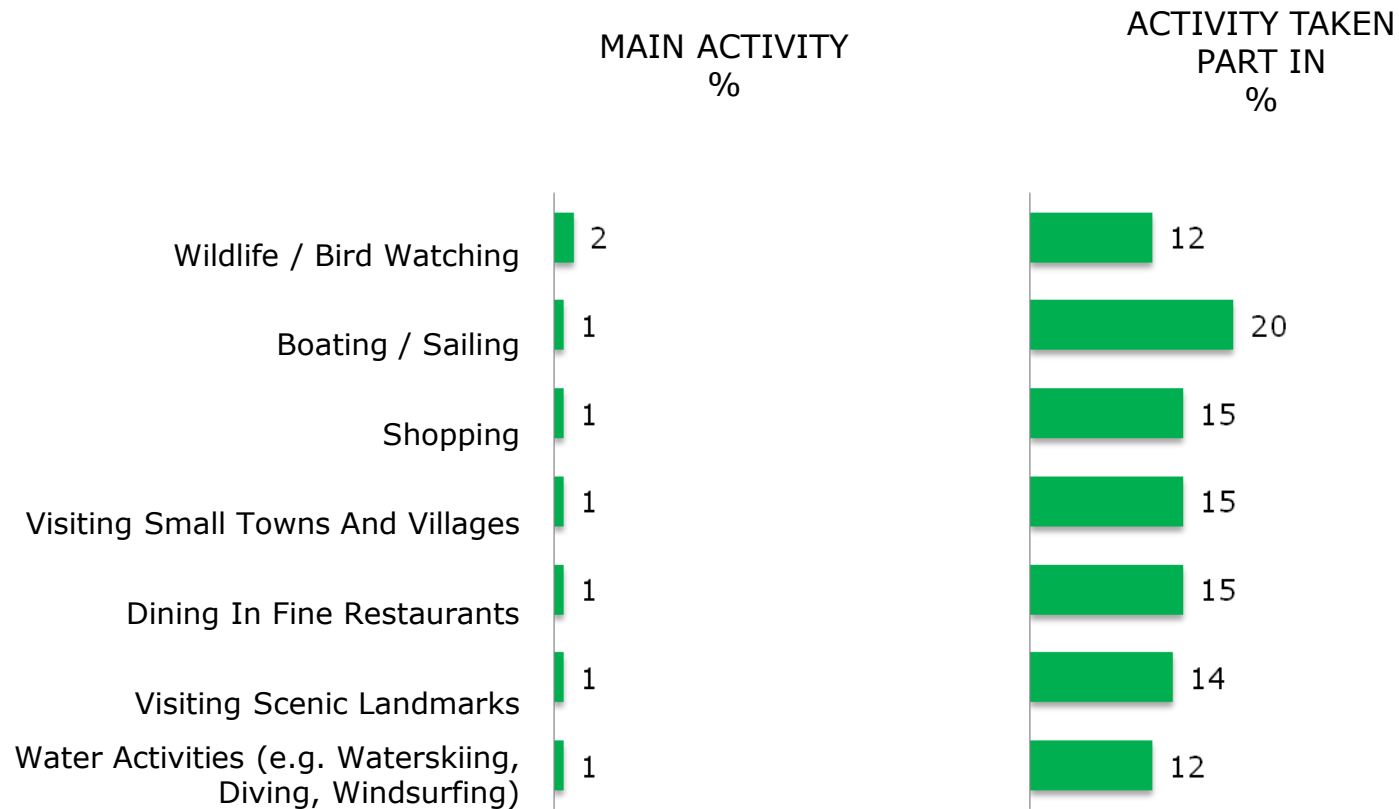
Q32A: Which one, if any, of these activities was the MAIN REASON for taking this trip?
 Q32B: In which of the following activities did you TAKE PART while on this trip?

