

Ontario RTO7 Image Study

Final Report

February, 2011

Table of Contents



Background and Purpose	3
Research Objectives	4
Method	5
Executive Summary	7
Conclusions & Implications	52
Detailed Findings	66
Destination Awareness and Visitation	67
Awareness, Past Visitation and Interest in Local Attractions	159
Awareness/Experience with Grey County Places/Attractions	160
Awareness/Experience with Bruce County Places/Attractions	178
Awareness/Experience with Simcoe County Places/Attractions	199
Interest in Types of Activities/Attractions/Events	220
Image Hot Buttons	243
RTO7's Image vs. Competitors	246
Image Strengths & Weaknesses vs. Individual Competitors	280
Image Strengths & Weaknesses vs. Individual Competitors — Ontario Residents	320
RTO7's Competitive Image in Each Region	355
RTO7's Image by Region of Residence and Demographics	361
RTO7's Product Delivery	382
Appendix: Questionnaire	389

Background & Purpose



- The Government of Ontario has recently realigned the province's tourism regions. The new RTO7 region consists of Grey, Bruce and Simcoe Counties.
- The Region 7 RTO recognizes the importance of tourism to the welfare of the area and has expressed interest in development of a comprehensive strategic plan.
- As part of this process, Longwoods was engaged to carry out consumer research designed to provide Region 7 with market insights to inform brand strategy development aimed at increasing demand for the region among leisure visitors:
 - *Measuring familiarity and experience with the region/its attractions*
 - *Measuring the region's image and interest in its product*
 - *Defining the competition*
 - *Profiling non-visitors, including demographics, perceptions, attitudes, barriers to visitation*

Research Objectives



- The specific objectives of the research are to measure:
 - *Awareness of the region itself and towns/attractions within the region*
 - *Past visitation and future intentions to visit the region and its competition*
 - *The image, including strengths and weaknesses, of the region in the context of competitive offerings*
 - *How well the region is thought to deliver on the promise with its product*
 - *The rational and emotional drivers for getting on the destination “wish list” in RTO7’s competitive set, i.e., what factors are taken into consideration and what is their ranking - to help understand what consumers’ top priorities are*
 - *The key attributes and hot buttons for the region itself, i.e., identifying the region’s own unique selling proposition*
 - *Perceptual barriers to visitation*
 - *Interest in the various places and attractions within the region*
 - *Definition and size of key segments*
 - *Awareness and visitation by origin market*
 - *Profiles of visitors by demographics and behavioral characteristics*

Methodology



- ◉ A self-completion internet survey was conducted.
- ◉ The survey was executed online among a sample of 3,029 residents of regional markets, selected from members of an online consumer internet panel, with regional distribution as follows:

Greater Toronto Area	810
SW Ontario	618
Eastern Ontario (east of Oshawa)	513
Montreal (French)	570
US Border DMA's (Detroit, Buffalo, Rochester, Syracuse, Watertown)	518

- ◉ To qualify for participation in the survey, respondents had to be:
 - ◉ *adults 18+ years of age*
 - ◉ *“travelers”, i.e., they must have taken a day or overnight leisure trip in the past 3 years and intend to in the next 2 years*

Methodology



- ◉ Fieldwork was carried out between December 14, 2010 and January 8, 2011.
- ◉ Data were weighted on key demographic variables (age, gender, household size, household income and region) prior to analysis to ensure that the data are representative of and projectable to the population.
- ◉ For a sample of this size (i.e., 3,029), the confidence level is + or – 1.6%, based on statistical probability at the 95% level of confidence.

Executive Summary

Destination Awareness/Experience



- In order to gauge the awareness of and experience with the three-county “region” and its component parts, we asked respondents several types of questions:
 - *Unaided awareness of places in Ontario that people “would really enjoy visiting” – unaided share-of-mind measures like this are often considered strong indicators of market presence because respondents have to specifically mention names based on pure recall and without lists to prompt them. In packaged goods, responses to such questions tend to correlate highly with brand purchase/market share.*
 - *Prompted recognition of names of places and attractions – people ticked off names they recognized on lists*
 - *Past visitation of destinations – ever visited, and visited in the past 2 years*

Unaided Destination Awareness



- On the unaided measure, we grouped individual mentions of specific cities, towns and attractions/destinations into regions.
- Among residents of Ontario, the top regions that people said they are interested in visiting are:
 - *Niagara (45%), including the Falls, but also Niagara-on-the-Lake and the Niagara region*
 - *Ottawa (40%)*
 - *Northern Ontario (33%) – rarely called out as “Northern Ontario”, but rather a compendium of many towns and places*
- Toronto is slightly further down the list (25%) – but since a high proportion of the Ontario sample lives in Toronto, that lower ranking is understandable – residents don’t necessarily want to vacation at home.
- The big surprise is that about the same number of people name a place in RTO7 as a desirable vacation destination (23%) as name Toronto:
 - *Virtually all mentions are places on/close to the shores of Georgian Bay, Lake Huron, Lake Simcoe, or Lake Couchiching*

Unaided Destination Awareness



- Much lower interest is expressed by Ontario residents on this unaided measure in destinations such as:
 - *Muskoka*
 - *Algonquin Park*
 - *Kingston and the Thousand Islands*
 - *Haliburton/Kawarthas*
- Among Ontario residents, unaided mentions of RTO7 places are much higher in the GTA and Southwestern Ontario than in Eastern Ontario.
- In comparison to Ontarians, the spontaneous destination “wish lists” for Quebecers and American travelers are quite different:
 - *In Quebec, the only places on the radar are Toronto, Niagara, and Ottawa*
 - *Among Americans, the two main destinations of interest are Toronto and Niagara, plus Windsor for those living in Michigan.*
 - *Only about 1 in 10 Quebecers and slightly fewer American travelers name a destination in RTO7, about the same number as mention a place in Northern Ontario, but well ahead of any other region in Ontario*

Aided Destination Awareness



- On an aided basis, virtually everyone in the Ontario sample recognized at least one of the 10 major cities, towns and other specific place names we asked about in RTO7
 - *People in Ontario were somewhat less likely to recognize one of the 3 county names*
- The most familiar non-county names, with at least 9 in 10 people indicating recognition, were:
 - *Barrie*
 - *Wasaga Beach*
 - *Georgian Bay*
 - *Orillia*
 - *Owen Sound*
 - *Collingwood*

Aided Destination Awareness



- These were followed by the “Lake Huron beach towns from Kincardine to Sauble Beach”, Blue Mountains, the Bruce Peninsula, and a notch lower, Midland-Penetanguishene.
- Simcoe County was the most familiar county to Ontarians (84%), well ahead of Bruce (74%) and Grey (60%).
- Looking at the aided recall for the competitive set among Ontario residents, the areas with the highest name recognition were Muskoka, then Peterborough/Haliburton/Kawarthas, Kingston/Thousand Islands, and The Laurentians:
 - *There was much lower awareness for the Adirondacks, Prince Edward County, Finger Lakes, or especially, Michigan’s Upper Peninsula*

Aided Destination Awareness



- In Quebec and the U.S. border markets, familiarity with RTO7 place names is relatively strong overall, with three-quarters to 8 in 10 recalling at least one of the names:
 - *In Quebec, the top names people remember are Barrie and Georgian Bay, followed by Wasaga Beach, Owen Sound and Lake Huron beach towns*
 - *In the U.S. markets, the most familiar names were Georgian Bay, Lake Huron beach towns, and Barrie*
 - *In both Quebec and the U.S., the RTO7 county names were much less likely to be recalled than specific cities, towns and places*
 - *The competitive set in terms of name recall appears to be highly correlated to proximity, with Quebeckers much more likely than Ontario residents to remember the Laurentians, Adirondacks and Kingston/Thousand Islands, and Americans far more familiar with the Adirondacks, Finger Lakes and Michigan's Upper Peninsula*

Past Visitation



- ◉ Looking at the places people have ever visited, we find that there is a substantial amount of past experience with places in RTO7.
- ◉ About 9 in 10 Ontarians indicate they have taken an overnight or day trip to a least one place in the RTO7 region at some point in the past.
- ◉ The places which Ontarians are most likely to have visited are:
 - ◉ *Barrie*
 - ◉ *Wasaga Beach*
 - ◉ *Orillia*
 - ◉ *Collingwood*
 - ◉ *Owen Sound*
 - ◉ *Blue Mountains*
 - ◉ *Lake Huron beach towns*
 - ◉ *The first three of these were somewhat more apt to have been visited on day than overnight trips*
- ◉ The county names are again at a disadvantage to city/town and other place names, with many Ontarians recalling visits to places but not the counties those places are in.

Past Visitation



- Ontarians' prior experience with the competitive set seems more circumscribed, with fewer people mentioning Muskoka, Kingston/Thousand Islands, and Haliburton/Kawarthas, than RTO7 destinations, and only minority experience with Prince Edward County, the Laurentians or the U.S. tourism regions:
 - *Muskoka and Haliburton/Kawarthas appear to be more overnight than day destinations for Ontario residents, which may be a function of travel distance and/or the lack of day activities/attractions in each region*
- In the Quebec market, the Laurentians head the list of past regional destinations; nonetheless RTO7 is next in line, tied with Kingston/Thousand Islands and the Adirondacks:
 - *The top individual RTO7 places Quebeckers recall visiting are Barrie, Wasaga Beach, Collingwood, Owen Sound, and Georgian Bay, plus the three counties*
 - *In this market, past visitation of other Ontario competitors such as Muskoka, Haliburton/Kawarthas, Prince Edward County, or the other American regions is very limited*

Past Visitation



- Among residents of the U.S. border markets, RTO7 seems to have been almost as popular a past destination as Michigan's Upper Peninsula, tied with Finger Lakes, slightly leading the Adirondacks, and well ahead of Kingston/Thousand Islands, Prince Edward County and the other Ontario travel regions:
 - *The top RTO7 destinations for Americans appear to have been Lake Huron beach towns, Georgian Bay, the Bruce Peninsula, Barrie, Collingwood, Blue Mountains and the three counties*
- Some interesting variations in RTO7 name recall and past visitation by region within Ontario, likely related to distance to market and traditional travel patterns:
 - *Relative to GTA and SW Ontario residents, residents of Eastern Ontario are less familiar with and less apt to have visited most RTO7 names except Barrie and Orillia*
 - *SW Ontario residents have higher recall/prior visitation of Grey and Bruce Counties, Lake Huron beach towns and the Bruce Peninsula, and higher visitation of South Georgian Bay*

Past Visitation



- *GTA residents are the segment most likely to have visited Barrie, Simcoe County, Wasaga Beach, and Orillia, particularly on day trips*
- When we look at awareness and past visitation (ever) by demographics we generally find that awareness and experience with most destinations including RTO7 is higher among:
 - *Males*
 - *Older people -- one expects experience to increase with age*
 - *Those with higher household incomes (they can afford to travel)*
 - *Caucasians and Asians/South Asians*
- The main exceptions:
 - *For Blue Mountains, income is the main correlate with awareness/experience, and not age or gender*
 - *Less awareness/visitation of Bruce Peninsula, Midland-Penetanguishene, Owen Sound and Lake Huron by non-Caucasians*

Recent Visitation



- RTO7 places/destinations are prominent in the recent leisure trip-taking repertoire of Ontario residents:
 - *6 in 10 Ontarians indicate they have visited at least one of the 10 places and 3 counties listed for RTO7 in the survey on a day trip in the past 2 years and half indicate this for overnight trips*
 - *This is well above the levels posted for the competitive regions of Kingston/Thousand Islands, Haliburton/Kawarthas and Muskoka .*
- For Ontarians, the top RTO7 places for day trips in the past couple of years were Barrie, Orillia, Wasaga Beach and Collingwood
 - *On overnight trips, the most popular places people visited in the region were Collingwood, Lake Huron beach towns, Barrie, Wasaga Beach, Blue Mountains, Orillia, and Georgian Bay (plus the 3 counties)*
- For residents of the Quebec and U.S. border markets, the recent visitation patterns mirror those described above for longer-term travel.
- Demographically, recent RTO7 visitors are skewed slightly more male than female, younger, and with kids in the household. There were no significant skews by ethnicity.

Intentions to Visit



- Respondents were asked to rate their likelihood of visiting RTO7 in the next 12 months, as well as various competitors – 10 regions were rated this way across the entire sample:
 - *Each destination was shown on a regional map with major cities/attractions identified. The RTO7 “region” also showed the three counties.*
- The results of this question are markedly different from what we have seen so far in measures of awareness and past experience -- while in those other measures, competitors such as Muskoka, Haliburton/Kawarthas and others were much lower on the awareness and experience lists than RTO7, here they are clearly “in play”.
- In fact, for future travel intentions among Ontario residents, RTO7 falls behind the KW/Stratford/Goderich region and Muskoka, ties with Haliburton/Kawarthas, and is only slightly ahead of Kingston/Thousand Islands and even Prince Edward County.

Intentions to Visit



- ◉ Intent to visit RTO7 is higher in the GTA and SW Ontario than in Eastern Ontario.
- ◉ In the Quebec market, with only 1 in 4 intending a trip, interest in RTO7 is surpassed by every competitor except Muskoka,.
- ◉ Similarly in the U.S. border markets, RTO7 posts about the same level of intent (21%), which puts it only ahead of the Laurentians (7%), and far behind places like Muskoka and Michigan's Upper Peninsula.
- ◉ By demographics, there is greater interest in RTO7 among males, 18-54 year olds, people with higher income, non-Caucasians and those with children in the household.
- ◉ In all markets, when people are asked to indicate when they intend to visit RTO7, many more indicate they plan a trip during spring or summer than a trip at other times of the year.
- ◉ Nonetheless, there still seems to be substantial interest in off/shoulder season travel, even if it is in the minority.

Trip Type of Intended Trips



- Respondents were asked to indicate which type of leisure trip they would be most likely to take if they were to visit RTO7, using a detailed list of 9 different trip purposes.
- Among Ontario residents, a total of five trip types emerged as being associated with the region, four of which would be expected given the region's product:
 - *An outdoors trip, which is consistent with the strong camping and outdoor activity products*
 - *A resort trip to one of several resorts in the region*
 - *Visit to friends and relatives, which generally comprises a high proportion of trips to any region*
 - *Special event trip to take in one of many local sports or cultural events*

Trip Type of Intended Trips



- The one unexpected trip purpose that actually headed people's list not only in Ontario but by a sizeable margin in the Quebec and U.S. markets, was the touring trip:
 - *On the survey, a touring trip was defined as "a trip by car, bus, boat, train, snowmobile or other mode of transportation through the area to enjoy scenic beauty, local sightseeing, or for cultural or general interest."*
- In Quebec and U.S. border markets, resort and outdoor trips were the next most popular choices for trips to the region.
- People less often associated the region with city, shopping, gaming or ski/snowboarding trips.
- There were some other notable demographic skews in the types of trips people associated with RTO7:
 - *Touring trips – older, higher incomes and better educated*
 - *Special Event trips – in-province, younger*
 - *Outdoors trips – GTA, younger, kids at home*
 - *Ski/Snowboarding trips – younger, urban/suburban, kids at home, higher income*

Awareness/Visitation of Regional Places and Attractions – Grey County



- After Owen Sound and the Blue Mountains, the Grey County towns and places most often recalled and visited by Ontario residents are:
 - *Hanover*
 - *Meaford*
 - *Durham*
- Each generated just over 50% recall in Ontario, and reported visitation came in at about half that level:
 - *Nonetheless, we believe recall/visitation numbers for Durham may be inflated by confusion with the Regional Municipality of Durham and/or recall of news coverage of a recent tornado touchdown near the town*
- Between a third and a quarter of Ontarians recognized the names of Thornbury, Flesherton and Craigeleith, while only 1 in 10 recalled the names, Kimberley and Clarksburg:
 - *In each case, reported visitation was at half the level of awareness.*
- With the exception of the Durham name in Quebec (which had strong recognition likely associated with name confusion as noted above), the smaller Grey County towns seem to be relatively unknown to Quebecers and residents of U.S. border markets.

Awareness/Visitation of Regional Places and Attractions – Grey County



- The top attractions that people recall and say they have visited in Grey County are or are part of the county's main topographic feature:
 - *The Niagara Escarpment*
 - *The Bruce Trail on the Escarpment*
 - *Skiing at Blue Mountain*
- Over 6 in 10 Ontarians recognize the name of each of these attractions.
- It is interesting that more Ontario residents recall visiting the Escarpment in Grey County (49%), than indicate they have visited the Bruce Trail (28%) or skied at Blue Mountain (25%).
- Similarly, we see that a number of attractions have considerable awareness – between one-quarter and one-half of Ontarians recall The Blue Mountains Trail Systems, the Georgian Trails, Skiing at Talisman, Scenic Caves Nature Adventures and Beaver Valley – however past experience/visitation for each of these barely breaks 10%

Awareness/Visitation of Regional Places and Attractions – Grey County



- In Ontario, there is moderate awareness of Grey County's main cultural attractions – the Tom Thomson Art Gallery (21%), Owen Sound Marine and Rail Museum (19%), Billy Bishop Heritage Museum (18%); however only about 1 in 20 people indicate they have ever visited these places.
 - *We see the same for attractions Craigleith Provincial Park and Hanover Raceway/OLG Slots*
- The top events Ontario people recall are the Elvis Festival at Blue Mountains/Collingwood (35% recall; 7% said they attended), Owen Sound's Festival of Northern Lights (20% recall; 5% claimed visitation) and Salmon Spectacular (11% recall; 3% claimed attendance).
- In Ontario, recall and past visitation of the various waterfalls featured in Grey County's Waterfall Tour is fairly modest, with Eugenia Falls and Feversham Gorge/Waterfall heading the list.

Awareness/Visitation of Regional Places and Attractions – Grey County



- Among residents of Quebec and U.S. border markets, the top attraction people claimed to recall and said they have visited at some point in the past was the Niagara Escarpment – about a third recognized the name and 2 in 10 indicated they had ever visited.
- Americans and Quebeckers also seemed to be fairly familiar with skiing at Blue Mountain, the Georgian Trail, the Blue Mountains' Trail System, and the Bruce Trail, though few had actually visited.
 - *Scandinave Spa, Tom Thomson Art Gallery, Billy Bishop Heritage Museum and Duncan Crevice Caves Provincial Park also seemed recognizable names to some Quebec residents, again with low past visitation*
- No other attractions or events in Grey County broke the 10% awareness level in the markets outside Ontario, or generated over 2-3% past visitation.
- In fact, about half of residents in the Quebec and U.S. markets have not experienced any of the 34 Grey County places or attractions listed in the survey.
- And among those who have visited an attraction/event, they generally experienced just one rather than a number of the options available.

Awareness/Visitation of Regional Places and Attractions – Bruce County



- The most familiar Bruce County names among Ontario travelers are Lake Huron or Georgian Bay beach towns – Sauble Beach, Port Elgin, Kincardine, Port Elgin, Tobermory, Wiarton – plus Walkerton, which made the news several years ago for reasons other than tourism:
 - *Each name was recognized by about 7 in 10 people surveyed*
 - *People in the province are most likely to have visited Sauble Beach (48%), followed by Tobermory (39%)*
- In comparison, awareness and visitation of Southampton and Lucknow was less prevalent, while towns such as Mildmay, Chesley, and Ferndale, and Cape Croker on the Bruce Peninsula generated relatively little awareness or claimed visitation.
- Despite the high level of recognition of beach town names, Ontarians seem relatively unaware of what attractions are available in those towns – although 6 in 10 travelers in the province know that there is a beach in Sauble Beach, only half that number seem to be aware of beaches at Port Elgin, Kincardine, etc.

Awareness/Visitation of Regional Places and Attractions – Bruce County



- Apart from the beaches, the most familiar attractions among Ontario residents in Bruce County are the Bruce Trail (46%), the Wiarton Willie Statue and Festival (35%), and Sauble Falls Provincial Park (30%), followed by several attractions on the Peninsula – Flowerpot Island (27%), Lion’s Head Provincial Park (26%), Bruce Peninsula National Park (25%), Chi-Cheemaun Ferry (25%) –as well as Formosa Springs Brewery (26%), the Bruce County Rail Trail (25%), and the Saugeen River (24%).
- After Wiarton Willie, the most famous events appear to be the Kincardine Scottish Festival, the International Plowing Match at Teesdale, Sauble Beach’s Sandfest and Port Elgin’s Pumpkinfest and Beach Carnival, each recalled by between 1 in 6 and 1 in 10 Ontario residents:
 - *Three museums are at about the same recall level – Bruce County Museum and Cultural Centre, Cabot Head Lighthouse & Museum, Kincardine Lighthouse Museum*
 - *It is interesting that Fathom Five National Marine Park, the first of its kind in Canada enjoys only 13% awareness among travelers in the province*

Awareness/Visitation of Regional Places and Attractions – Bruce County



- The only Bruce County attraction that has attracted visits by even 1 in 3 Ontario residents is the beach at Sauble Beach:
 - *In comparison only 2 in 10 recall visiting the Bruce Trail in this county (much lower than in Grey County) or the beach at Port Elgin*
 - *Chi-Cheemaun Ferry, the beaches at Kincardine and Southampton, Saugeen River, Sauble Falls Provincial Park, Flowerpot Island and Bruce Peninsula National Park are the only other county attractions that more than 1 in 10 Ontarians say they have visited at some point in the past*
- Quebec residents seem to be most familiar with the towns of Port Elgin, Walkerton, and Sauble Beach, followed by Wiarton, Kincardine and Southampton – though all at fairly low levels, i.e. 3 in 10 or less
- Americans' awareness of towns is even more modest – the most familiar tops out at 15% -- but the same places appear on the list albeit in a somewhat different order – Southampton leads, followed by Port Elgin, Tobermory, Kincardine then Sauble Beach.

Awareness/Visitation of Regional Places and Attractions – Bruce County



- ◉ The only attractions in Bruce County with awareness of more than 1 in 10 Quebeckers are the beaches at Port Elgin and Sauble Beach, Bruce Peninsula National Park and Cabot Head Lighthouse & Museum.
- ◉ The latter two attractions plus the beach at Southampton are the only names 10% or more Americans in border markets recognize.
- ◉ For both out-of-province markets, actual experience with county towns, attractions and events is very limited.
- ◉ Americans are somewhat more likely than Quebec residents to have visited at least one attraction in the county, which is likely a function of the proximity to the Michigan market..

Awareness/Visitation of Regional Places and Attractions – Simcoe County



- As noted earlier, the places in Simcoe County that almost everyone in Ontario has heard of are Barrie, Collingwood, Wasaga Beach and Orillia:
 - *And about 6 in 10 have visited each of these places*
- About two-thirds recognize the Midland-Penetanguishene and Alliston names, somewhat more than are familiar with Innisfil and Base Borden:
 - *Only a minority recall the names of New Tecumseh (28%) or Brechin (19%)*
 - *Past visitation for each of these places tends to be roughly half or less the level of awareness*
- The same top places are recalled by Quebeckers, though at much lower levels than we see with Ontario residents:
 - *Barrie, Wasaga Beach, and Collingwood are the top places visited by Quebeckers, named as past destinations by between 2 in 10 and 1 in 7 travelers*
- Among Americans the most prominent place names recalled are Barrie, Collingwood and Wasaga Beach, however at most 8-10% have actually visited any of these places.

Awareness/Visitation of Regional Places and Attractions – Simcoe County



- Among Ontarians, the best known attractions and events in Simcoe County are Casino Rama, followed by attractions linked to the county's main natural features – Wasaga Beach Provincial Park, the Niagara Escarpment/Bruce Trail section in the County, the trail systems in the Collingwood/Blue Mountain area, and skiing at Horseshoe Valley:
 - *each heard of by between half and three quarters of Ontario travelers.*
- In the next “tier” of awareness with between 30% and 50% recall, we find:
 - *Water features (Trent-Severn Waterway, Innisfil Beach, Barrie's waterfront trails/Lake Simcoe beaches)*
 - *Ski resorts (Mount St. Louis Moonstone, Snow Valley Barrie)*
 - *Festivals (Collingwood's Elvis Festival, Orillia's Mariposa Folk Festival)*
 - *A brewery (Creemore)*
 - *A major historic site (Sainte-Marie among the Hurons)*
- The most familiar museums include the Base Borden Military Museum/Air Show (28%), Collingwood Museum (15%), Simcoe County Museum (13%) and Huronia Museum (12%).
- Only 1 in 6 Ontarians have heard of a live theatre venue in the county.

Awareness/Visitation of Regional Places and Attractions – Simcoe County



- These levels of awareness in Ontario seem very high relative to actual past visitation numbers:
 - *The attraction most often visited has been Wasaga Beach Provincial Park – 3 in 10 recall visiting*
 - *However, the only other attractions with even 1 in 10 indicating past experience are Collingwood’s Downtown Heritage District, the Trails along Orillia’s waterfront, Skiing at Mount St. Louis Moonstone, Casino Rama, and Midland’s Martyr’s Shrine and Sainte-Marie among the Hurons historic sites*
 - *We believe that high awareness of some of these attractions is a clear function of recent/on-going advertising in major markets in Ontario, e.g., Casino Rama*
- Among Quebec and U.S. residents, Wasaga Beach Provincial Park, Casino Rama, the Georgian Bay Queen 30,000 Island Cruise, the trails around Collingwood/Blue Mountain, Barrie’s waterfront/Lake Simcoe beaches, and the Niagara Escarpment/Bruce Trail top the aided awareness list; however, the levels for even these attractions are quite low – only between 1 in 10 and 2 in 10 recall the names.
 - *And very few recall past visitation to any of these attractions*

Interest in Attractions/Activities/Events



- In an effort to understand what types of attractions would generate the greatest interest among potential visitors, we asked survey respondents to rate the appeal of a series of 50+ activities, events and activities that exist or could potentially be developed in the region.
- Some overarching observations:
 - *The list was framed as county specific, however, there was no systematic difference in the way people actually evaluated the various items by this geographic division – i.e., people seem to want the same offerings regardless of county*
 - *Ontarians, Quebecers and Americans are generally interested in the same attractions/activities – a few exceptions are noted below*
- When we examine the most appealing things to see and do, we find both the expected and the unexpected:
 - *Given the current offering and travel patterns, we were not surprised to see “going to the beach/swimming”, “staying at a resort”, “walk/hike the Bruce Trail” and “visiting conservation area/provincial park”*

Interest in Attractions/Activities/Events



- The big surprise was seeing attractions/activities that fit more with the typical touring trip than with the more sedentary outdoor/camping or beach trip, including:
 - *Dining overlooking the water , i.e., getting involved in the landscape*
 - *A boat ride or cruise – having someone take you around on the water seems to be more appealing than DIY sailing or boating*
 - *Viewing the topography - scenic tour by car, open air gondola ride*
 - *Exploring local food/beverage – fine dining, local markets, food/culinary festivals, breweries/wineries*
 - *Enjoying local music and cultural performances*
 - *Historic sites/towns – walking tours, lighthouses, monuments, historic homes, museums, etc.*

Interest in Attractions/Activities/Events



- People expressed more moderate interest in activities such as:
 - *Spas*
 - *Shopping*
 - *Traditional resort amusements - amusement parks, waterparks, zoos, putt-putt*
 - *Low-adventure outdoor pursuits like camping, canoeing/kayaking, tree-top walking/ziplining, golf, countryside cycling, visiting local gardens, horseback riding*
 - *“High culture”, such as art galleries and live theatre*
 - *Spectator sports*
 - *Casinos*
- The least interest was expressed in:
 - *Higher adventure activities such as scuba diving, off-road biking, para-sailing*
 - *Motorcycle touring*
 - *Fishing/hunting*
 - *Winter sports – the most popular were snowmobiling and downhill skiing with just under 2 in 10 expressing interest*
 - *Racetracks/slot venues*

Interest in Attractions/Activities/Events



- Compared to Ontario and Quebec markets, people living in the U.S. border markets seem more interested in:
 - *Staying in resorts*
 - *Festivals and fairs*
 - *Amusement parks/miniature golf*
 - *Casinos*
- In contrast, they appear less interested in:
 - *Hiking the Bruce Trail*
 - *Cycling through the countryside*
 - *Most winter sports*
- Quebeckers express less interest in elements of local culture where language might be a barrier, e.g., music, festivals, theatre, etc.

Interest in Attractions/Activities/Events



- As one might expect, the appeal of many of these activities/interests is skewed by demographics:
 - *Younger people are more interested in outdoor activities like camping, boating/canoeing, winter sports, motorcycle touring*
 - *People with children tend to find beaches and amusement parks/activities more appealing*
 - *Women tend to be more interested in activities such as theatre, historic venues, gardens, cruises, dining*
 - *In addition some activities are skewed both female and younger, e.g., music, festivals, beaches, spas, shopping*
 - *On the other hand, certain sports generate more interest among males, including golf, sports events, fishing/hunting, cycling, snowmobiling, scuba*
 - *Interest in fishing /hunting and higher adventure activities (including cycling/mountain biking, para-sailing, scuba diving, motorcycle touring) were of greater interest to non-Caucasians, as were racetracks and waterparks*
- However, most of these are just skews, and not exclusive interests of specific groups in the population.

Interest in Visiting Based on Descriptions of Activities in RTO7 Counties



- People who had not heard of any place in RTO7 (people in Quebec and U.S. border markets) were asked how interested they would be in visiting after evaluating the appeal of various activities, and being told all of this was available in the region.
- When we compare the results of this measure against the results of a similar measure of intent to revisit among prior visitors, we find that positive intent wasn't much different between the two groups, but negativity ("probably/definitely will not visit") was dramatically lower among those who learned about the range of attractions and activities in the region.

Image Hot Buttons



- Respondents evaluated the image of the three-county area and the nine other regional competitive destinations on an overall basis and on a series of 80 additional detailed image attributes.
- In order to determine hot buttons for getting on the “consideration list”, we measured the degree of association between the destinations’ overall image and their ratings on individual attributes.
- Then, in order to better communicate the results, the data have been grouped into broader categories or factors.
- Ultimately, these relative priorities should help guide the development of a destination’s positioning and what the destination communicates about itself through advertising, taking into consideration the top motivators, the destination’s image strengths, and what the destination delivers through its product.

Image Hot Buttons



- In order for a destination to get on the consideration list, it must be perceived, first and foremost, to be an exciting place and one that adults and children will enjoy:
 - An **exciting** place is a once-in-a-lifetime destination that offers a sense of fun and adventure
 - An **adult destination** is one that is appealing to adults traveling alone and couples
 - A good **family atmosphere** is one with lots for the family to do and plenty of things for kids to enjoy
- Also relatively important determinants of destination choice are the perceptions that a place:
 - Has a **worry-free** atmosphere, which means perceived safety, plus a sense of relaxation, welcoming and general friendliness
 - Is great for **sightseeing**, especially the variety of things to see and do
 - Is **unique**, with interesting scenery, experiences, cultures and customs
 - Is **popular** – people like to travel to places that are well-known and that they see being advertised

Image Hot Buttons



- For a destination like RTO7 and its competition, several aspects are somewhat less important in predicting interest:
 - *The availability of options for **sports and recreation***
 - ***luxurious** accommodations and fine dining*
- Of least importance at the “wish list” stage of travel planning are a destination’s image for:
 - ***Entertainment** options, ranging from shopping to live performances, casinos and nightlife*
 - ***Affordability***
 - ***Climate***
- Nonetheless, affordability tends to move closer to the top of the priority list, the closer consumers come to making up their minds on a destination, as pocketbook and time/travel distance issues play a greater role in travel decisions.

RTO7's Image



- In this survey, respondents were asked to evaluate RTO7 (described as the Grey/Bruce/Simcoe County area) versus several competitors – in-province regions Muskoka, Peterborough/Haliburton/Kawarthas, Kingston and the Thousand Islands, Prince Edward County, and the KW/Stratford/Goderich area, plus the out-of-province regions of the Finger Lakes, Michigan's Upper Peninsula, the Adirondacks and The Laurentians in Quebec
- On an overall basis, relative to these other destinations combined, RTO7's image could be described as weak:
 - *46% agreed that RTO7 is a place they "would really enjoy visiting", about the same as KW/Stratford/Goderich (RTO4)*
 - *Slightly behind the Haliburton/Kawarthas region (52%)*
 - *Well behind every other competitor on the list, which were led by the Laurentians (61%) and Muskoka (59%)*
- RTO7 is even tied for last place for perceived value for money with the Adirondacks, Muskoka and the Thousand Islands region

RTO7's Image



- RTO7's only perceived advantage versus this competitive set is for having great beaches.
- On almost all factors and attributes, people tend to give RTO7 ratings that rank it towards the bottom of the competitive set.
- The greatest perceptual weaknesses are related to the notions that RTO7:
 - *Is not a particularly popular/well-known destination*
 - *Is not great for sightseeing, e.g., not historic, scenery not very beautiful, not many landmarks, not a good place for walking*
 - *Lacks good accommodations and dining*
 - *Isn't very good for adults*
 - *Is too far away/hard to get to*
 - *Isn't exciting or unique*
 - *Isn't a good place for skiing or camping*
- Many of these areas are important predictors of destination interest, so it's not surprising then that RTO7 is given such a low overall rating.

RTO7's Image



- In the following analysis, we look at RTO7's image versus the image of the individual competitive regions evaluated in this study.
- **The Laurentians** – RTO7 is felt to surpass the Laurentians only for water-related activities – beaches, unique waterfronts, boating and sailing. The Laurentians' main edges are for the ski, accommodations/dining and popularity factors. People also give the Laurentians the advantage for other winter activities too, plus the unique culture, excitement, interesting nightlife/entertainment, sightseeing options and adult suitability. People also felt this region is better for summer activities like golf, biking, and hiking. In short, among this competitive set, the Laurentians are the gold standard, ahead of all on most of the top selection criteria.
- **Muskoka** – People gave RTO7 the perceived advantage just for having better breweries/wineries. Muskoka is regarded as being much more popular; far better for outdoor pursuits such as swimming, camping and canoeing/kayaking; better accommodations and dining; better scenery/sightseeing; more suitable for adults/couples; more worry-free; better climate; and more exciting. Muskoka is generally ranked just behind the Laurentians or tied on many of the top motivating factors. Muskoka is more “in the pack” among the competitors for things like sightseeing, uniqueness, entertainment and affordability.

RTO7's Image



- ◉ **Prince Edward County** - Travelers believe RTO7 is better than Prince Edward County mainly for its winter offering (skiing, snowshoeing, snowmobiling) and hunting. Prince Edward County is thought to come out ahead for its historic sightseeing, plus the adult/couples getaway offering, e.g., fine accommodations/inns and B&B's, dining, spas, antiquing, etc. The other sightseeing elements such as museums, galleries, gardens/parks, beautiful scenery contribute to the belief that this is a unique and exciting place.
- ◉ **Haliburton/Kawarthas** – RTO7 has the perceptual edge versus this region only for its breweries/wineries, architecture and beaches. Haliburton/Kawarthas' main image advantages are related to proximity/easy to get to, popularity, suitability for outdoor recreational activities, and climate. Generally though, the region is not strongly differentiated from RTO7, i.e., the gaps are not huge in any single area.

RTO7's Image



- ◉ ***KW/Stratford/Goderich Region*** – RTO7's image is much better for attributes related to outdoor recreation (both winter and summer), the sun and sand factor (beaches, swimming, boating, etc.), the worry-free/safe atmosphere, unique/beautiful scenery, family orientation, great summer weather. The RTO4 region is given the advantage for proximity, and is associated very much with its theatres, festivals and music offerings, plus better accommodations and dining, unique culture/history and food (the Waterloo County Pennsylvania Dutch/German connection), antiques/other shopping, museums/galleries, and affordability. This region tends to rank last with RTO7 on many key variables.
- ◉ ***Kingston/Thousand Islands*** – People think RTO7 is better than this region for winter trips and pursuits (both types of skiing, snowshoeing and snowmobiling), as well as certain summer outdoor activities – beaches, hiking and hunting. However, Kingston and the Thousand Islands region has a huge lead for historic sightseeing, popularity, adult orientation, proximity, dining/accommodations, entertainment/nightlife, climate and excitement

RTO7's Image



- ⊙ ***The Adirondacks*** – RTO7's main image “wins” vs. the Adirondacks are water-related – beaches, waterfronts, boating – plus casinos, breweries/wineries, and perceived safety. The Adirondacks are given the clear edge for skiing and other winter activities; popularity; beautiful and unique scenery; great accommodations; summer activities including camping, parks/gardens, hiking; climate across the seasons, excitement, and adult suitability.
- ⊙ ***Finger Lakes*** – People think that RTO7 has only one advantage over the Finger Lakes region – safety. In contrast, they view the Finger Lakes as being much better for sightseeing (scenery, history, festivals/events), popularity, suitability for adults, outdoor recreation including water-based activities and camping, accommodations and dining, wineries, and excitement.

RTO7's Image



- ⦿ ***Michigan's Upper Peninsula*** – RTO7's is thought to have a few small advantages over Northern Michigan: great spas head the list, followed by suitability for winter trips, entertainment options (gambling, music, theatre/performing arts, shopping), and sightseeing elements such as breweries/wineries and architectural features. Where Michigan is felt to come to the fore is for most outdoor sports and recreational activities in both winter and summer, sightseeing (scenery, historic sites), excitement, uniqueness and popularity.

RTO7's Image



- RTO7's overall image and its image on key factors do not vary much by market:
 - *Ontarians outside of the GTA seem a bit more positive towards RTO7 in most image areas.*
 - *Americans and Quebeckers seem particularly negative towards RTO7 in terms of perceived uniqueness*
 - *But in relative terms, people in each region invariably rank RTO7 last or second last among the competitive set for overall appeal, and on most factors*
- RTO7 is perceived slightly more positively by women, middle-aged and older people (i.e., 35+ years), those with higher income, and Caucasians.

RTO7's Product Delivery



- ◉ When we compare how recent visitors evaluate RTO7 versus people who have never visited we find that visitors are especially impressed with RTO7 relative to their expectations for:
 - ◉ *Proximity, i.e., being close, easy and affordable to get to*
 - ◉ *Popularity*
 - ◉ *Beautiful/unique scenery including both beaches/waterfront and countryside*
 - ◉ *Climate, including suitability for trips in shoulder seasons and winter*
 - ◉ *Great casinos*
 - ◉ *Safe, friendly, relaxing, and walkable place*
 - ◉ *Must-see, exciting place*
 - ◉ *Family atmosphere*
 - ◉ *Great for outdoor activities including swimming and skiing/boardng*
- ◉ There were no areas among those evaluated where visitors came away disappointed with their experience relative to their ingoing expectations.

Conclusions & Implications

Conclusions & Implications



- ◉ In the absence of a defined RTO7 “region” from the consumers’ perspective, we used maps and lists of place names in the survey to provide frames of reference for survey respondents and we then used the same lists to aggregate results.
- ◉ From this aggregation, it becomes apparent that via the sum of its parts, the RTO7 region has a fairly strong share-of-mind presence as a potential destination among people living in its core Ontario drive market:
 - ◉ *There is very high prompted awareness of several key tourism generators within the three-county area*
 - ◉ *Combined unaided mentions of places in RTO7 as destinations people “would really enjoy visiting” are higher than all of the other competitive regions within Southern Ontario*

Conclusions & Implications



- Past visitation of the “region” is also very high, in aggregate well surpassing prominent competitors like Muskoka, Haliburton/The Kawarthas, and Kingston/Thousand Islands:
 - *And this is not just an artifact of aggregating multiple names across the region, because past experience with individual places within the RTO7 region is also very high, i.e., in many instances, the same as or better than competitive regions*
- The broad destination awareness and past visitation patterns in the markets we surveyed are basically what one would expect in the absence of substantial marketing of any destinations in the competitive set:
 - *People’s awareness and experience are influenced mainly by convenience and travel distance*
 - *The closer/easier to get to a destination is, the more it is on people’s radar*
 - *Entities that market (e.g., Casino Rama) and change the pattern are rare*

Conclusions & Implications



- So, for RTO7, the closest markets are SW Ontario and the GTA, and those are correspondingly the markets with the highest awareness and past visitation.:
 - *Eastern Ontario (east of Oshawa) is further away, and seems to provide fewer visitors than the other Ontario regions*
 - *With the exception of some traffic from the Detroit market to the Lake Huron beach towns, the U.S. and Quebec markets are relatively minor contributors to the tourism picture in RTO7*
- It comes as a bit of a surprise, given the extent of awareness and experience Ontario residents have with RTO7, that RTO7 is suddenly only “in the pack” behind RTO4 (KW/Stratford/Goderich region), Muskoka and the Haliburton/Kawarthas region when people name places they intend to visit in the next 12 months.

Conclusions & Implications



- Part of this can be explained by traffic patterns and roads within the province:
 - *The 400 series highways provide good links to Muskoka and Haliburton/Kawarthas*
 - *Most highways to and within RTO7 are just two-lane roads*
- Other factors seems to be at play as well:
 - *When we look at awareness of and experience with local places and attractions, we see a great deal of asymmetry and lack of “cross-pollination”*
 - *The region appears to have image issues*
- People are much more familiar with the places and attractions along the shorelines and around the Blue Mountains than they are with inland locales:
 - *Even though people had to have driven through places to get to the lakeshore, they do not report having experienced those towns and villages very often*

Conclusions & Implications



- ◉ There is a substantial amount of name recognition for the key attractions around the three counties; however, only eight places/attractions have actually been visited by large numbers of people across the province:
 - ◉ *The only places that have ever been visited by at least half of Ontario travelers are Barrie, Wasaga Beach, Collingwood, Orillia, Blue Mountains, Sauble Beach, Owen Sound, and the Niagara Escarpment*
- ◉ With the exception of places with concentrated groupings of attractions, e.g., Collingwood/Blue Mountain/Wasaga Beach, survey data on past visitation of attractions suggest that people are not moving around the region a lot to experience the variety of things there are to see and do:
 - ◉ *.for example, if you took the Niagara Escarpment/Bruce Trail and Blue Mountain skiing out of the mix, the average Grey County visitor from Ontario appears to have only ever visited one other attraction/event while there*
 - ◉ *Similarly in Bruce and Simcoe Counties, visitation/participation in attractions not on the major beaches (Sauble and Wasaga) is very low*

Conclusions & Implications



- One of the big surprises to come out of this research is the relatively poor image the three-county area appears to have relative to the competition.
- Typically in market research, low image scores are explainable by three main possibilities:
 - *The product is poor, i.e., the problem is real*
 - *The product is perceived poorly because of some prejudice in the marketplace*
 - *People are not very knowledgeable about the product, so they downgrade their ratings – the notion that product familiarity influences product evaluation is a well-accepted and often-tested phenomenon (e.g., Ballantyne, Warren, & Nobbs, 2006, The Evolution of Brand Choice, Journal of Brand Management)*

Conclusions & Implications



- Our feeling is that it is the last explanation that is at play for RTO7, for the following reasons:
 - *Per the behavioural measures described above, much of the region apart from the beaches/lakes and mountain attractions is not well known or well explored*
 - *When we compare the region's image among recent visitors to the image among people who have never visited, we find that RTO7 very much surprised visitors with its product in many positive ways; and there were no dimensions on which the region failed to live up to the promise. In other words, the image issue is not a product problem.*
 - *Apart from the Walkerton water tragedy, there haven't been any significant events or issues emanating from the region that would cause such negativity towards the region and its inhabitants so as to impact perceptions about tourism.*

Conclusions & Implications



- ◉ Given the existing product and people's travel patterns, we were not surprised that two of the key "marketable" trip occasions or purposes people associate with RTO7 are resort trips (either on the water or inland) and outdoor trips (camping, hiking, fishing, etc.).
- ◉ We did not expect that people would also include touring and special event trips in the types of travel they think they would particularly enjoy in the region:
 - ◉ *In fact, touring trips headed people's list and special events came in just behind resort and outdoor*
- ◉ A few observations about trip purpose segments from our work for other destinations:
 - ◉ *Travel is generally occasion-based and not "people"-based, i.e. over the course of a time period, one person may take trips for several different purposes (a camping trip, a beach resort trip, a city trip to enjoy big city sights/dining/etc.), even though demographics/psychographics may seem to define that individual as "an outdoorsy type" or a "city person"*

Conclusions & Implications



- ◉ *A destination can market more precisely by understanding what people want from a particular type of trip, than by using a person-based approach*
- ◉ *Certain trip purposes have greater or less “value” to a destination, based on how much and on what people spend money.*
- ◉ *To no one’s surprise, campers and cottagers tend not to spend a great deal of money, while those staying at resorts/resort towns spend a lot more. Ski trips are a specialized form of Resort Trips, and travelers in this segment tend to be the biggest spenders of all.*
- ◉ *Special event attendees spend money too, but often their spending is concentrated within the gated event or attraction and doesn’t spill over to the broader community to a great degree*
- ◉ *Touring vacationers are somewhere in between the extremes in terms of overall spending. But what makes them appealing for a destination is that they spread their spending around. A touring trip by definition in this survey is “a trip by car, bus, boat, train, snowmobile or other mode of transportation through the area to enjoy scenic beauty, local sightseeing, or for cultural or general interest”. In short, touring vacationers seek variety..*

Conclusions & Implications



- Consumers' strong interest in the touring aspect represents a significant opportunity for RTO7 to attract new visitors and broaden returning visitors' experience beyond just the primary demand generators.
- The types of activities and attractions that people said they would be interested in enjoying while in the region confirm the appeal of both the current major attractions and what would be at the heart of the variety touring vacationers are seeking, including:
 - *Interesting dining/food experiences*
 - *Scenic drives*
 - *Local history*
 - *Arts and culture*
 - *Etc.*
- The challenge in developing the touring market for this region will be in uncovering/developing marketing-worthy clusters of product and experiences that will attract and hold the visitor coming for this purpose.

Conclusions & Implications



- ◉ Using the trip purposes and how people are looking at RTO7 in that context as a guide, the competitive landscape for RTO7 in the Ontario market is as follows:
 - ◉ *For Resort and Outdoor Trips, the chief competitors are Muskoka and Haliburton/Kawarthas:*
 - ◉ *Muskoka for upscale and Haliburton/Kawarthas for value*
 - ◉ *For Touring Trips, Kingston/Thousand Islands and Prince Edward County are the top competition*
 - ◉ *Every destination is a competitor for Special Event Trips*
- ◉ In the relevant image areas, e.g., sightseeing for Touring Trips or sports/recreation options for Outdoor Trips, RTO7 trails the main competition; however, the gaps in perceptions are not huge, and could likely be substantially erased with communication/marketing.

In Summary



- ◉ The newly created RTO7 region is, as yet, an undefined entity from the consumer's perspective:
 - ◉ *County names don't mean much to travelers*
 - ◉ *Not much in-depth knowledge of the region beyond a few towns, the major beaches and Blue Mountains*
- ◉ The new region has an image problem, but the image problem is more likely based on lack of knowledge than on product or misperceptions.
- ◉ The good news is that it is easier to improve knowledge through communication than it is to build new product or fix ingrained negative attitudes and misperceptions.
- ◉ The first steps require forming a whole out of several parts:
 1. *Develop a name that is recognizable and easy to remember, and that can serve as an umbrella for the region*
 2. *Develop a positioning that celebrates but goes far beyond the water or hills that have so far defined the individual places in the three counties, to incorporate the emotional benefits of coming to RTO7, including a sense of fun and adventure, as well as the welcoming, friendly atmosphere*

In Summary



3. *Plan and carry out a marketing program for the region*
- ⦿ This research would suggest that marketing should be a much higher priority for the region rather than product development.
 - ⦿ There may be longer term opportunities to develop Quebec and U.S. border markets; however, in the absence of a sizeable marketing budget, the more productive markets for the short-term are likely to be the GTA and Southwestern Ontario.