Activities in Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands – Total Trips Reported by Past 12 Month GTA Visitors



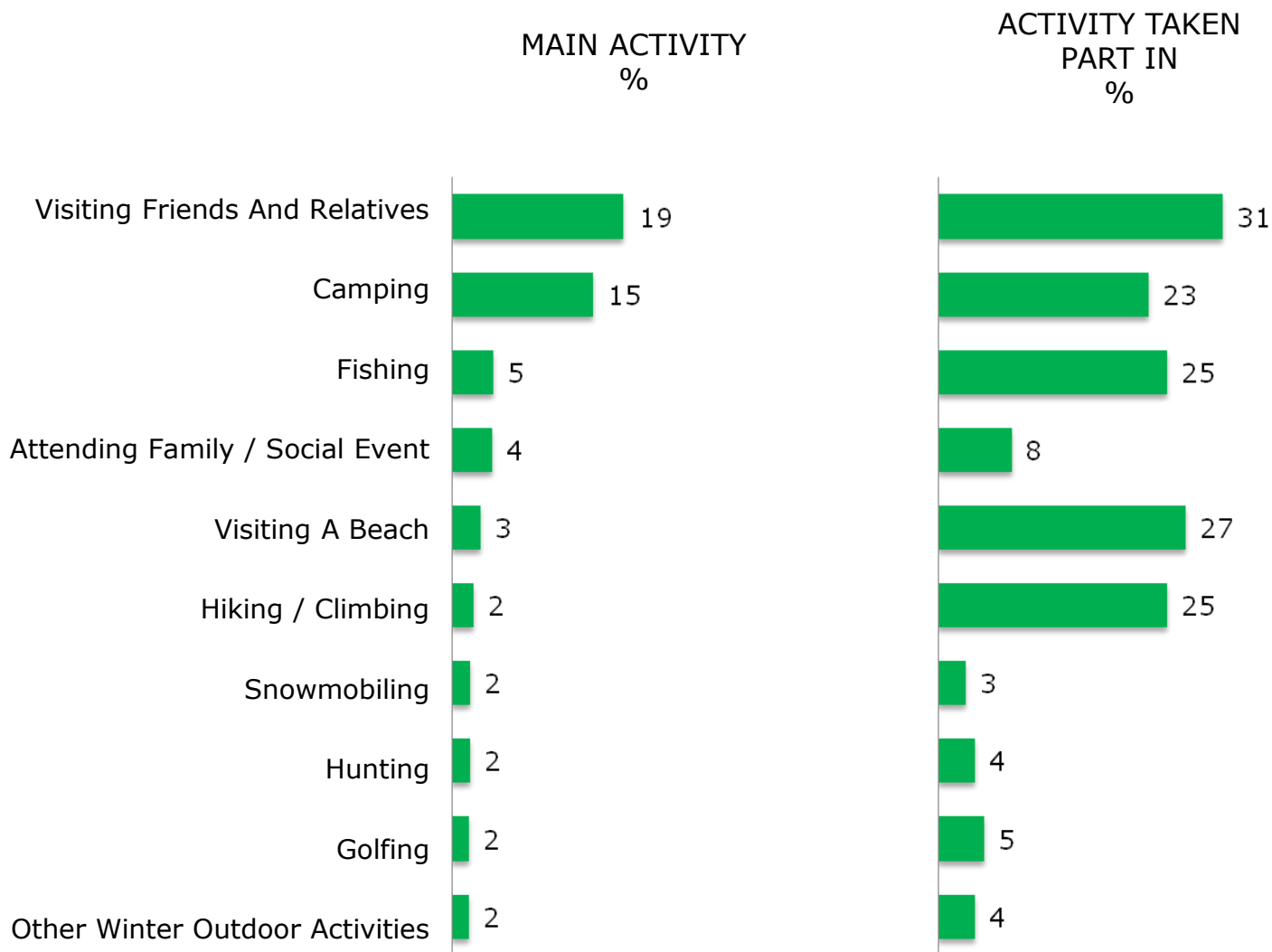
Q32A: Which one, if any, of these activities was the MAIN REASON for taking this trip?
 Q32B: In which of the following activities did you TAKE PART while on this trip?

Activities in Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands – Total Trips Reported by Past 12 Month GTA Visitors (Con't.)



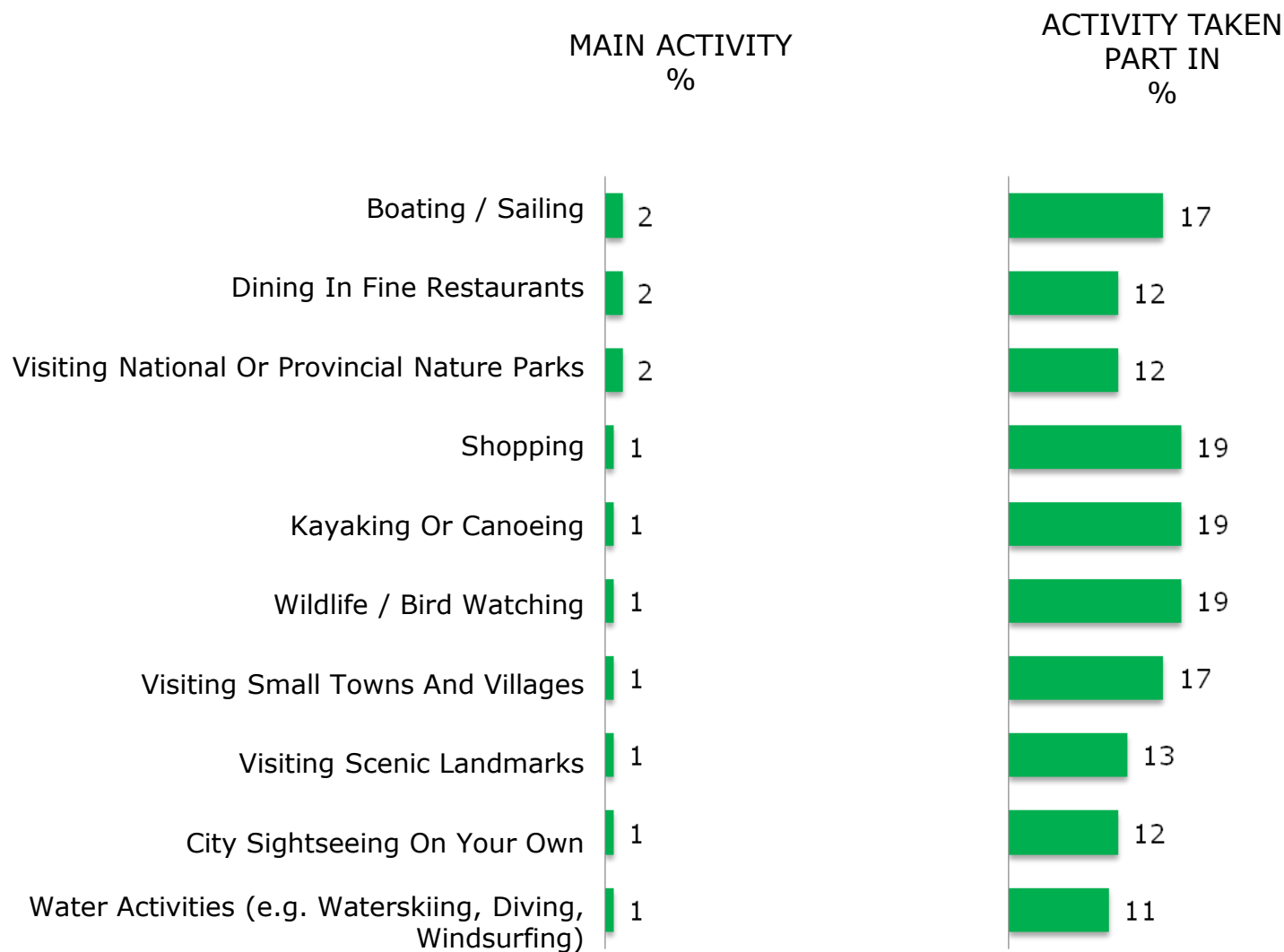
Q32A: Which one, if any, of these activities was the MAIN REASON for taking this trip?
 Q32B: In which of the following activities did you TAKE PART while on this trip?