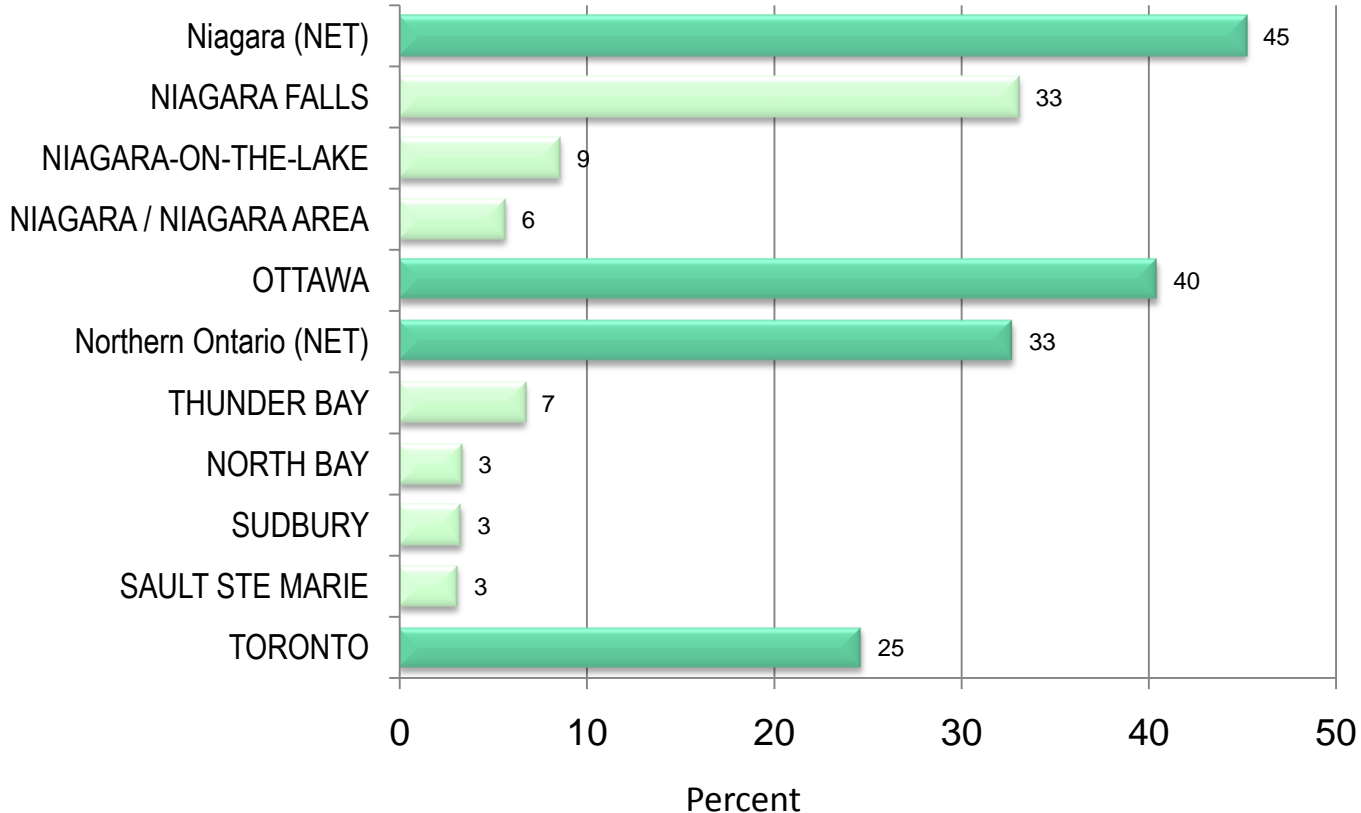
Detailed Findings

Destination Awareness and Visitation

Unaided Ontario Destinations “Would Really Enjoy Visiting”



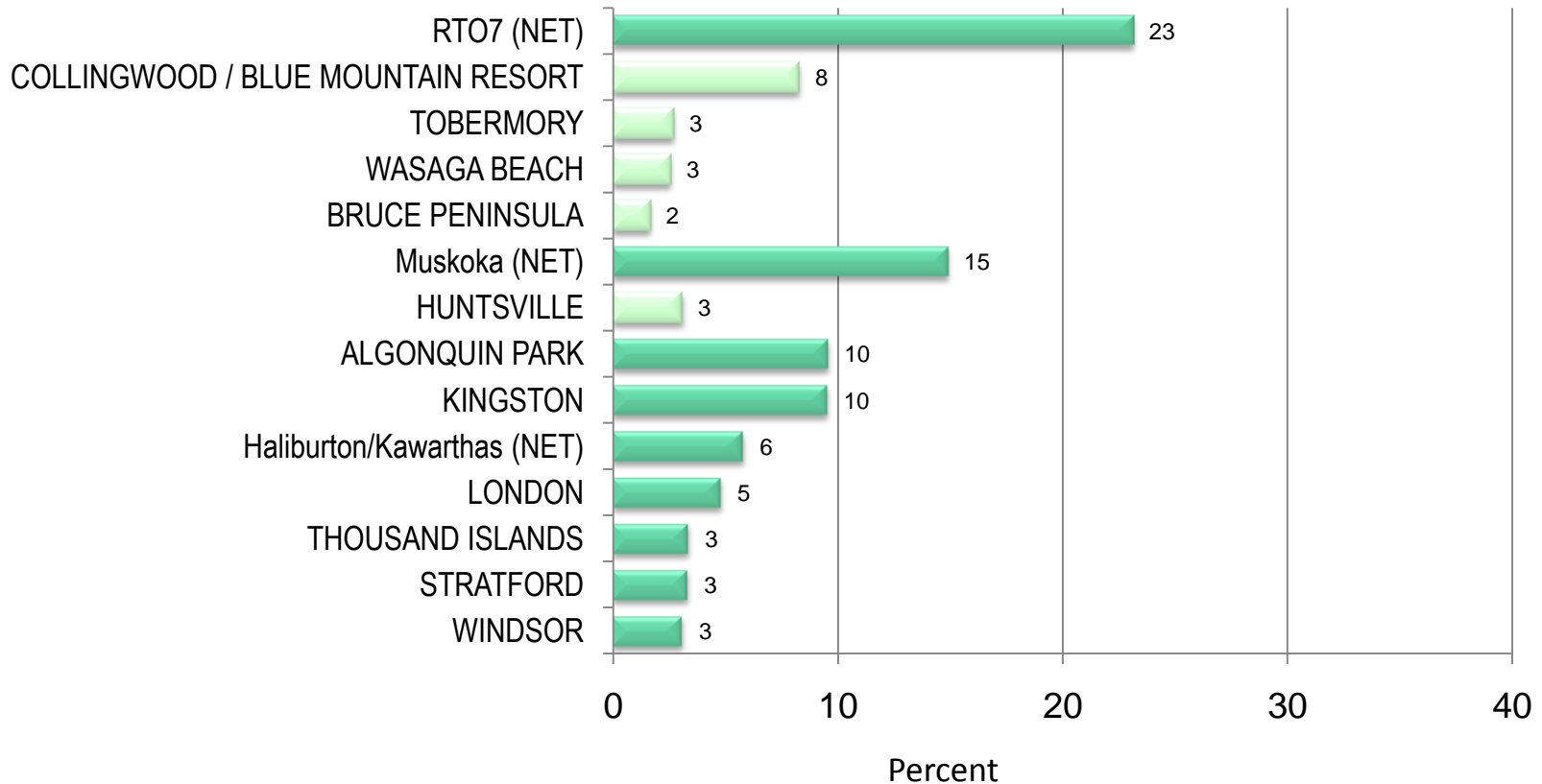
Base: Residents of Ontario



Unaided Ontario Destinations “Would Really Enjoy Visiting” (Cont’d)



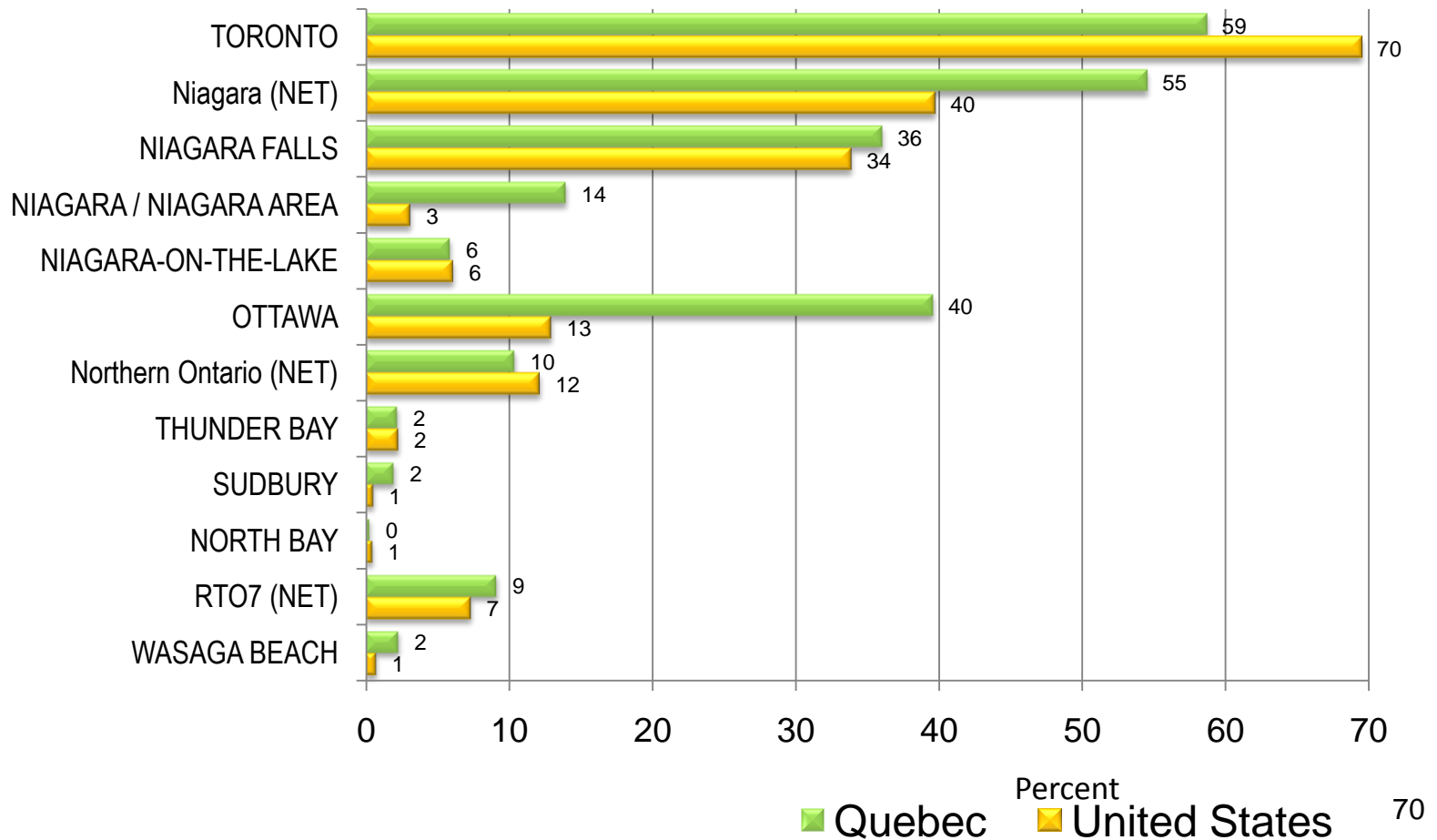
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Unaided Ontario Destinations “Would Really Enjoy Visiting”



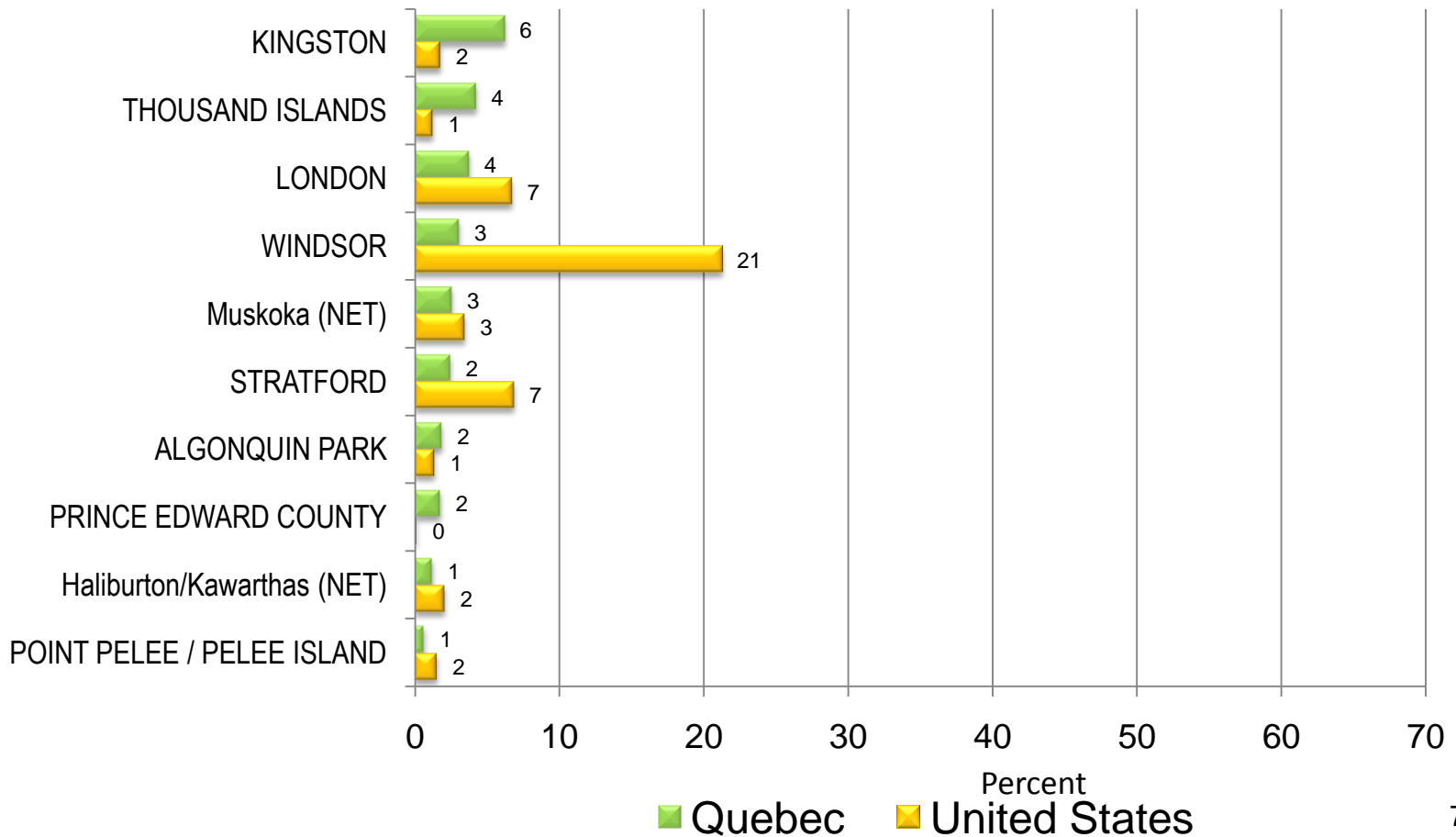
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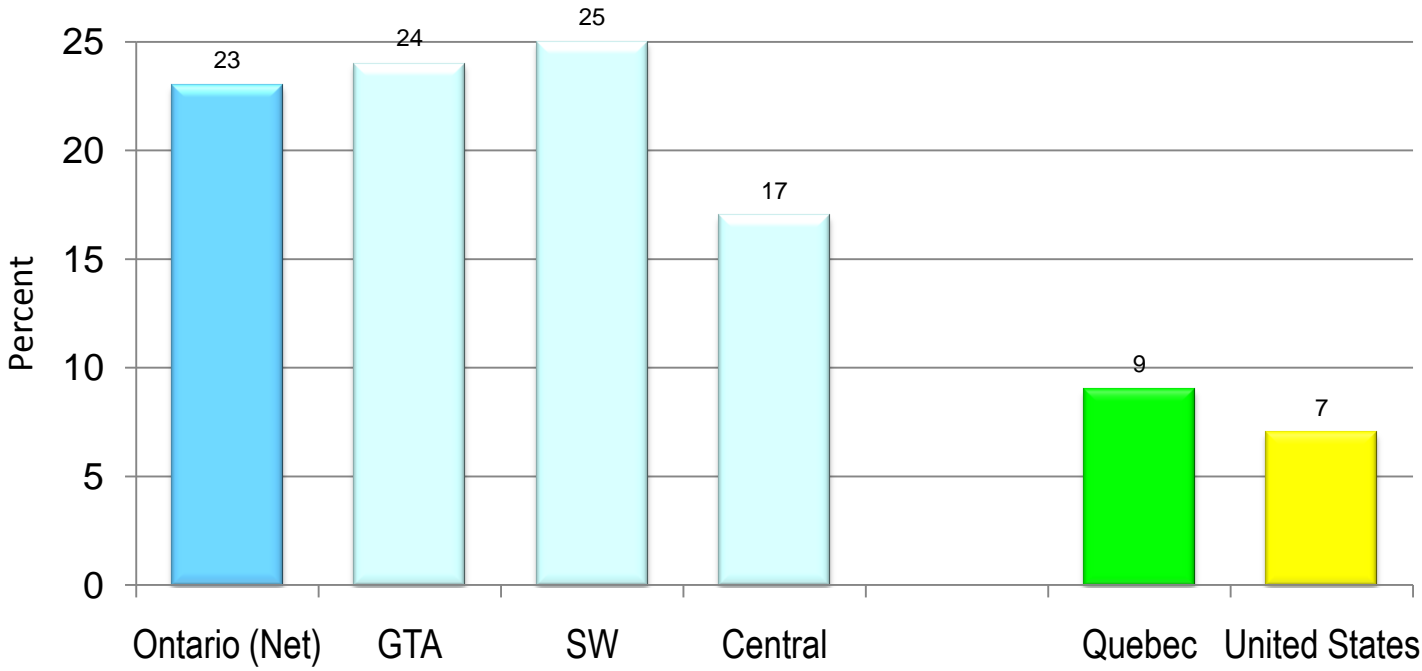
Unaided Ontario Destinations “Would Really Enjoy Visiting” (Cont’d)



Base: Residents of Quebec/United States



Unaided Mentions of RTO7* by Market

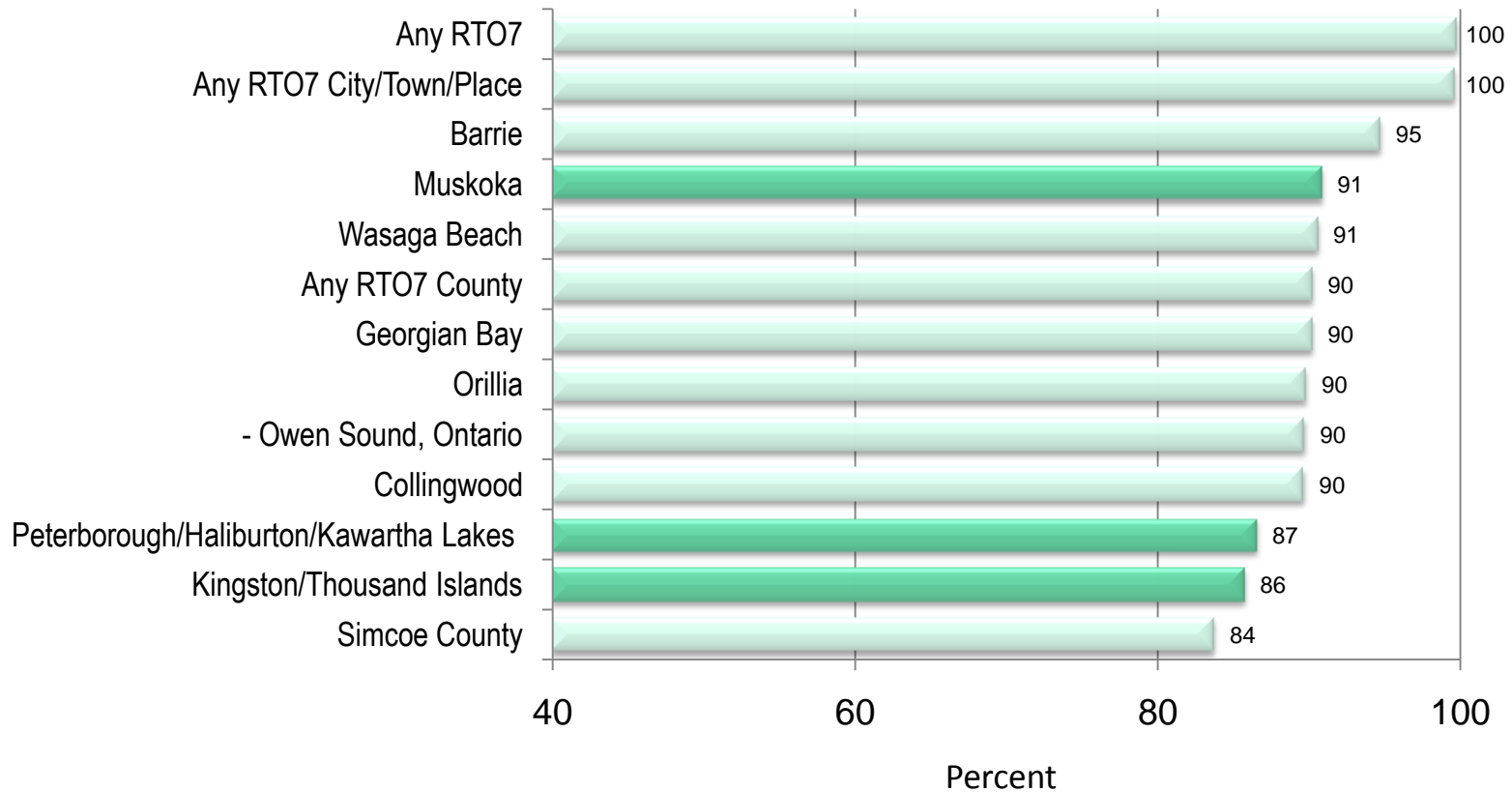


* Spontaneous mentions RTO7 destinations as places "would enjoy visiting"

Aided Name Recognition



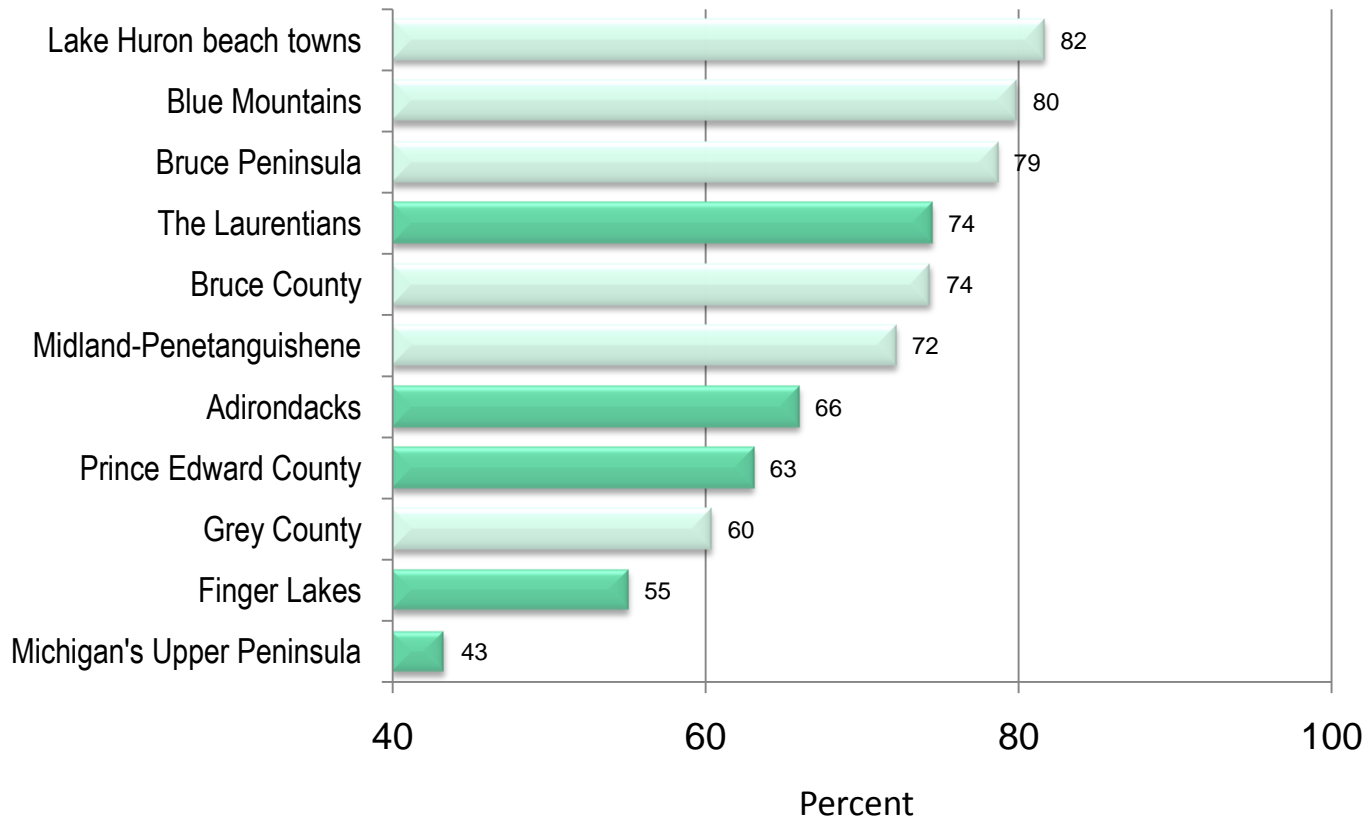
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Aided Name Recognition (Cont'd)



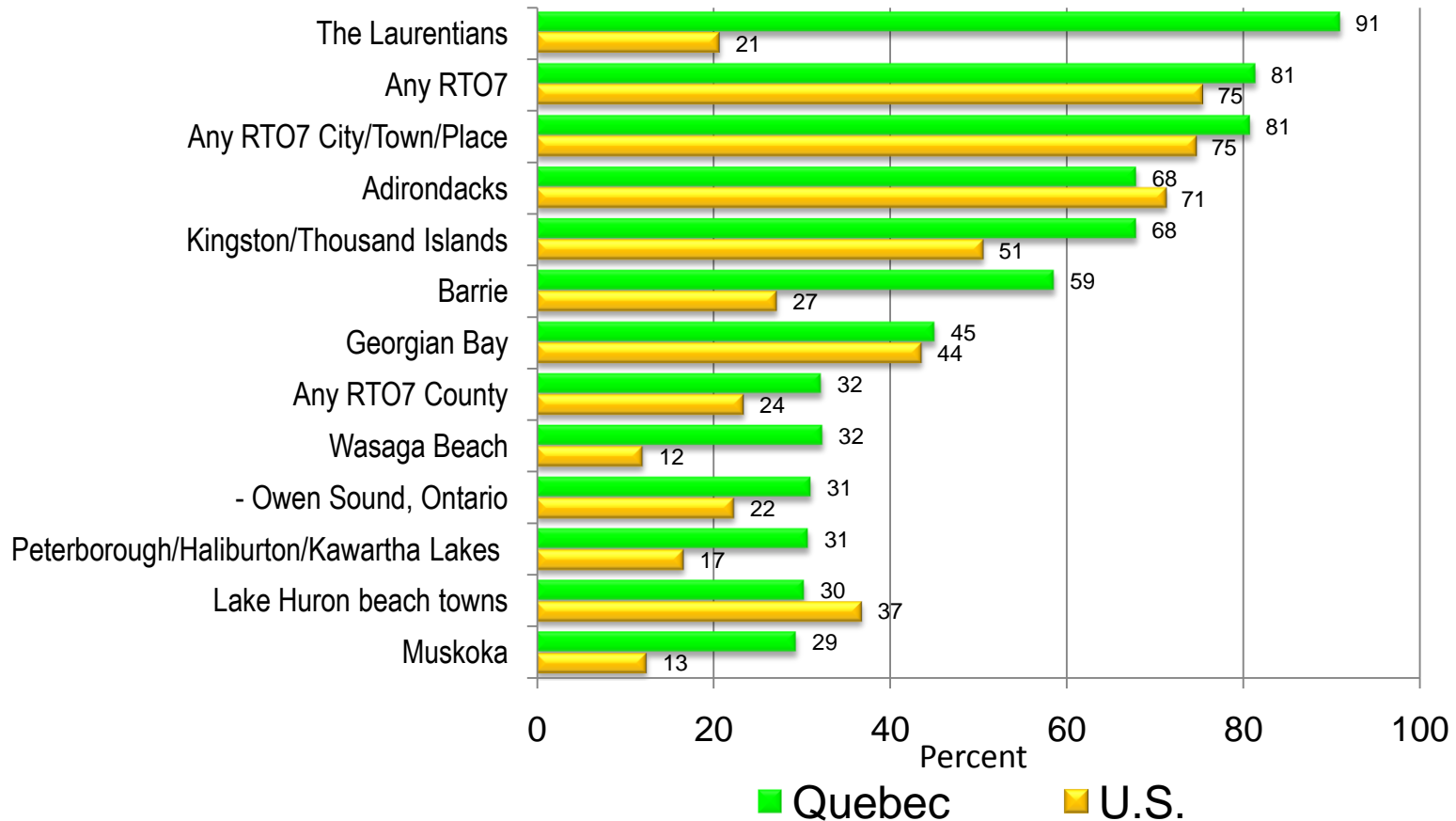
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Aided Name Recognition



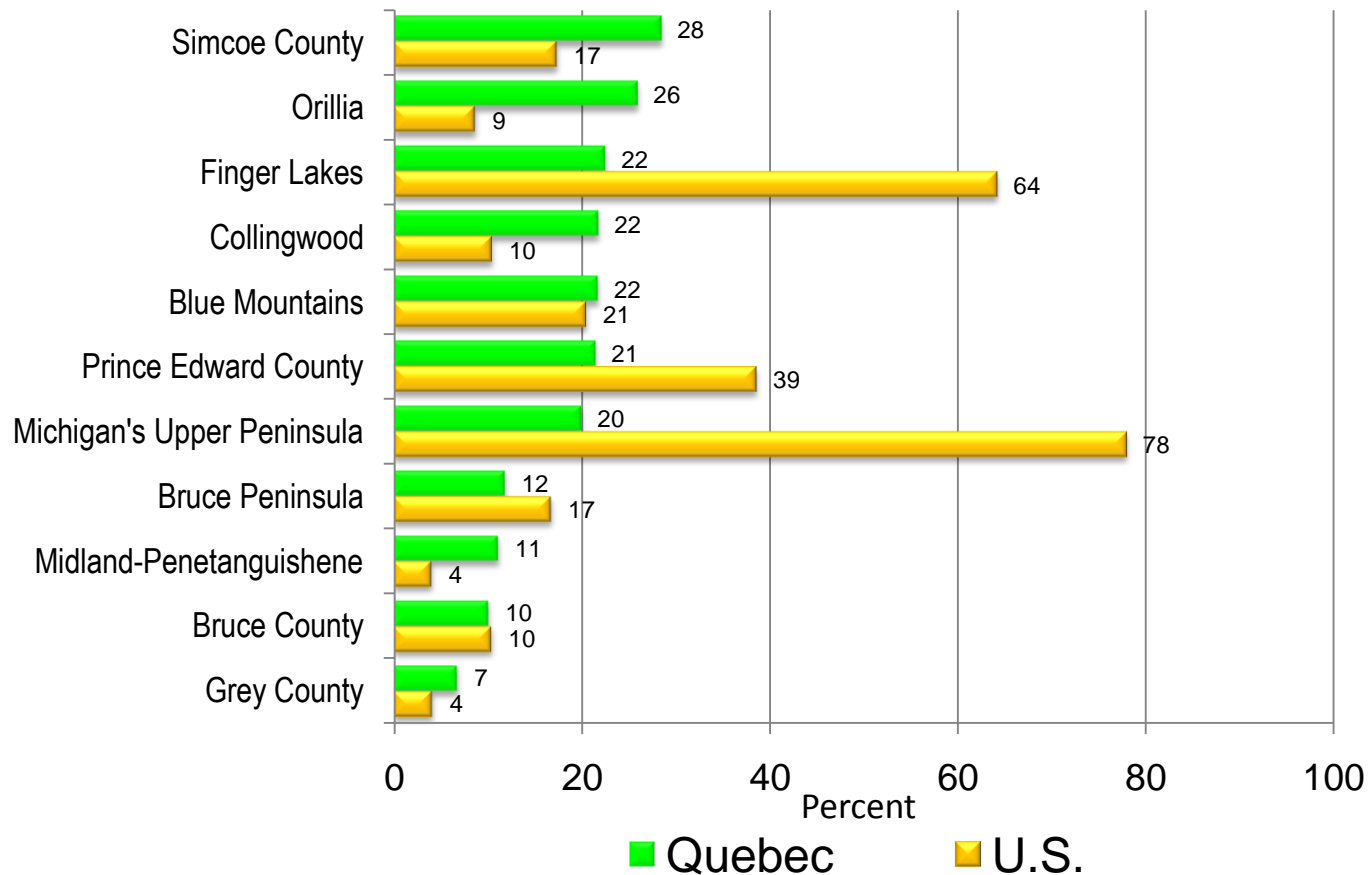
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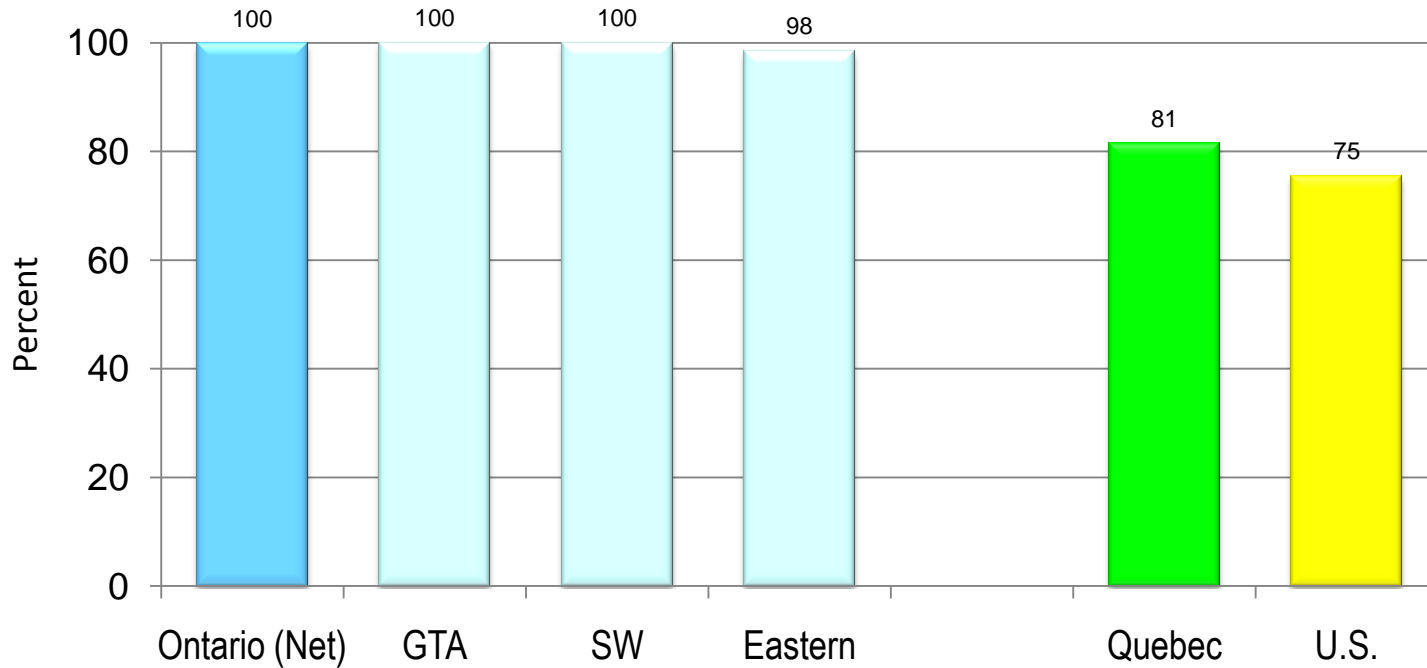
Aided Name Recognition (Cont'd)



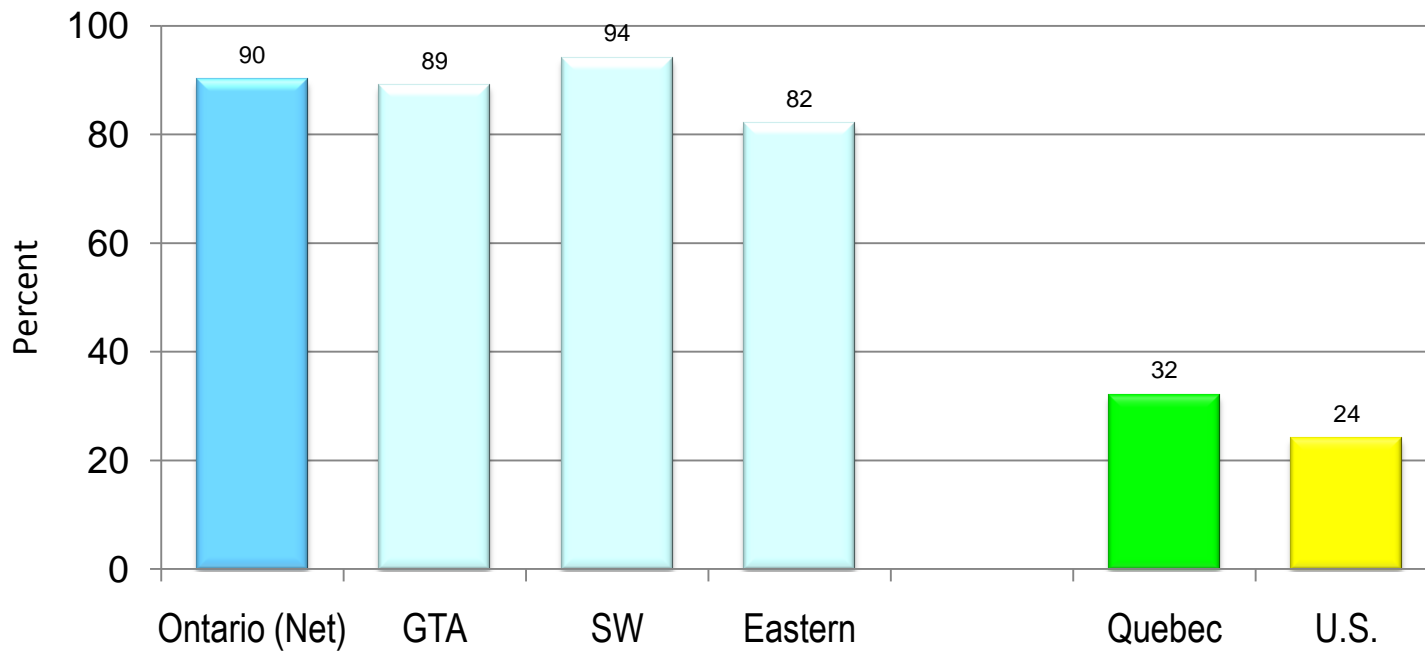
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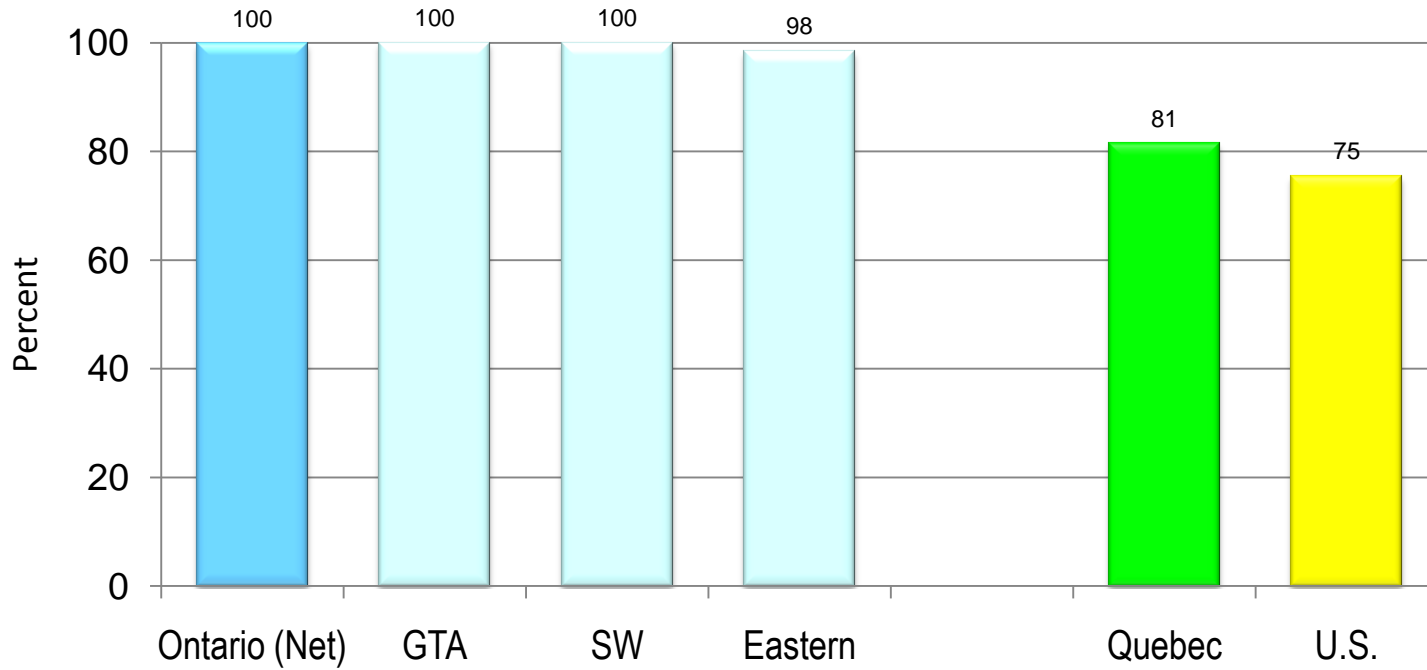
Aided Recognition of RTO7 ("Grey/Bruce/Simcoe County Region") by Market



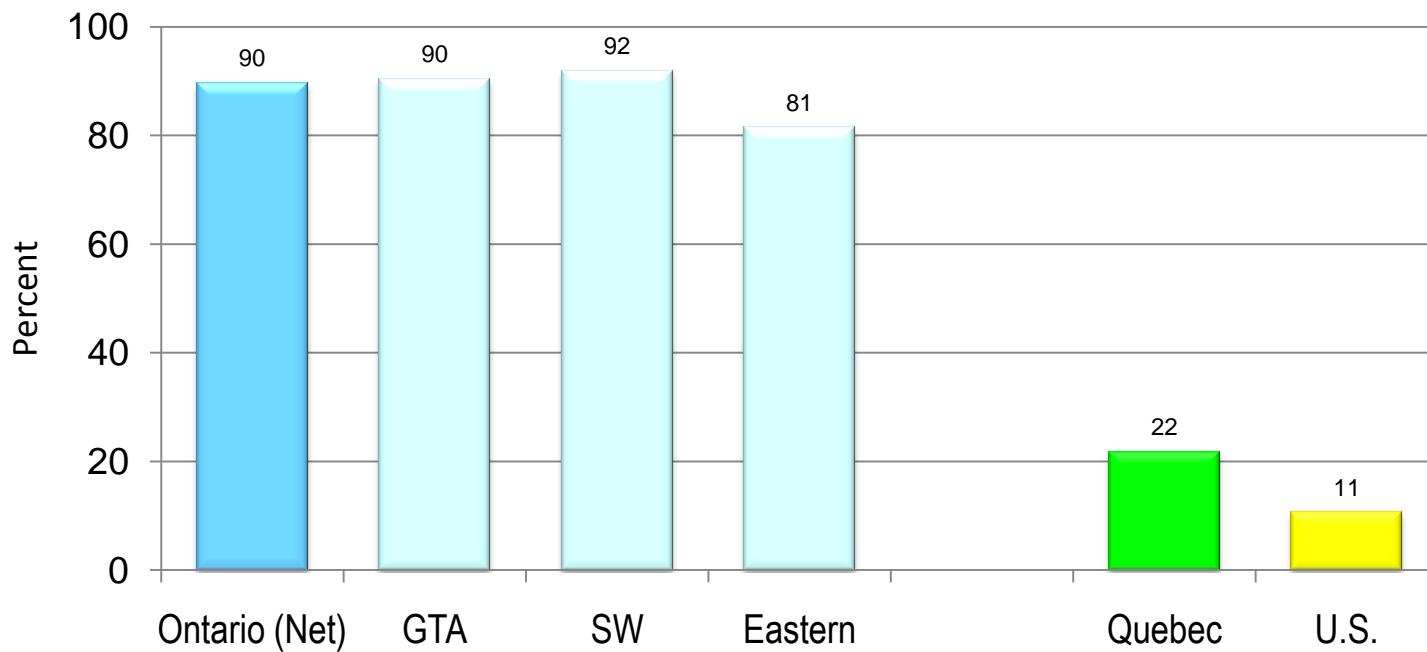
Aided Recognition of County Names (Net) by Market



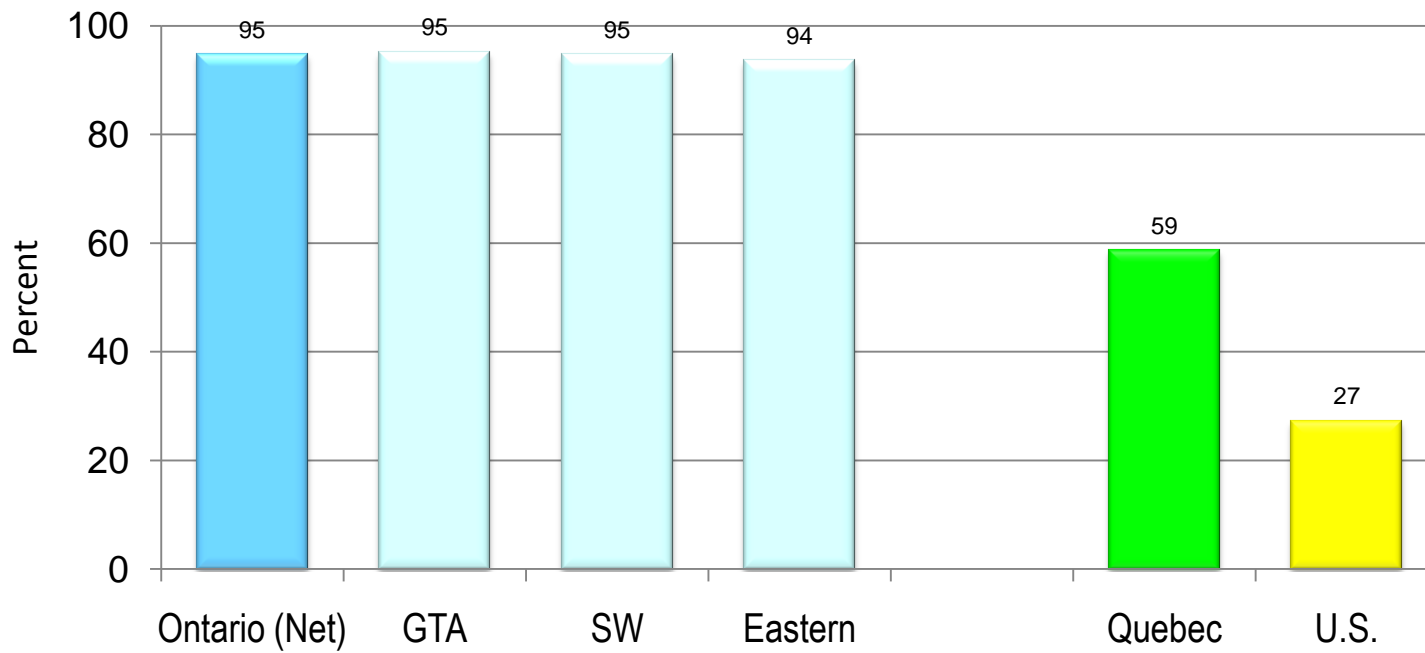
Aided Recognition of Non-County Names (Net) by Market



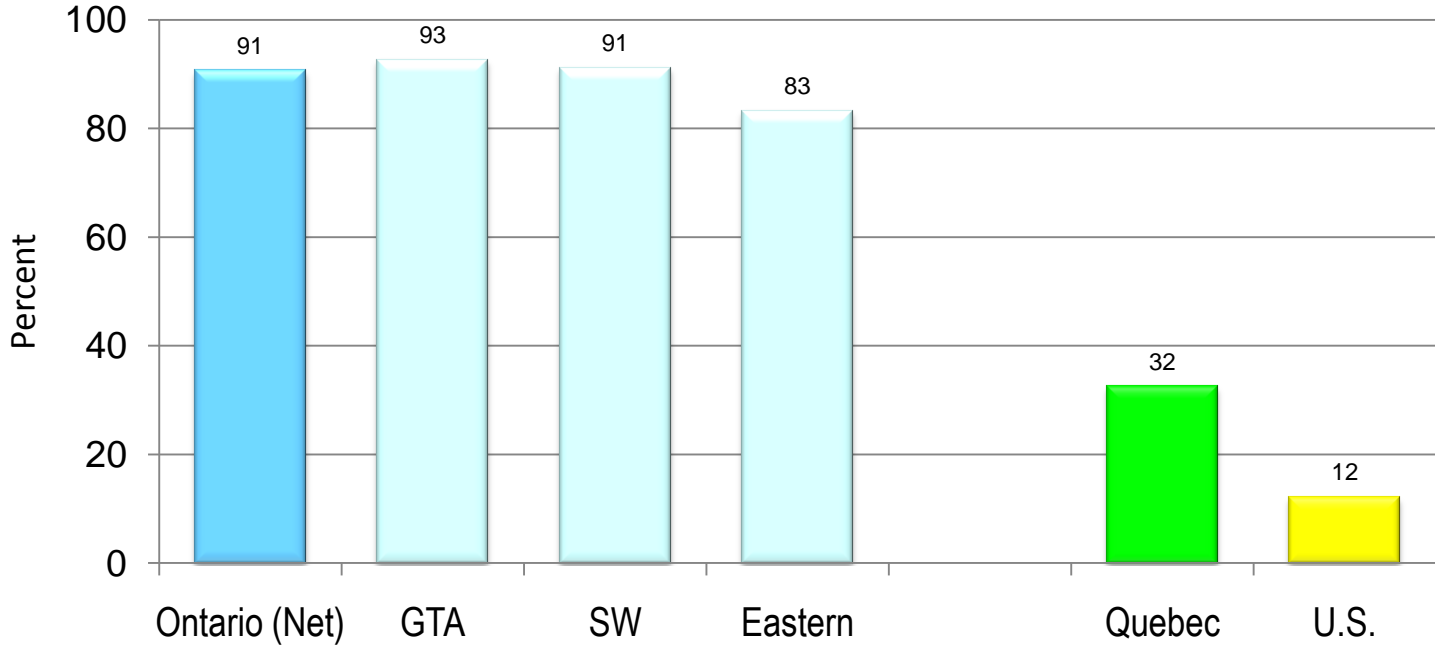
Aided Recognition of Collingwood by Market



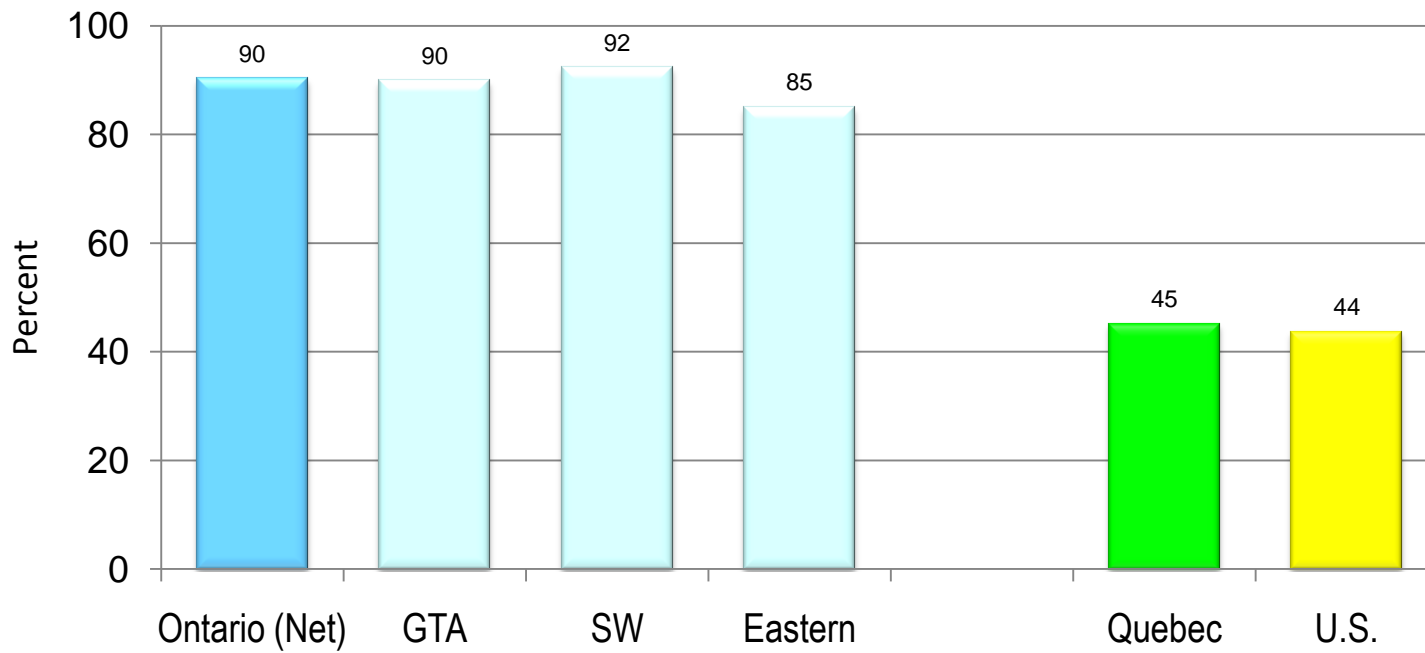
Aided Recognition of Barrie by Market



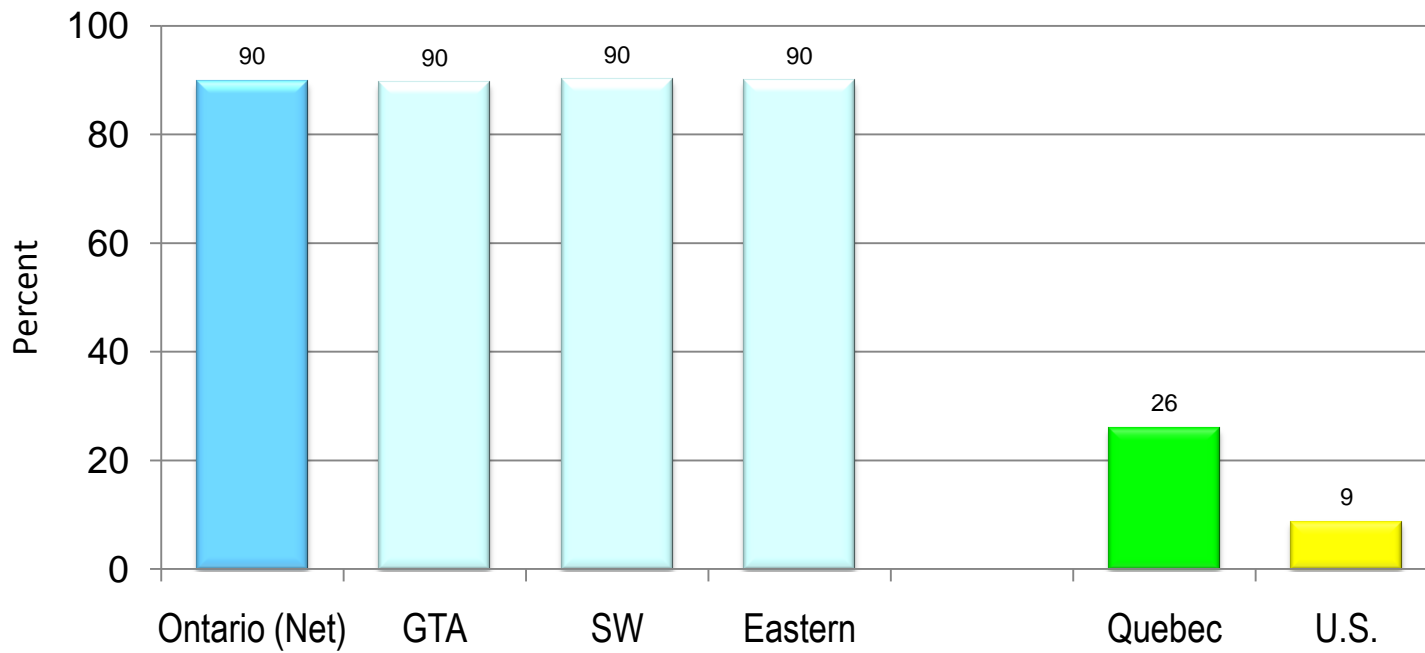
Aided Recognition of Wasaga Beach by Market



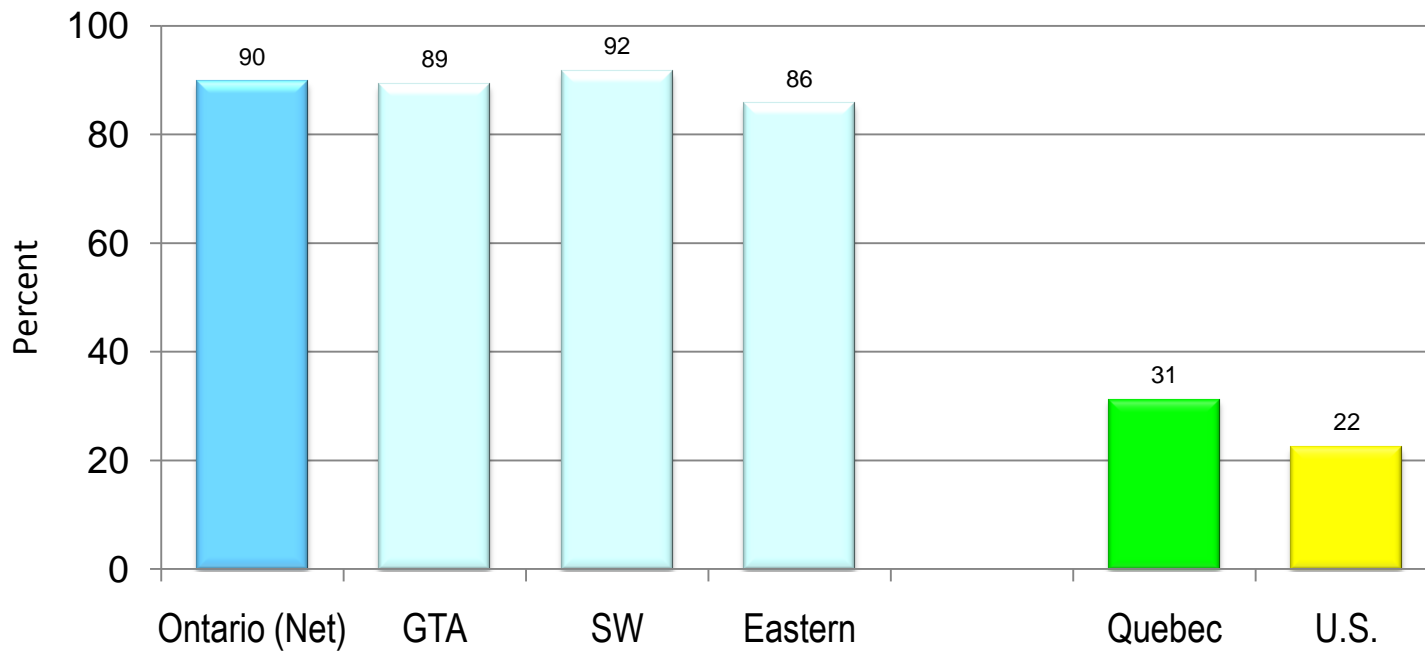
Aided Recognition of Southern Georgian Bay by Market



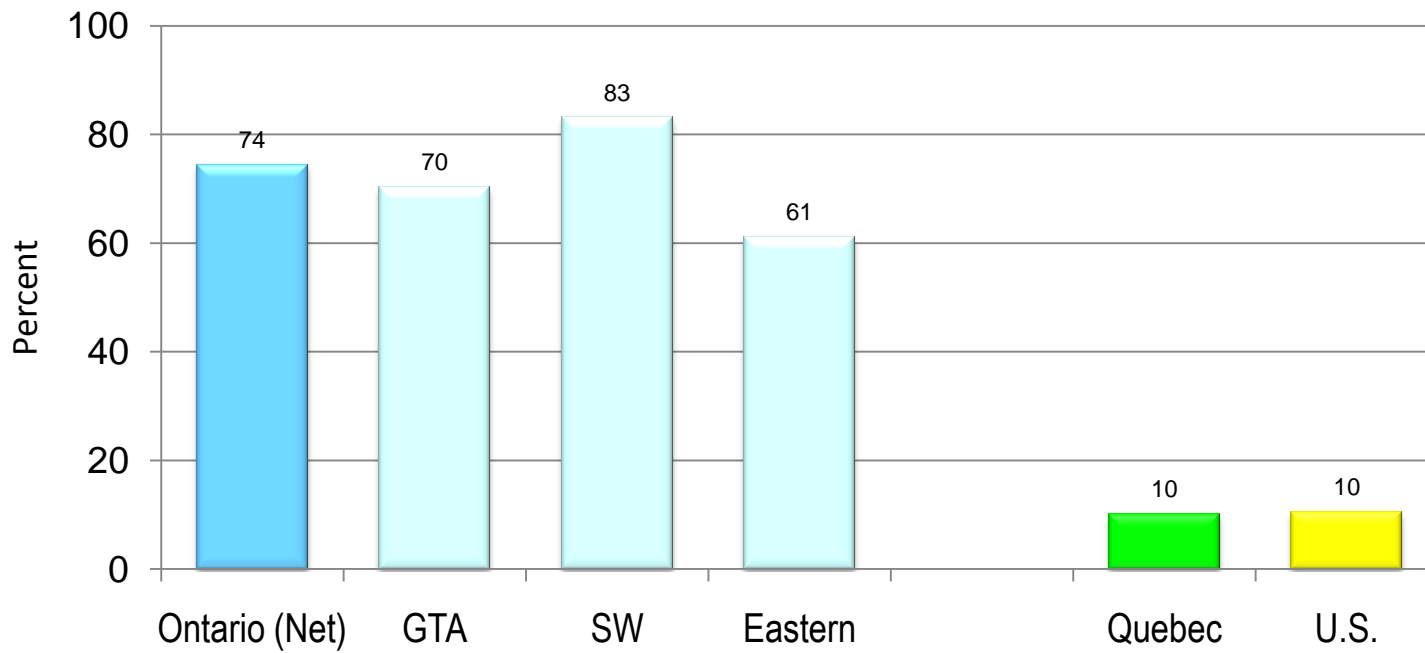
Aided Recognition of Orillia by Market



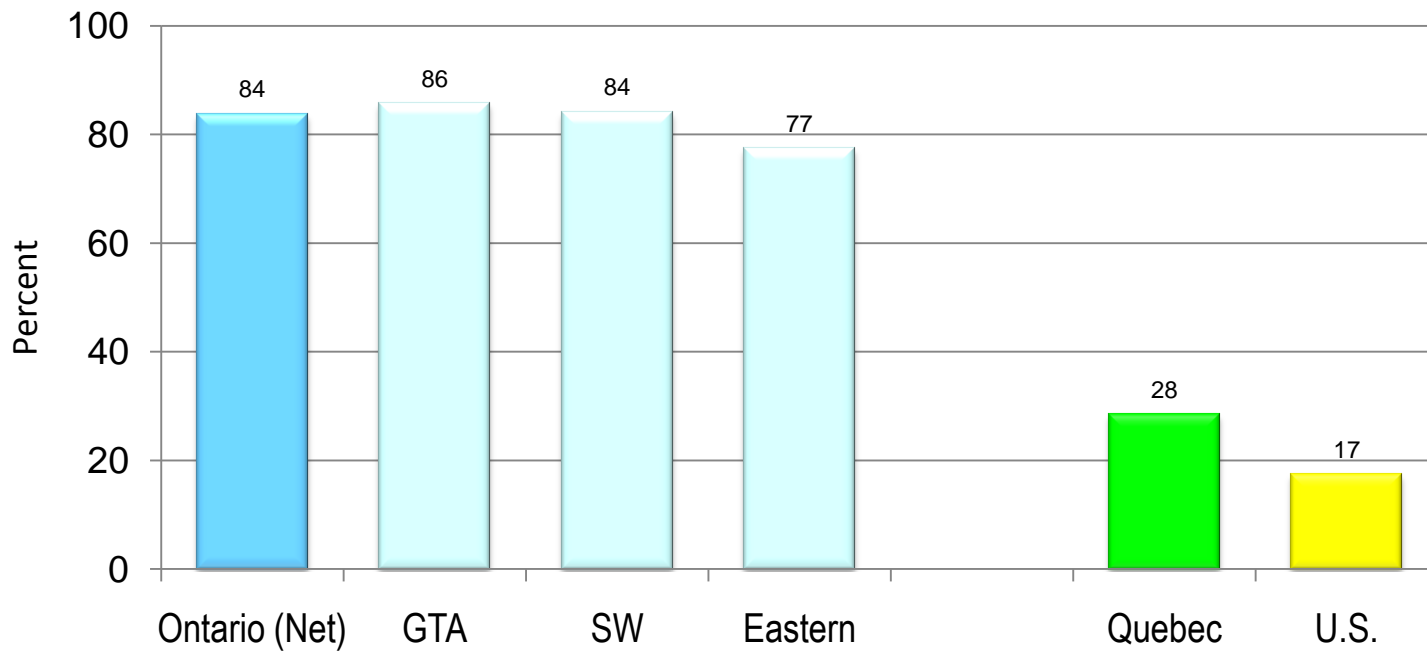
Aided Recognition of Owen Sound by Market



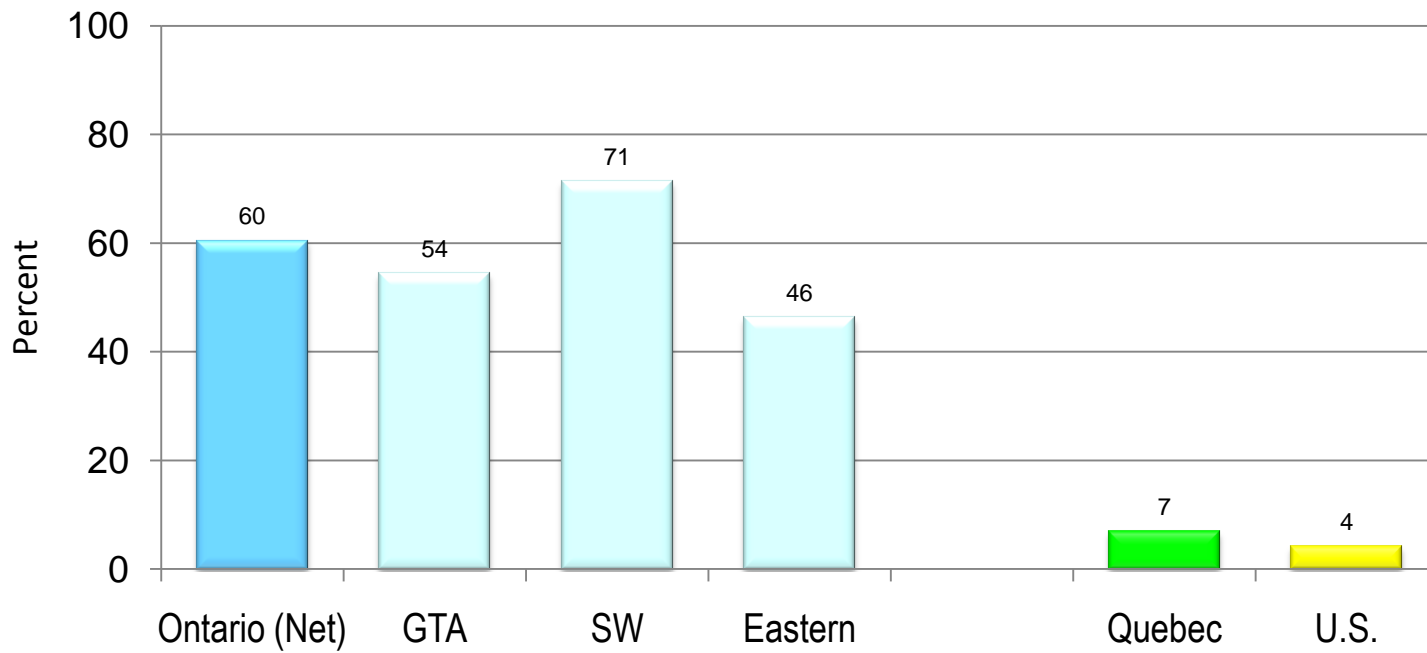
Aided Recognition of Bruce County by Market



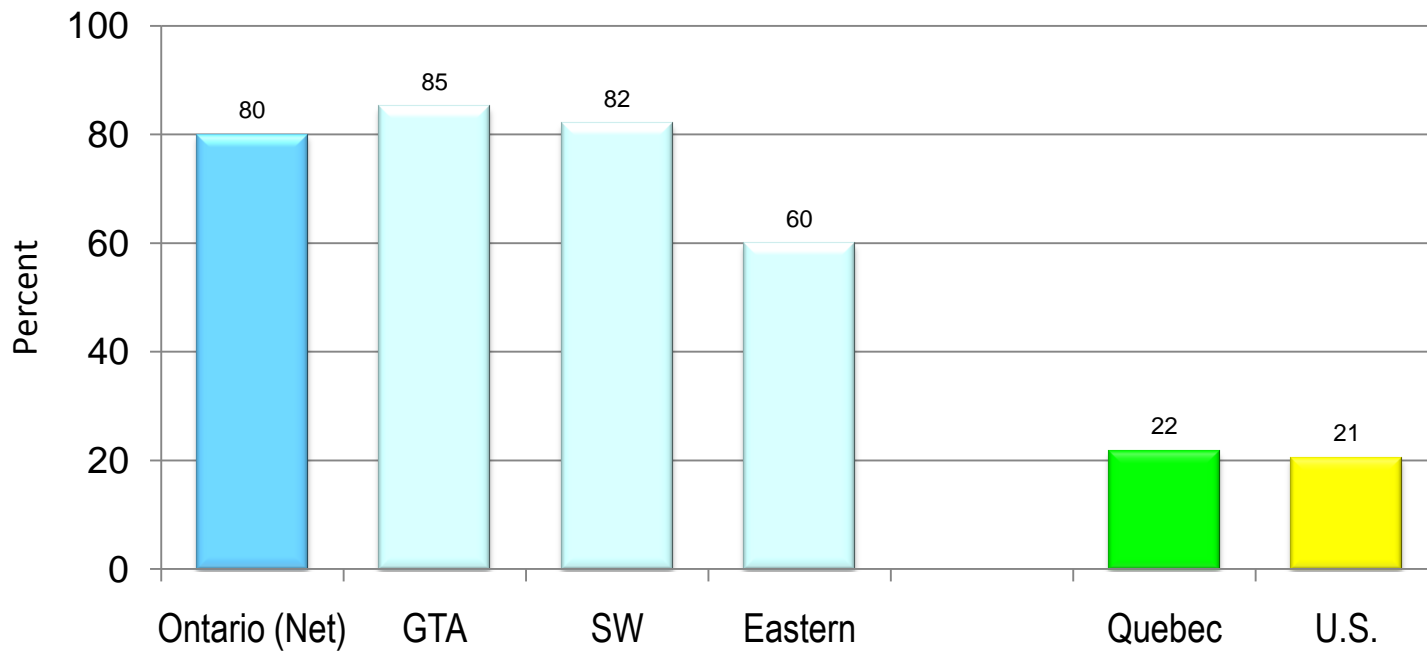
Aided Recognition of Simcoe County by Market



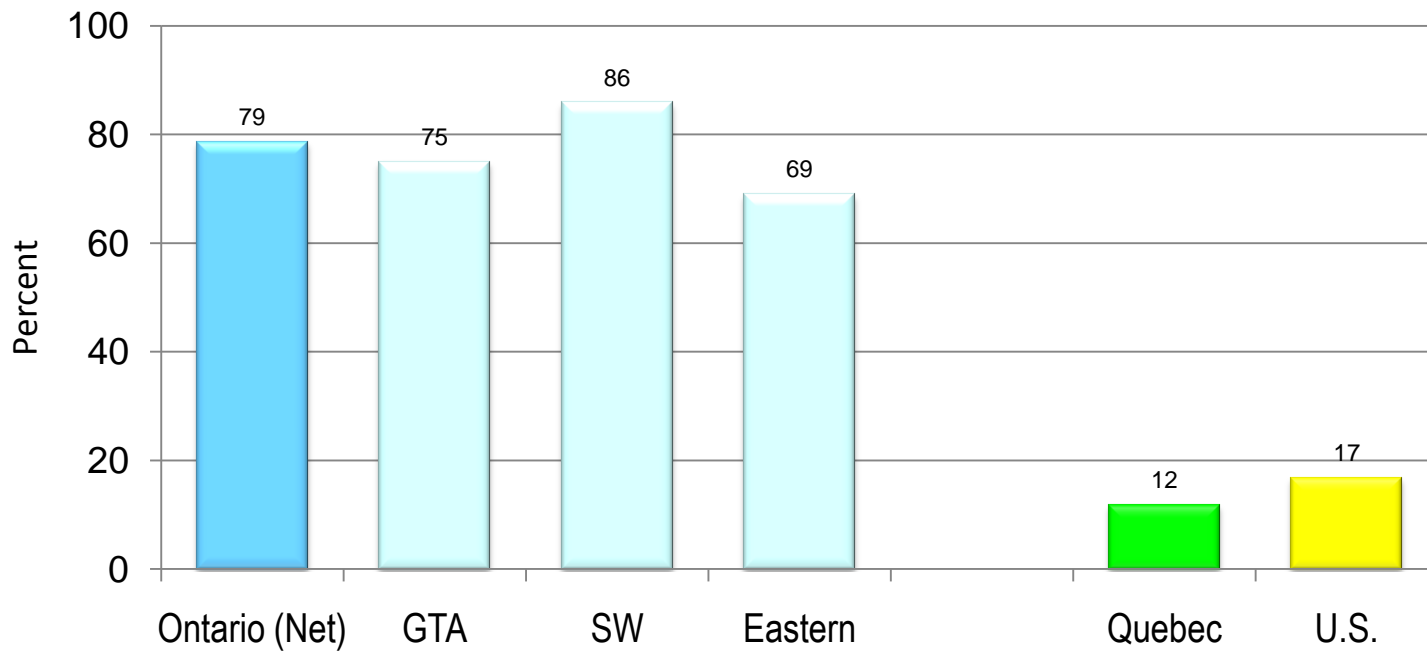
Aided Recognition of Grey County by Market



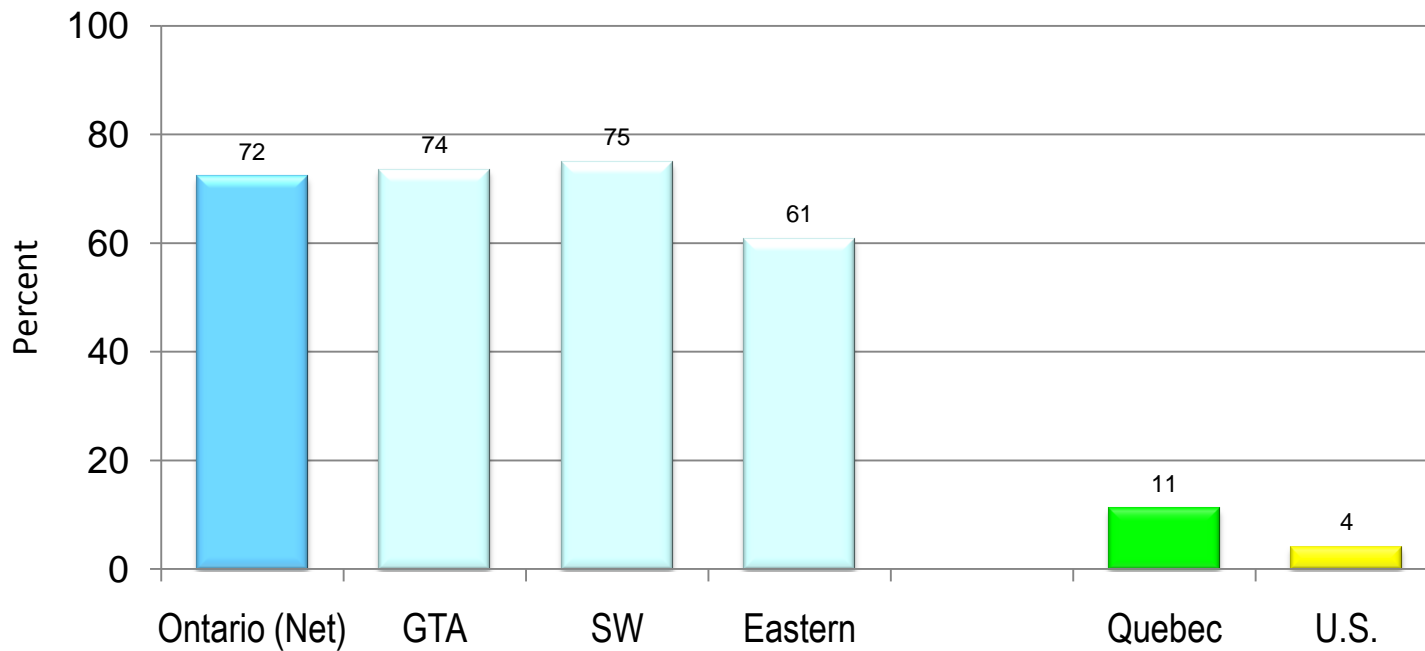
Aided Recognition of The Blue Mountains by Market



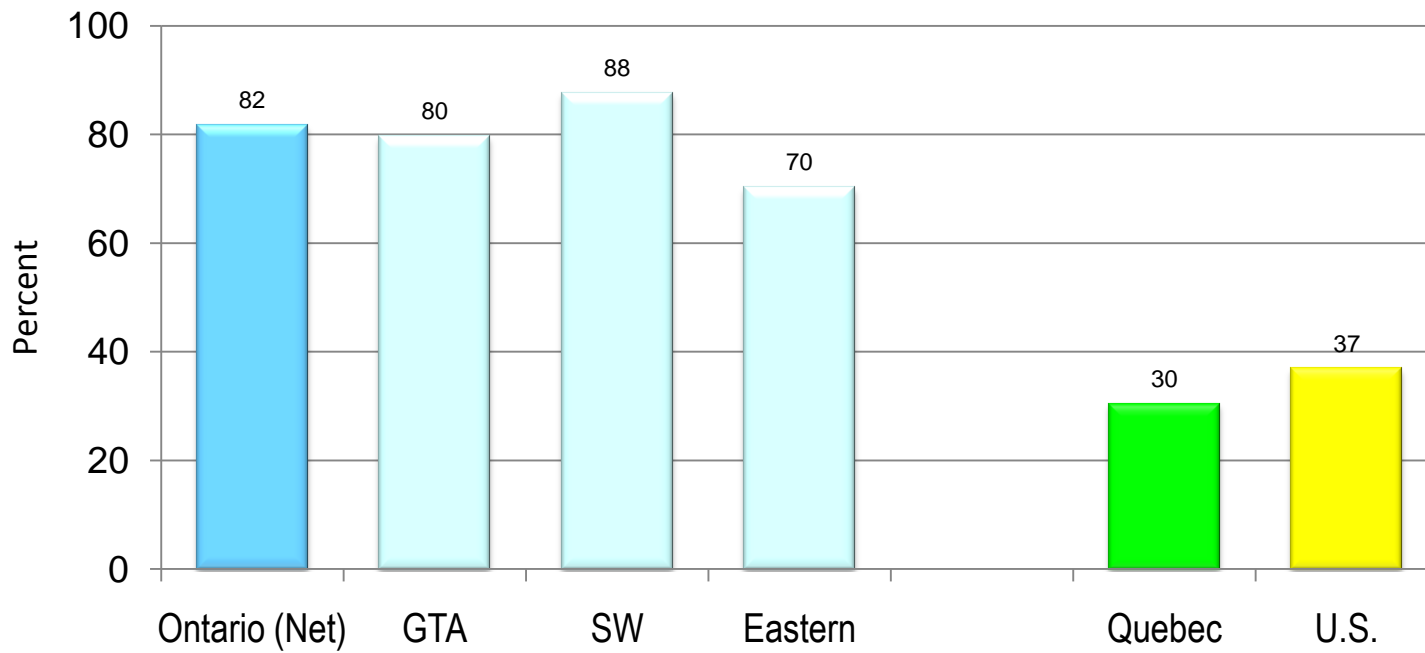
Aided Recognition of The Bruce Peninsula by Market



Aided Recognition of Midland-Penetanguishene by Market



Aided Recognition of Lake Huron Beach Towns by Market



Aided Name Recognition by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Grey County	35	39	32	29	35	44
Bruce County	45	46	45	40	46	53
Simcoe County	56	58	53	49	55	64
Southern Georgian Bay	69	72	67	61	67	83
Owen Sound	61	63	58	55	61	68
Collingwood	56	57	54	52	55	62
Wasaga Beach	58	60	57	56	59	60

Aided Name Recognition by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
The Blue Mountains	53	56	51	51	55	54
Bruce Peninsula	50	52	48	44	49	58
Lake Huron beach towns	60	60	61	57	58	68
Midland-Penetanguishene	43	44	41	35	43	52
Barrie	69	72	67	64	70	76
Orillia	56	57	55	51	56	63

Aided Name Recognition by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Muskoka	58	60	57	54	58	64
Prince Edward County	49	49	49	46	47	56
Kingston/Thousand Islands	73	75	71	67	70	83
Finger Lakes	52	56	49	36	54	71
The Adirondacks	68	69	66	52	69	85
Michigan's Upper Peninsula	50	53	46	42	46	63
The Laurentians	62	63	61	53	59	76
Haliburton/Kawartha Lakes	57	59	56	52	57	64

Aided Name Recognition by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
		%	%	%	%	%
Grey County	35	30	39	38	24	20
Bruce County	45	38	50	48	39	27
Simcoe County	56	46	59	57	57	34
Southern Georgian Bay	69	60	73	72	59	47
Owen Sound	61	50	66	63	58	39
Collingwood	56	44	61	57	59	36
Wasaga Beach	58	48	63	59	63	44

Aided Name Recognition by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
The Blue Mountains	53	43	57	54	59	40
Bruce Peninsula	50	43	54	52	41	31
Lake Huron beach towns	60	57	62	63	47	44
Midland-Penetanguishene	43	33	47	46	29	23
Barrie	69	59	75	71	73	50
Orillia	56	46	60	58	53	38

Aided Name Recognition by Demographics

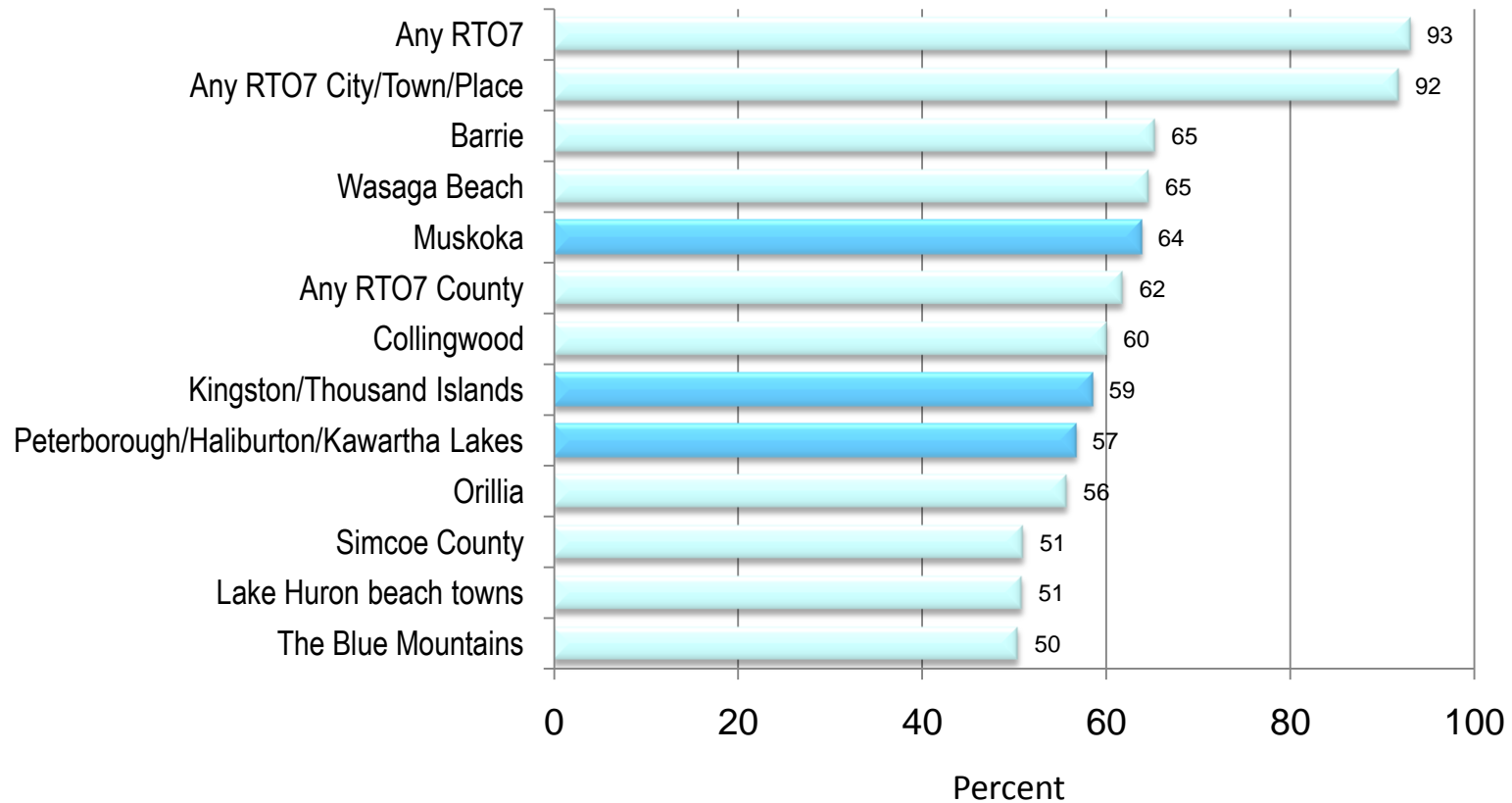


	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Muskoka	58	49	63	60	60	38
Prince Edward County	49	47	51	51	40	40
Kingston/Thousand Islands	73	66	76	75	70	53
Finger Lakes	52	46	55	57	29	26
The Adirondacks	68	64	69	73	33	39
Michigan's Upper Peninsula	50	51	48	52	29	44
The Laurentians	62	54	66	65	44	40
Haliburton/Kawartha Lakes	57	47	63	59	54	39

Destinations Ever Visited



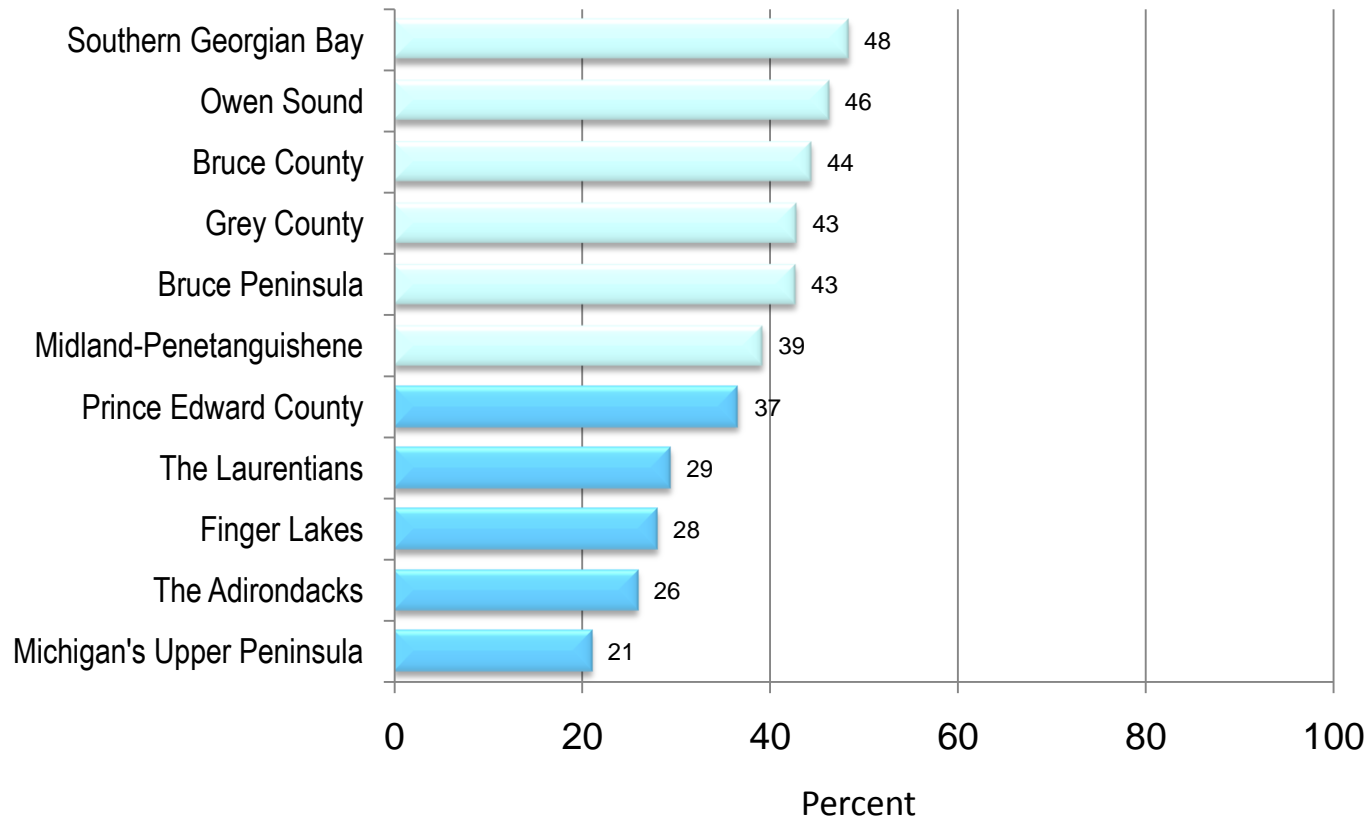
Base: Residents of Ontario



Destinations Ever Visited (Cont'd)



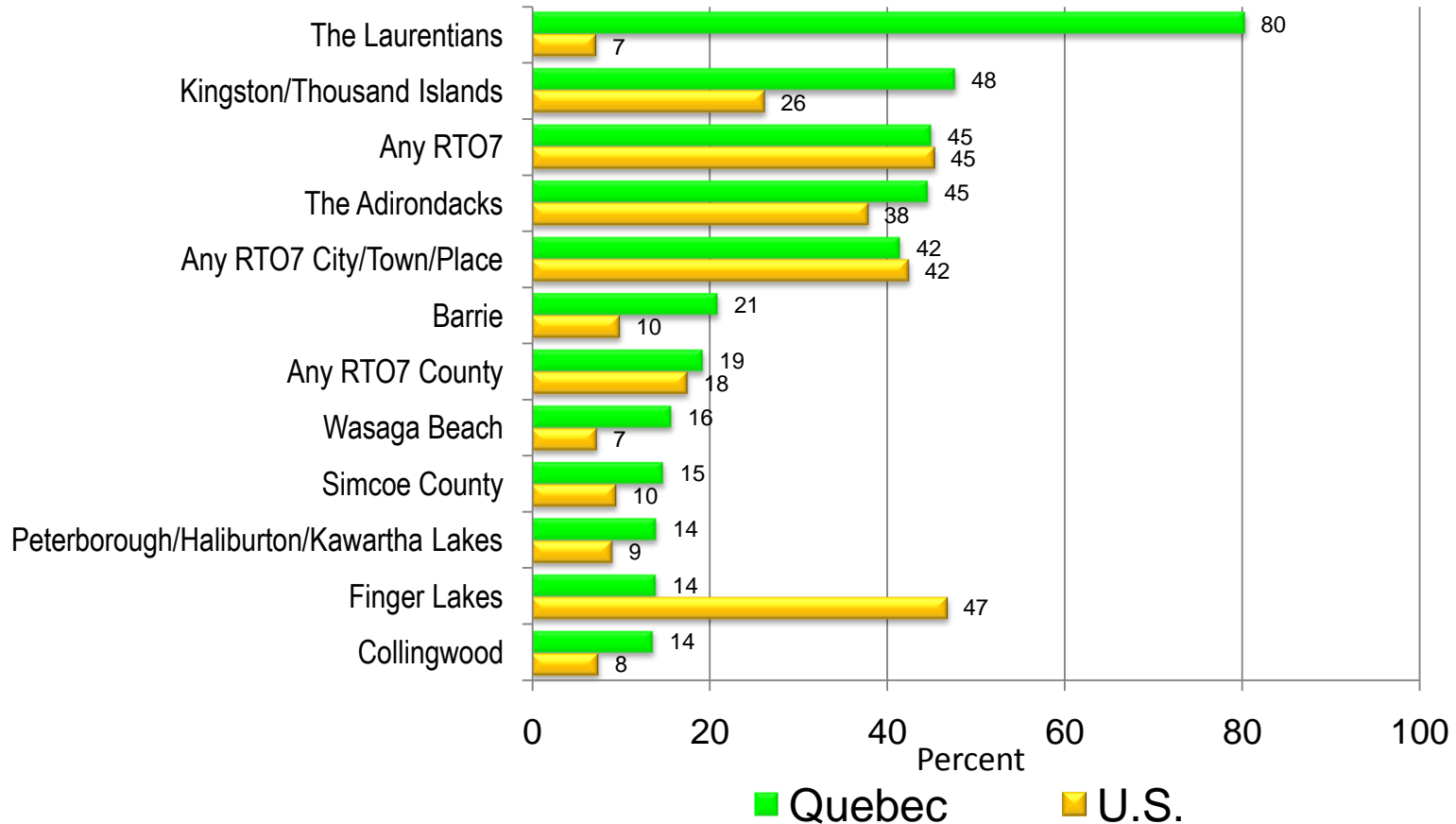
Base: Residents of Ontario



Destinations Ever Visited



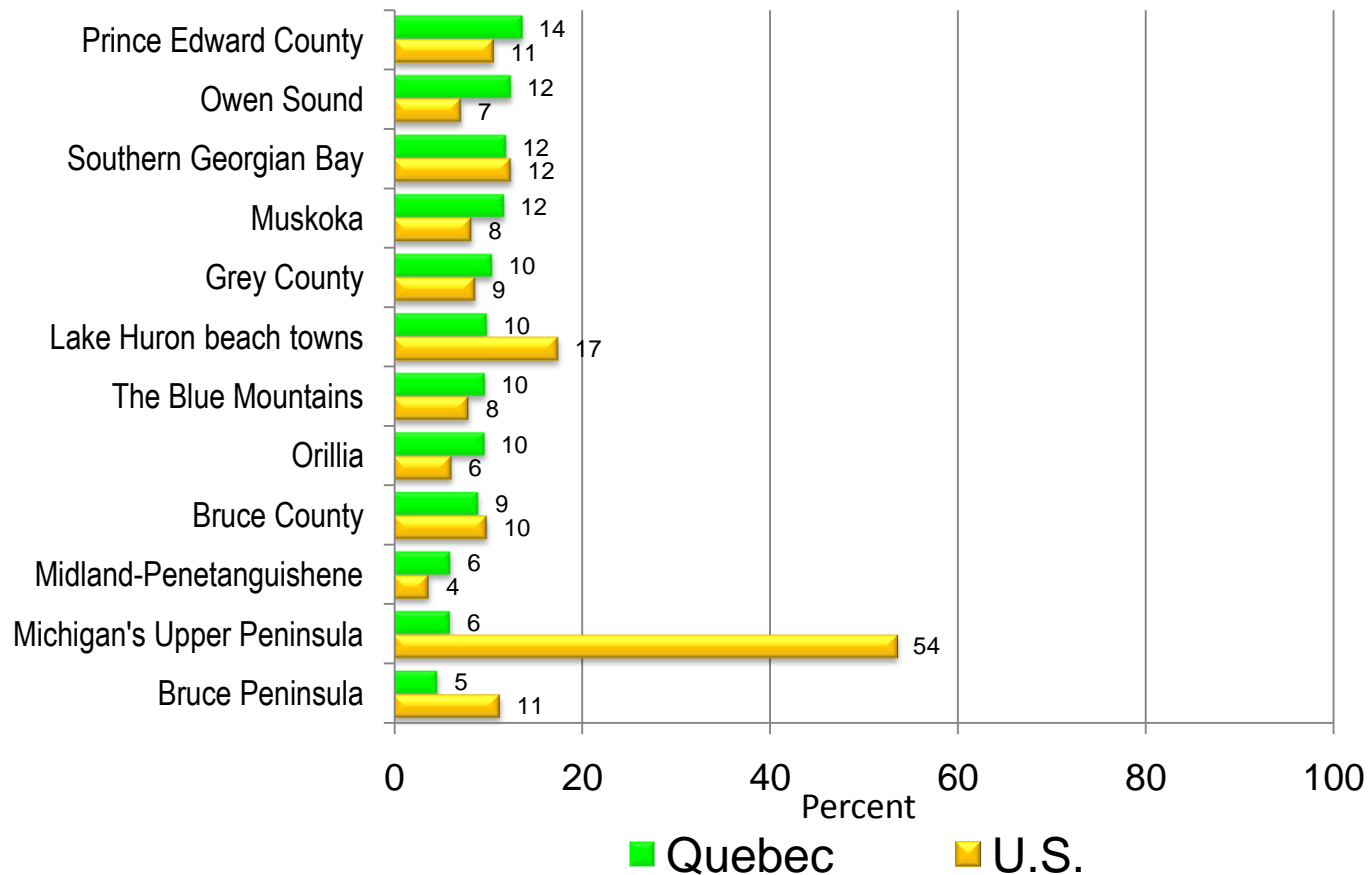
Base: Residents of Quebec/United States



Destinations Ever Visited (Cont'd)



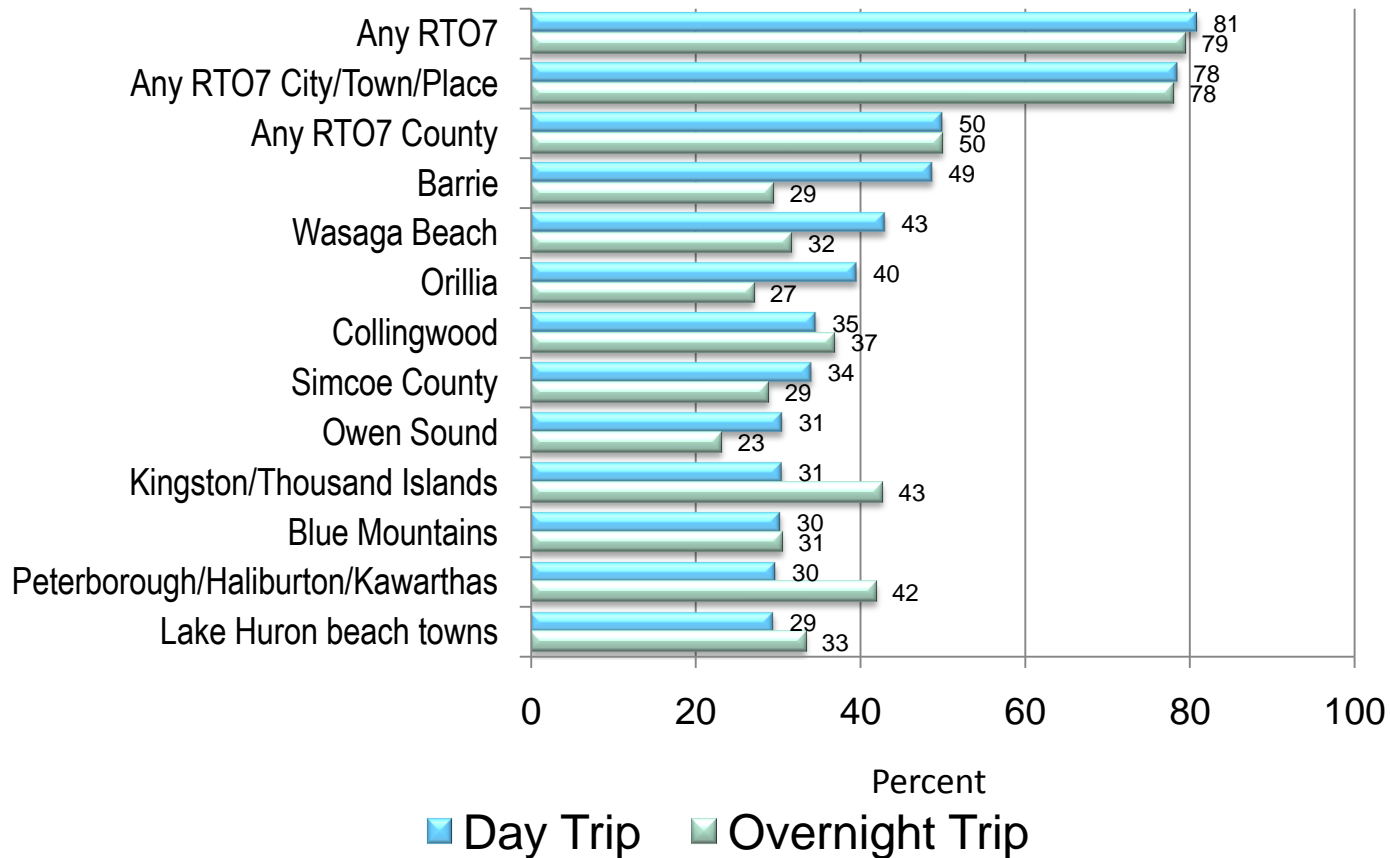
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Destinations Ever Visited



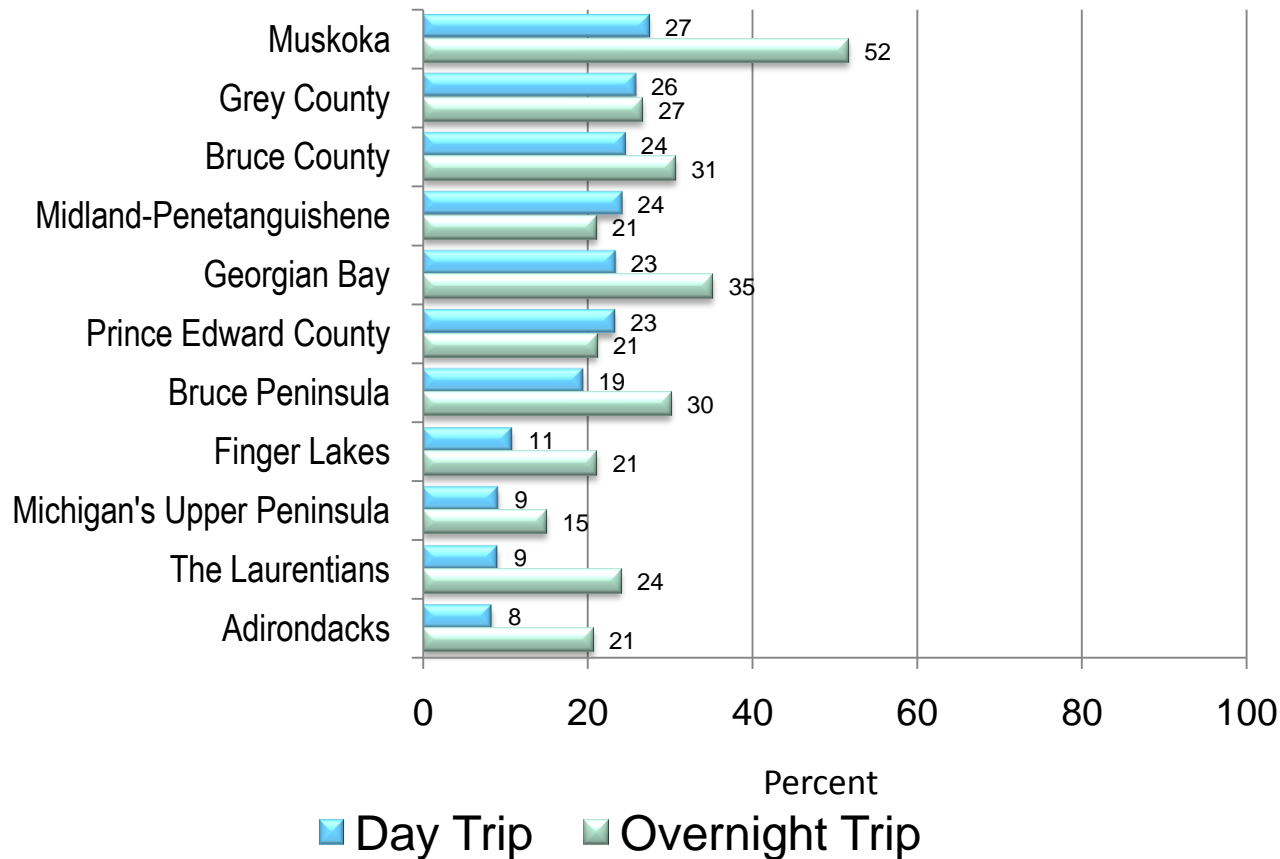
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Destinations Ever Visited (Cont'd)



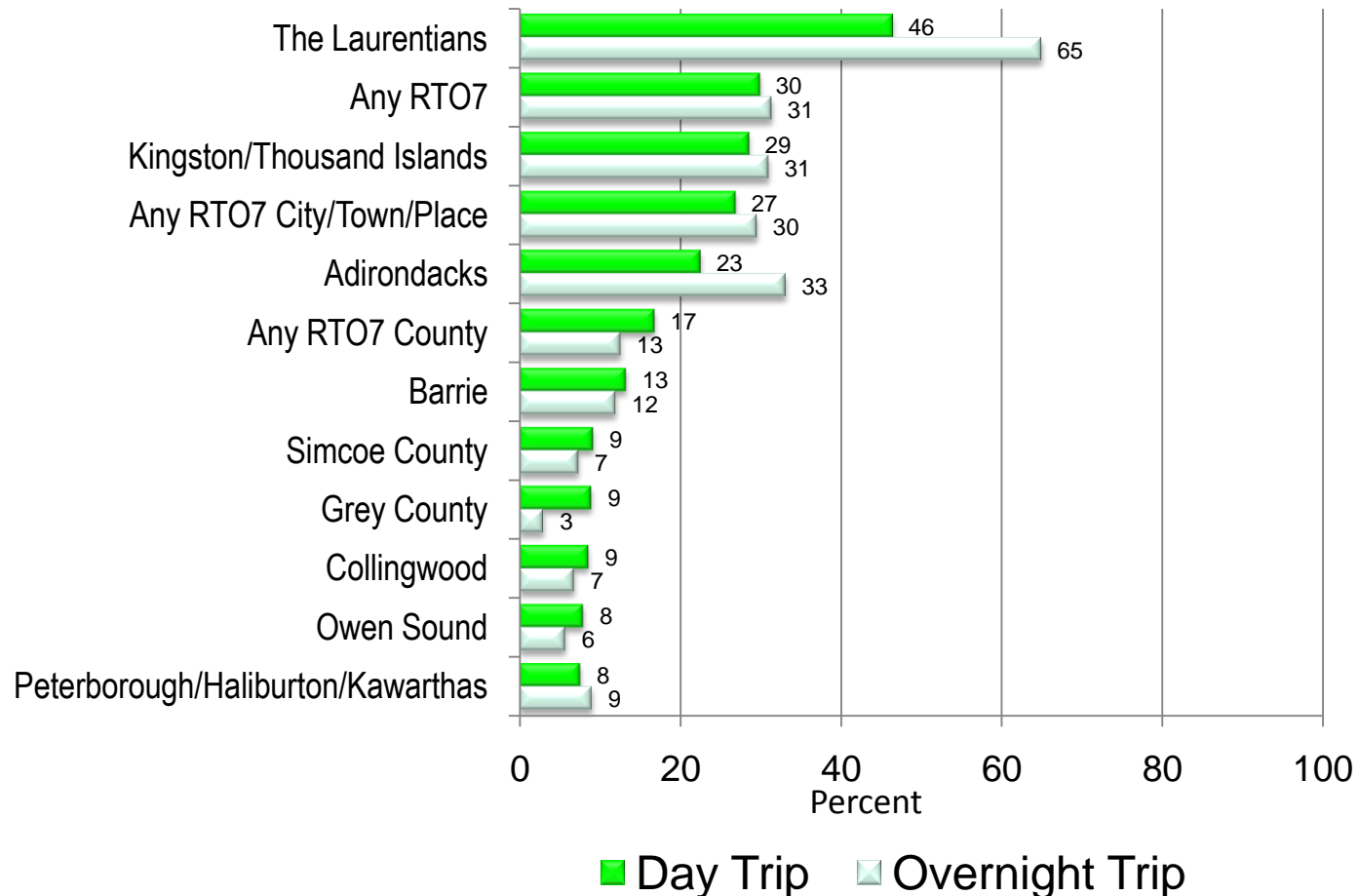
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Destinations Ever Visited



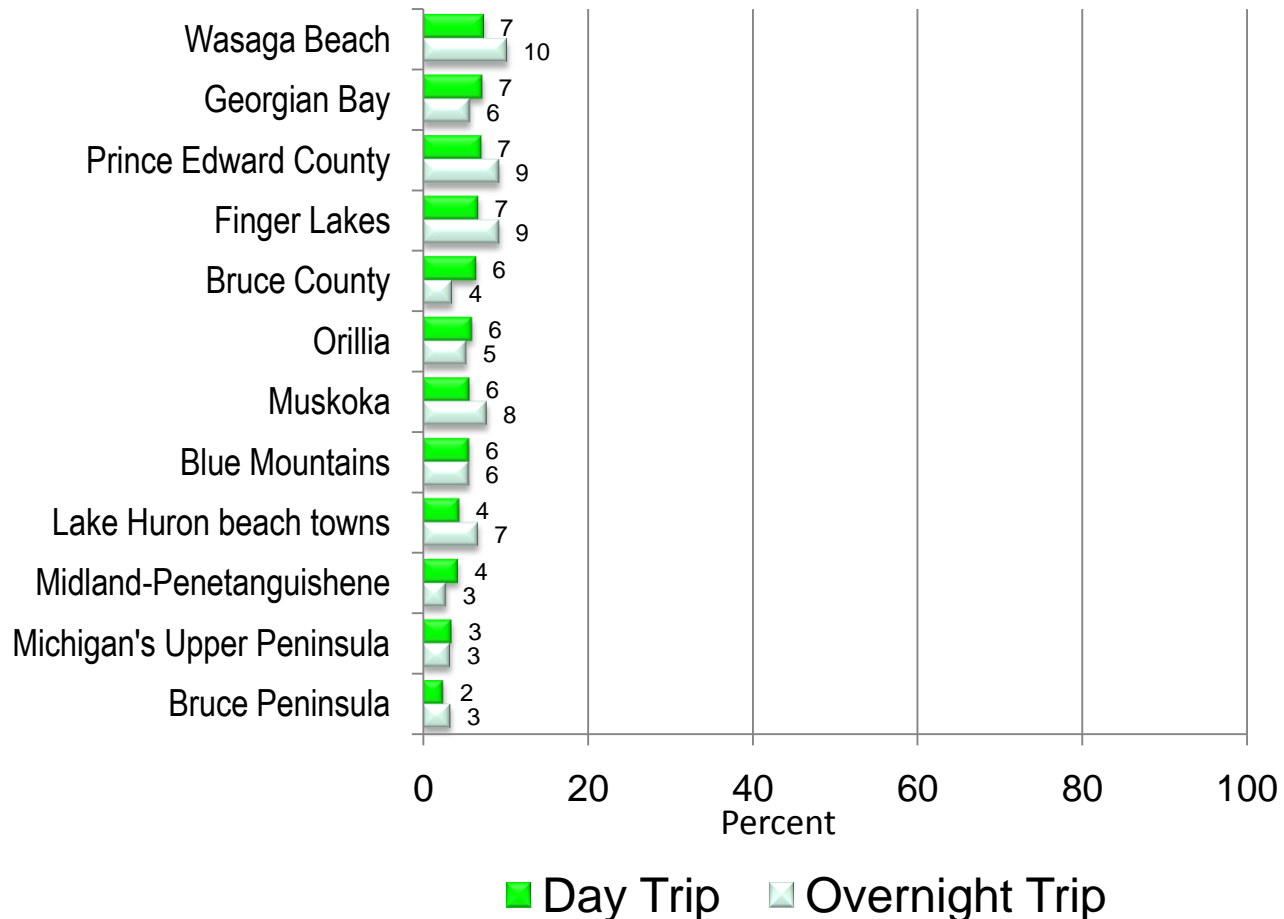
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Destinations Ever Visited (Cont'd)



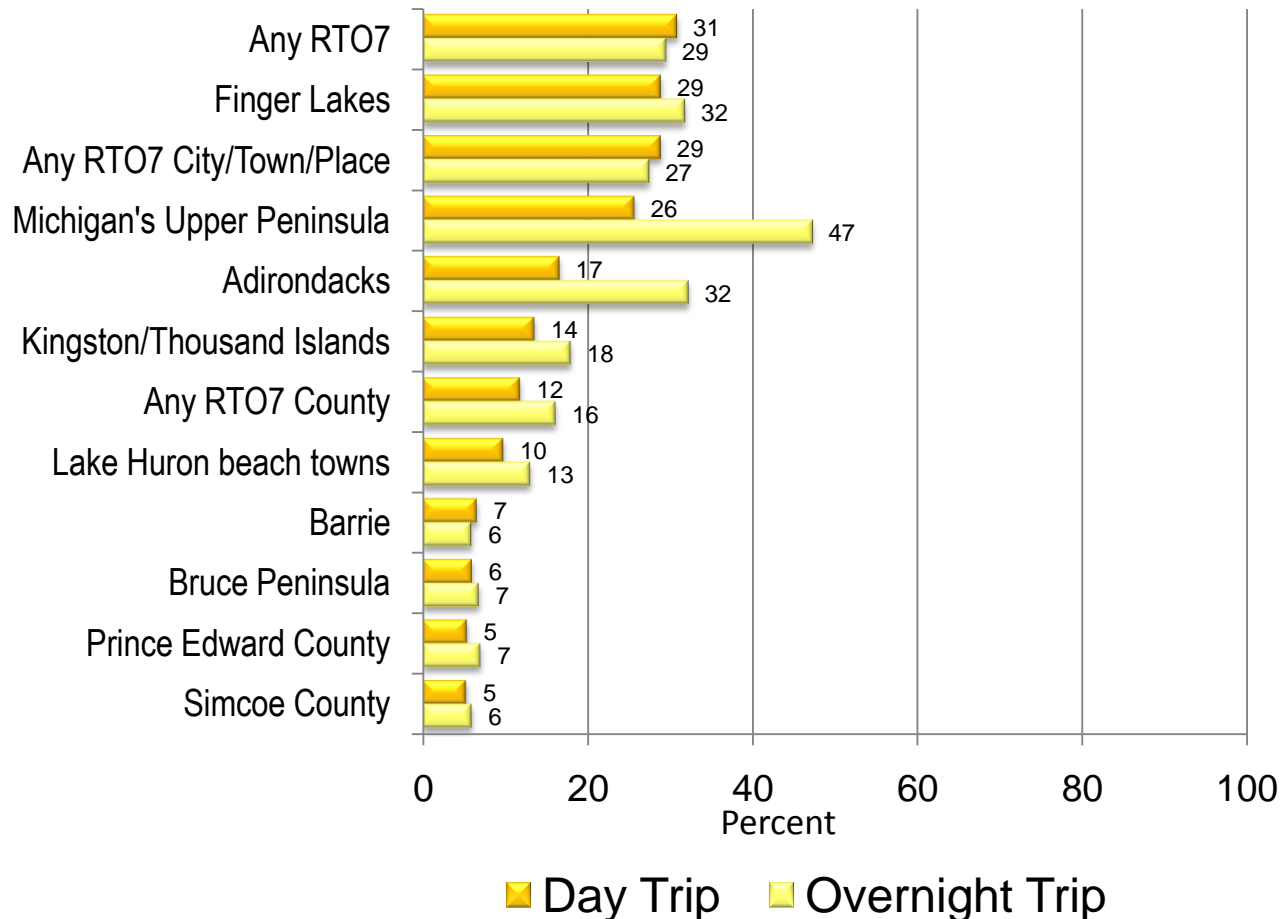
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Destinations Ever Visited