Activities in Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands – Total Trips Reported by Past 12 Month Other Ontario Visitors



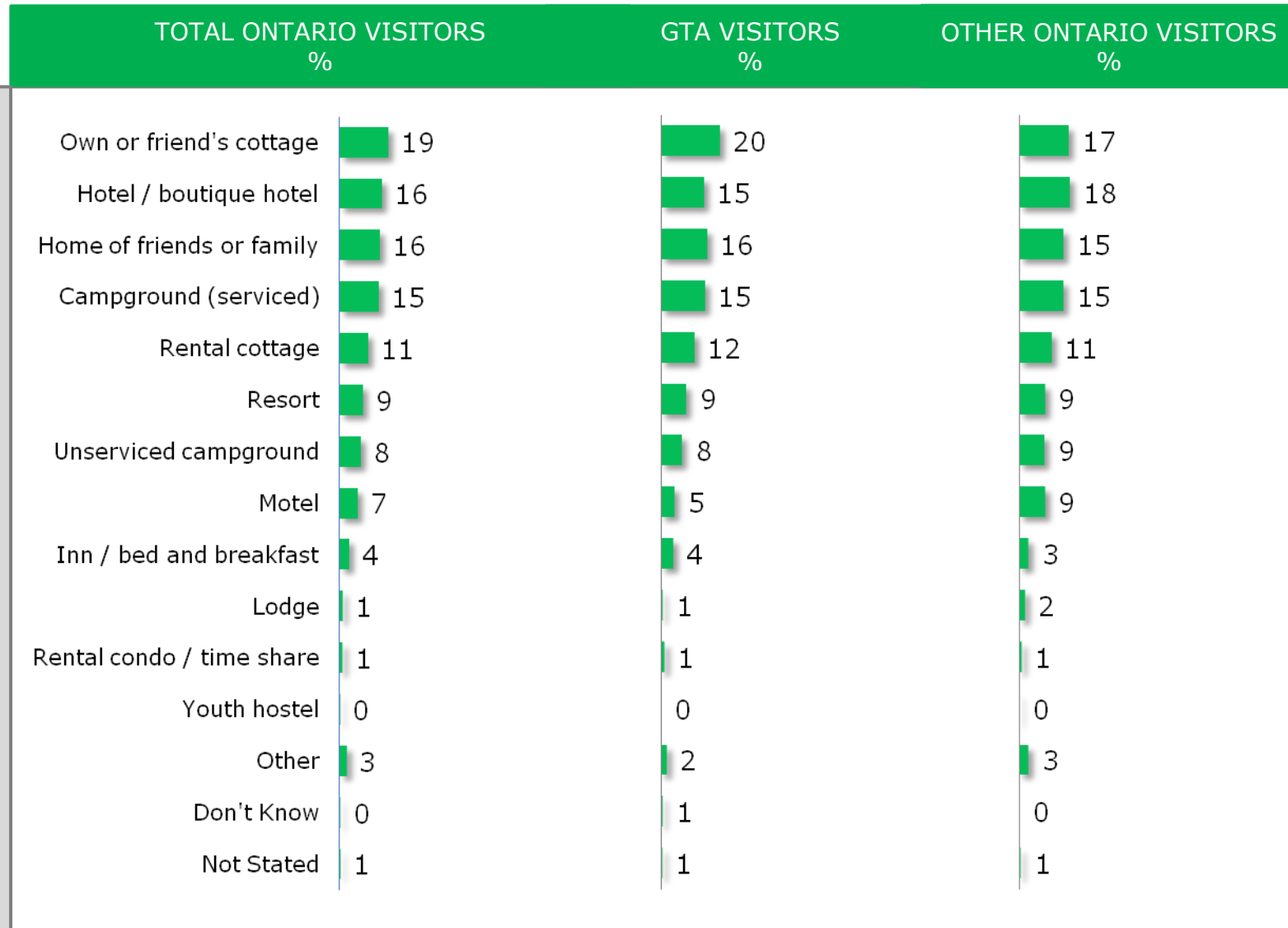
Q32A: Which one, if any, of these activities was the MAIN REASON for taking this trip?
 Q32B: In which of the following activities did you TAKE PART while on this trip?