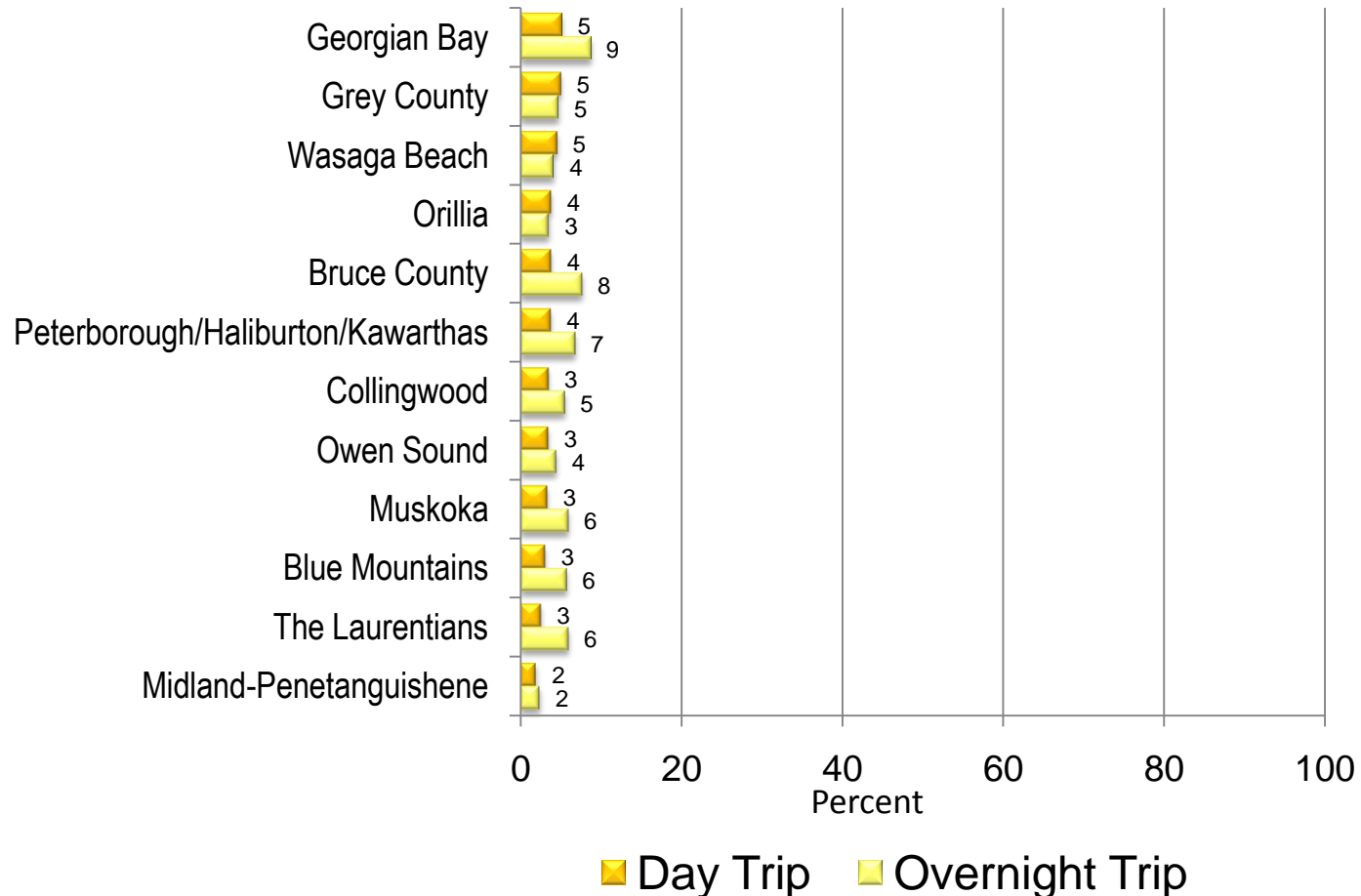
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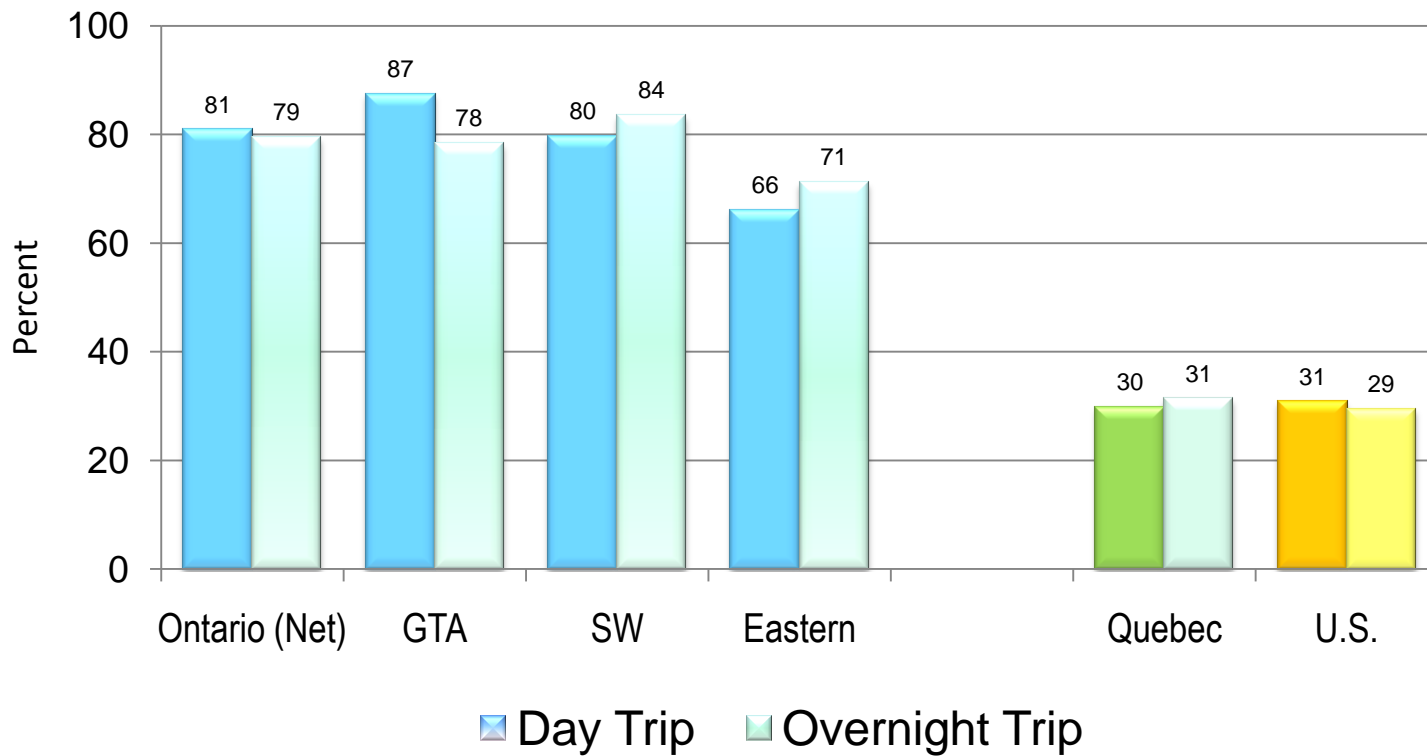
Destinations Ever Visited (Cont'd)



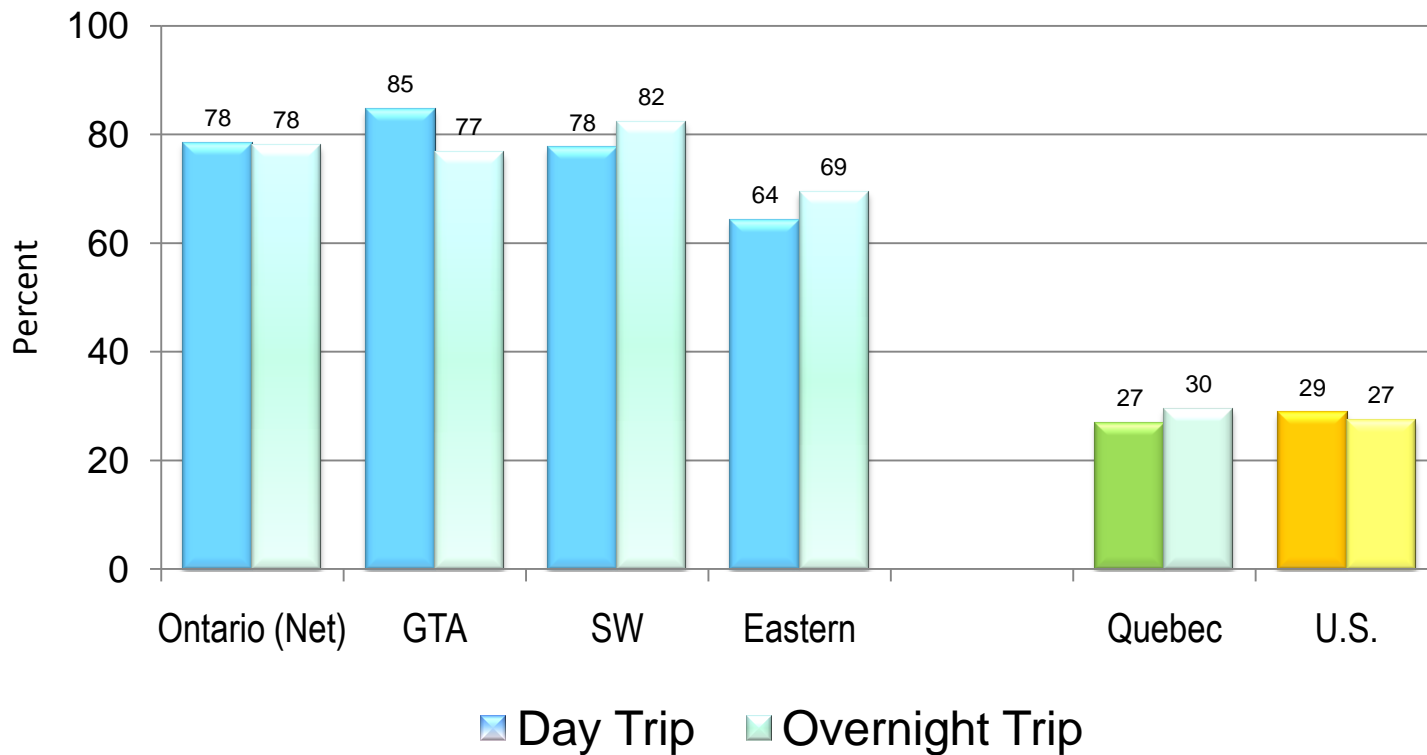
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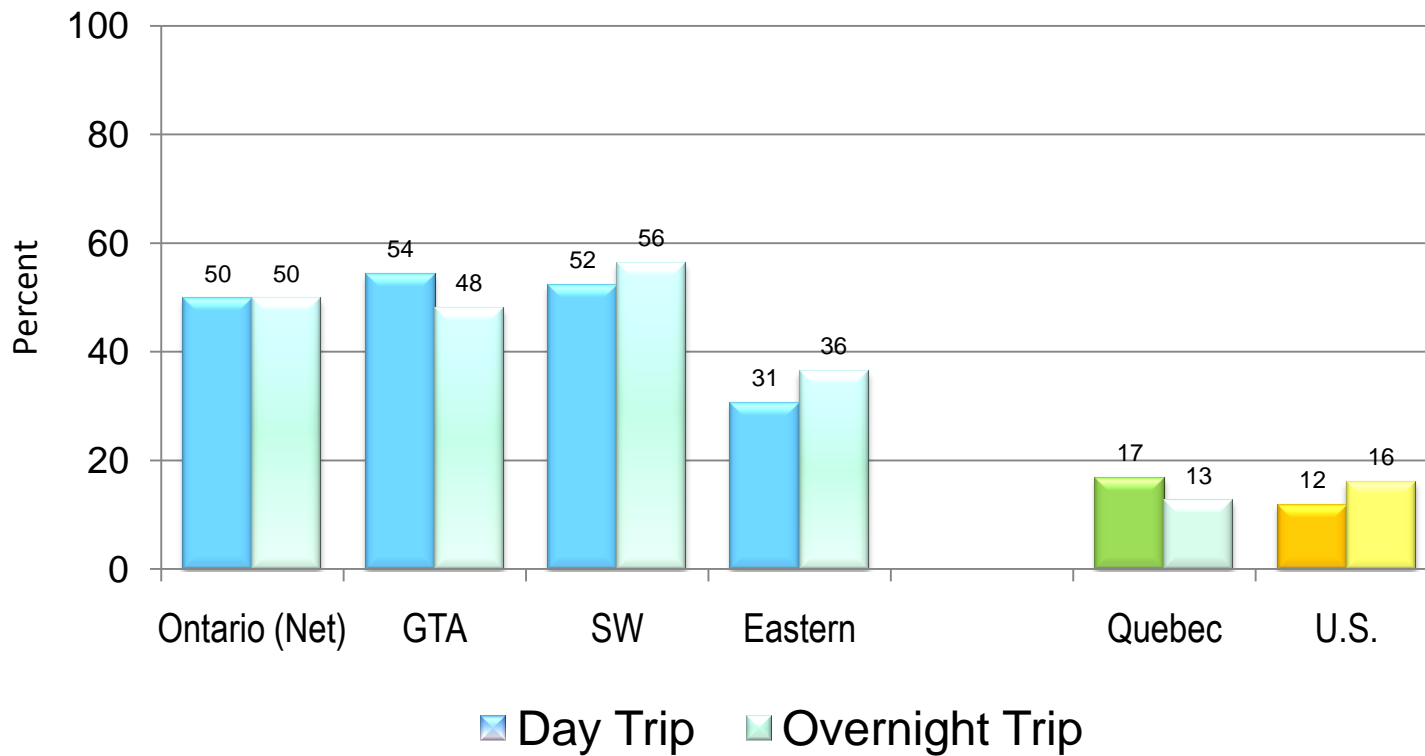
Ever Visited Any RTO7 Place by Market



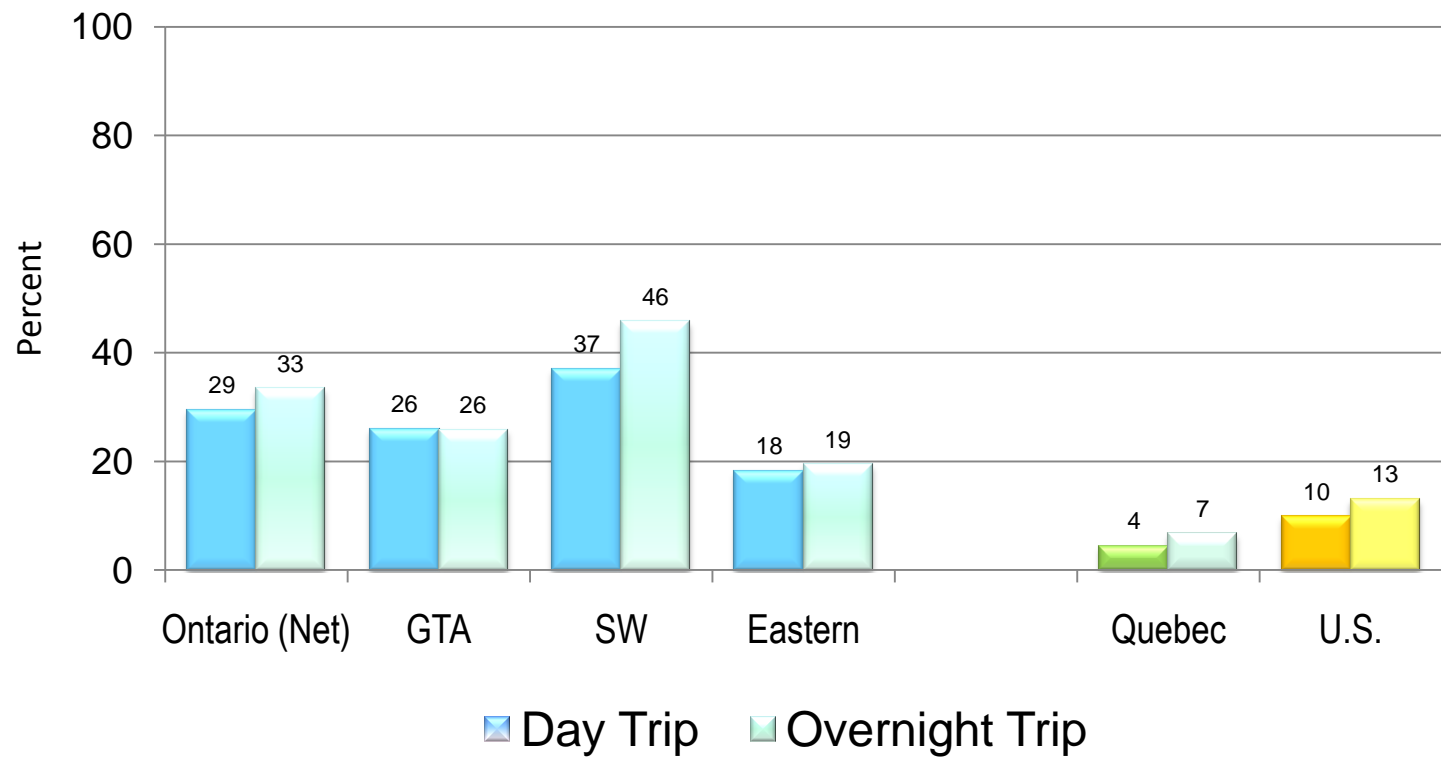
Ever Visited Any RTO7 City/Town/Place by Market



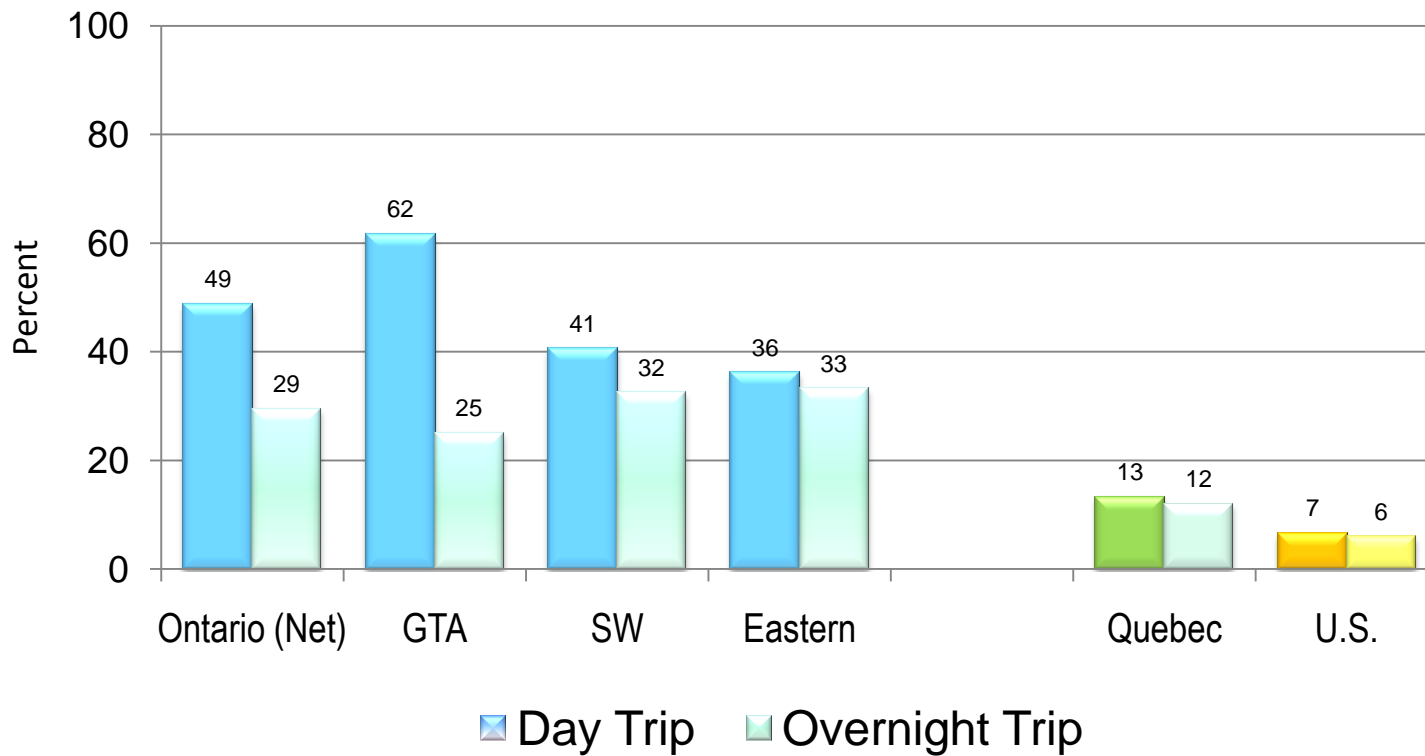
Ever Visited Any County in RTO7 by Market



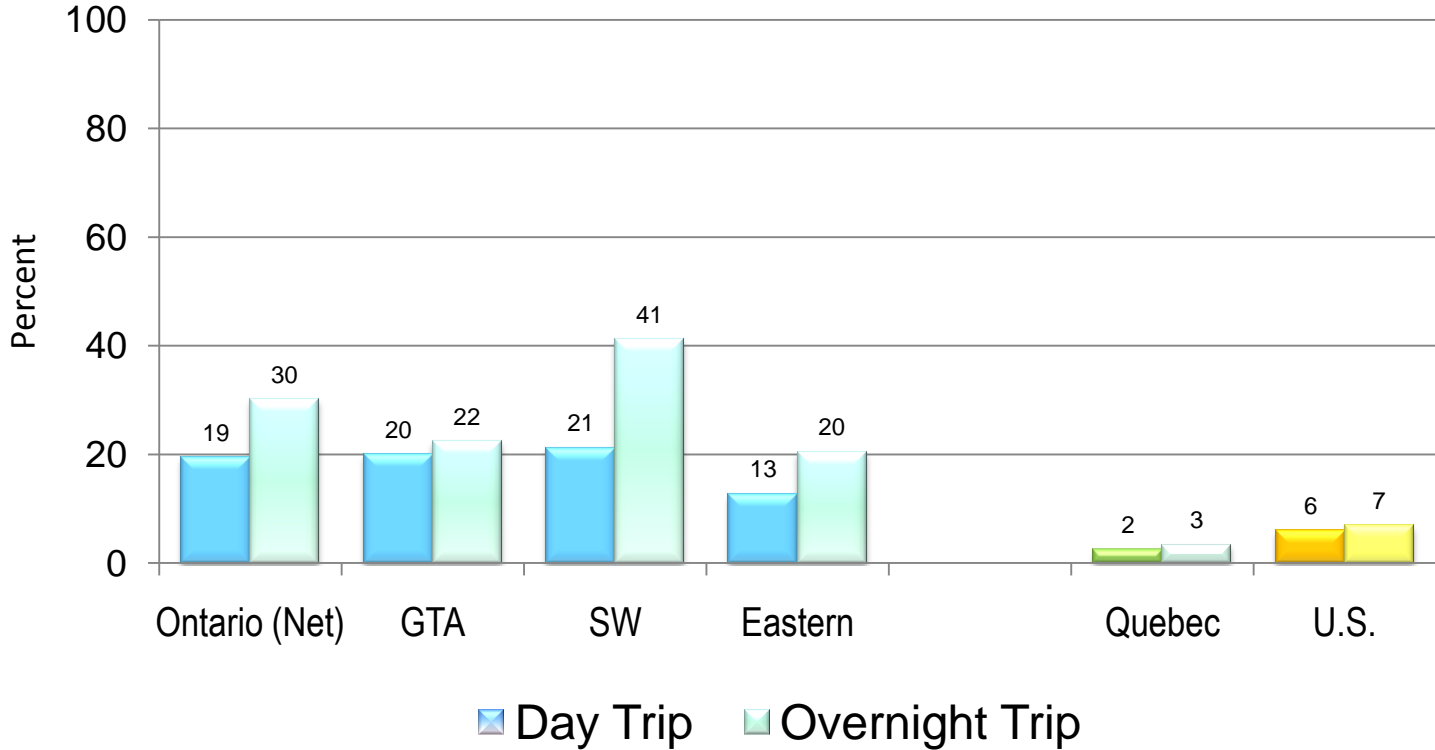
Ever Visited Lake Huron Beach Towns by Market



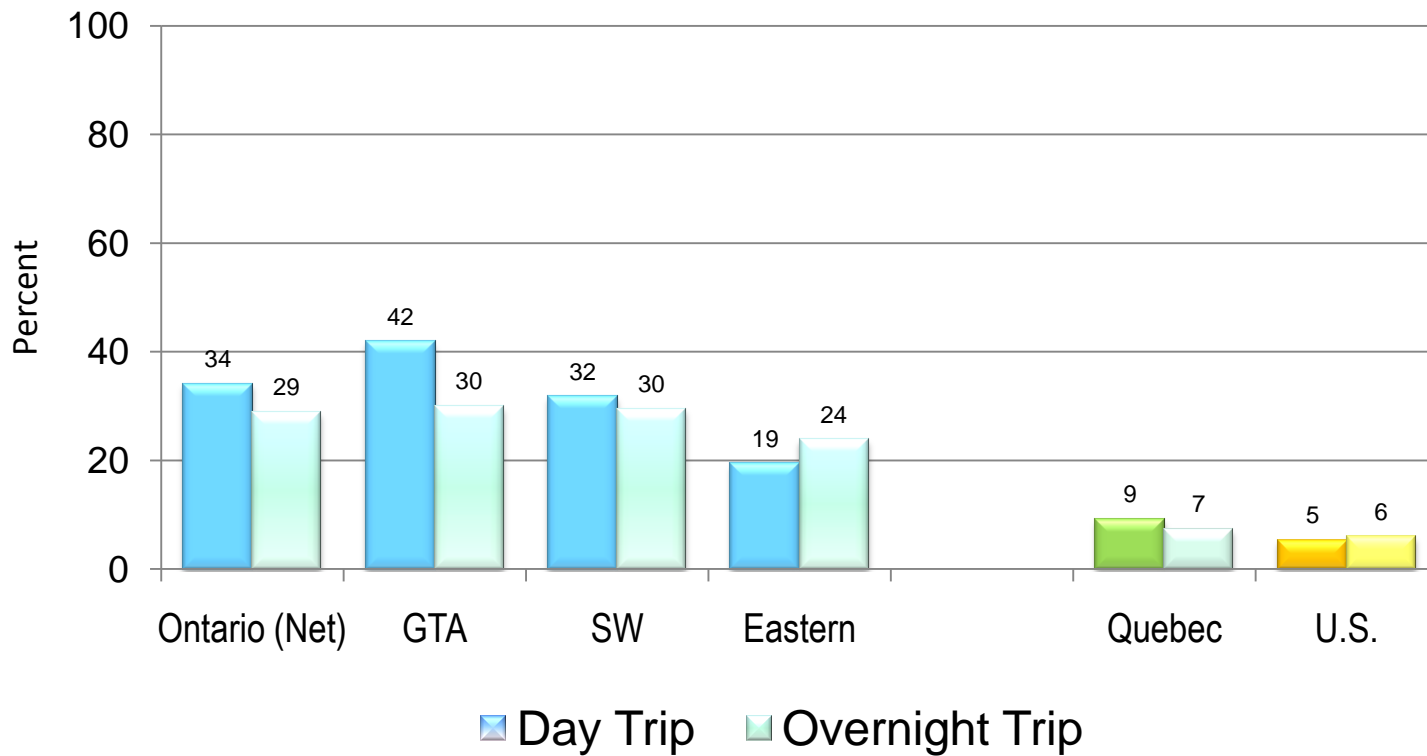
Ever Visited Barrie by Market



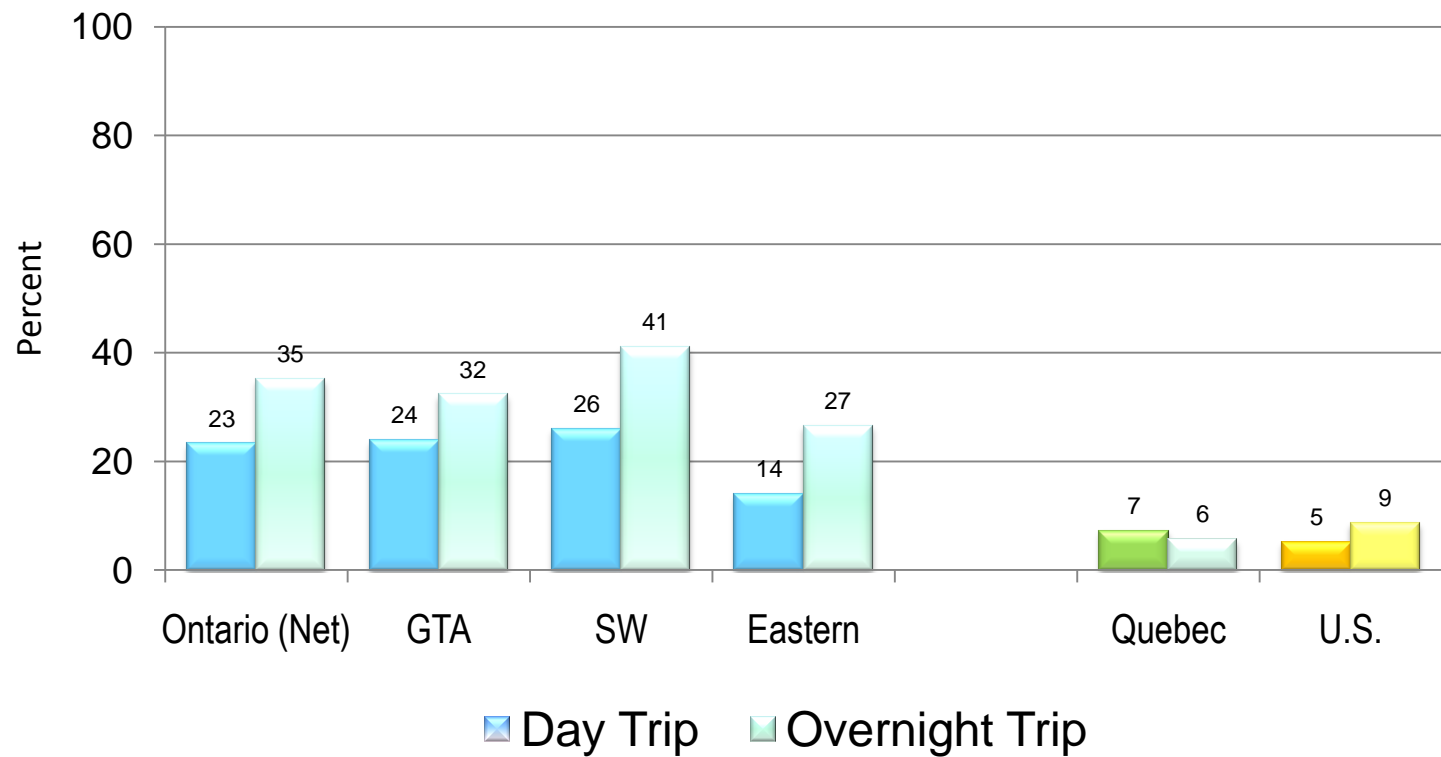
Ever Visited Bruce Peninsula by Market



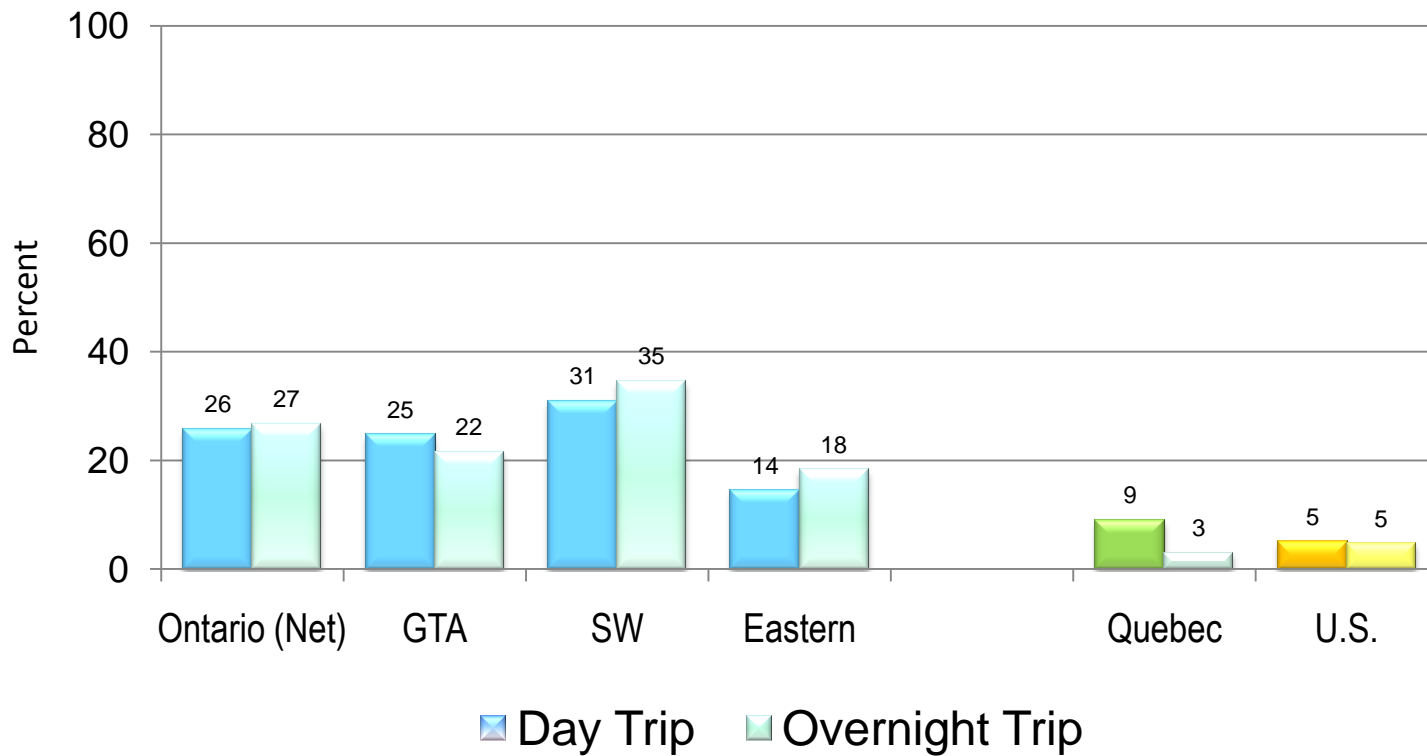
Ever Visited Simcoe County by Market



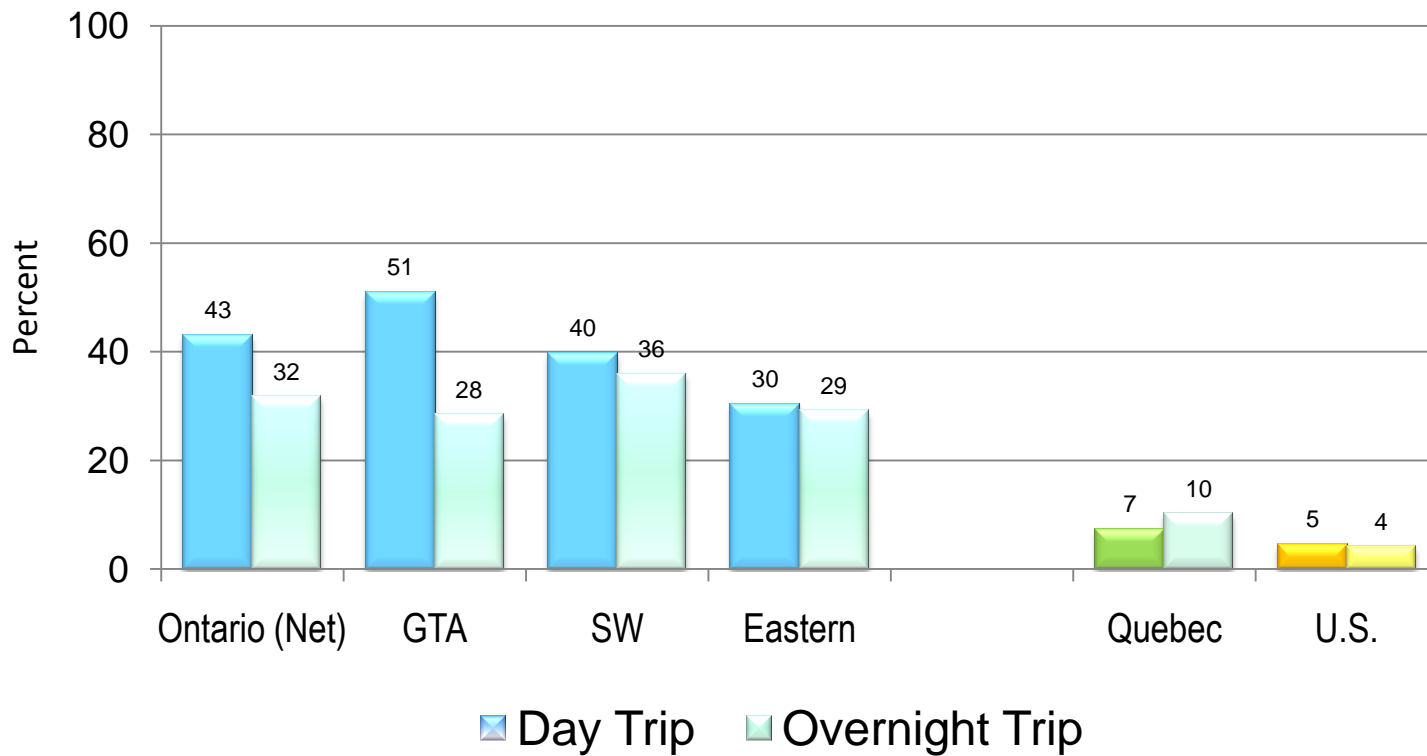
Ever Visited Southern Georgian Bay by Market



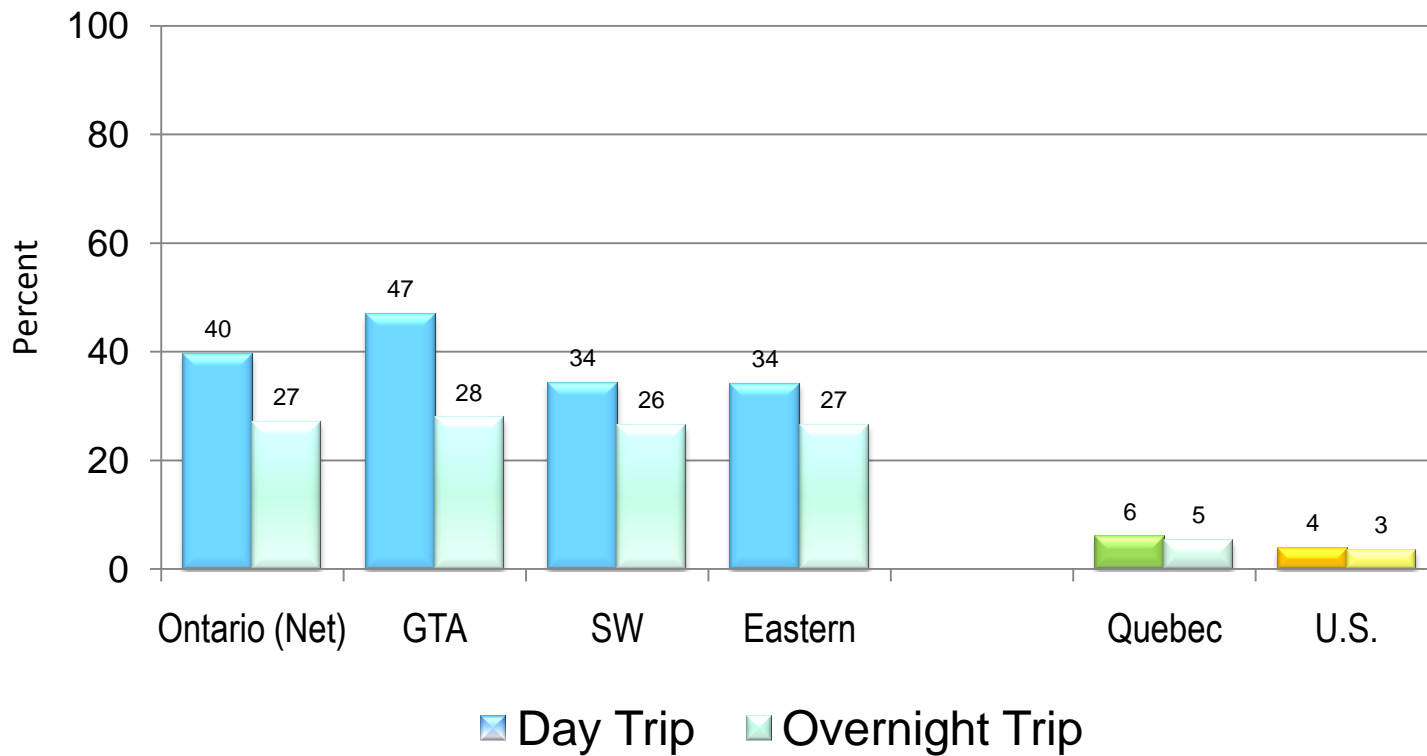
Ever Visited Grey County by Market



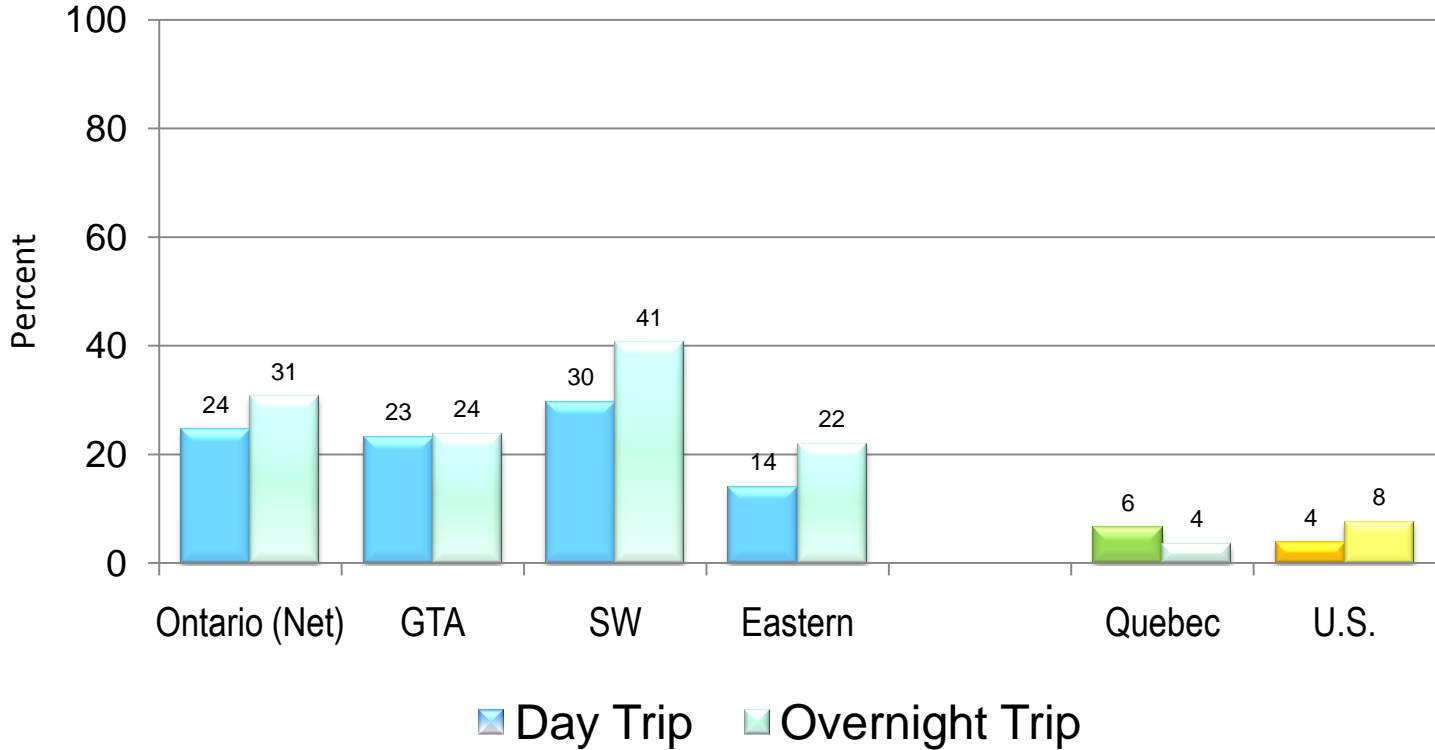
Ever Visited Wasaga Beach by Market



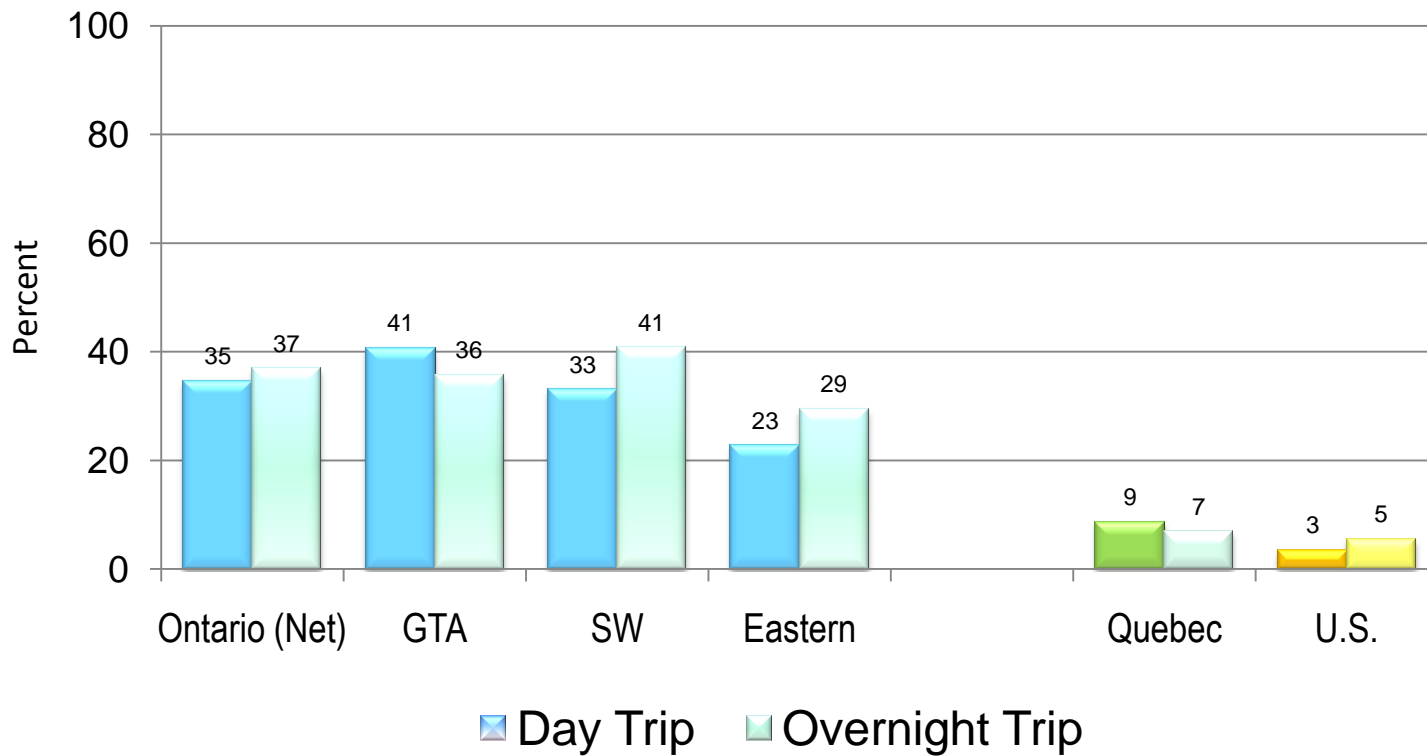
Ever Visited Orillia by Market



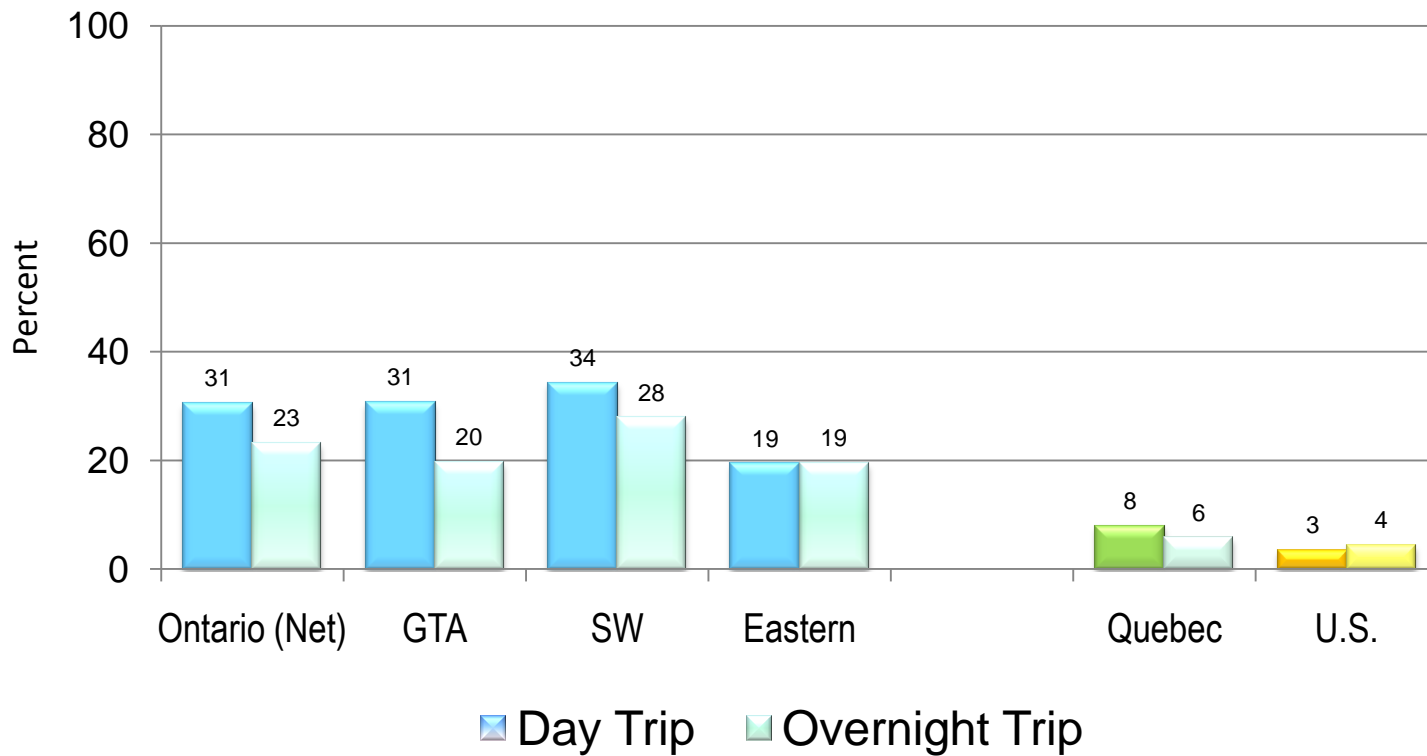
Ever Visited Bruce County by Market



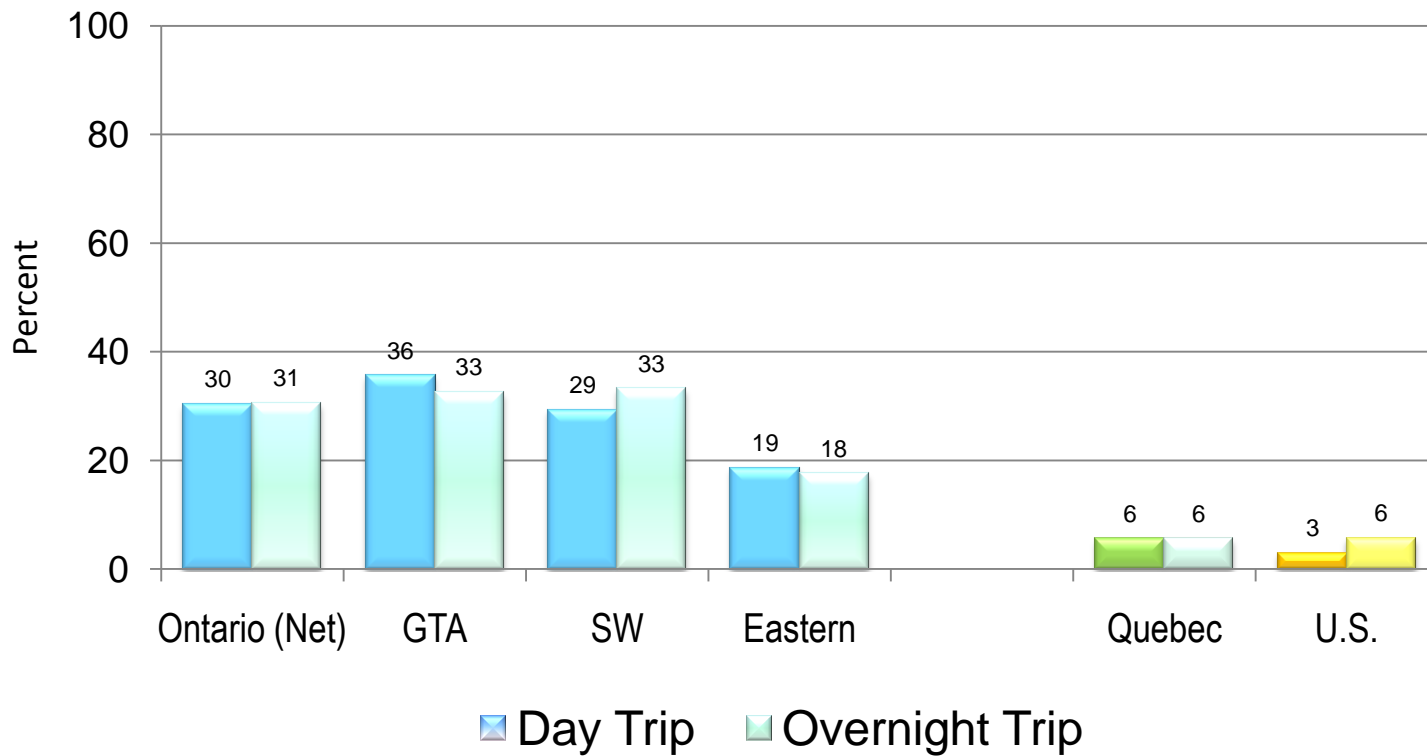
Ever Visited Collingwood by Market



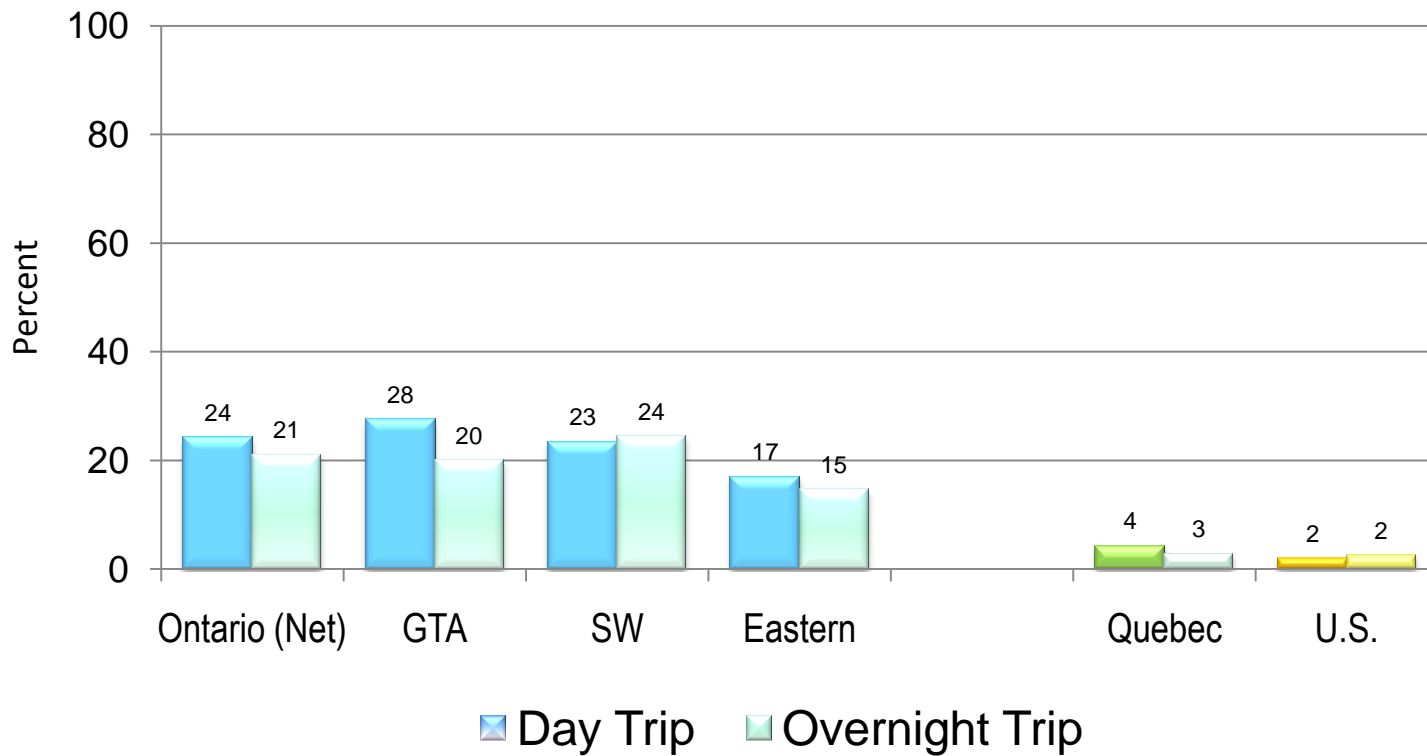
Ever Visited Owen Sound by Market



Ever Visited Blue Mountains by Market



Ever Visited Midland-Penetanguishene by Market



Destinations Ever Visited by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Grey County	28	30	25	22	29	33
Bruce County	29	32	25	22	30	35
Simcoe County	33	35	32	30	33	38
Southern Georgian Bay	32	33	31	26	31	41
Owen Sound	30	33	26	23	29	38
Collingwood	37	39	36	32	37	45
Wasaga Beach	40	41	39	38	40	43

Destinations Ever Visited by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
The Blue Mountains	32	35	28	28	33	33
Bruce Peninsula	27	30	25	23	27	34
Lake Huron beach towns	35	37	33	30	35	40
Midland-Penetanguishene	24	25	22	19	22	31
Barrie	42	44	40	38	41	49
Orillia	34	36	32	29	33	43

Destinations Ever Visited by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Muskoka	39	41	38	34	39	47
Prince Edward County	25	28	23	22	22	34
Kingston/Thousand Islands	48	50	45	38	45	63
Finger Lakes	31	35	28	22	31	43
The Adirondacks	32	37	28	21	31	50
Michigan's Upper Peninsula	28	31	25	23	26	37
The Laurentians	31	34	29	27	30	40
Haliburton/Kawartha Lakes	36	37	35	31	34	45

Destinations Ever Visited by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Grey County	28	23	31	30	12	20
Bruce County	29	23	32	31	14	17
Simcoe County	33	28	36	35	26	19
Southern Georgian Bay	32	25	36	34	21	17
Owen Sound	30	22	34	31	20	18
Collingwood	37	28	41	39	35	23
Wasaga Beach	40	30	45	41	42	32

Destinations Ever Visited by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
The Blue Mountains	32	22	36	32	30	24
Bruce Peninsula	27	25	30	29	18	18
Lake Huron beach towns	35	29	37	37	23	20
Midland-Penetanguishene	24	18	27	25	19	15
Barrie	42	32	47	44	35	30
Orillia	34	27	37	35	31	25

Destinations Ever Visited by Demographics

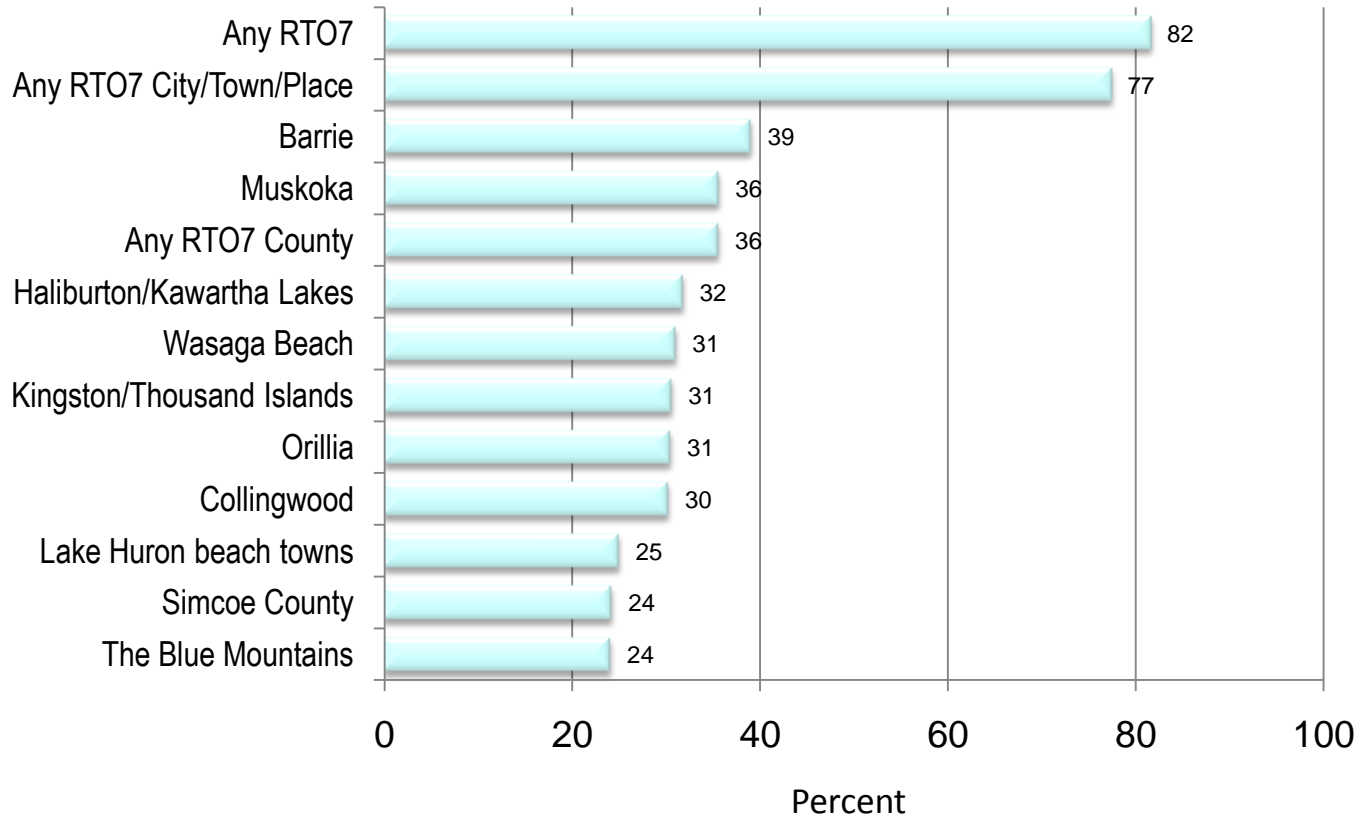


	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Muskoka	39	29	44	42	32	20
Prince Edward County	25	20	28	26	17	22
Kingston/Thousand Islands	48	39	52	49	42	33
Finger Lakes	31	27	34	34	15	18
The Adirondacks	32	27	34	35	16	18
Michigan's Upper Peninsula	28	27	28	29	16	27
The Laurentians	31	25	34	33	23	22
Haliburton/Kawartha Lakes	36	28	41	38	25	20

Destinations Visited in the Past Two Years



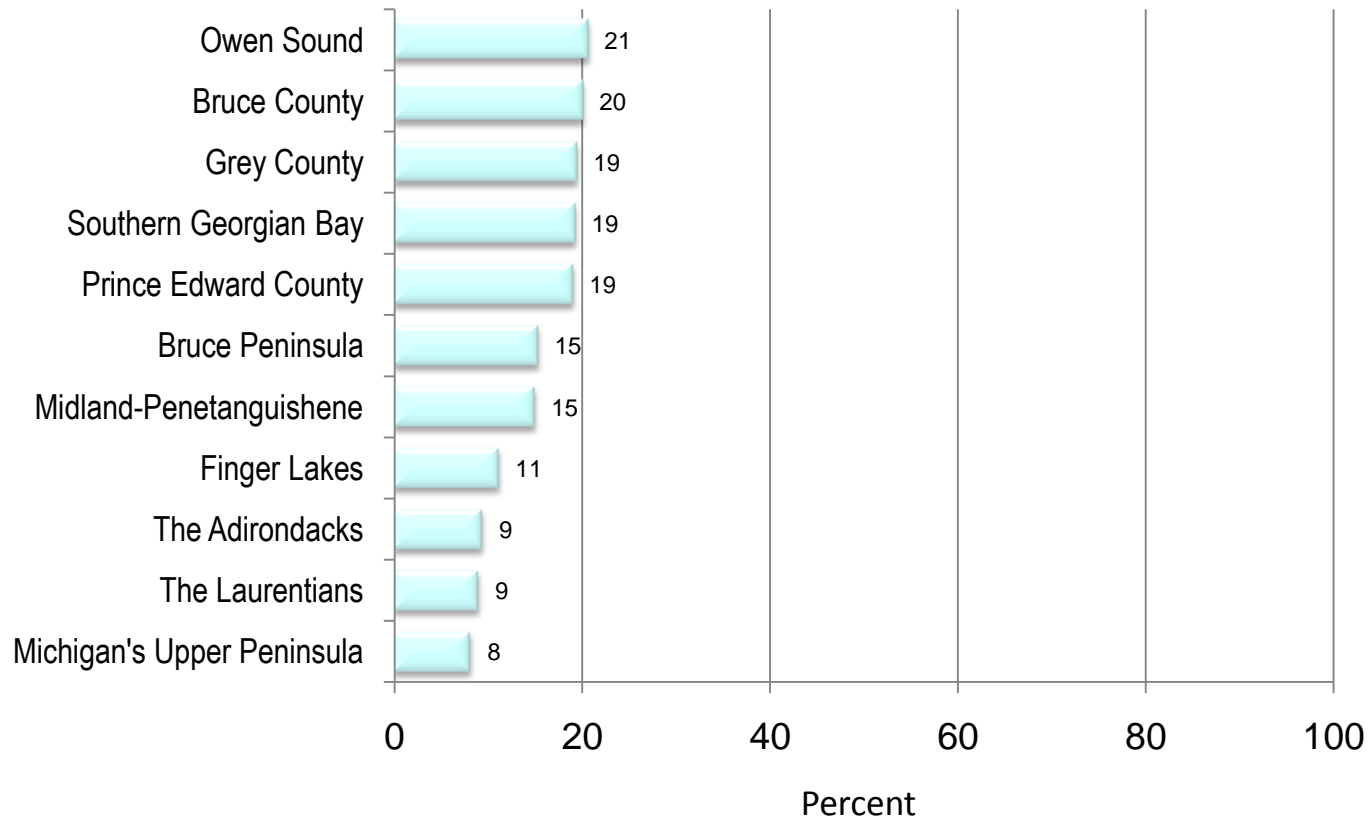
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Destinations Visited in the Past Two Years (Cont'd)



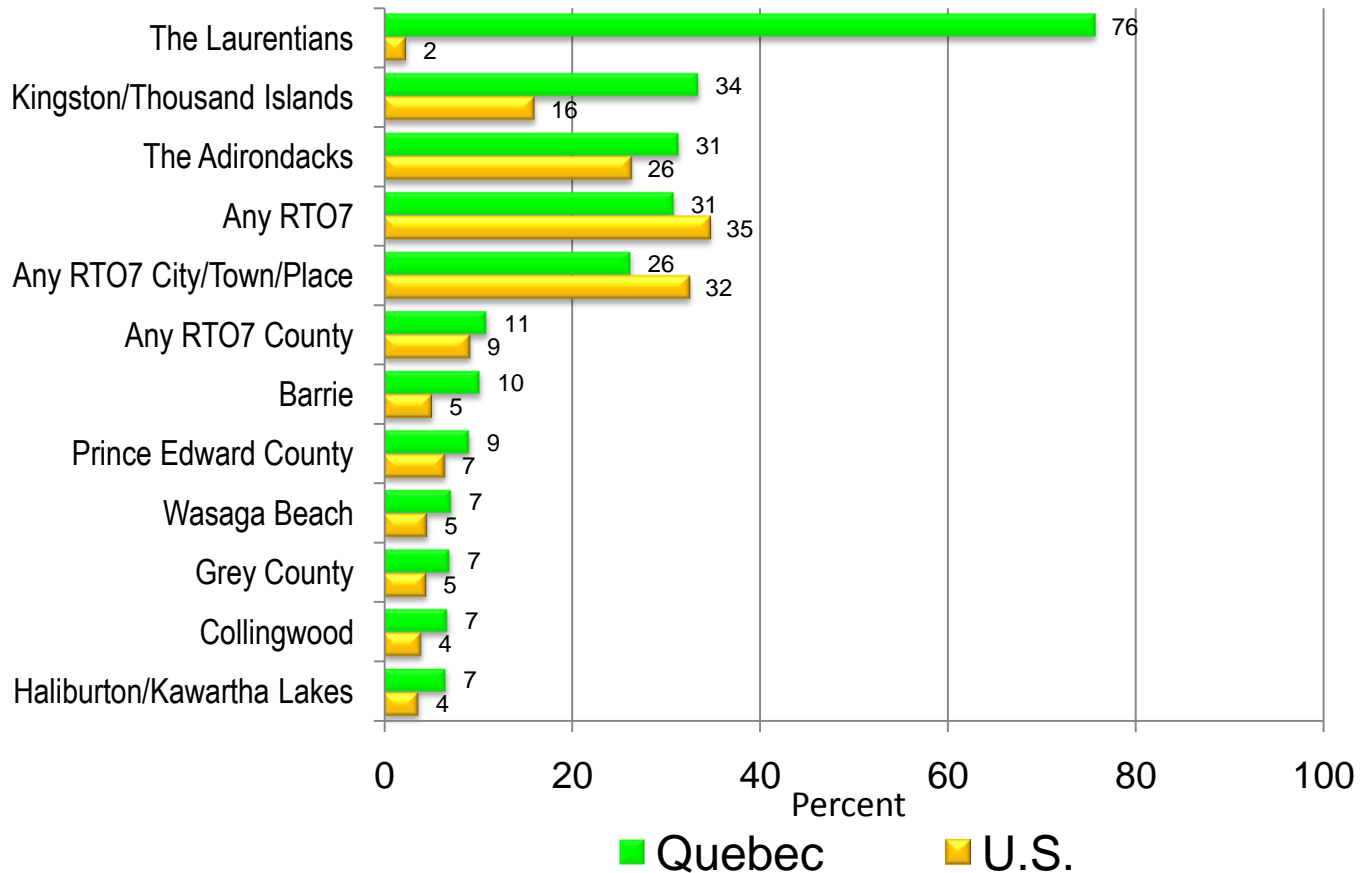
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Destinations Visited in the Past Two Years



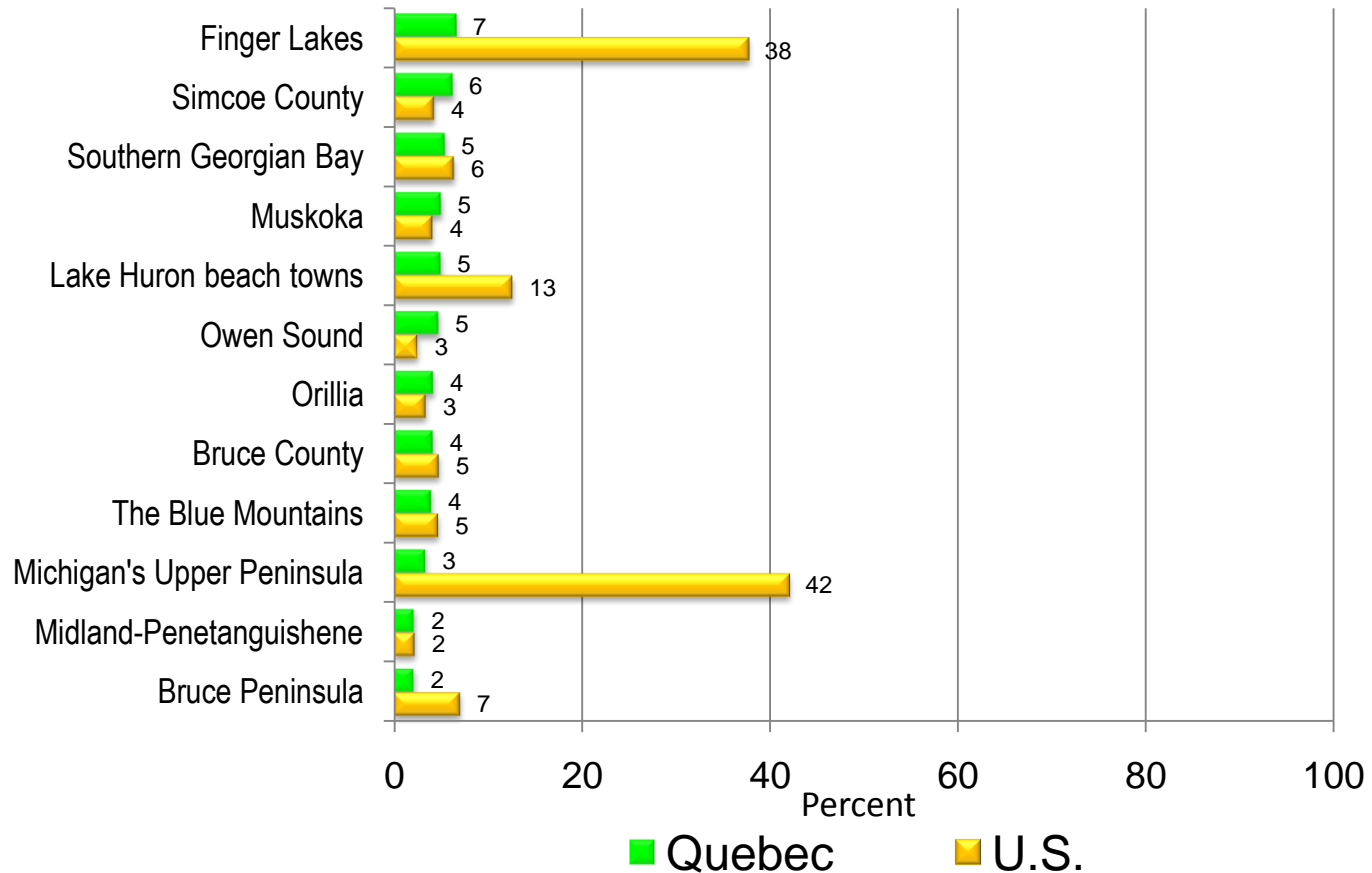
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Destinations Visited in the Past Two Years (Cont'd)



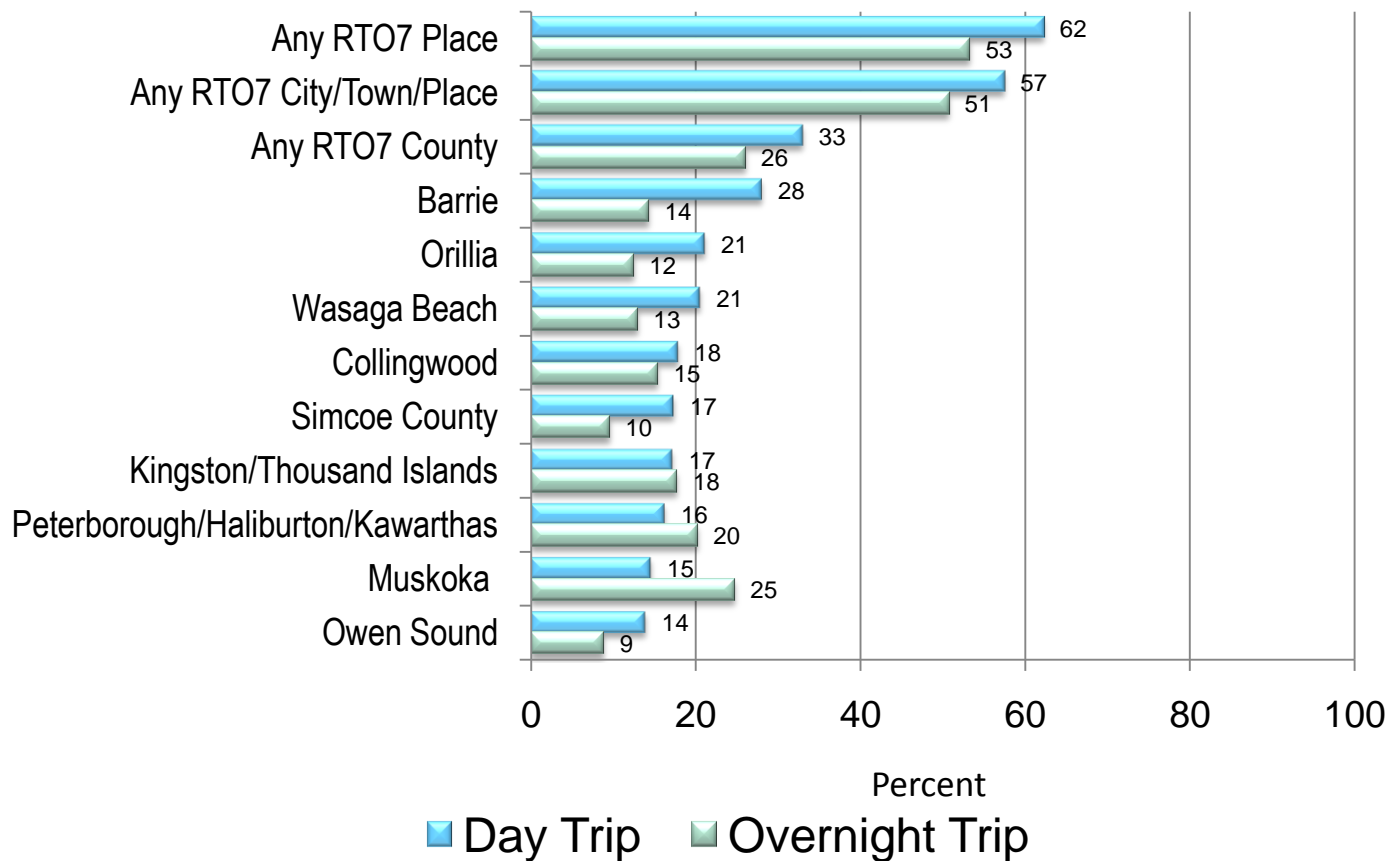
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Destinations Visited in Past Two Years



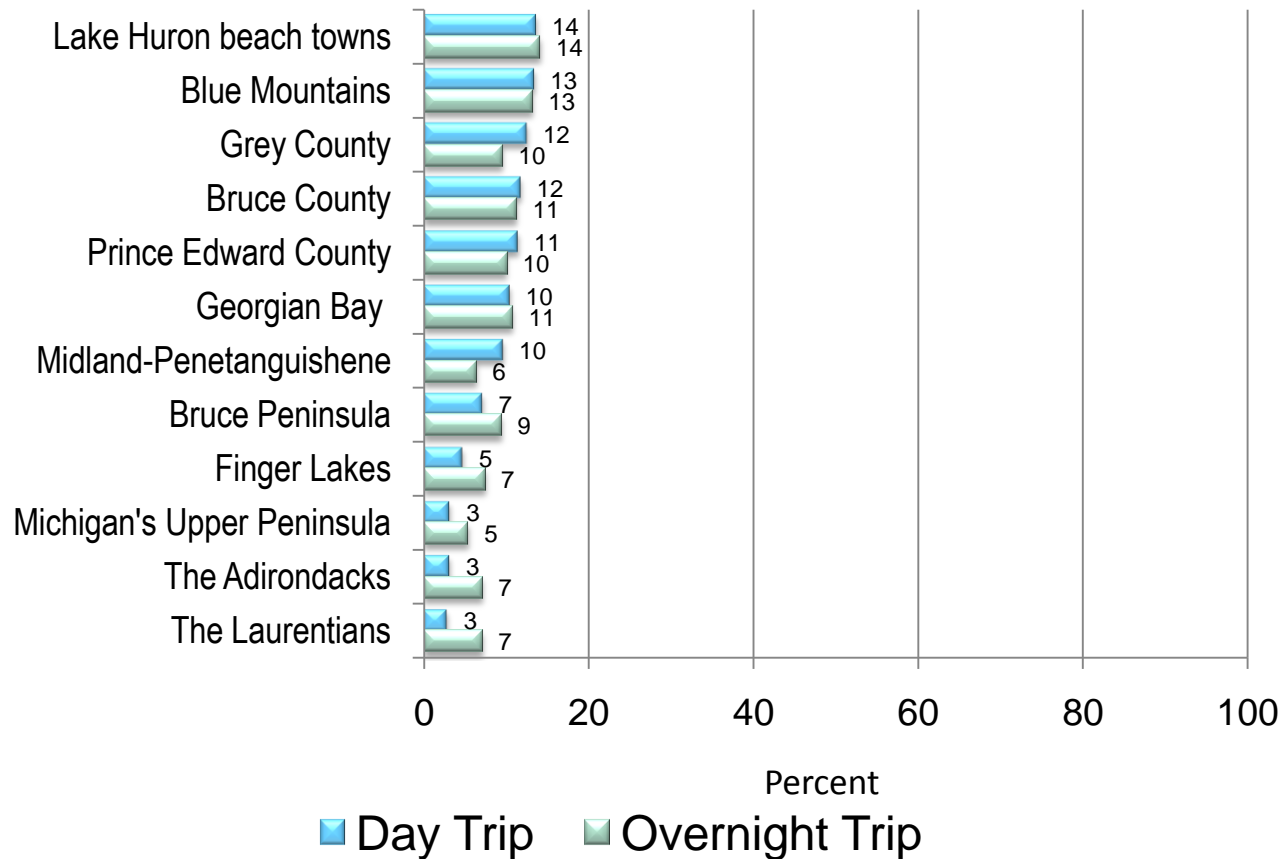
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Destinations Visited in Past Two Years (Cont'd)



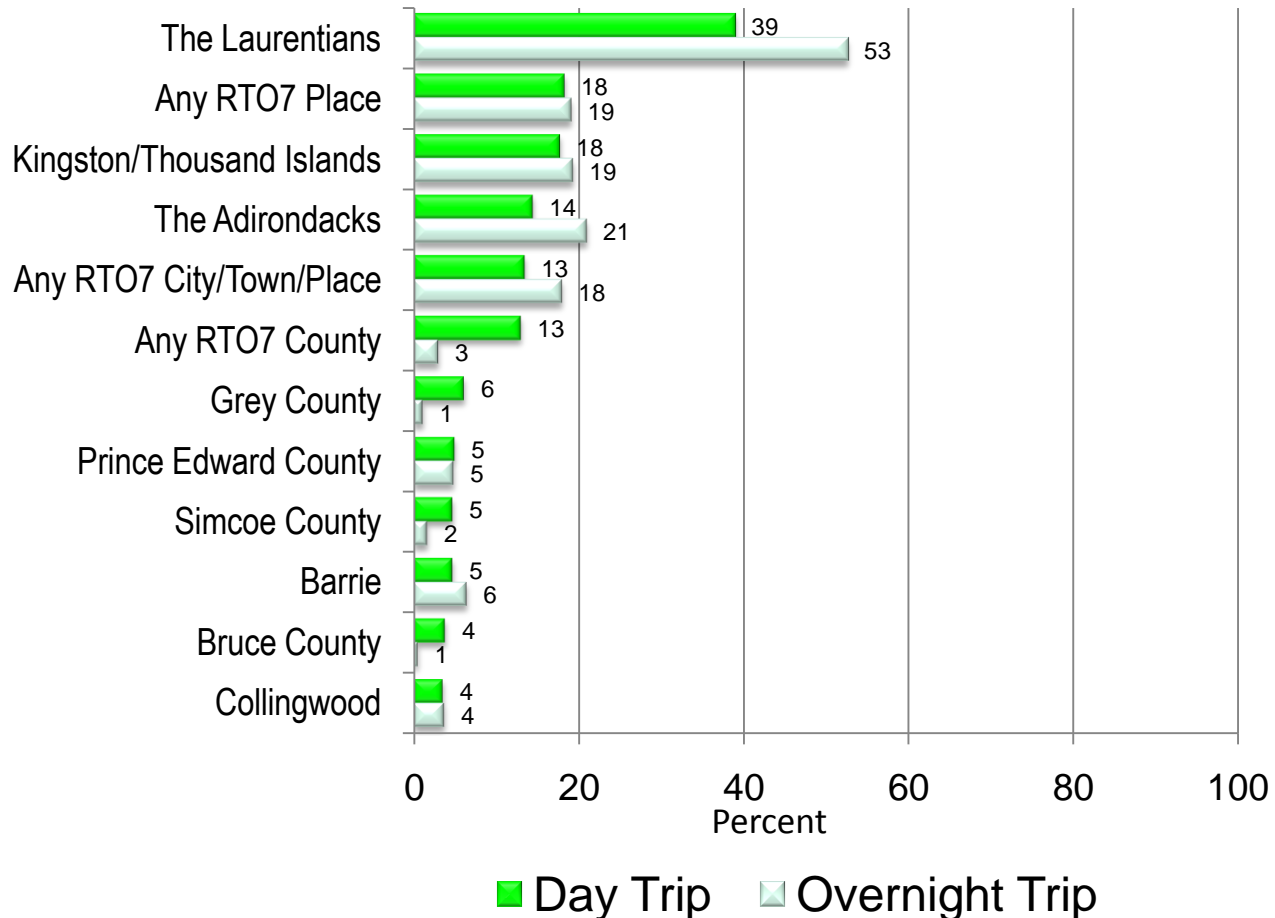
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Destinations Visited in Past Two Years



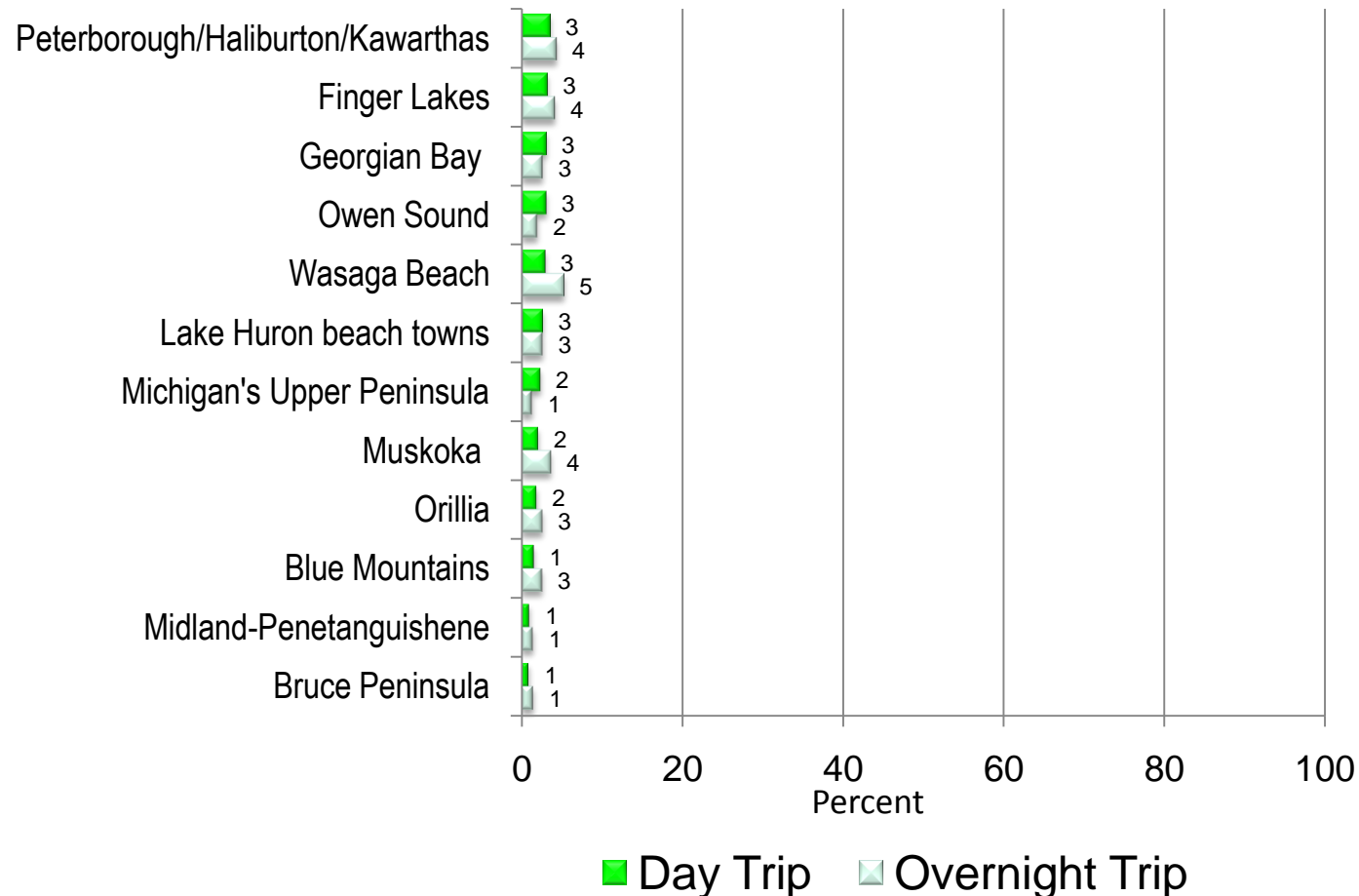
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Destinations Visited in Past Two Years (Cont'd)



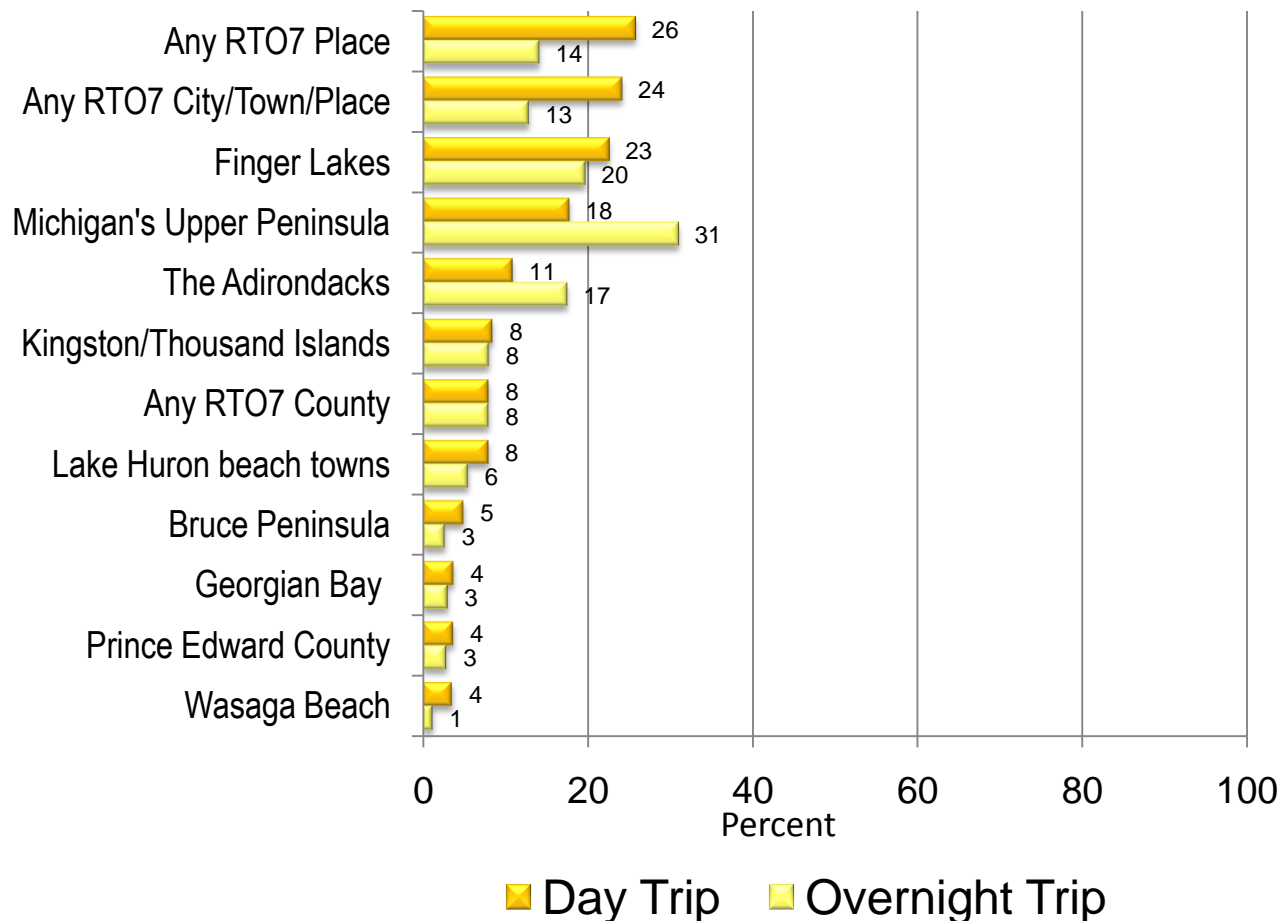
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Destinations Visited in Past Two Years



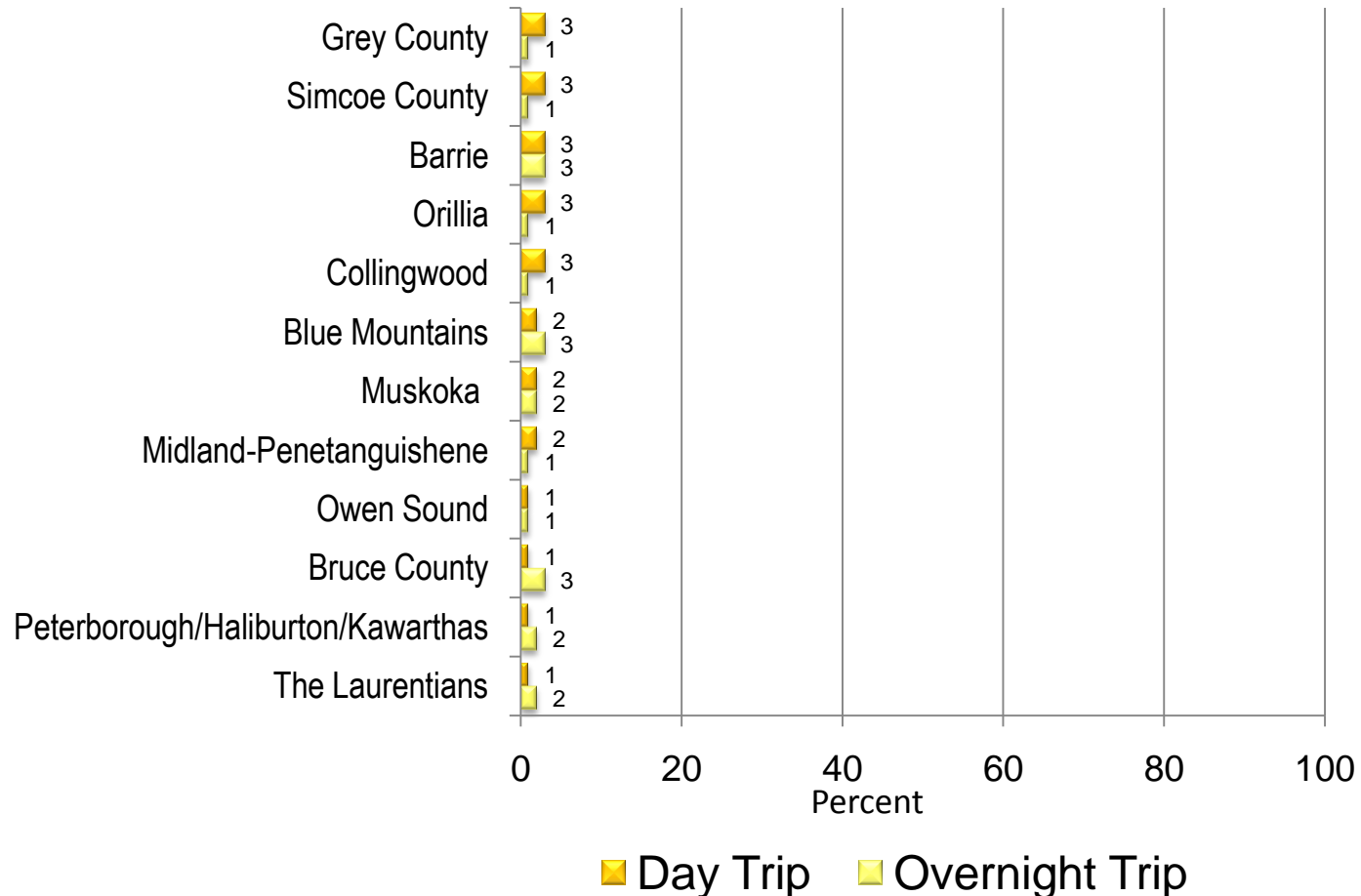
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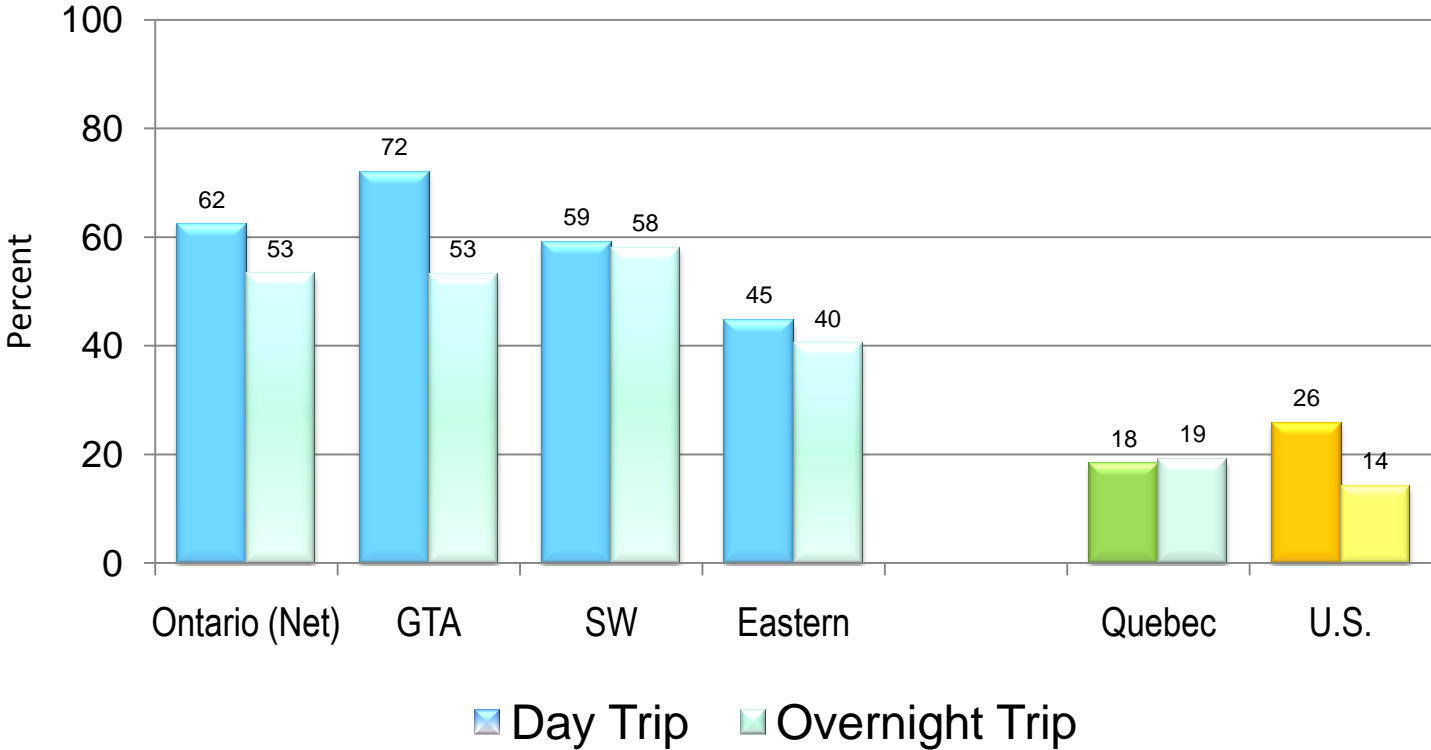
Destinations Visited in Past Two Years (Cont'd)



Base: Residents of United States.



Visited Any RTO7 Place in the Past Two Years by Market



Destinations Visited in Past Two Years by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Grey County	13	14	12	13	13	13
Bruce County	13	14	12	12	14	12
Simcoe County	16	16	15	17	15	14
Southern Georgian Bay	13	14	12	11	12	17
Owen Sound	13	15	10	13	13	13
Collingwood	19	21	17	19	19	19
Wasaga Beach	20	21	19	22	20	16

Destinations Visited in Past Two Years by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
The Blue Mountains	15	16	14	15	18	12
Bruce Peninsula	11	12	10	12	11	10
Lake Huron beach towns	18	20	16	18	18	19
Midland-Penetanguishene	9	11	8	9	8	12
Barrie	25	27	23	24	24	26
Orillia	18	19	18	19	16	21

Destinations Visited in Past Two Years by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Muskoka	22	23	20	21	21	23
Prince Edward County	14	16	12	13	12	17
Kingston/Thousand Islands	27	29	25	23	25	35
Finger Lakes	18	20	16	13	21	21
The Adirondacks	18	21	15	12	18	25
Michigan's Upper Peninsula	17	18	16	15	18	20
The Laurentians	18	19	17	16	17	21
Haliburton/Kawartha Lakes	20	20	19	18	20	21

Destinations Visited in Past Two Years by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/ S.Asian	Other
	%	%	%	%	%	%
Grey County	13	13	14	14	6	11
Bruce County	13	12	14	14	6	10
Simcoe County	16	13	17	16	18	12
Southern Georgian Bay	13	12	15	14	11	9
Owen Sound	13	9	15	13	10	13
Collingwood	19	14	20	19	23	15
Wasaga Beach	20	14	22	19	28	22

Destinations Visited in Past Two Years by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
The Blue Mountains	15	10	18	15	21	15
Bruce Peninsula	11	12	11	11	10	11
Lake Huron beach towns	18	17	19	19	16	16
Midland-Penetanguishene	9	6	11	10	8	7
Barrie	25	20	27	25	25	21
Orillia	18	14	20	18	21	17

Destinations Visited in Past Two Years by Demographics

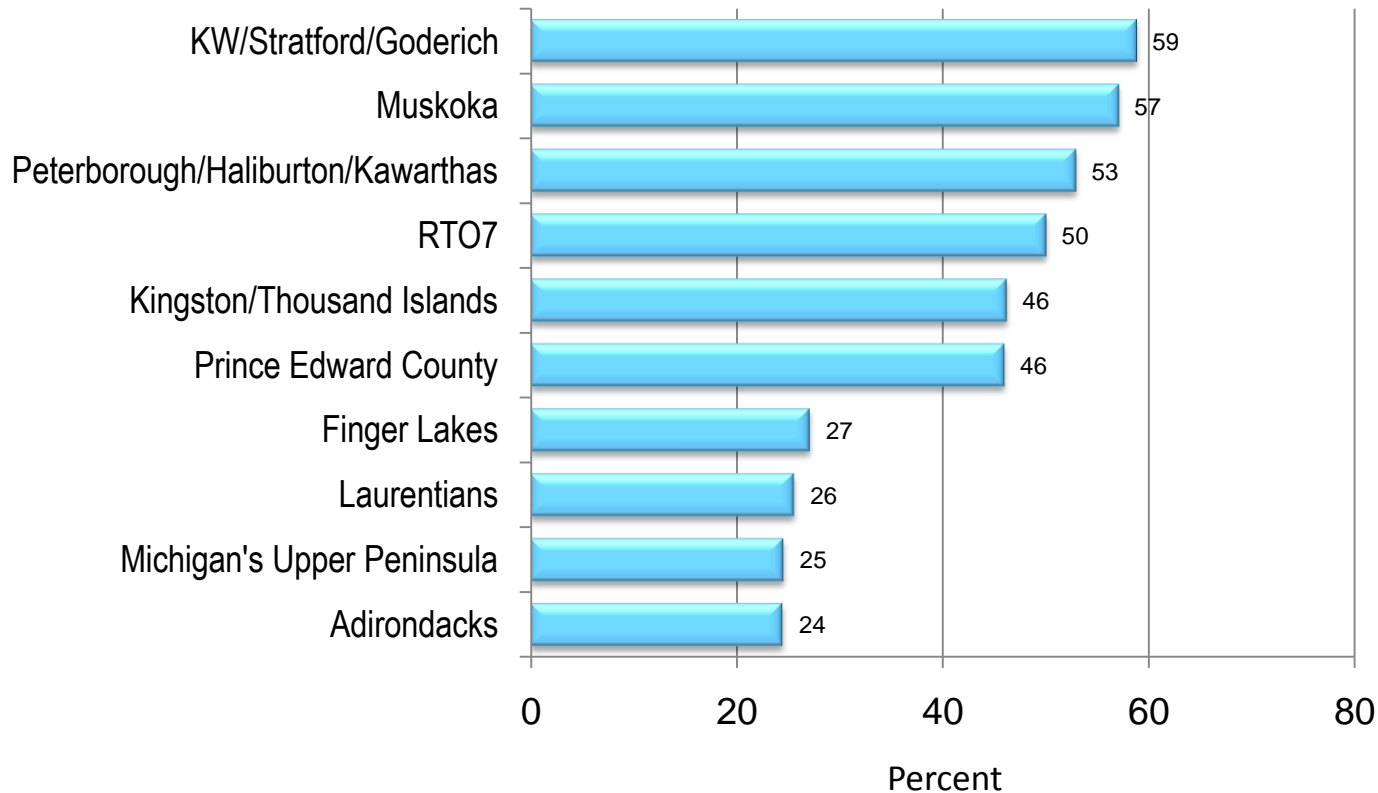


	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Muskoka	22	13	25	22	23	15
Prince Edward County	14	12	15	14	10	15
Kingston/Thousand Islands	27	22	30	27	28	24
Finger Lakes	18	17	19	20	9	11
The Adirondacks	18	16	18	19	10	12
Michigan's Upper Peninsula	17	16	18	17	11	20
The Laurentians	18	17	19	19	16	16
Haliburton/Kawartha Lakes	20	15	22	21	15	12