Activities in Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands – Total Trips Reported by Past 12 Month Other Ontario Visitors (Con't.)



Q32A: Which one, if any, of these activities was the MAIN REASON for taking this trip?
 Q32B: In which of the following activities did you TAKE PART while on this trip?

Accommodation on Trip (Total Trips Reported by Past 12 Month Ontario Visitors)



Q27: Please indicate below the types of accommodation you stayed in on this trip

ONTARIO
Yours to discover

APPENDIX

Definitions

- Nearby U.S. defined as: Pennsylvania, Ohio and New York State
- Awareness of each RTO is taken from Q1B of the RTS questionnaire (excludes those who “know absolutely nothing about the RTO”)
- Interest in visiting is taken from Q8C of the main questionnaire (somewhat or very interested)
- Visitation is taken from Q9B of the main questionnaire (ever)
- Type of trip is taken from Q15, Q32A/B of the main questionnaire

Geographic Coverage of the Research

CANADA

ONTARIO

QUEBEC

- Montreal

- Gatineau

- Sherbrooke

- Quebec City

MANITOBA

- Winnipeg

USA

CONNECTICUT

DELAWARE

ILLINOIS

INDIANA

KENTUCKY

MARYLAND

MASSACHUSETTS

MICHIGAN

MINNESOTA

NEW HAMPSHIRE

NEW JERSEY

NEW YORK

NORTH CAROLINA

OHIO

PENNSYLVANIA

RHODE ISLAND

VERMONT

VIRGINIA

WISCONSIN

WEST VIRGINIA

CITIES CROSSING STATE BOUNDARIES

- Philadelphia, PA--NJ PMSA

- Cincinnati, OH--KY--IN PMSA

- Washington, DC--MD--VA--WV PMSA

- Boston, MA--NH, PMSA

Sample Sizes by Source Markets for Each Report Section

Section A – Where Are You On The Purchase Cycle?					
Travellers from... (Canadian Markets)	Ontario	GTA	Other Ontario	Quebec	Manitoba
	20,970	5,163	15,807	4,208	1,419
Travellers from... (US Markets)	Nearby US – 7,294				
	Michigan	New York		Ohio	
	3,214	2,098		1,982	
	Other US – 12,175				
	Illinois	Michigan	New Jersey	North Carolina	Virginia
	1,222	1,833	1,278	951	708

Section B – Evaluation of Trip to Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands			
Total Trips Reported by Past 12 Month Visitors	Ontario	GTA	Other Ontario
	1,731	517	1,214

Section C – Traveller Perceptions							
Northern Ontario – North East (very familiar/familiar from...)	Ontario	GTA	Other Ontario	Quebec	Manitoba	Nearby US	Other US
	10,173	2,438	7,735	366	139	479	625

Sample Sizes by Source Markets for Each Report Section

Section D – Visitor Profiles			
Total Travelling Population	46,066		
Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands Visitors (ever visited – From All Source Markets)	14,464		
Algonquin Park, Muskoka, Parry Sound and the Almaguin Highlands Visitors (visited past 12 months from...)	Ontario	GTA	Other Ontario
Section E – RTO Trip Activities Profile			
Total Trips Reported by Past 12 Month Visitors	Ontario	GTA	Other Ontario
	1,731	517	1,214