Intent to Visit Destinations on a Day or Overnight Trip in the Next 12 Months



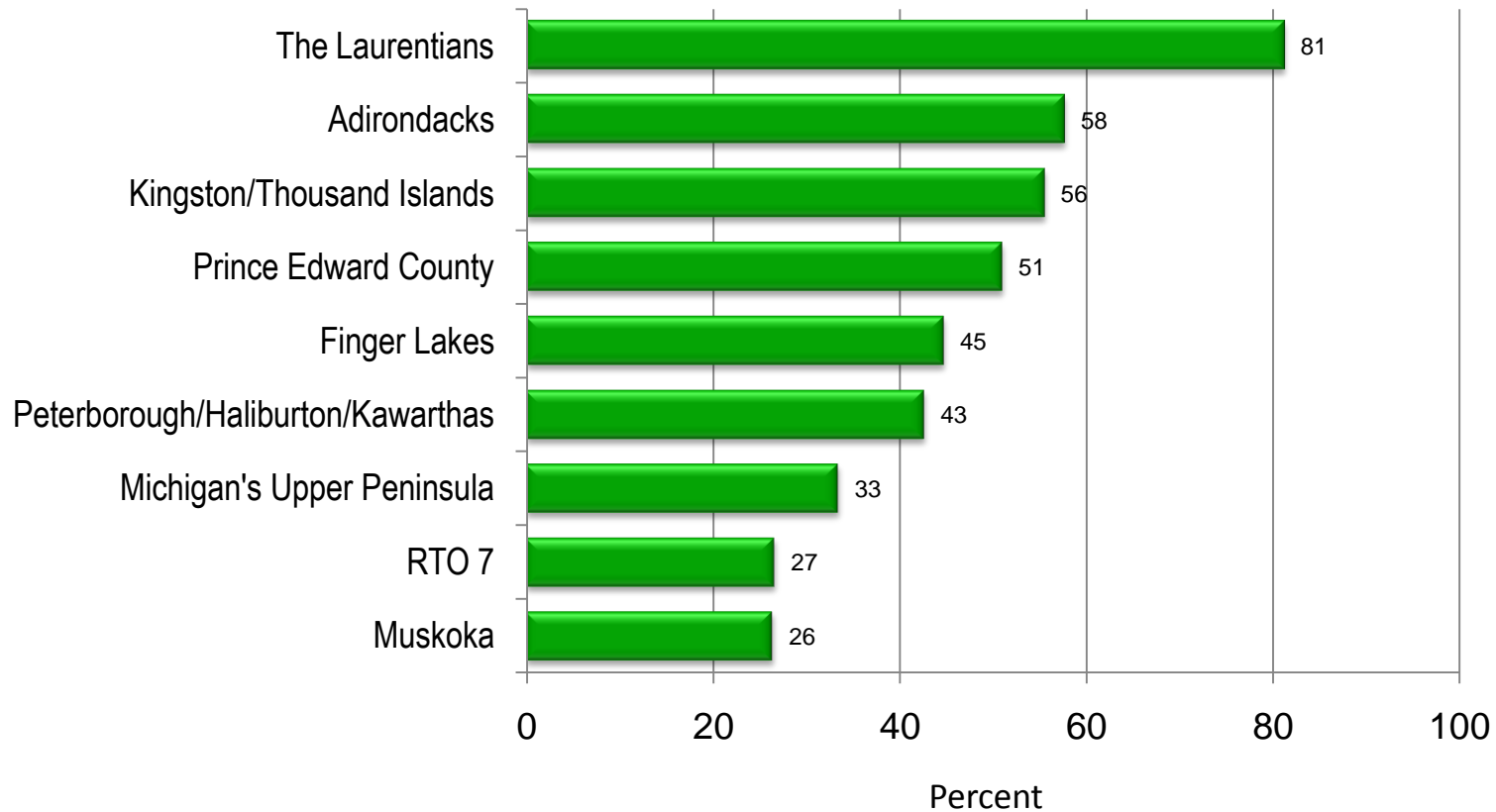
Base: Residents of Ontario



Intent to Visit Destinations on a Day or Overnight Trip in the Next 12 Months



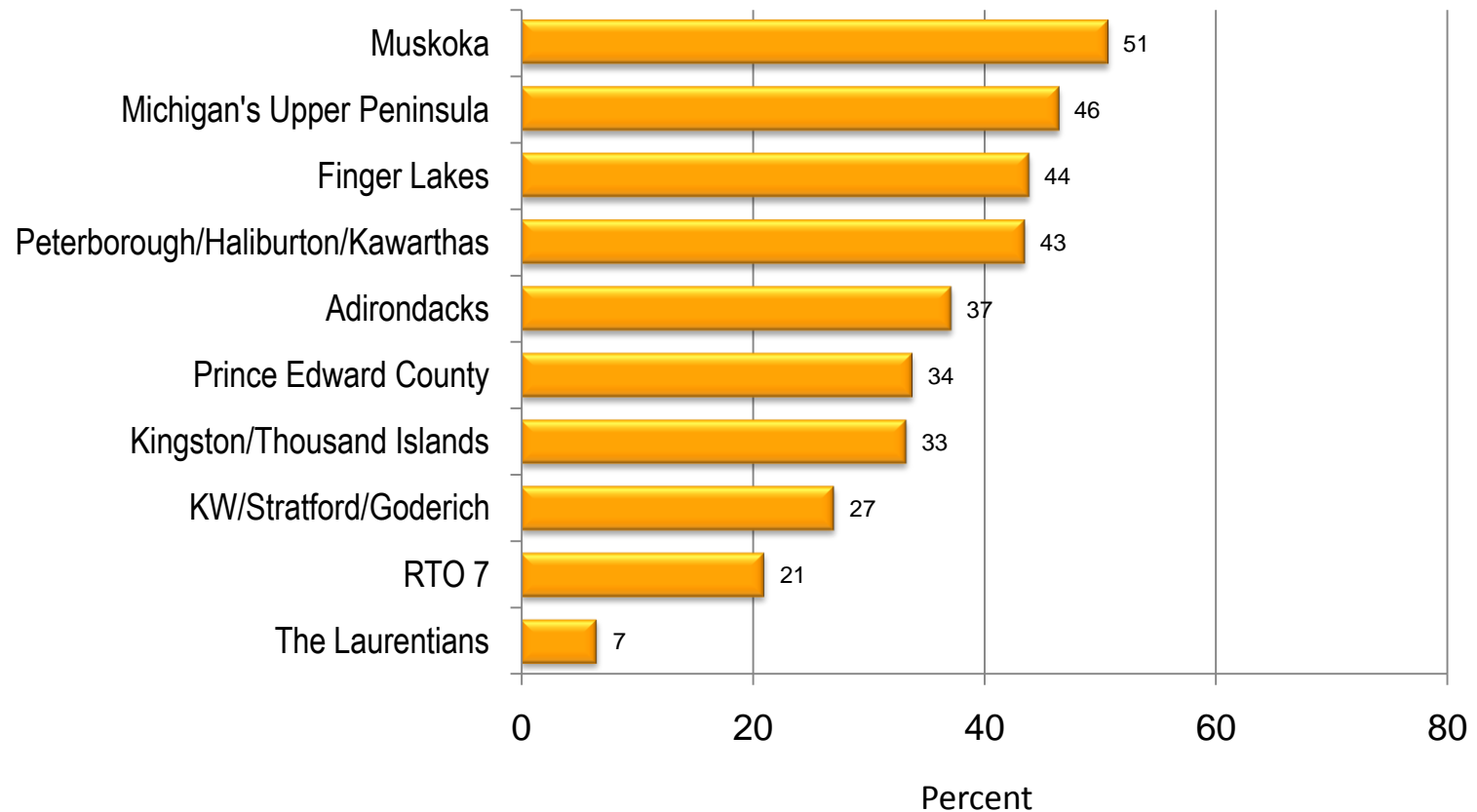
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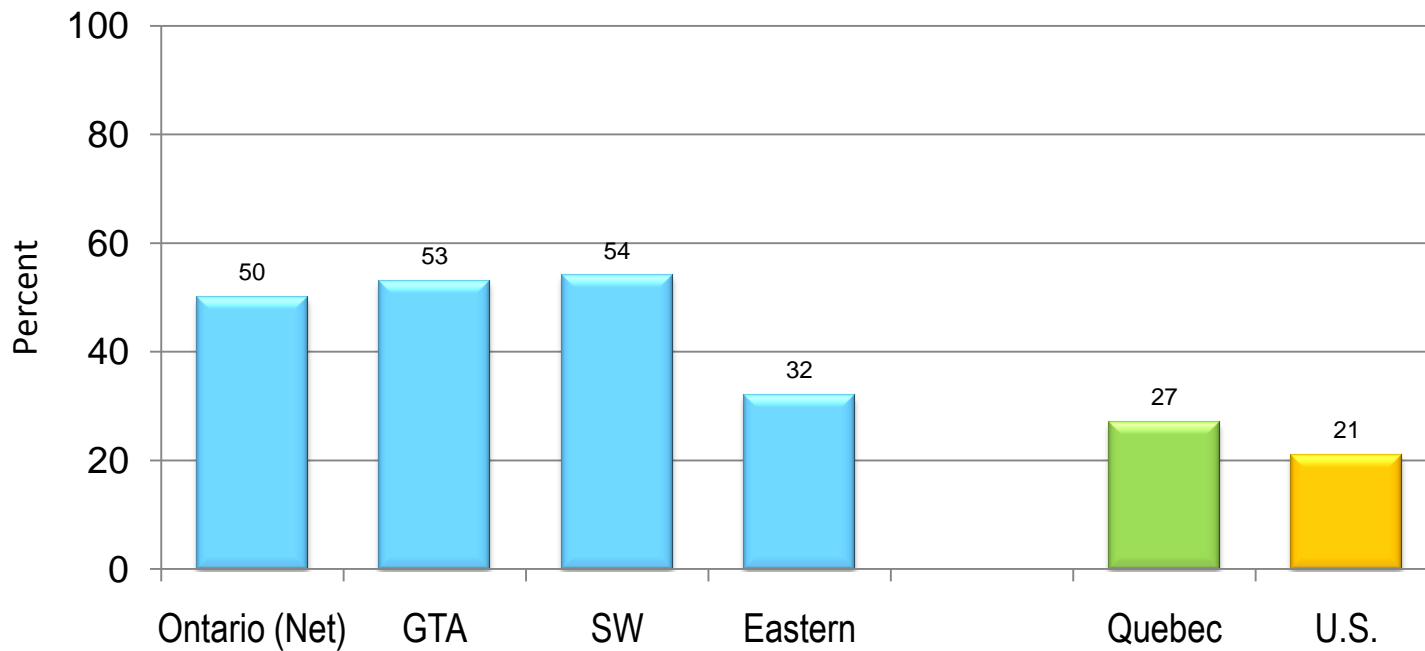
Intent to Visit Destinations on a Day or Overnight Trip in the Next 12 Months



Base: Residents of United States



Intent to Visit RTO7 on Day or Overnight Trip in the Next 12 Months by Market



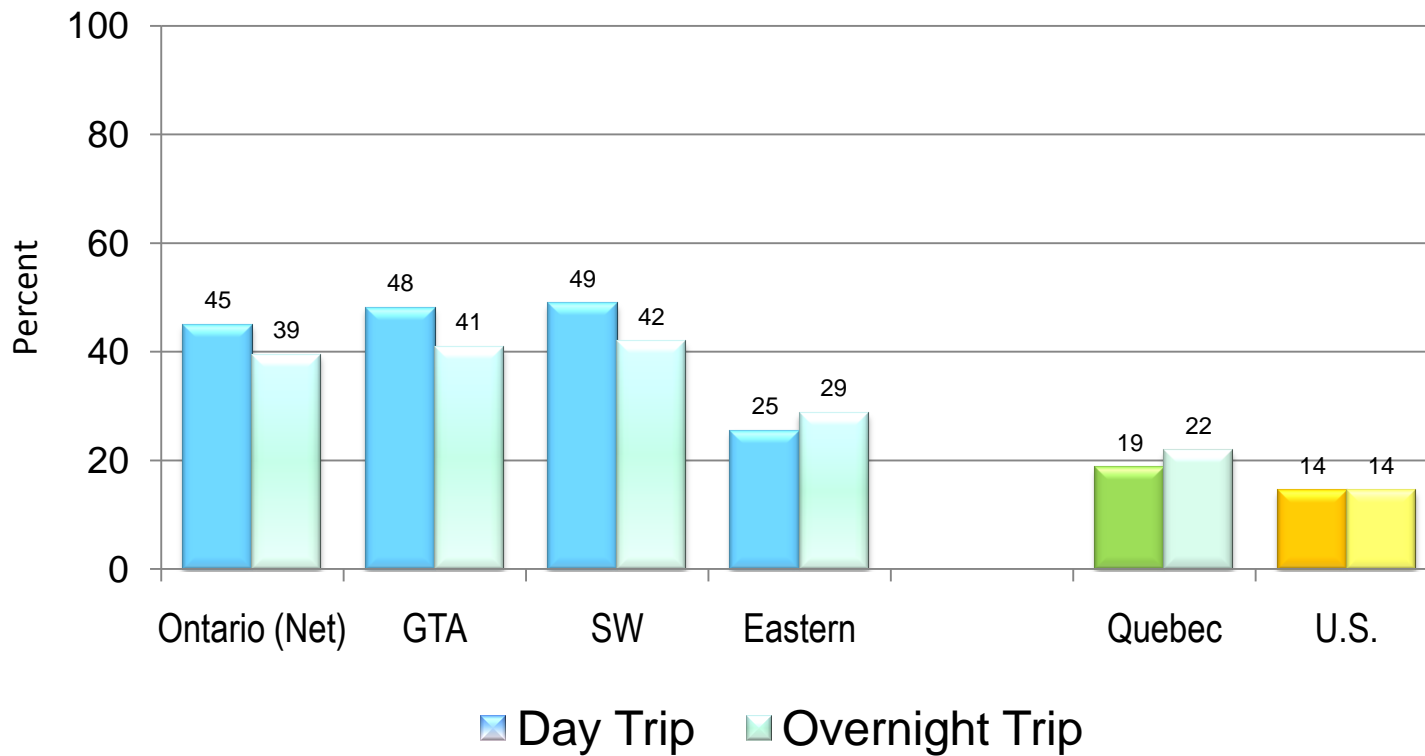
Intent to Visit RTO7 in Next 12 Months by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Intend to Visit RTO7 on Day/Overnight Trip	40	43	36	43	42	33

	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Intend to Visit RTO7 on Day/Overnight Trip	40	35	43	38	53	49

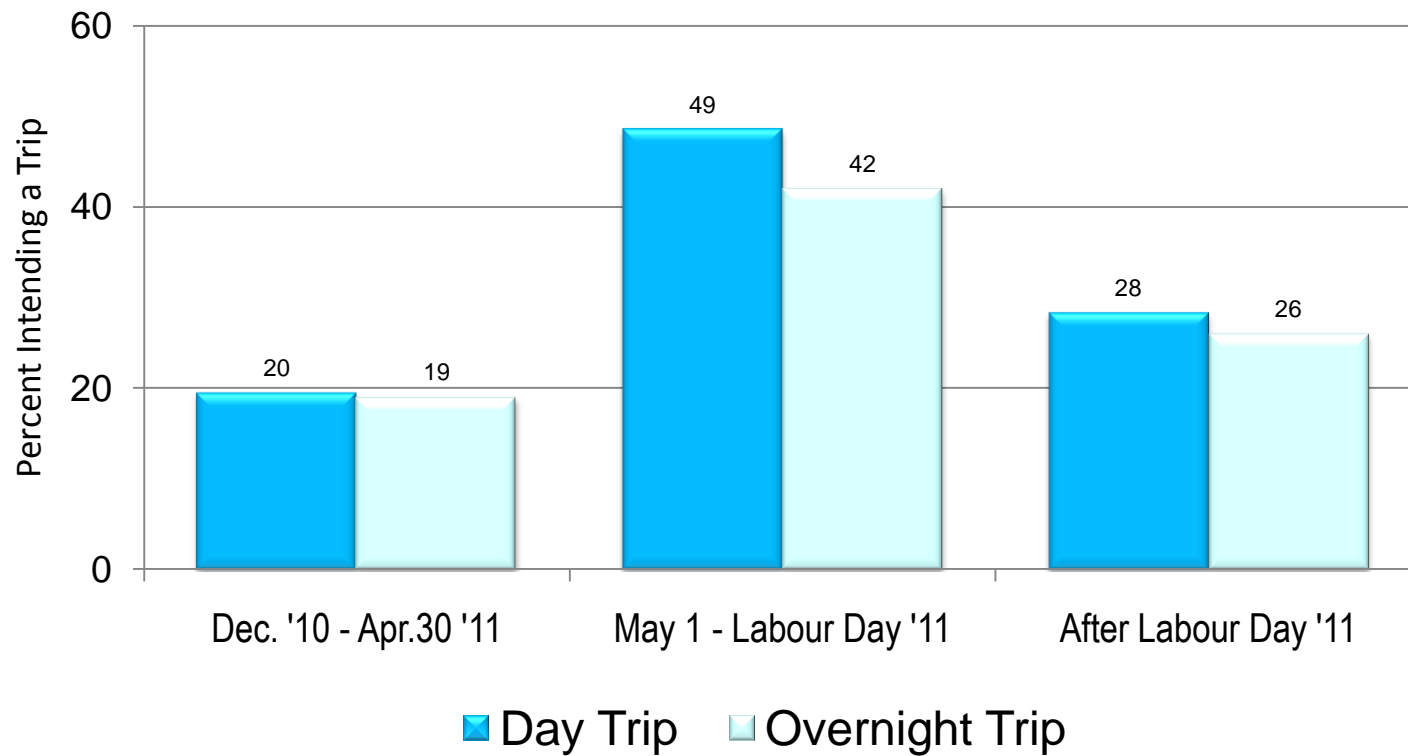
Intent to Visit RTO7 in the Next 12 Months by Market



Timing of Intended Trips



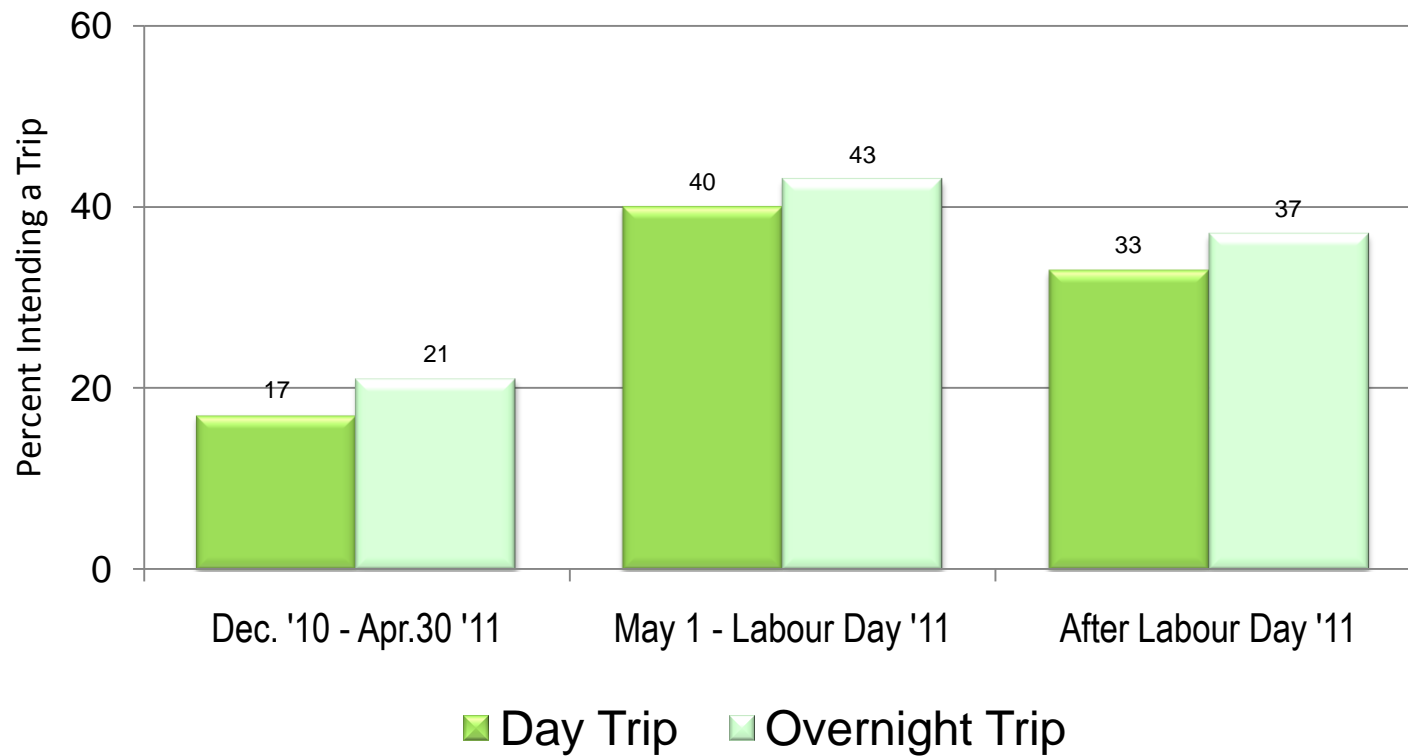
Base: Residents of Ontario



Timing of Intended Trips



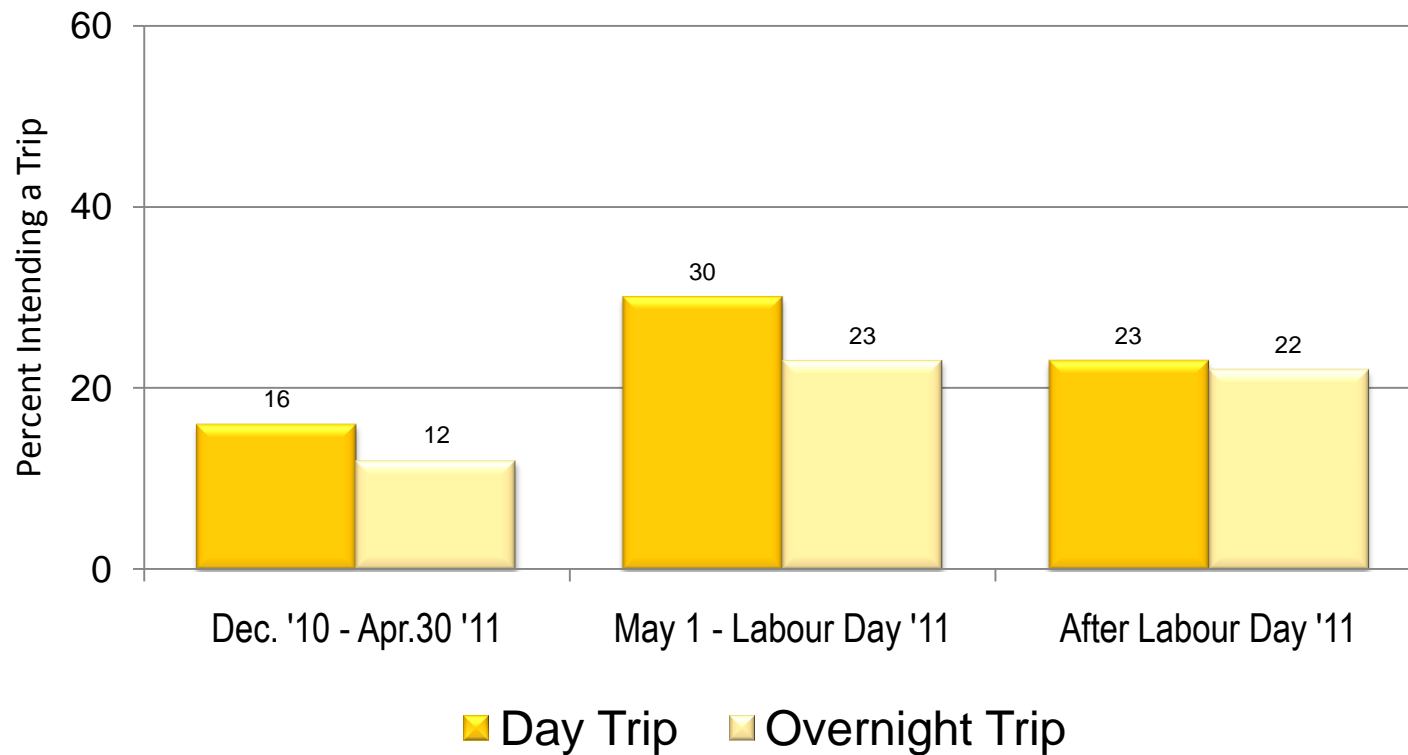
Base: Residents of Quebec



Timing of Intended Trips



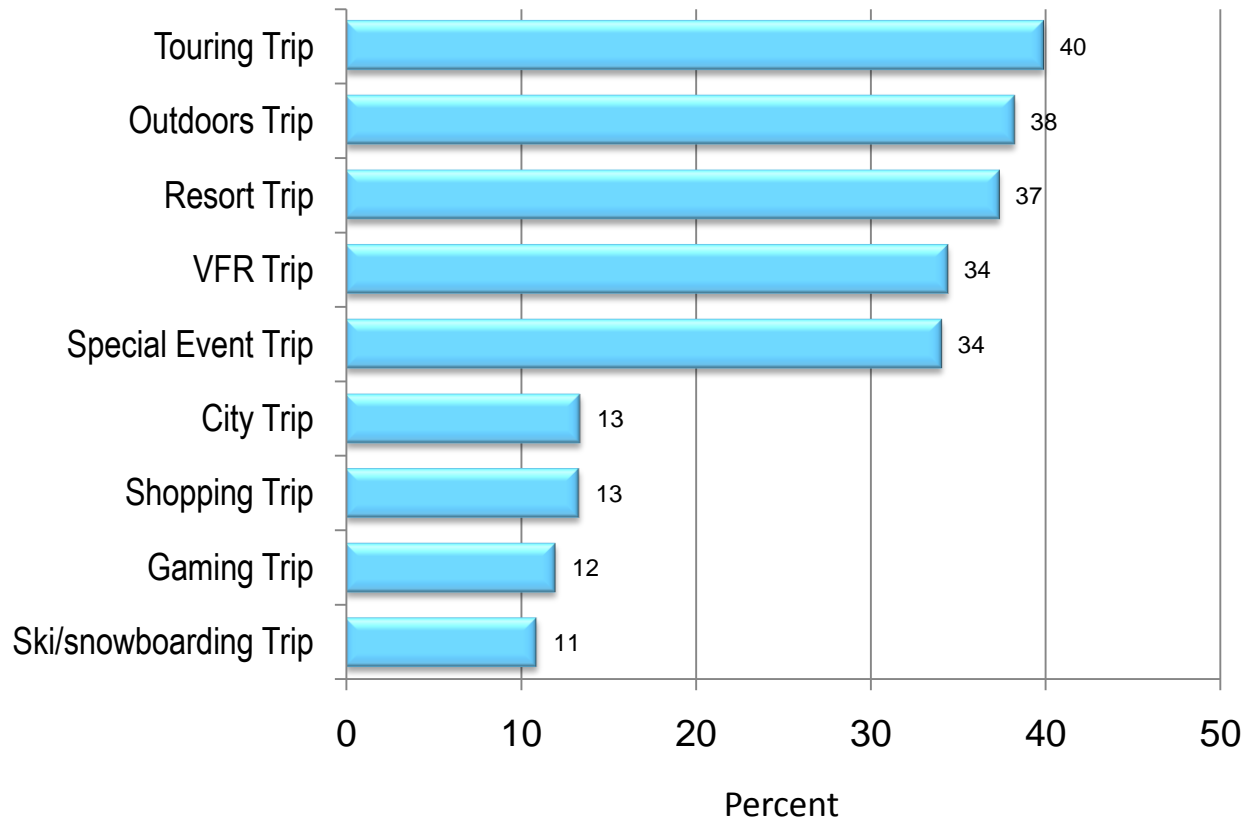
Base: Residents of United States



Types of Trip Most Likely to Take When Visiting RTO7



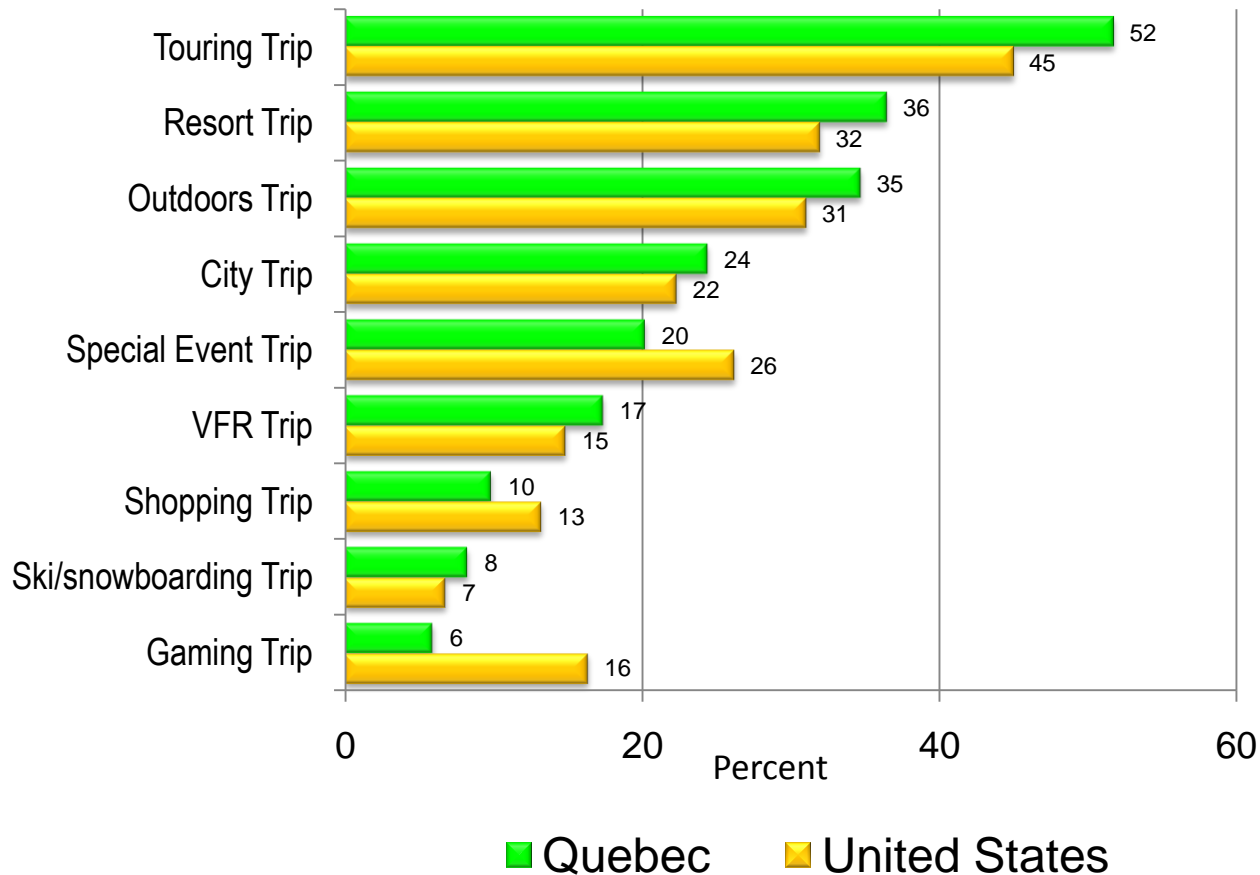
Base: Residents of Ontario



Types of Trip Most Likely to Take When Visiting RTO7



Base: Residents of Quebec/United States



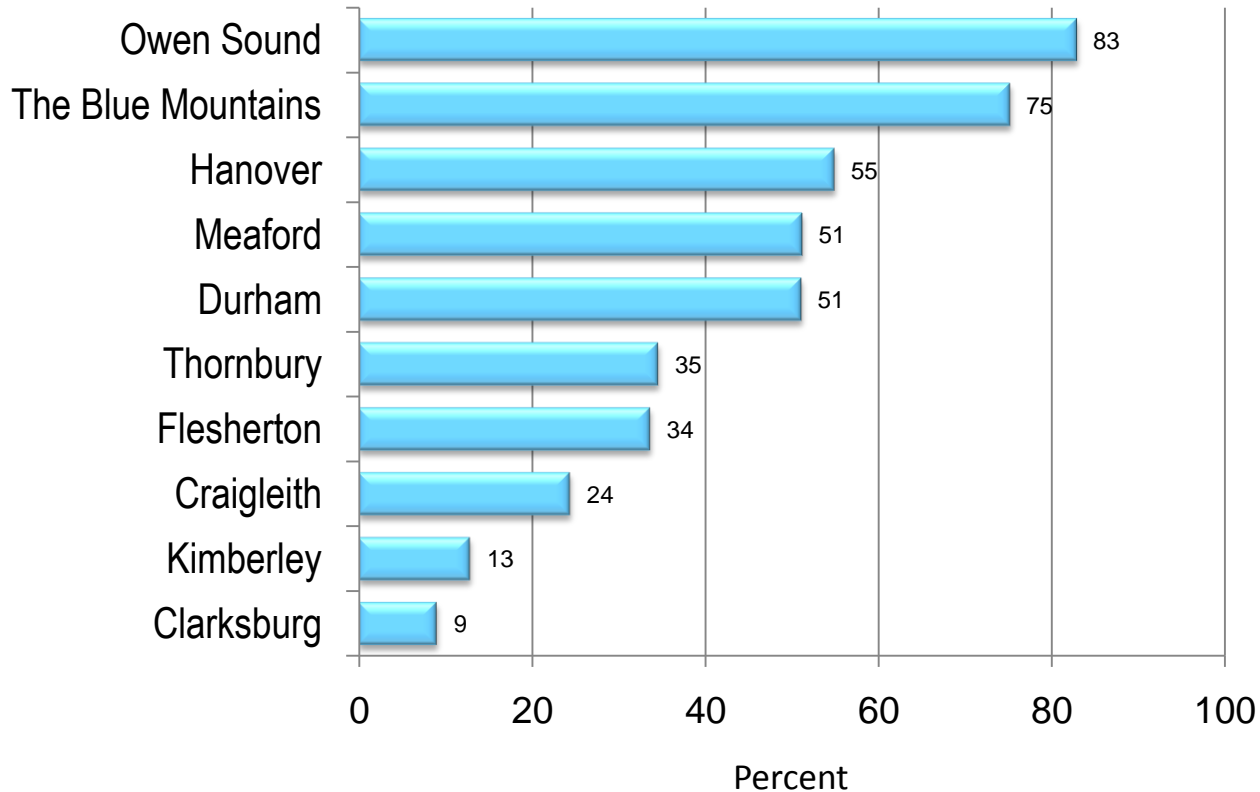
Awareness, Past
Visitation and Interest in
Local Attractions

Awareness/Experience
with Grey County
Places/Attractions

Aided Awareness of Towns/Places in Grey County



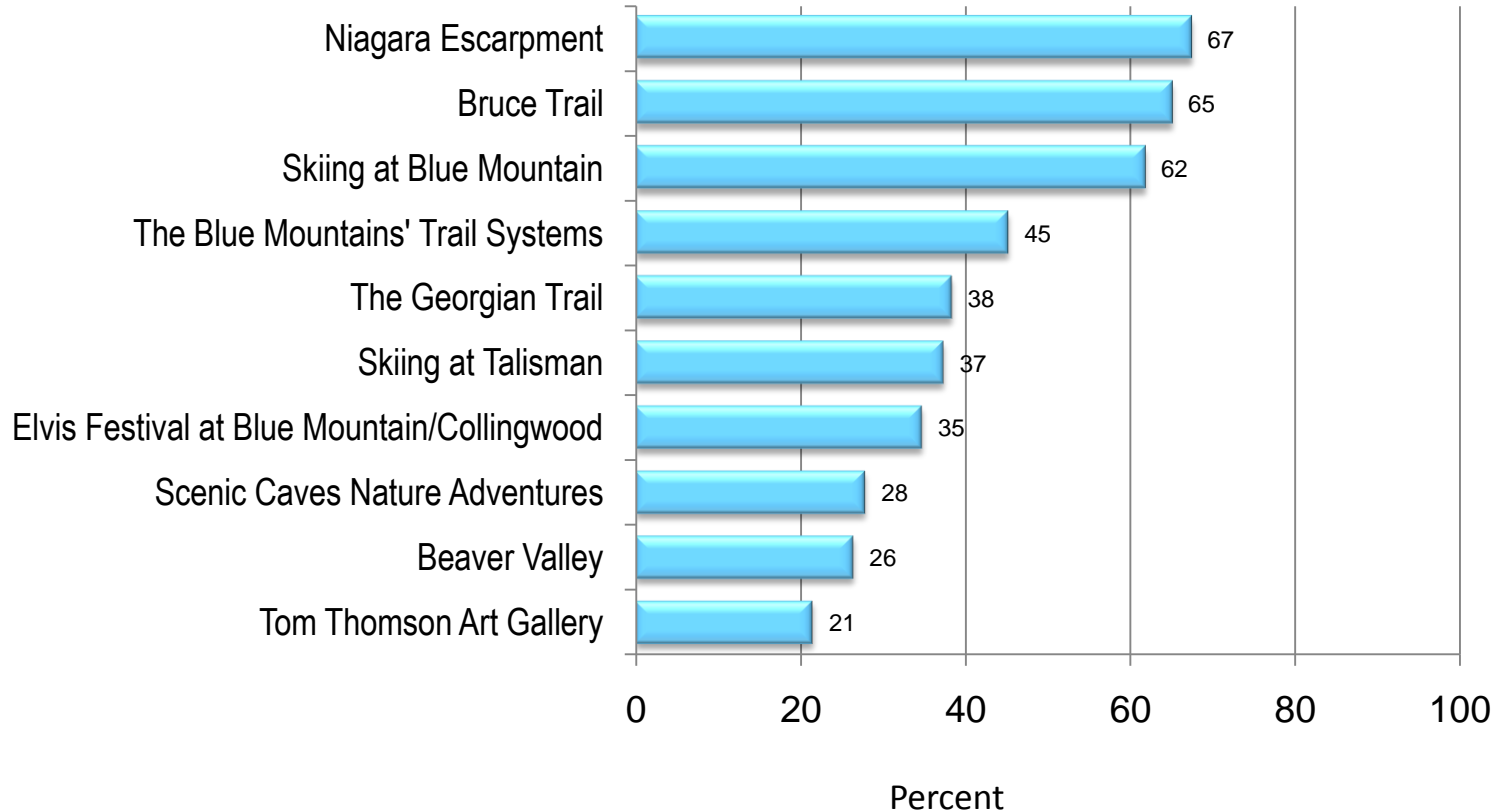
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Grey County



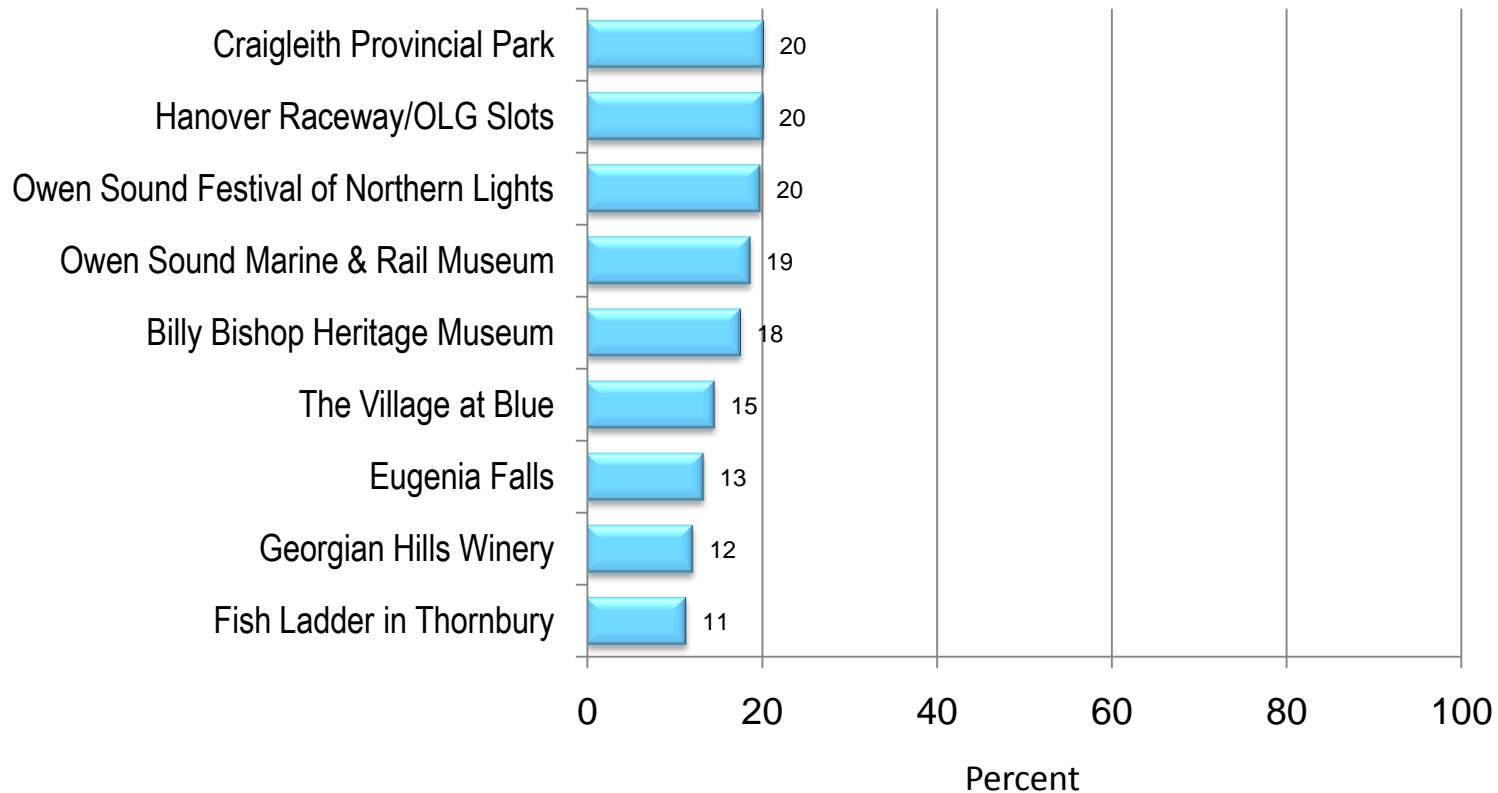
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Grey County (Cont'd)



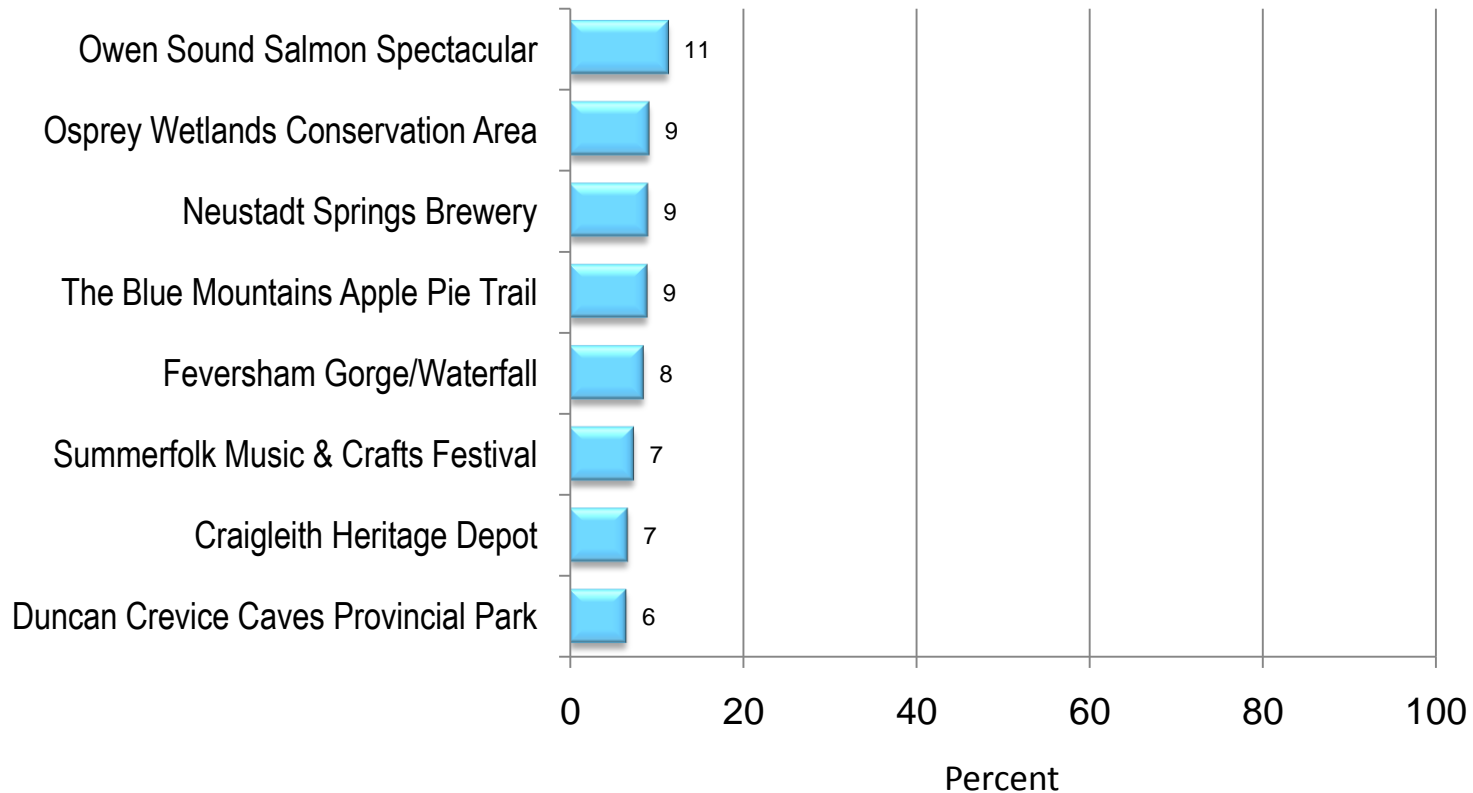
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Grey County (Cont'd)



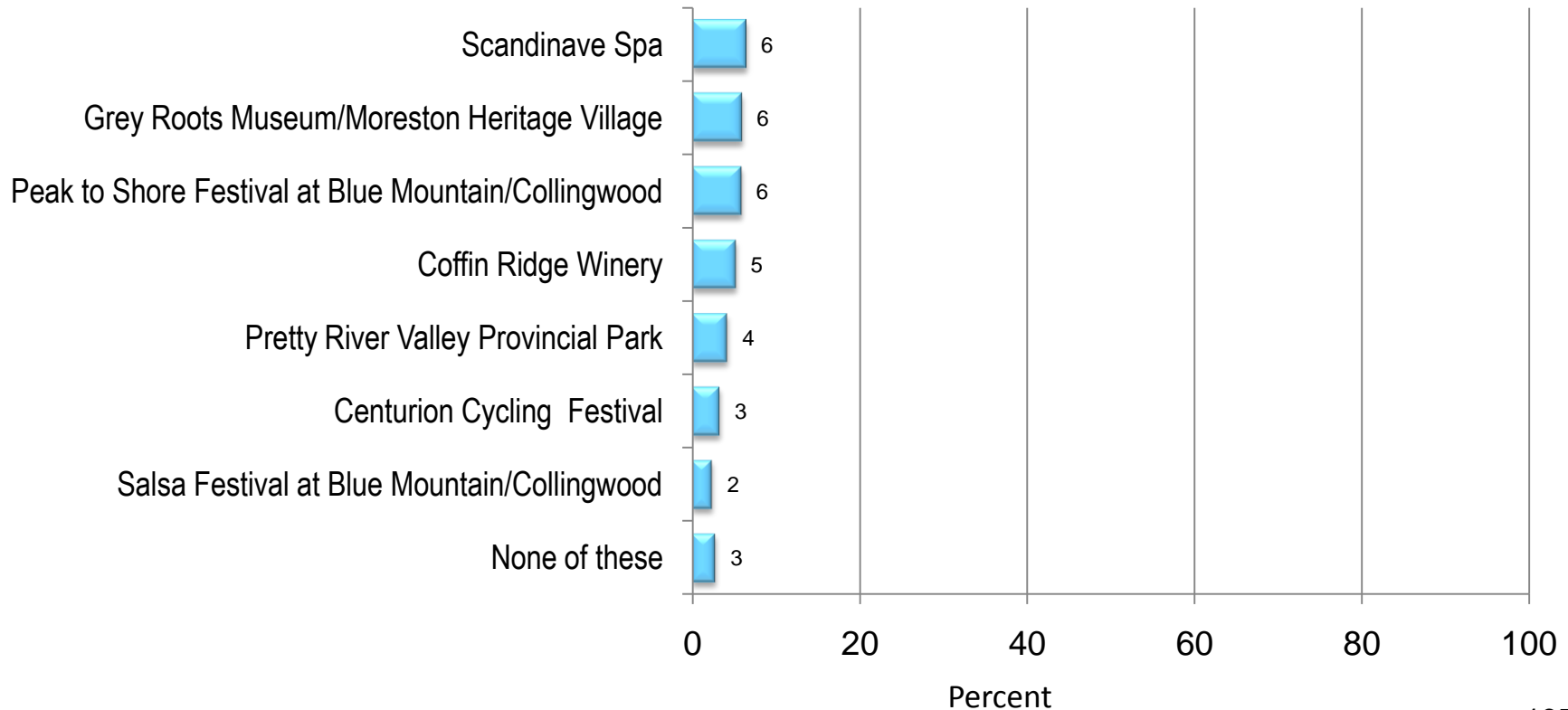
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Grey County (Cont'd)



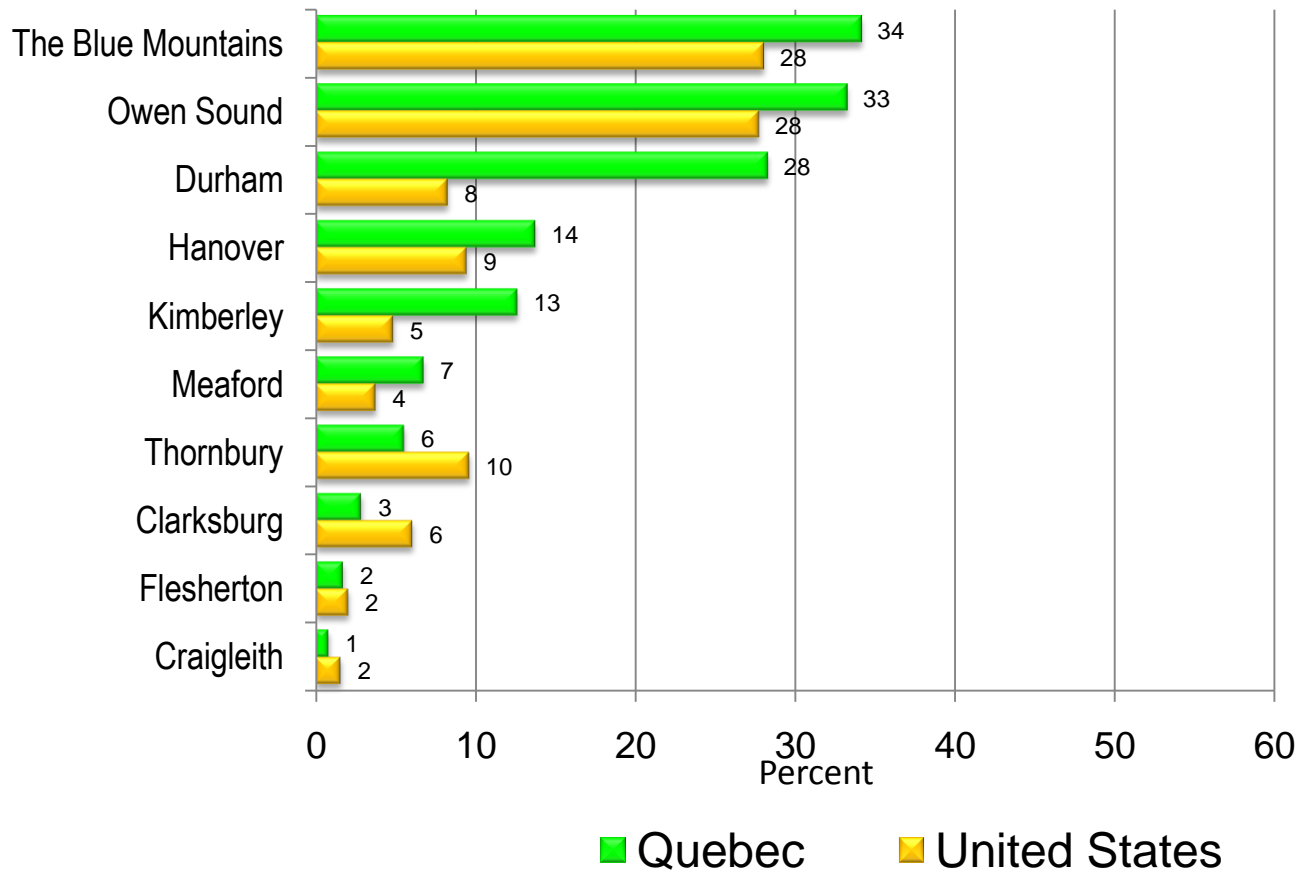
Base: Residents of Ontario



Aided Awareness of Towns/Places in Grey County



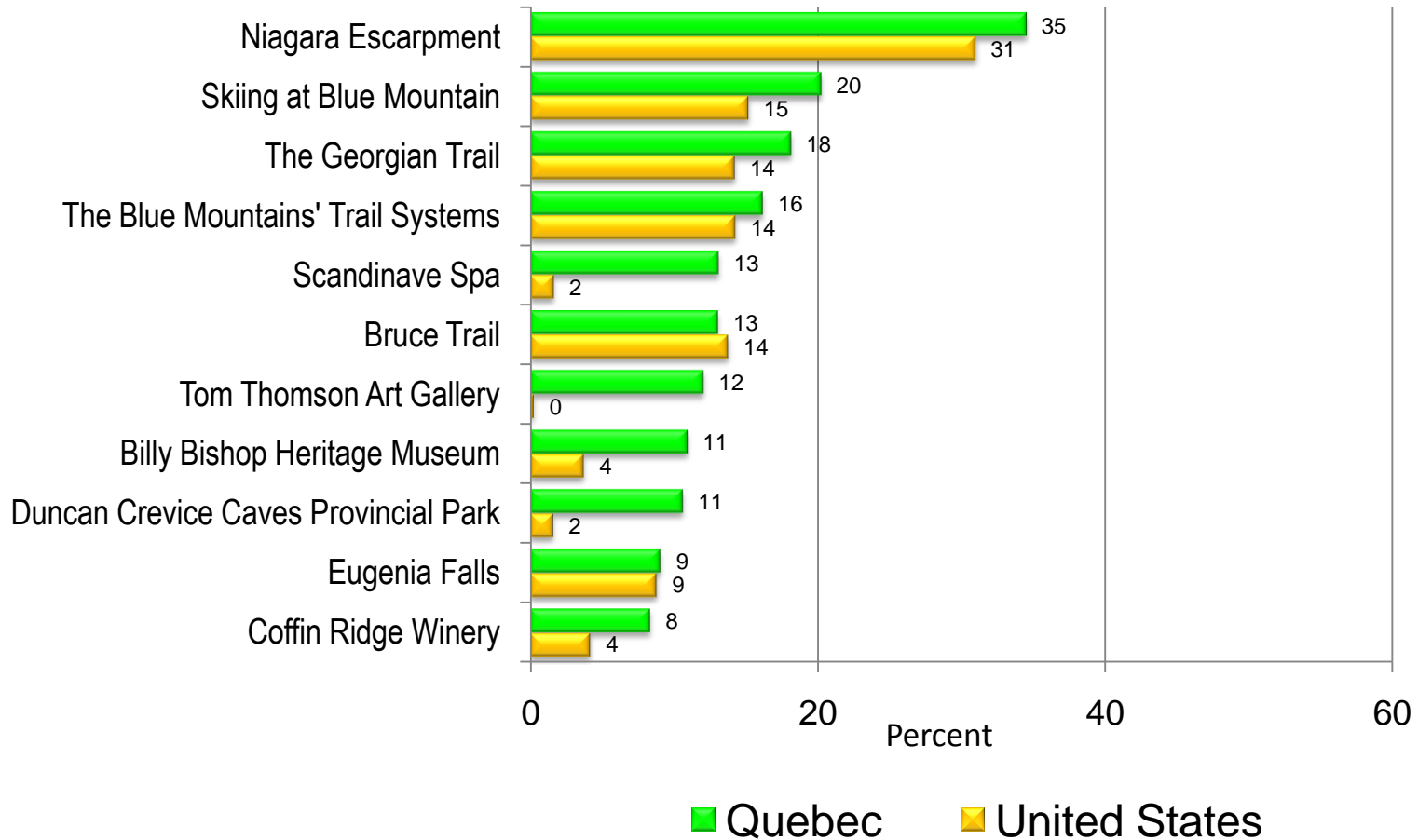
Base: Residents of Quebec/United States



Aided Awareness of Attractions/Events in Grey County (Cont'd)



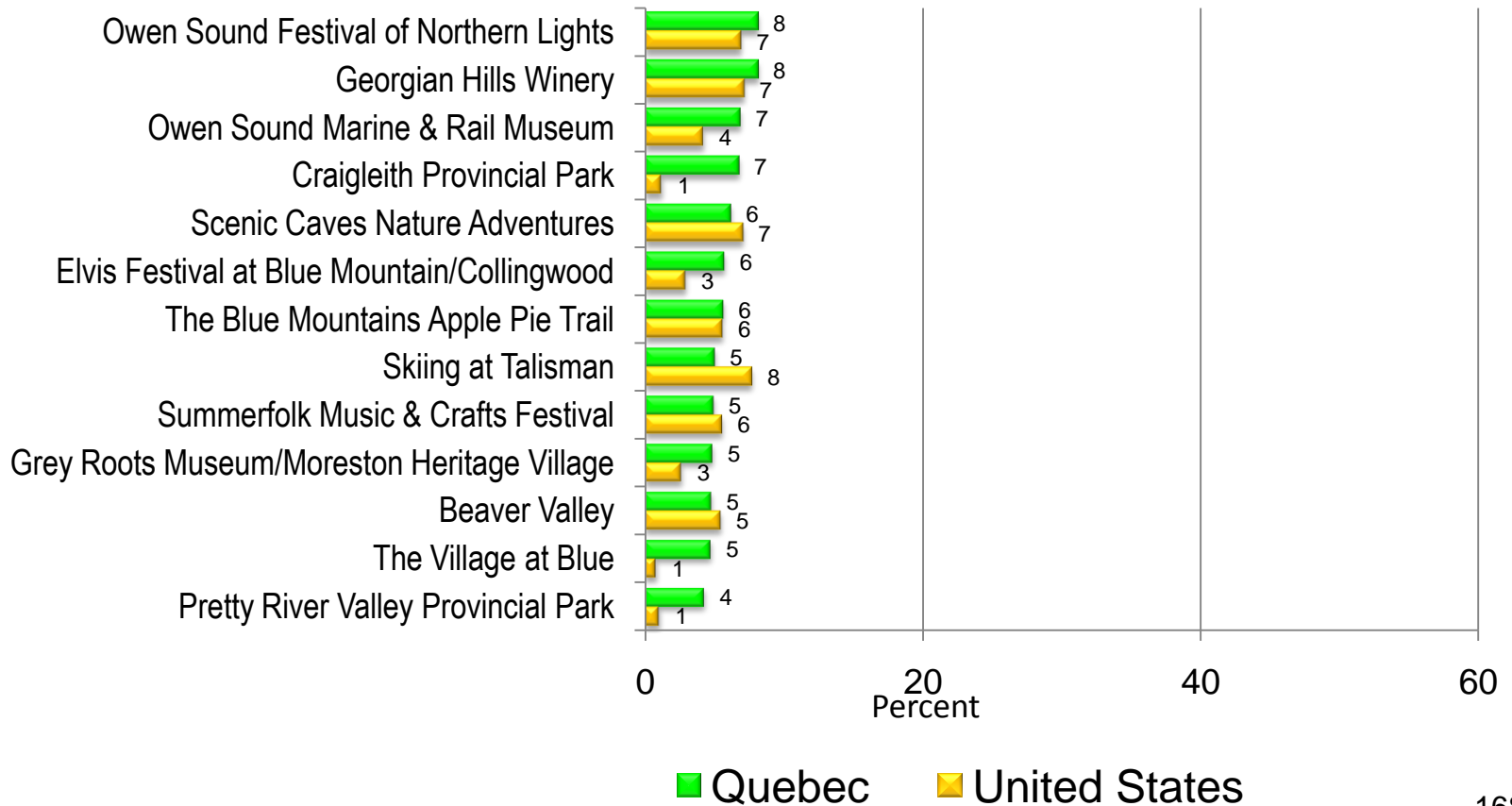
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Aided Awareness of Attractions/Events in Grey County (Cont'd)



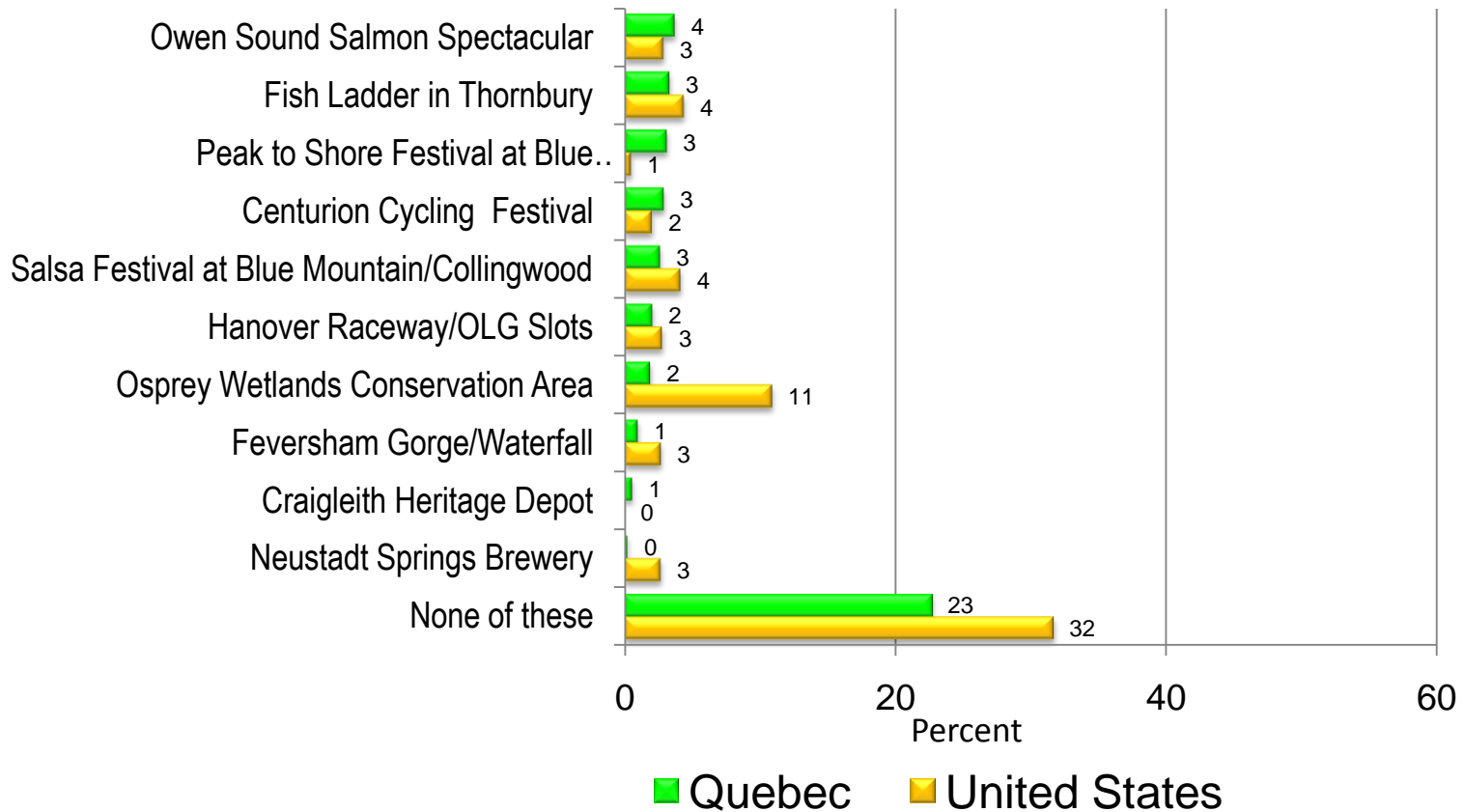
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Aided Awareness of Attractions/Events in Grey County (Cont'd)



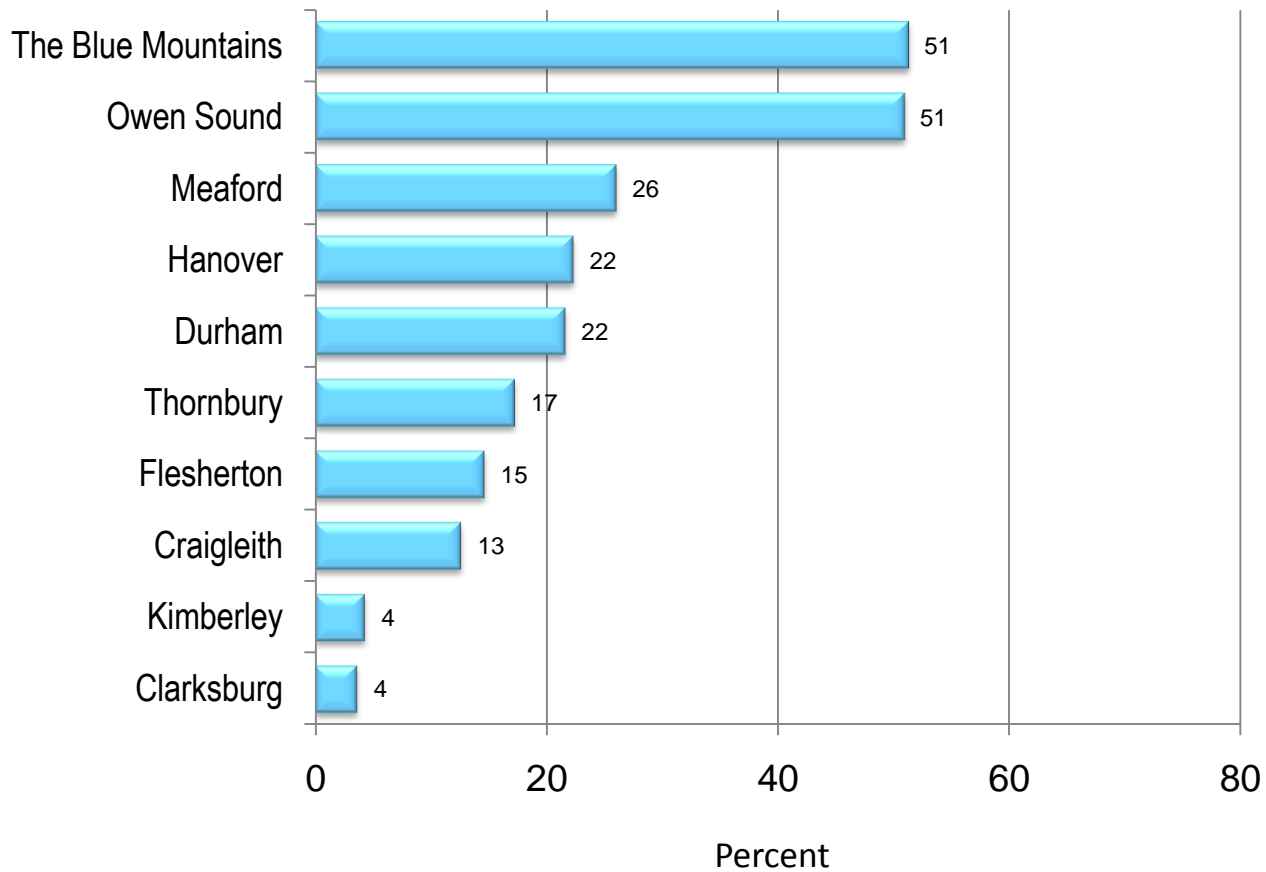
Base: Residents of Quebec/United States



Ever Visited Towns/Places in Grey County



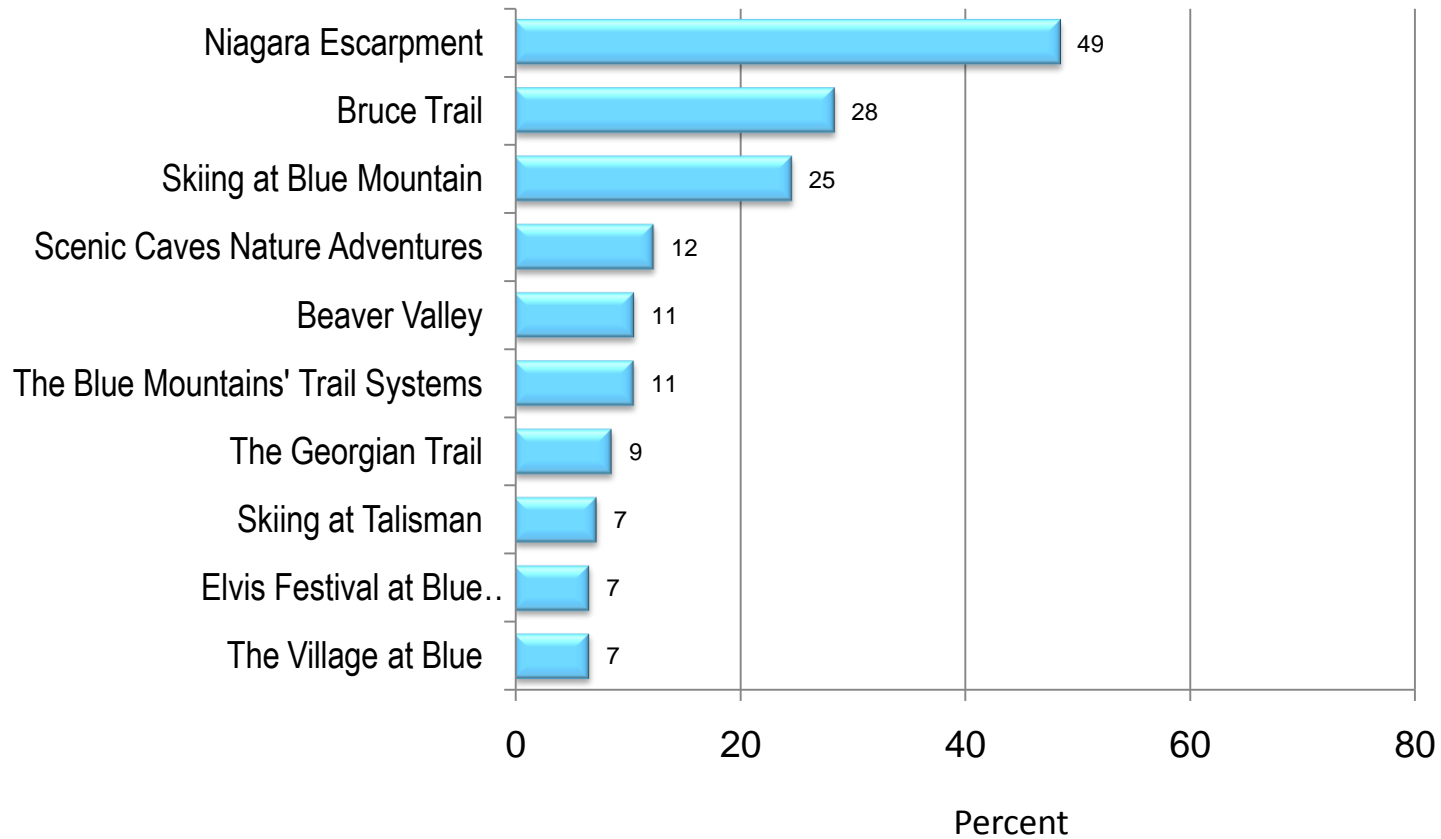
Base: Residents of Ontario



Ever Visited Attractions/Events in Grey County



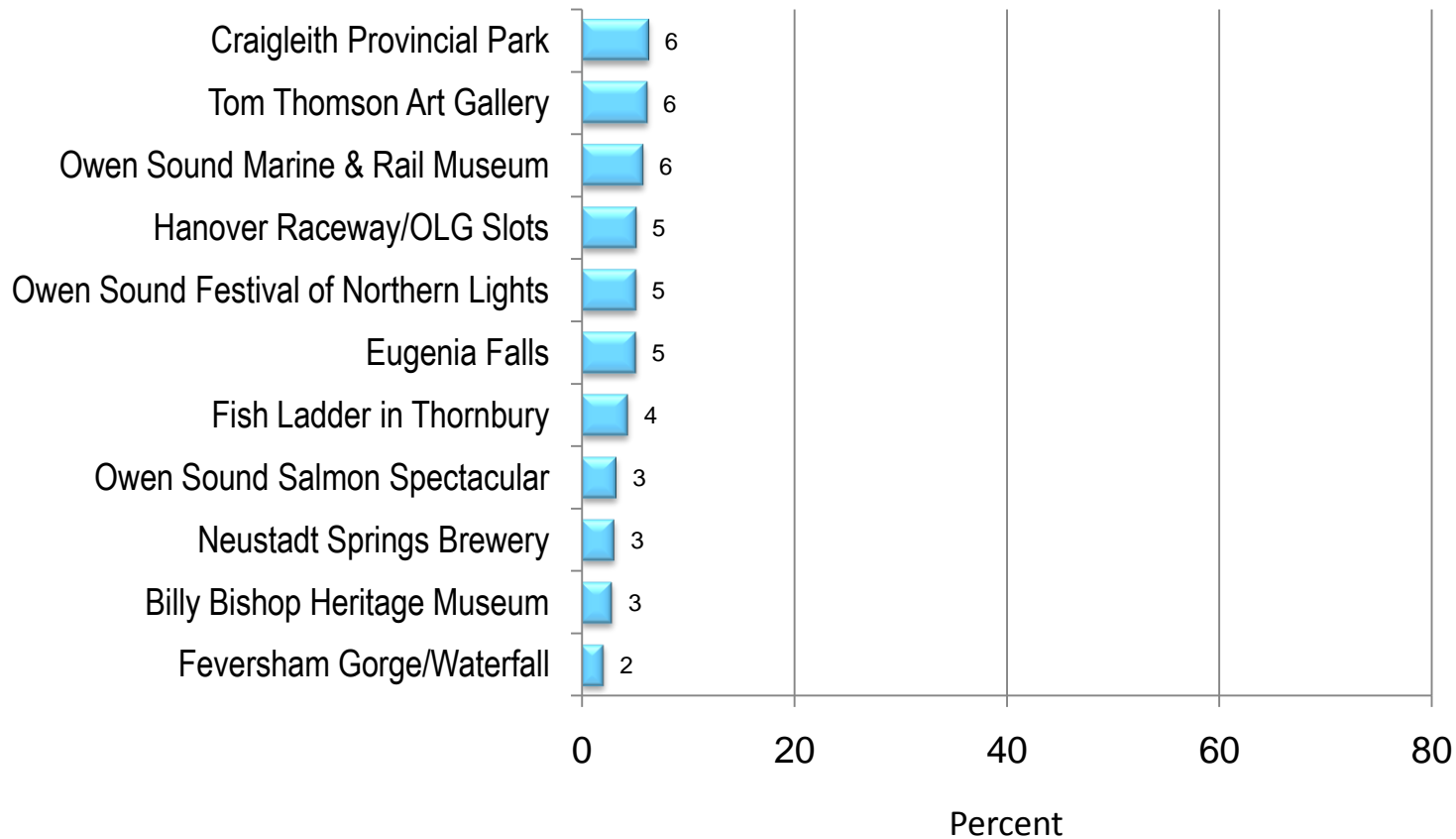
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Ever Visited Attractions/Events in Grey County (Cont'd)



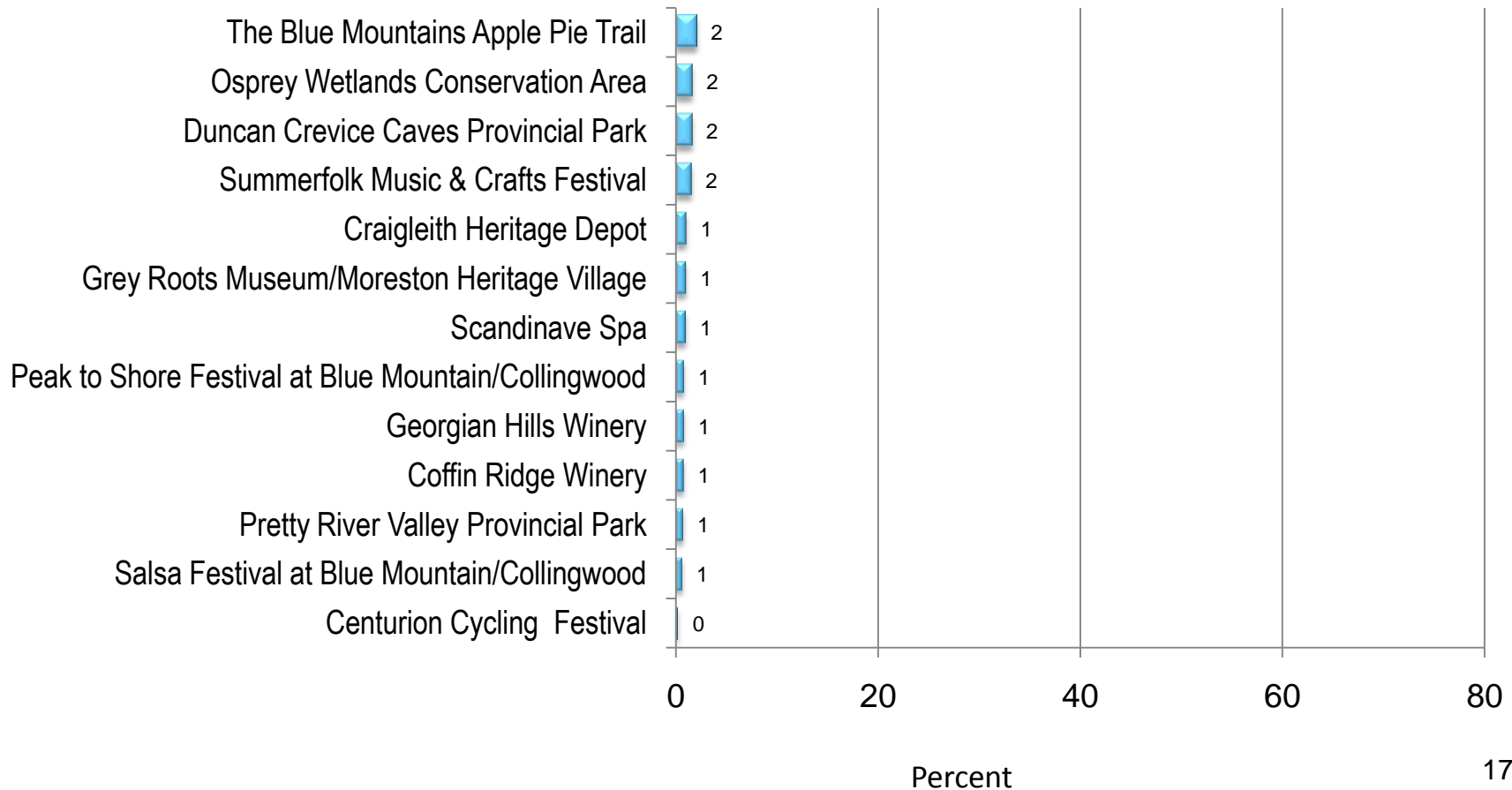
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Ever Visited Attractions/Events in Grey County (Cont'd)



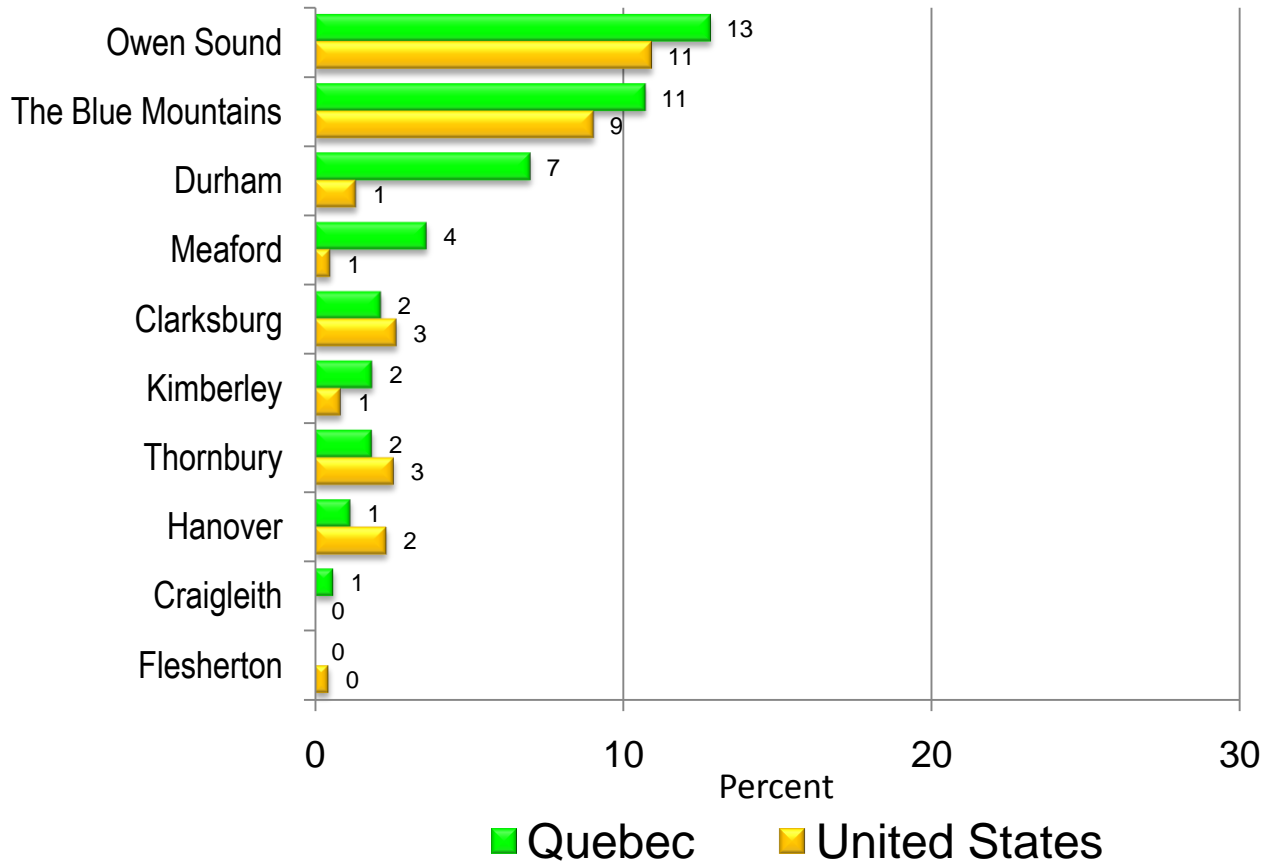
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Ever Visited Towns/Places in Grey County



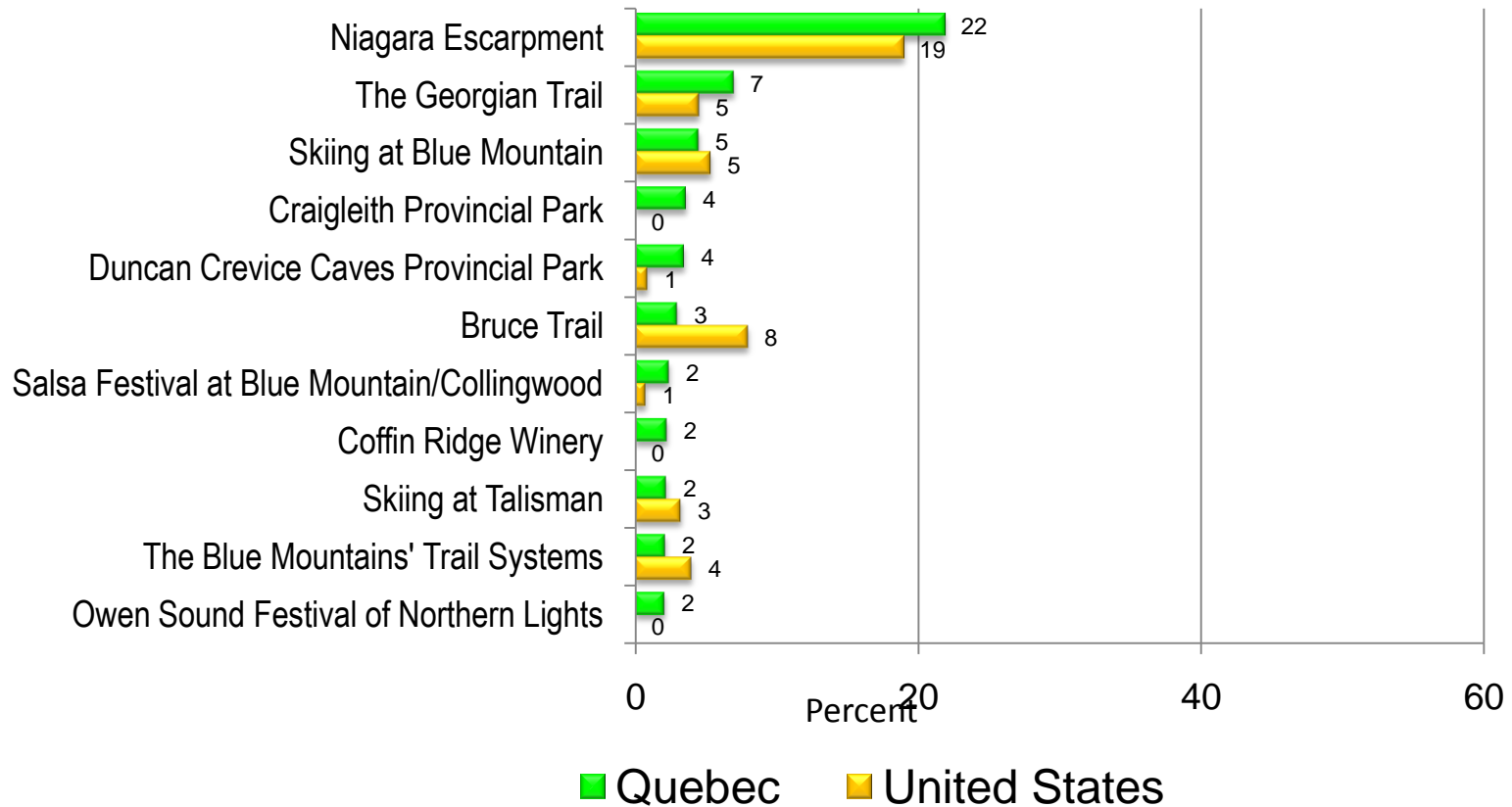
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Ever Visited Attractions/Events in Grey County (Cont'd)



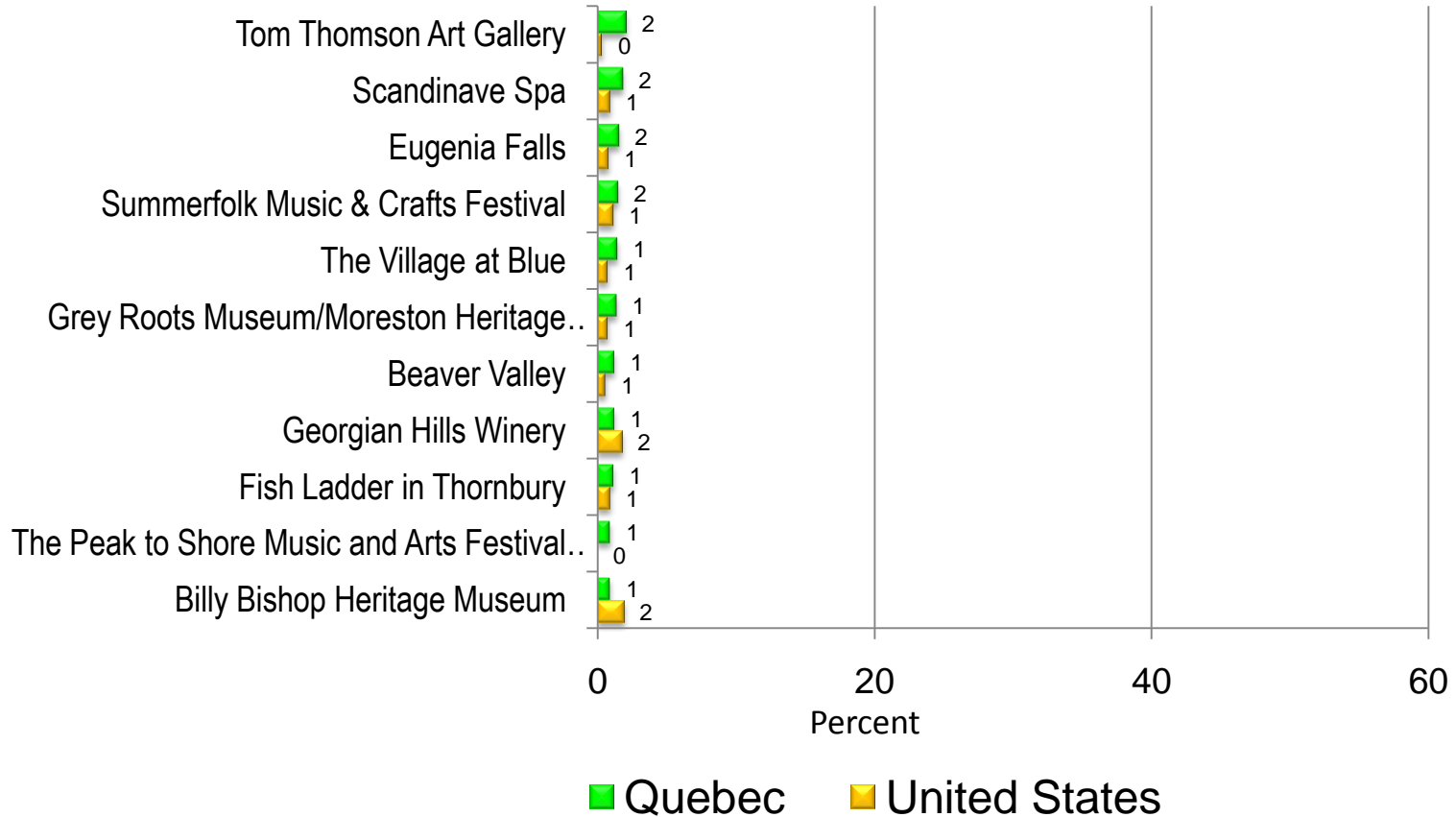
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Ever Visited Attractions/Events in Grey County (Cont'd)



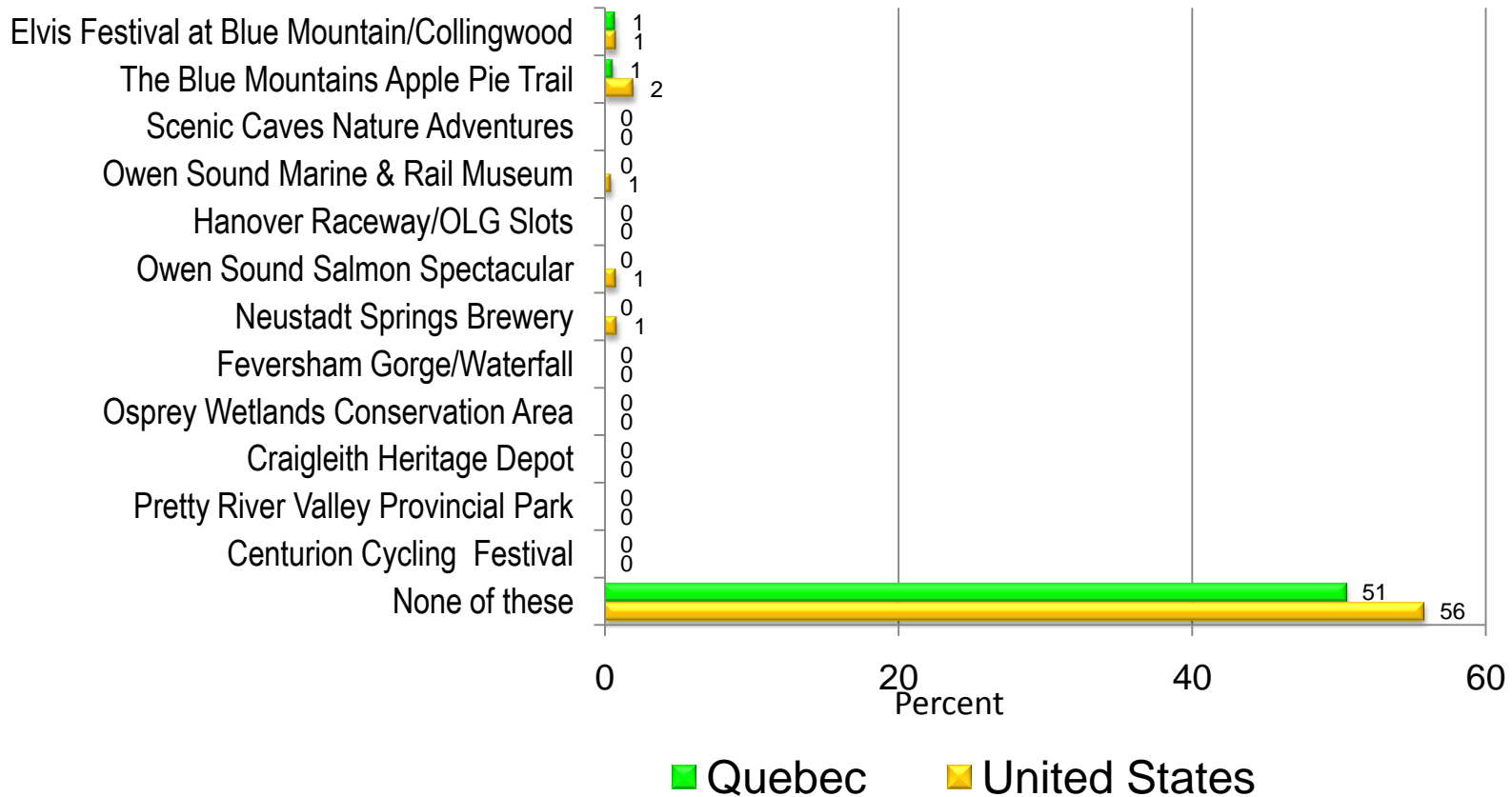
Base: Residents of Quebec/United States



Ever Visited Attractions/Events in Grey County (Cont'd)



Base: Residents of Quebec/United States

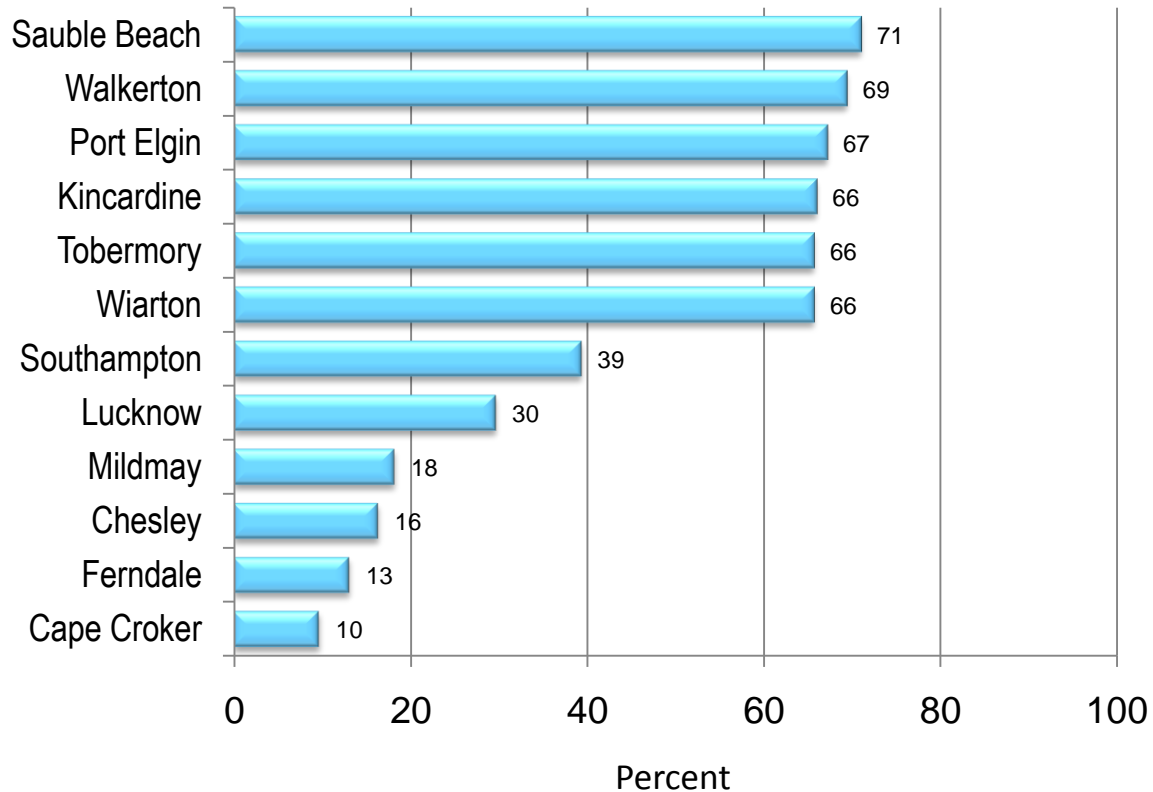


Awareness/Experience
with Bruce County
Places/Attractions

Aided Awareness of Towns/Places in Bruce County



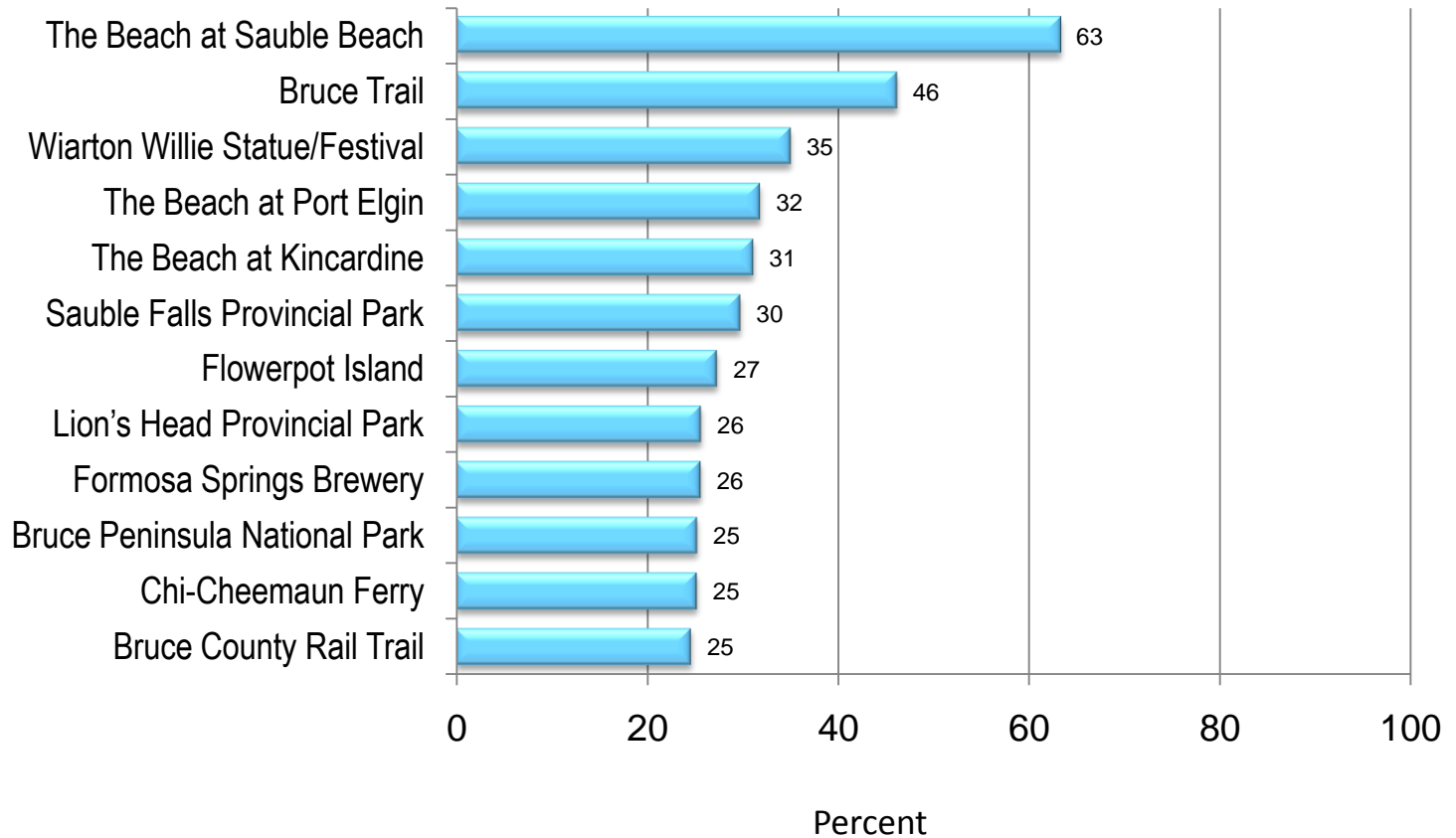
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Bruce County



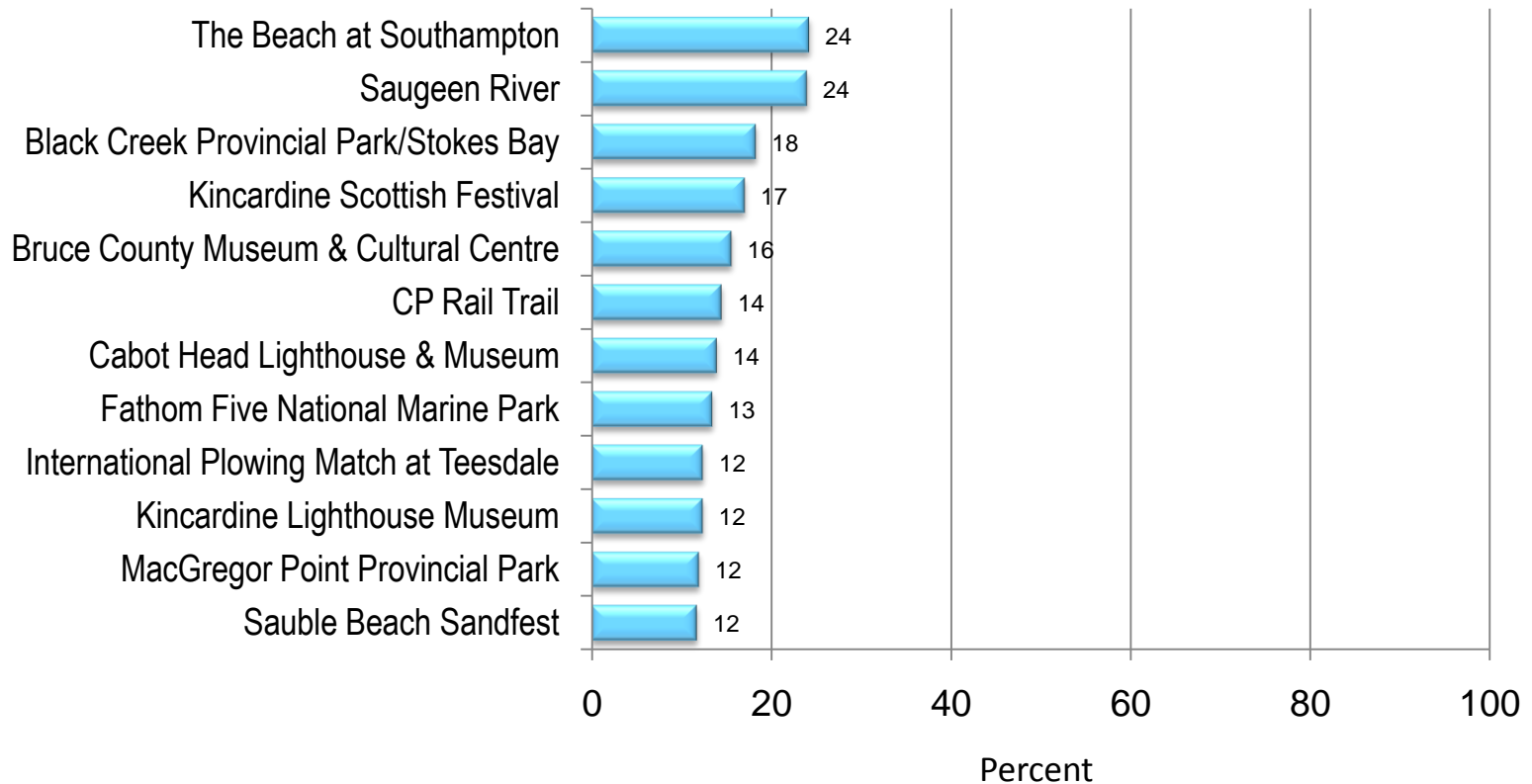
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Bruce County (Cont'd)



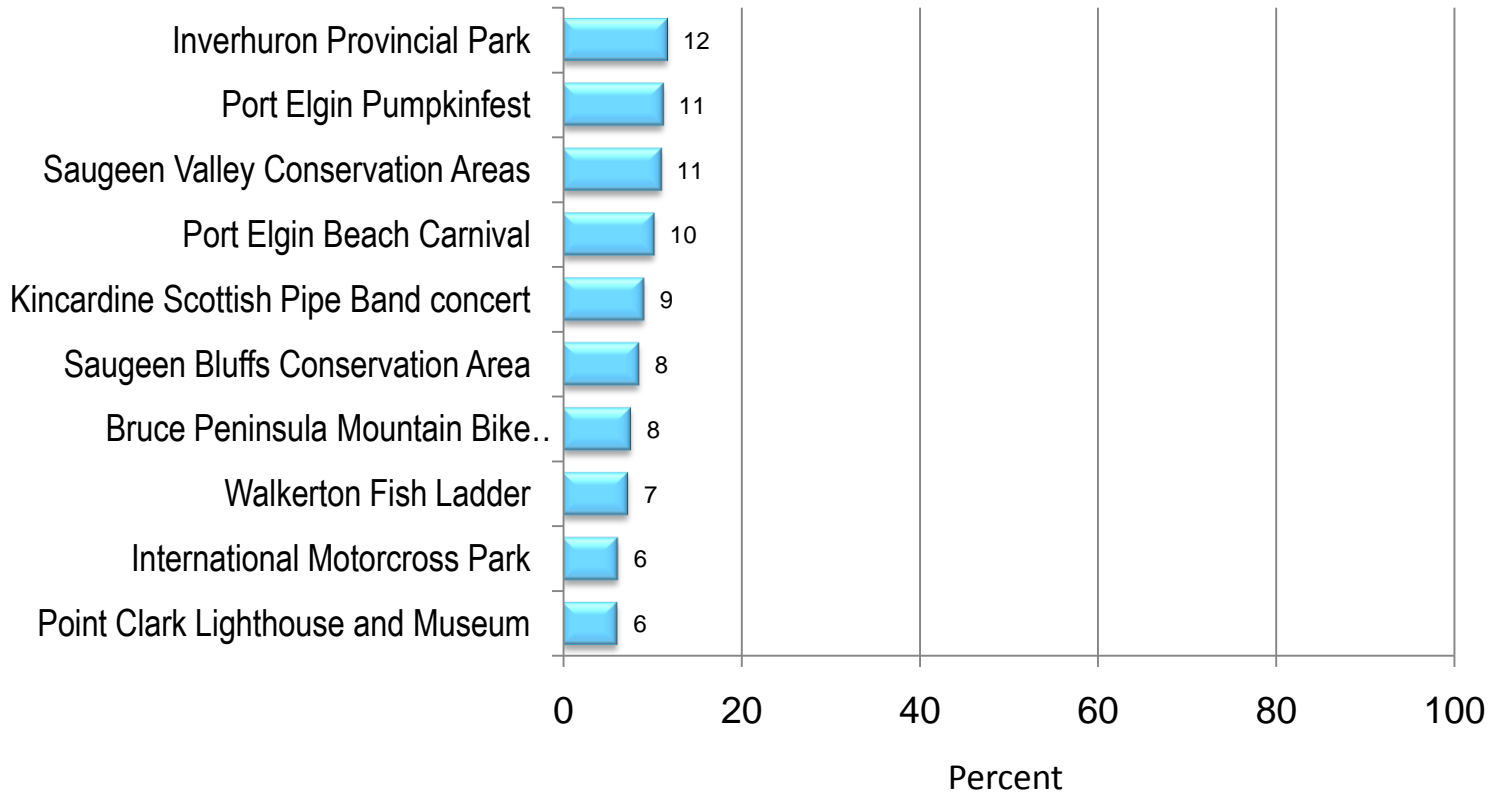
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Bruce County (Cont'd)



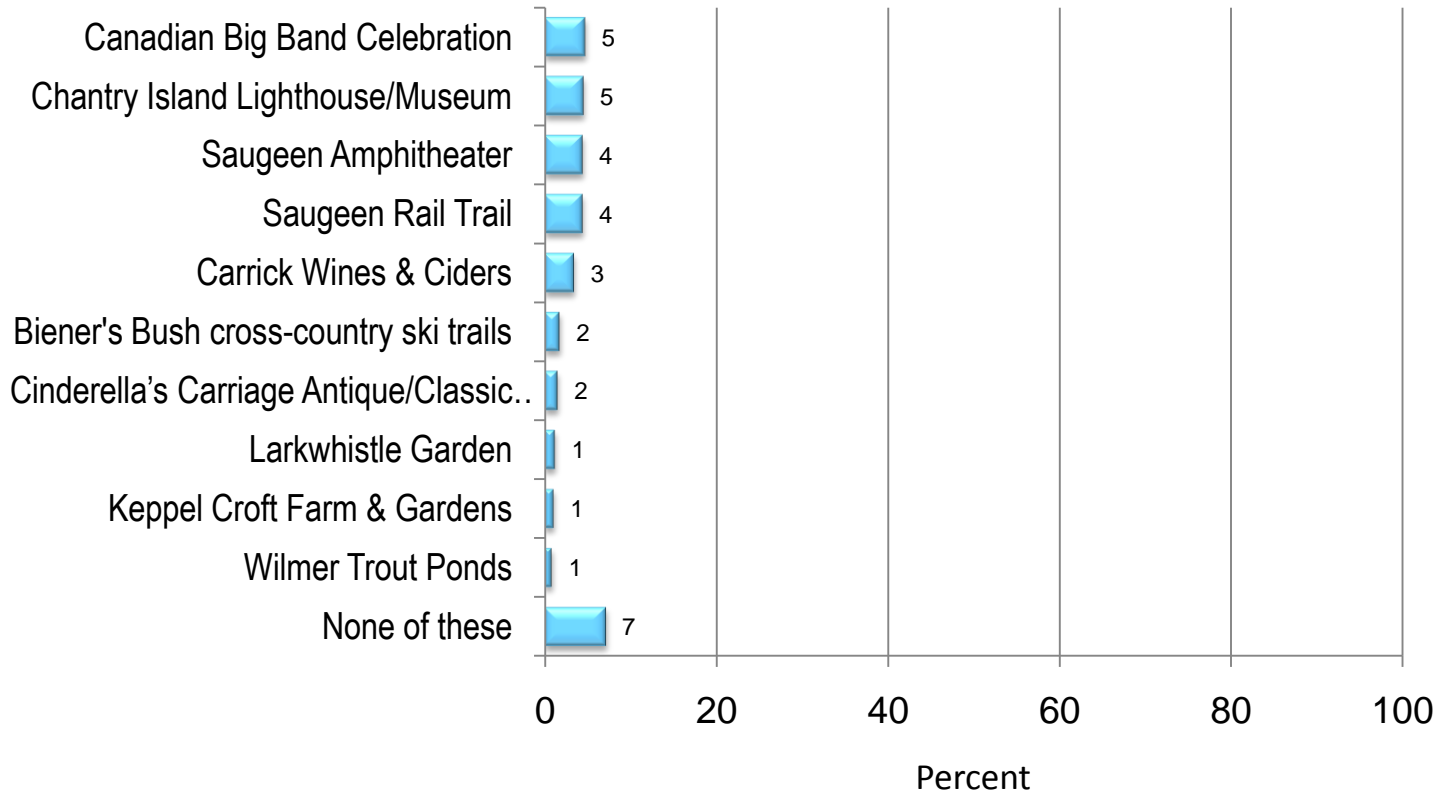
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Bruce County (Cont'd)



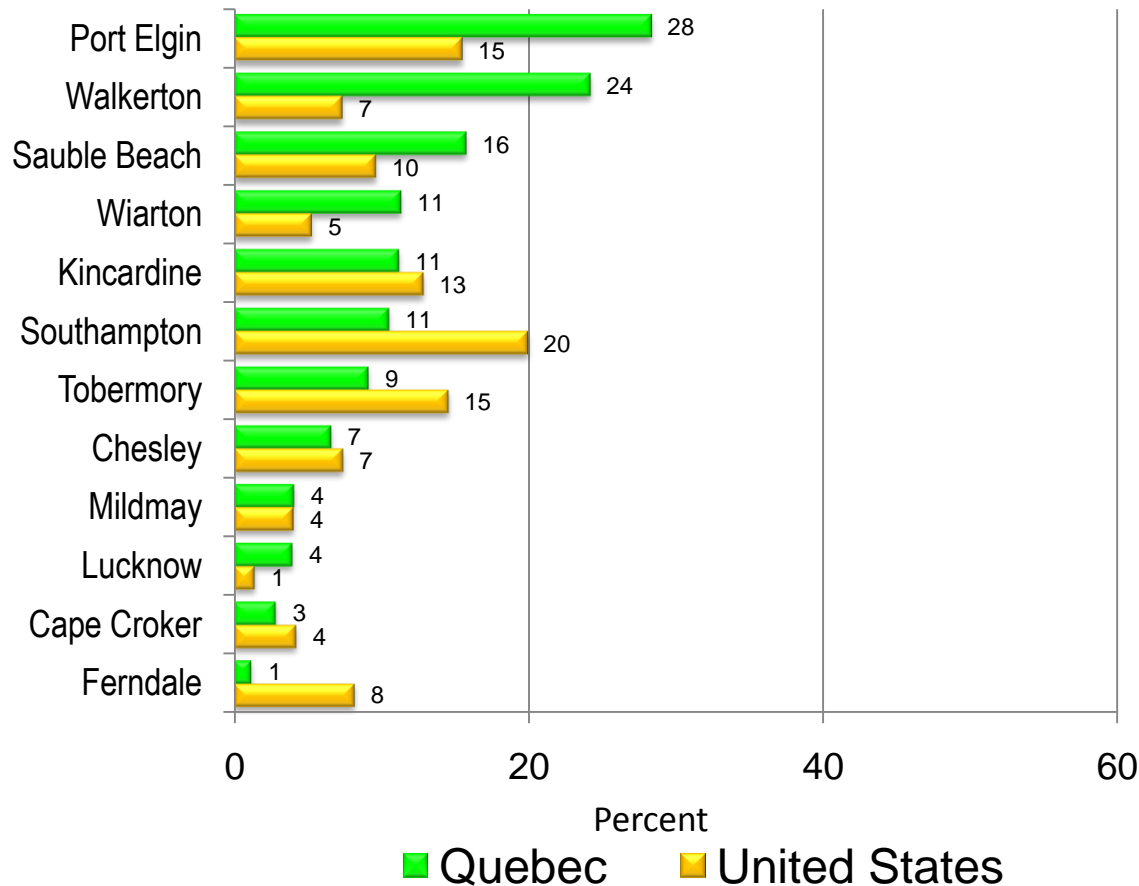
Base: Residents of Ontario



Aided Awareness of Towns/Places in Bruce County



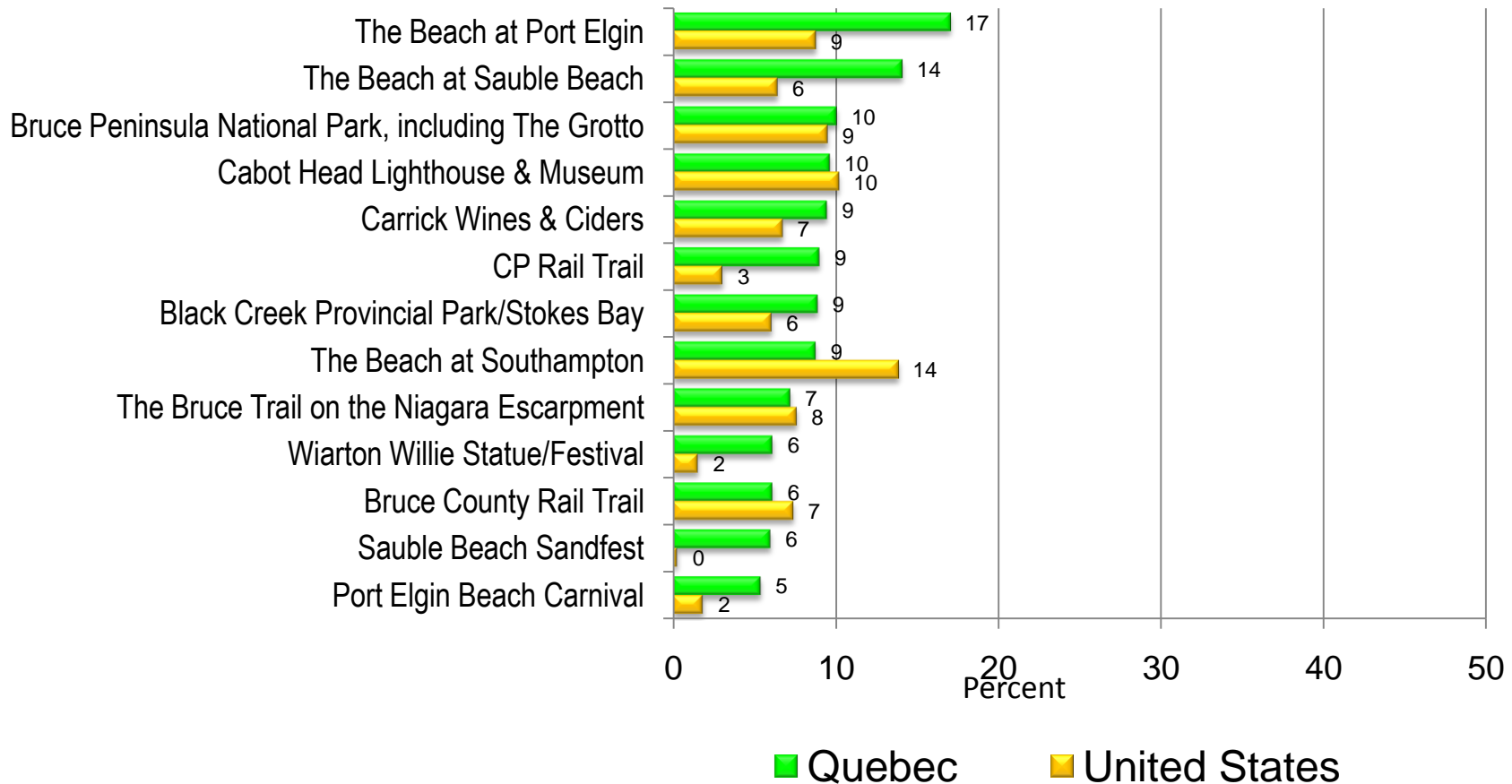
Base: Residents of Quebec/United States



Aided Awareness of Attractions/Events in Bruce County



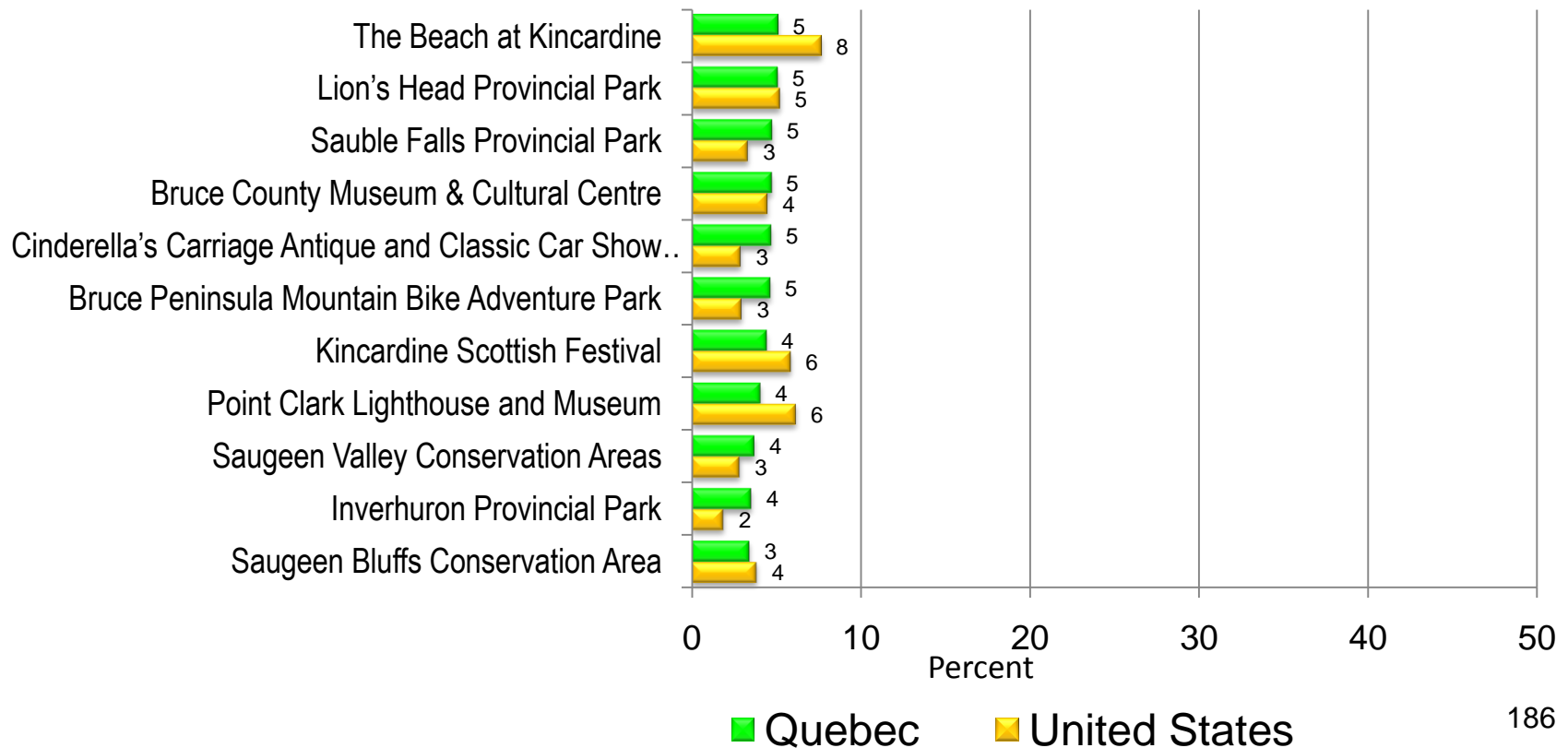
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Aided Awareness of Attractions/Events in Bruce County (Cont'd)



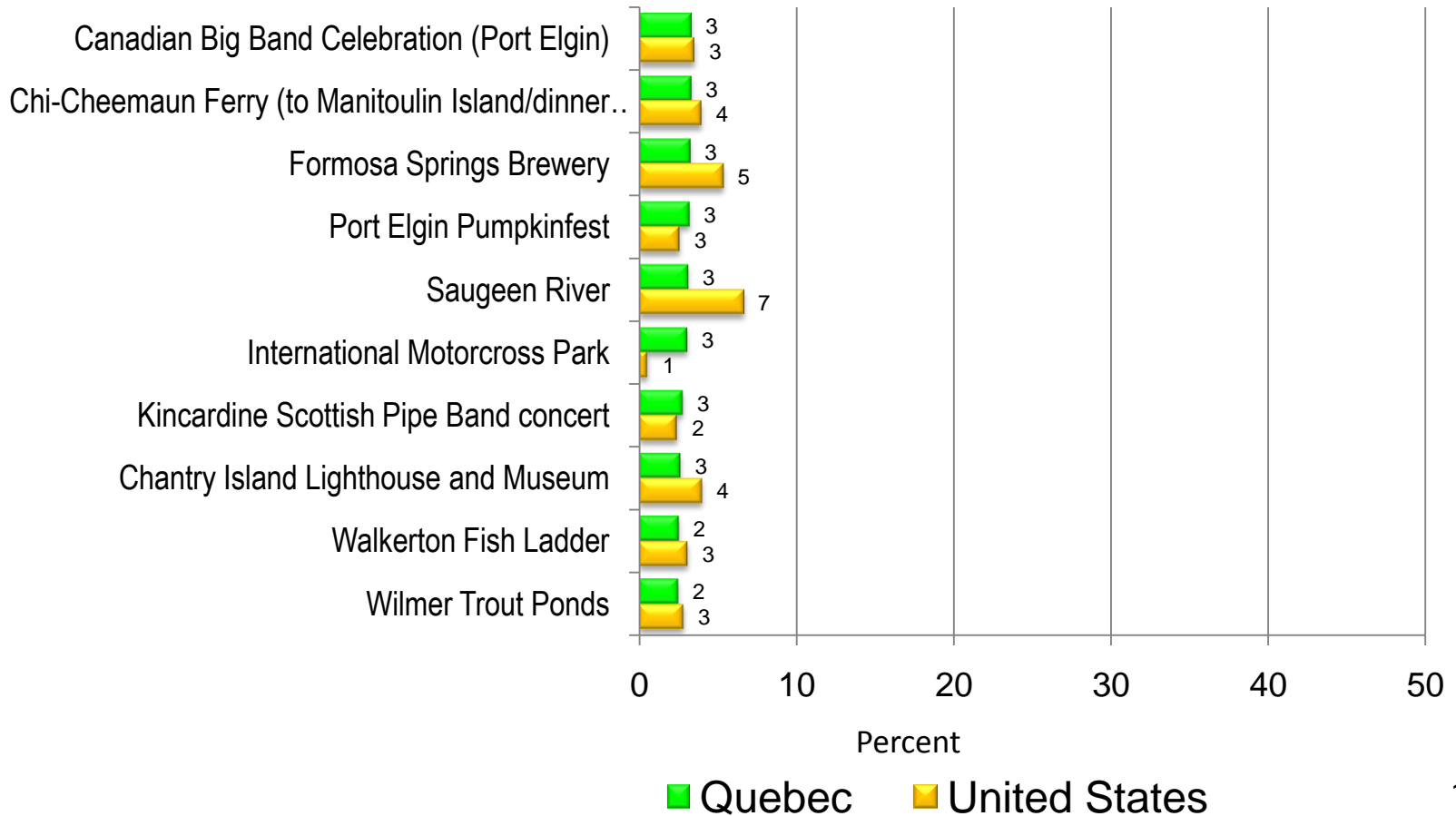
Base: Residents of Quebec/United States



Aided Awareness of Attractions/Events in Bruce County (Cont'd)



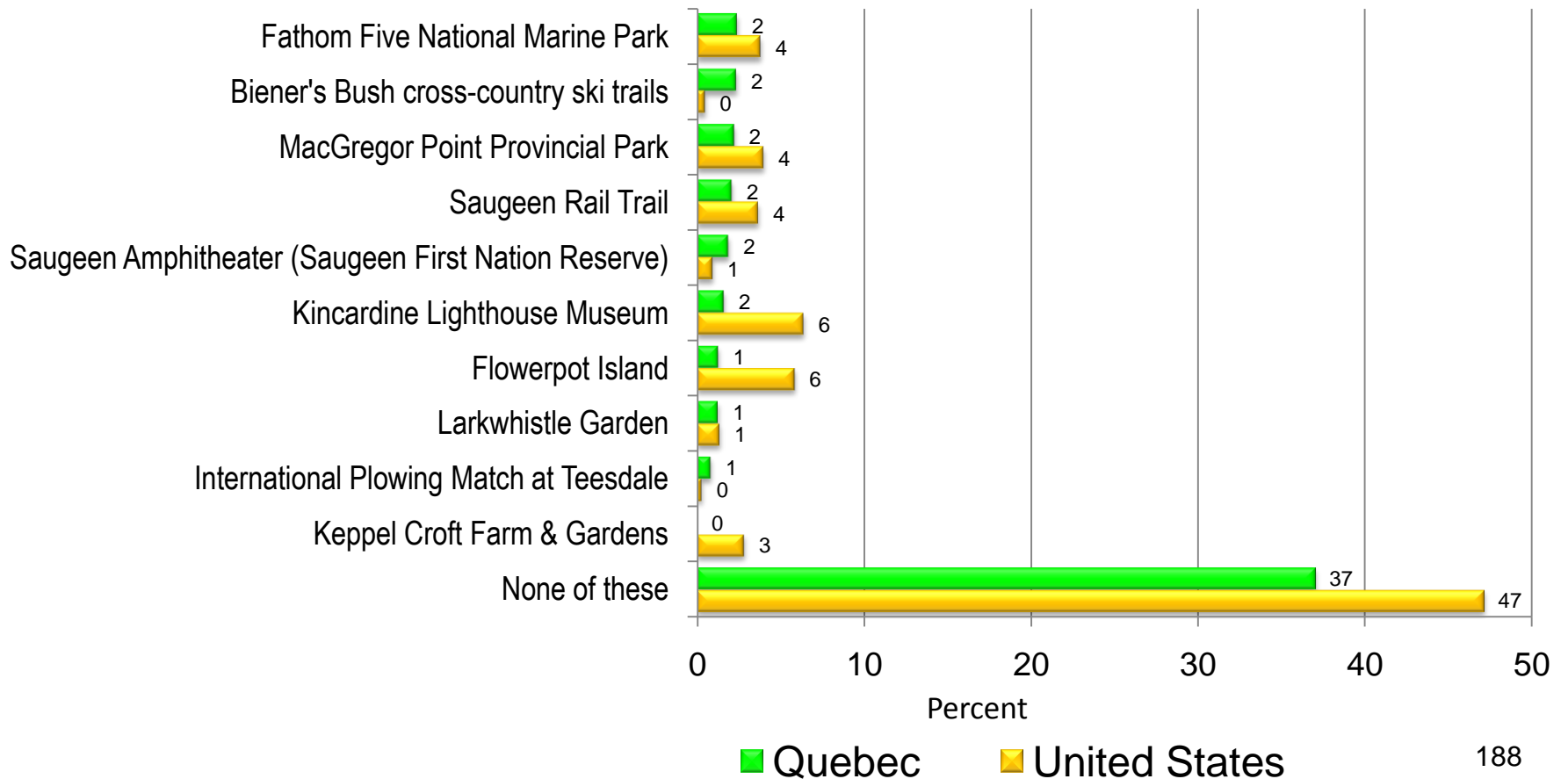
Base: Residents of Quebec/United States



Aided Awareness of Attractions/Events in Bruce County (Cont'd)



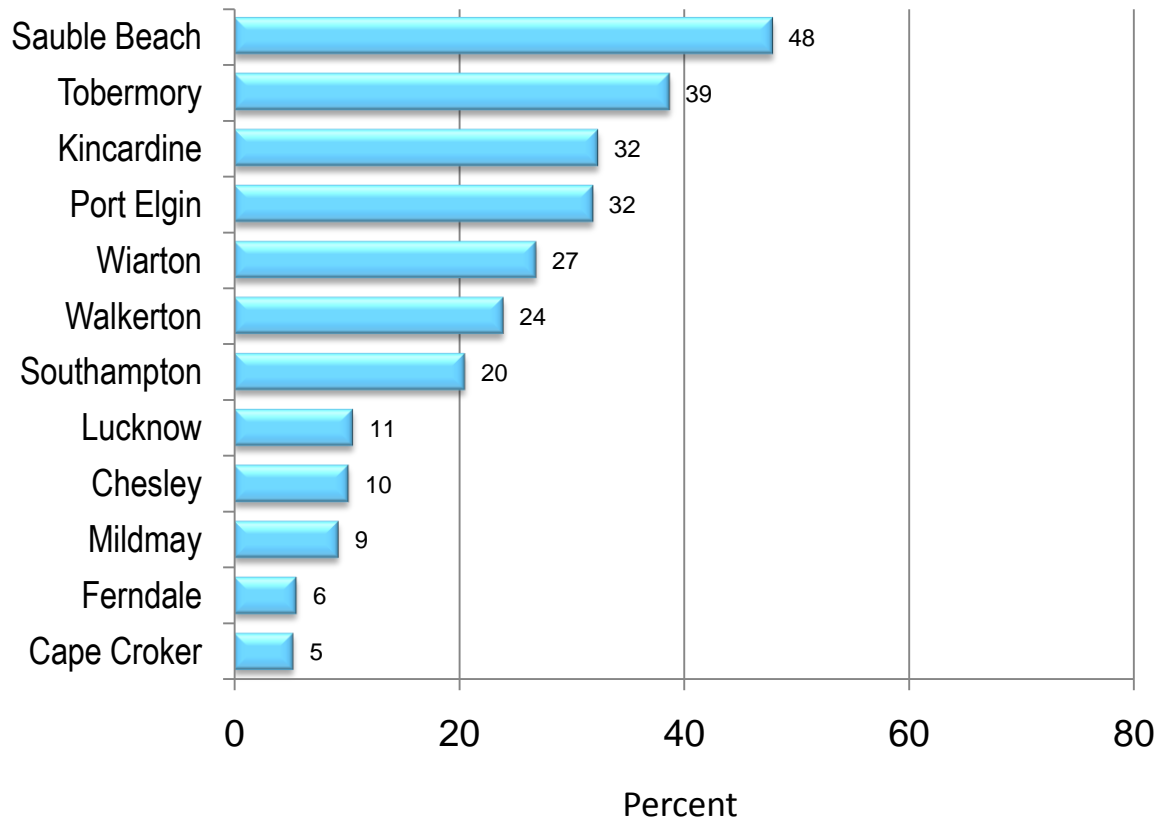
Base: Residents of Quebec/United States



Ever Visited Towns/Places in Bruce County



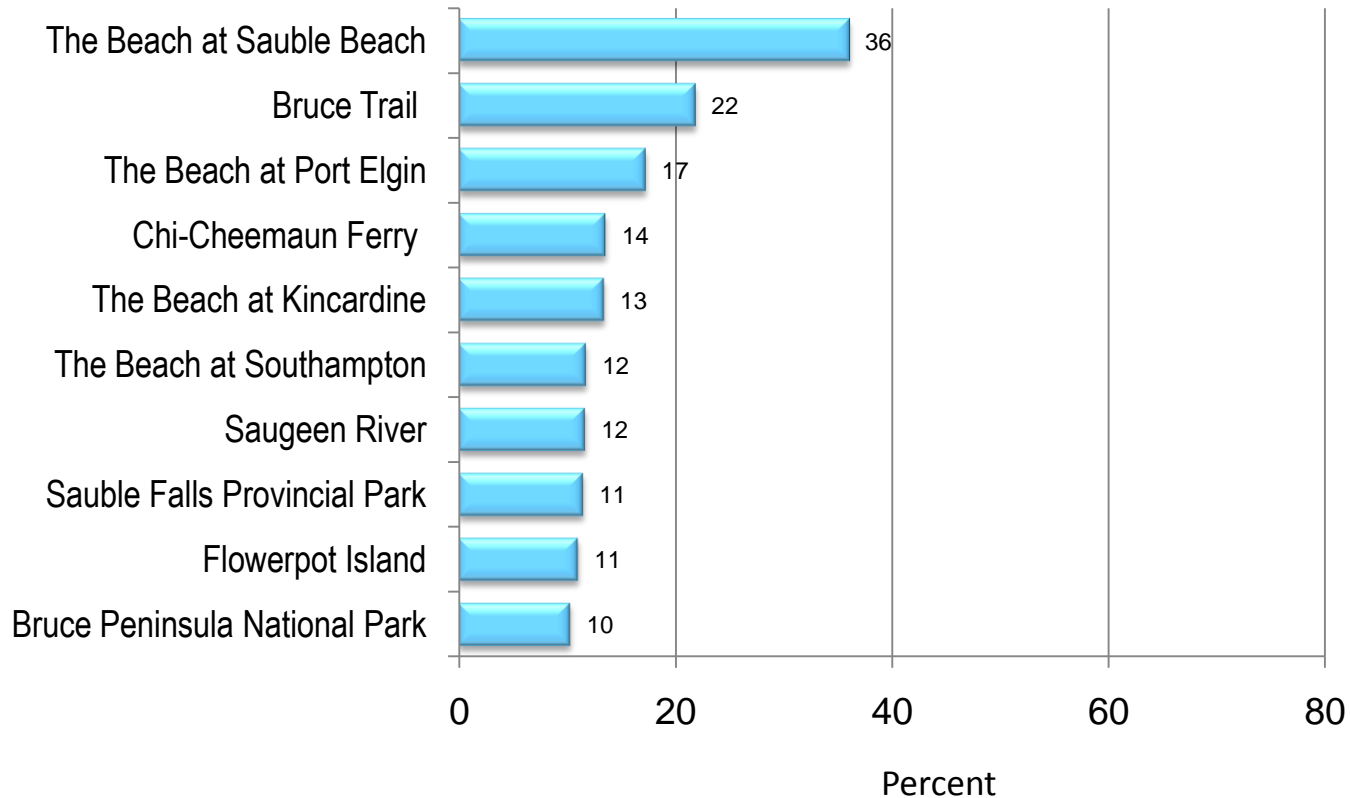
Base: Residents of Ontario



Ever Visited Attractions/Events in Bruce County



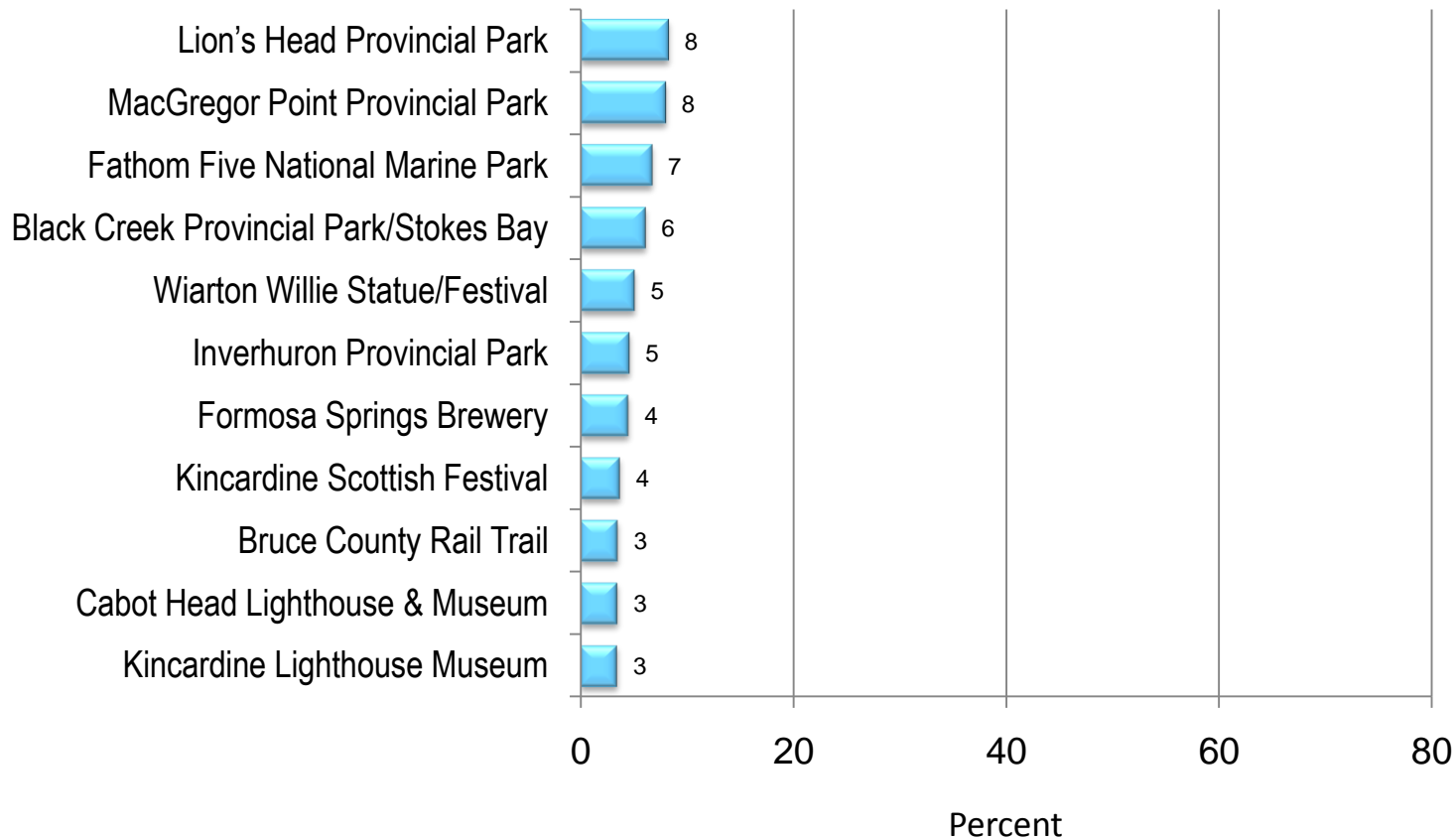
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Ever Visited Attractions/Events in Bruce County (Cont'd)



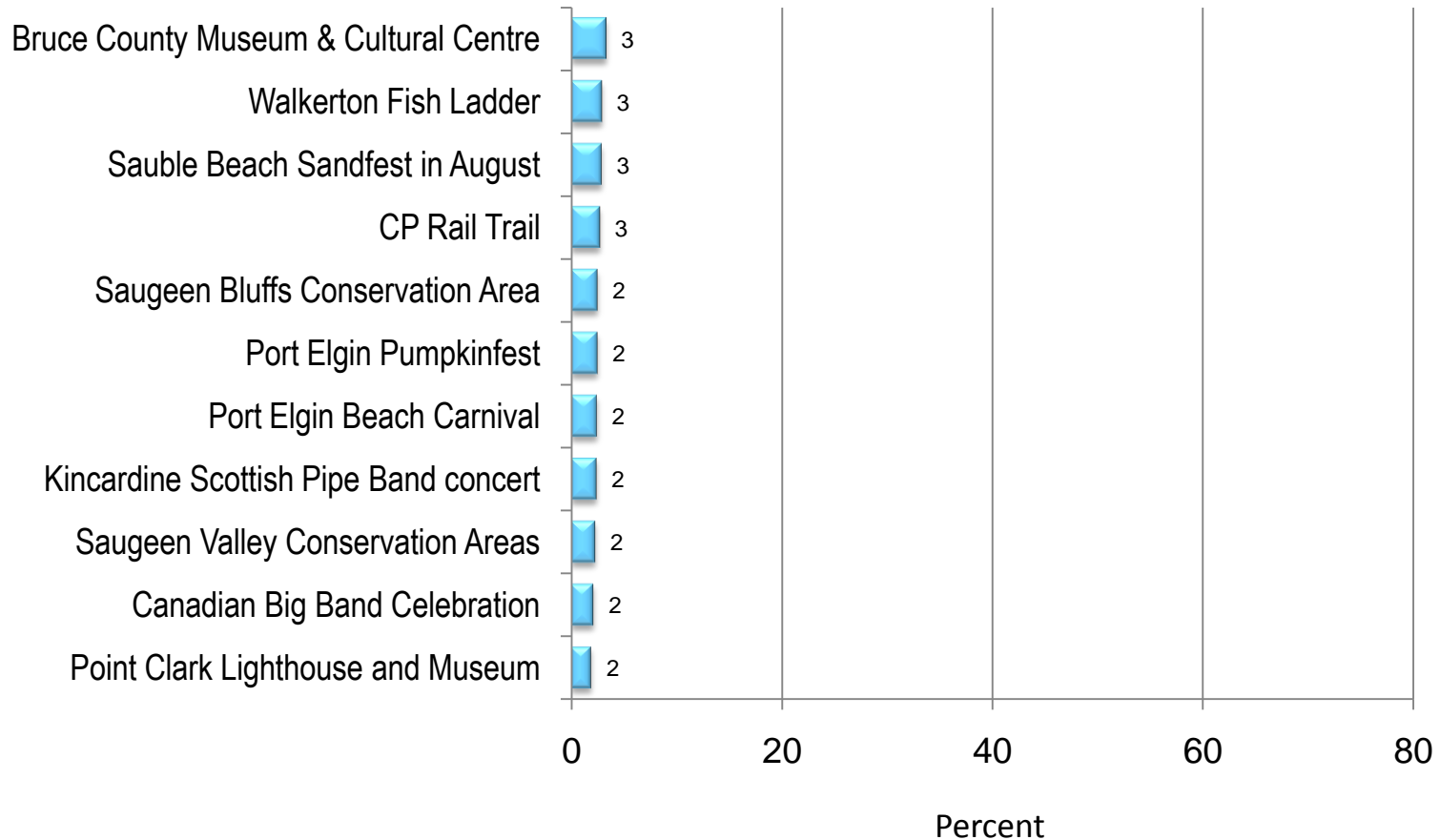
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Ever Visited Attractions/Events in Bruce County (Cont'd)



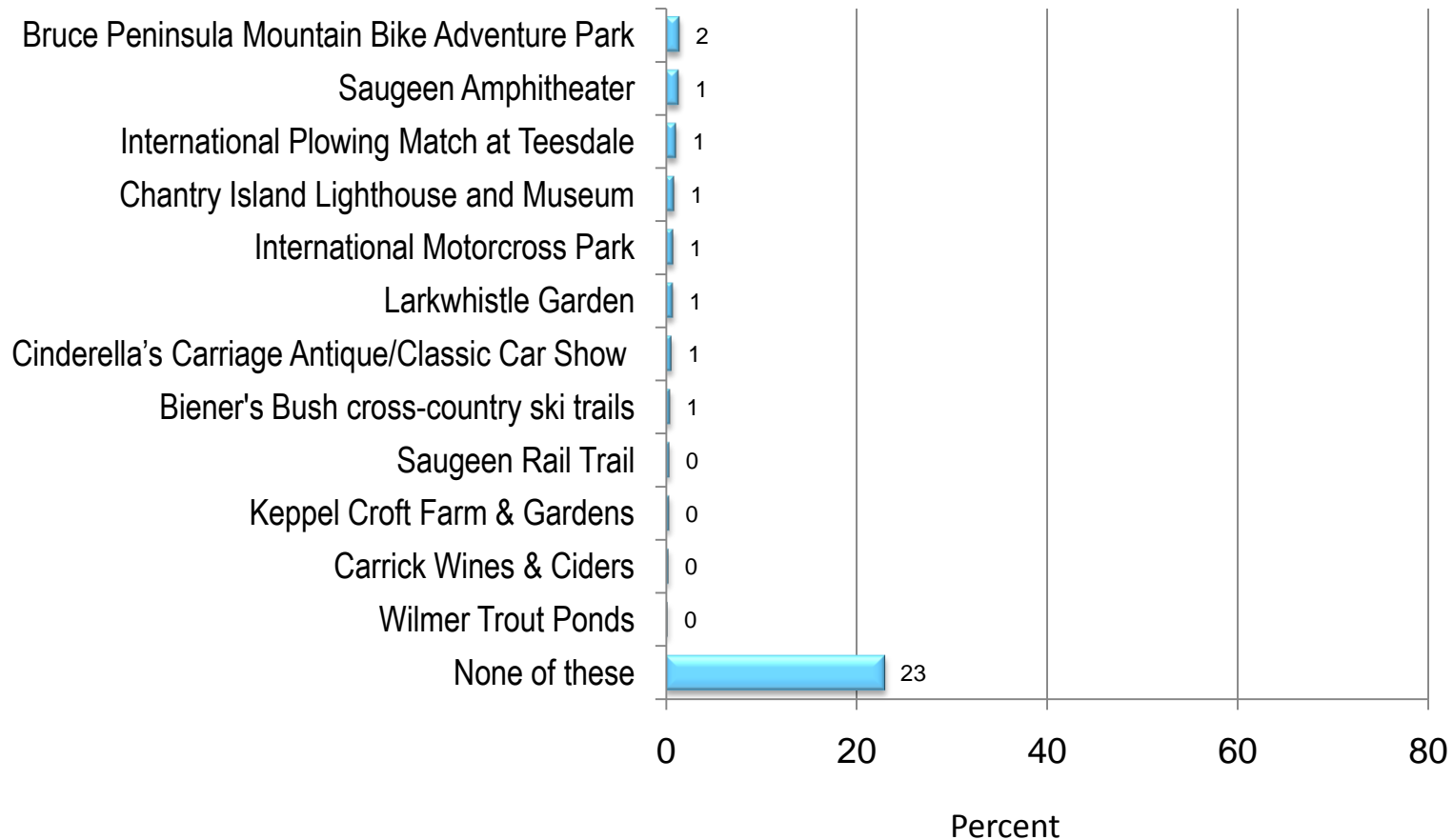
Base: Residents of Ontario



Ever Visited Attractions/Events in Bruce County (Cont'd)



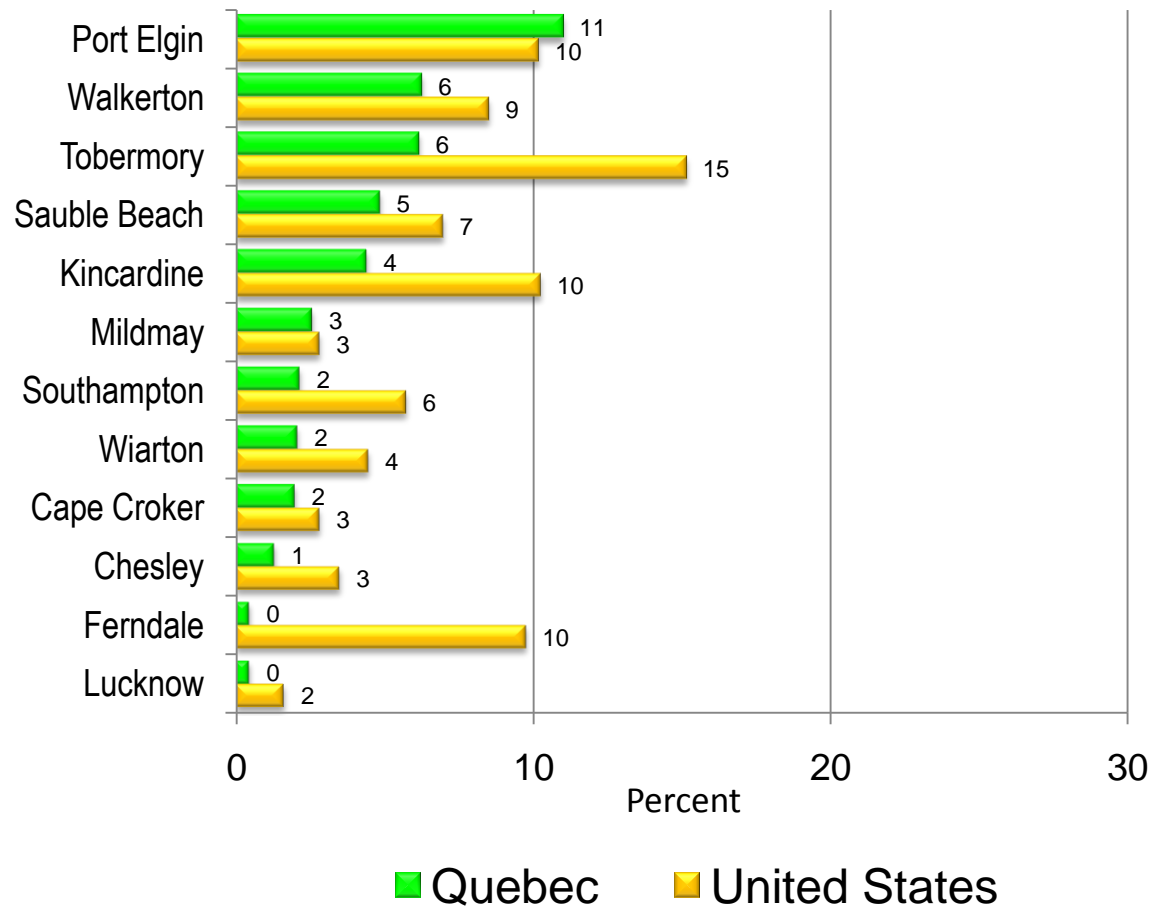
Base: Residents of Ontario



Ever Visited Towns/Places in Bruce County



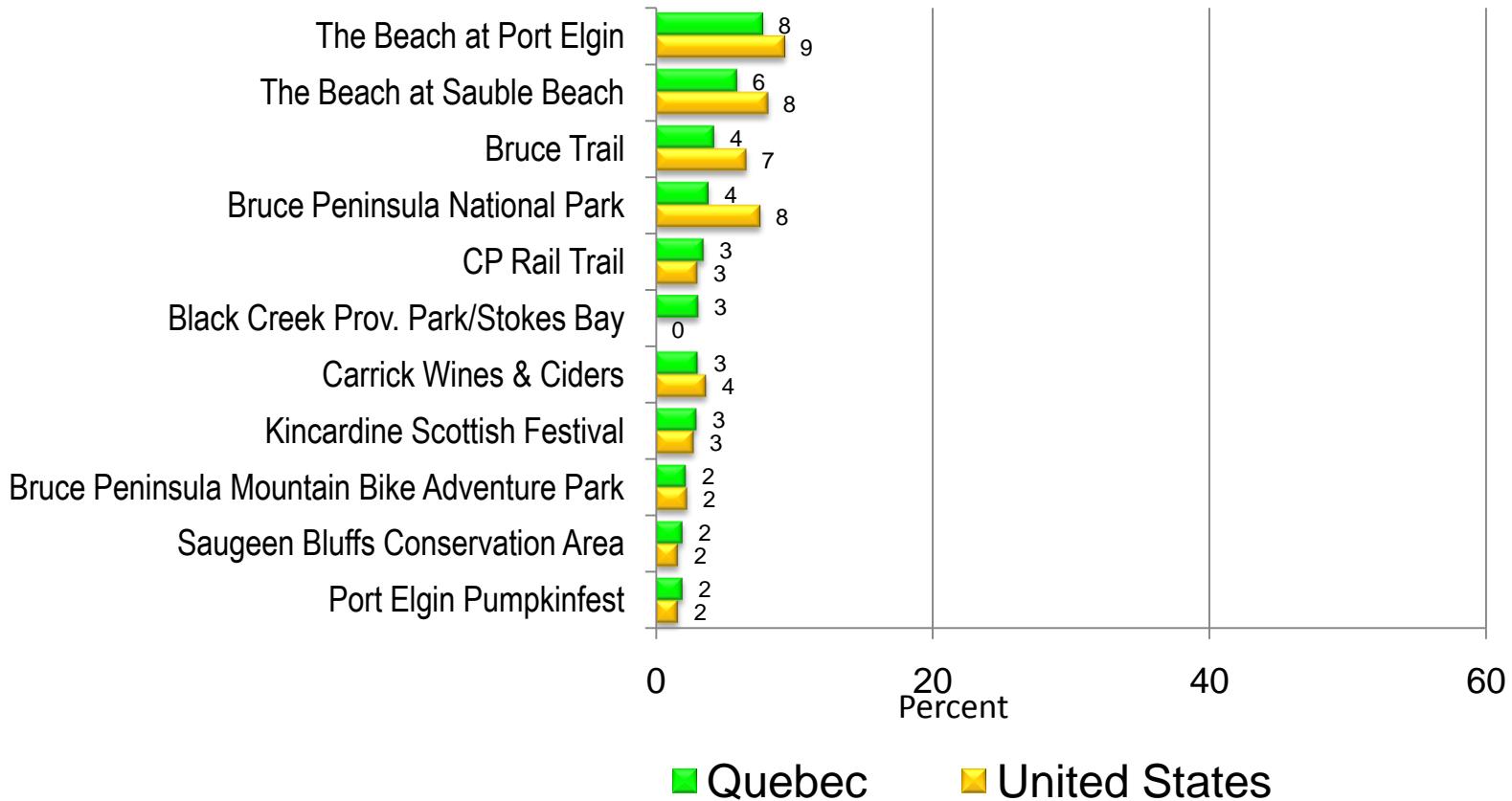
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Ever Visited Attractions/Events in Bruce County



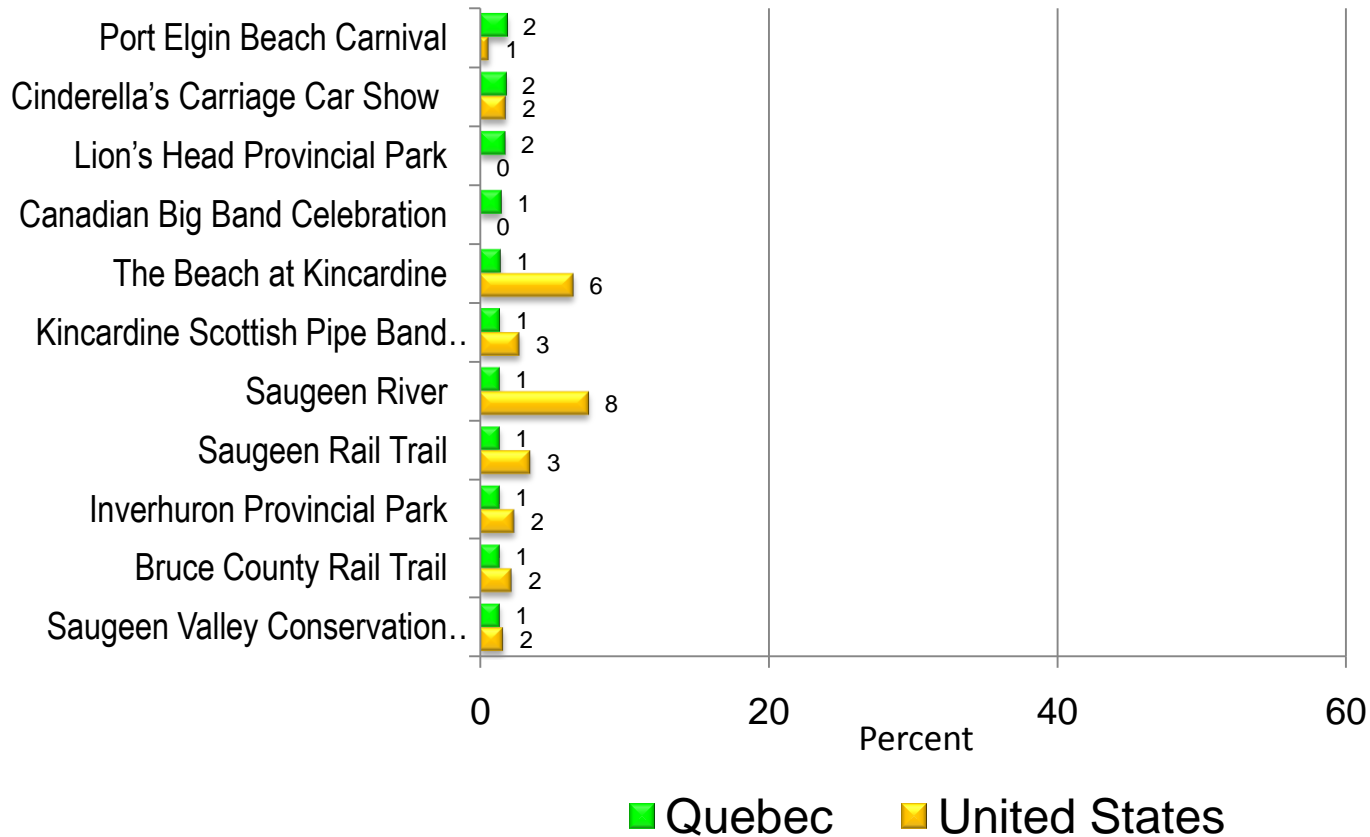
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Ever Visited Attractions/Events in Bruce County (Cont'd)



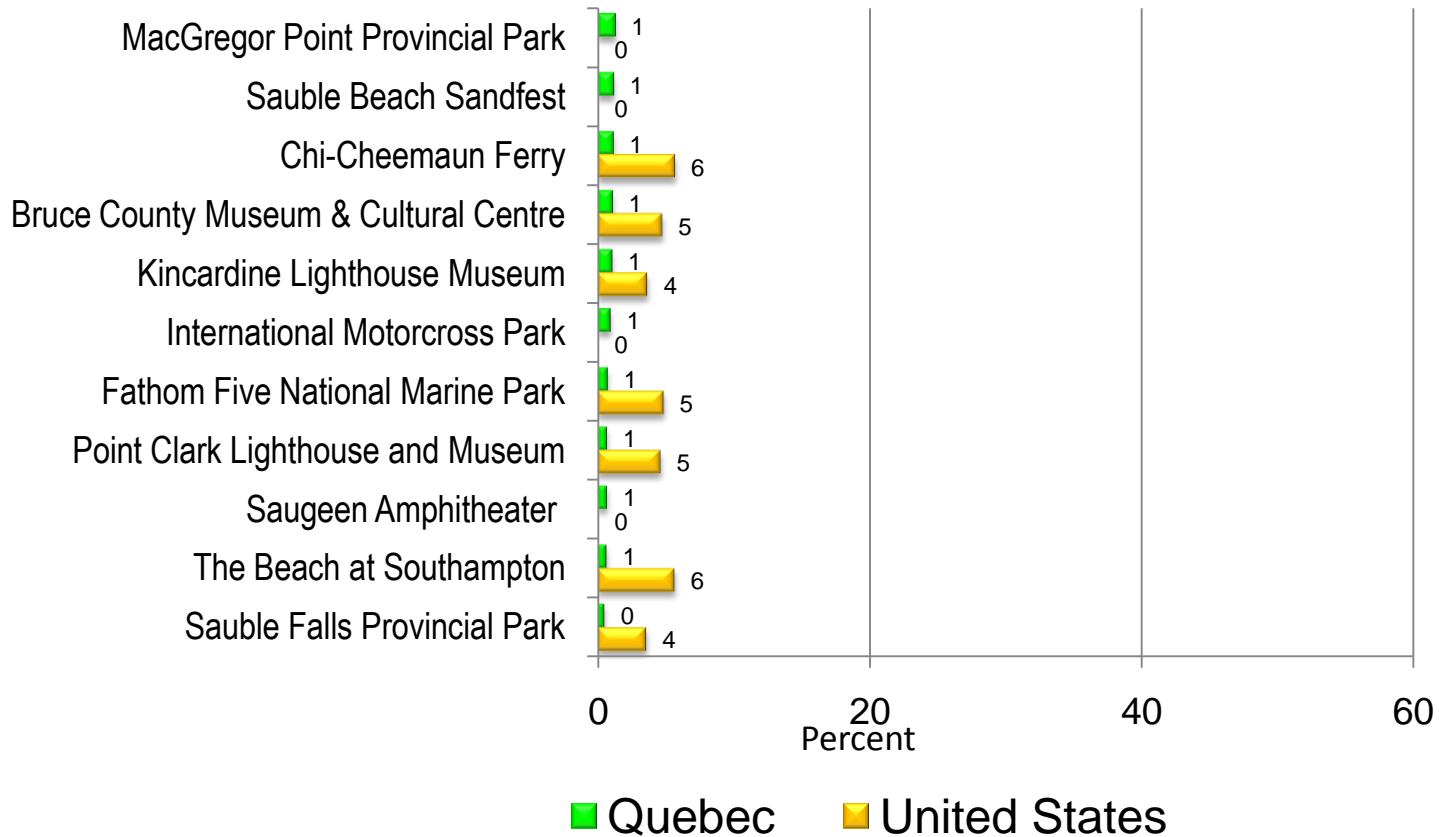
Base: Residents of Quebec/United States



Ever Visited Attractions/Events in Bruce County (Cont'd)



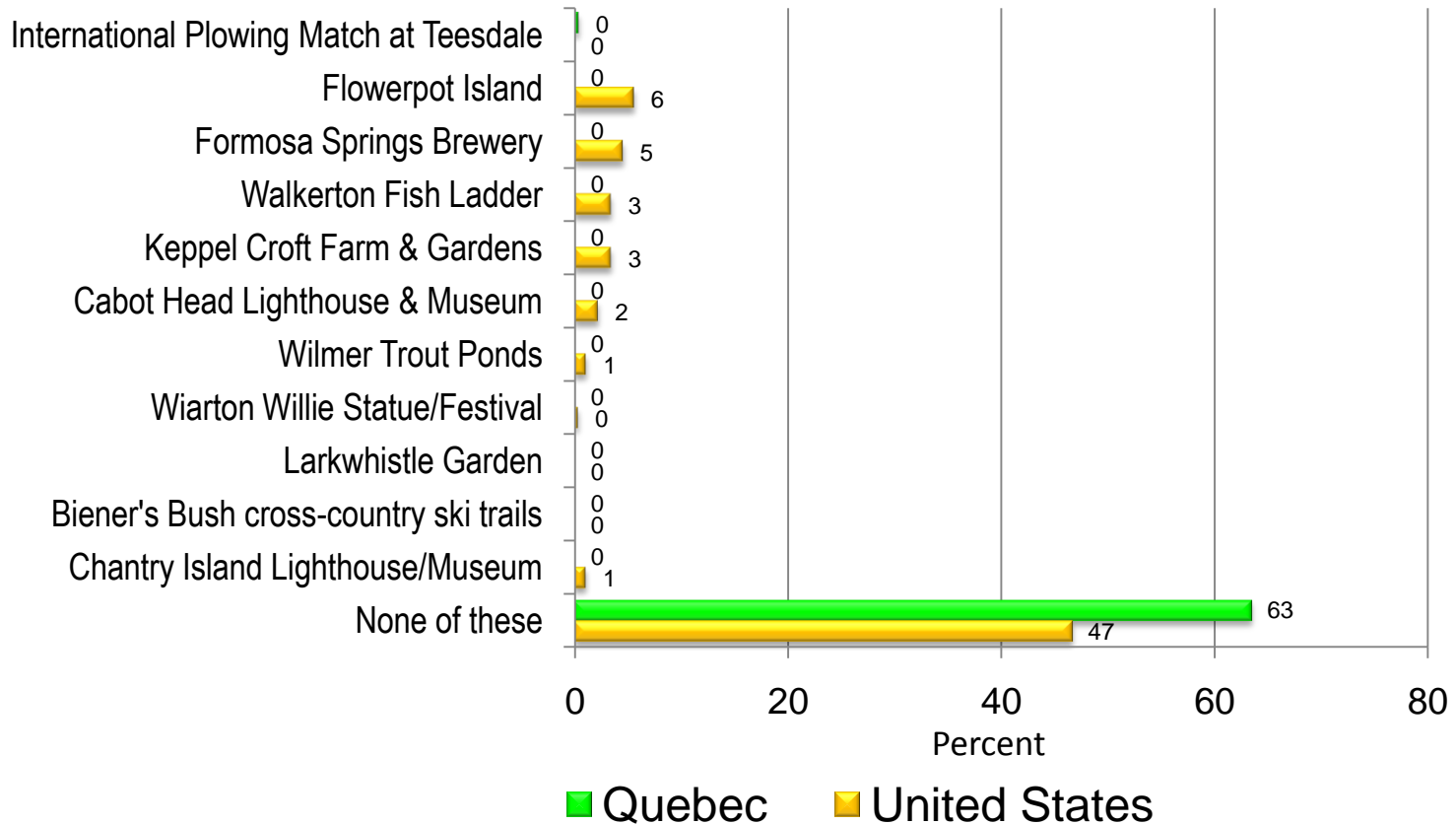
Base: Residents of Quebec/United States



Ever Visited Attractions/Events in Bruce County (Cont'd)



Base: Residents of Quebec/United States

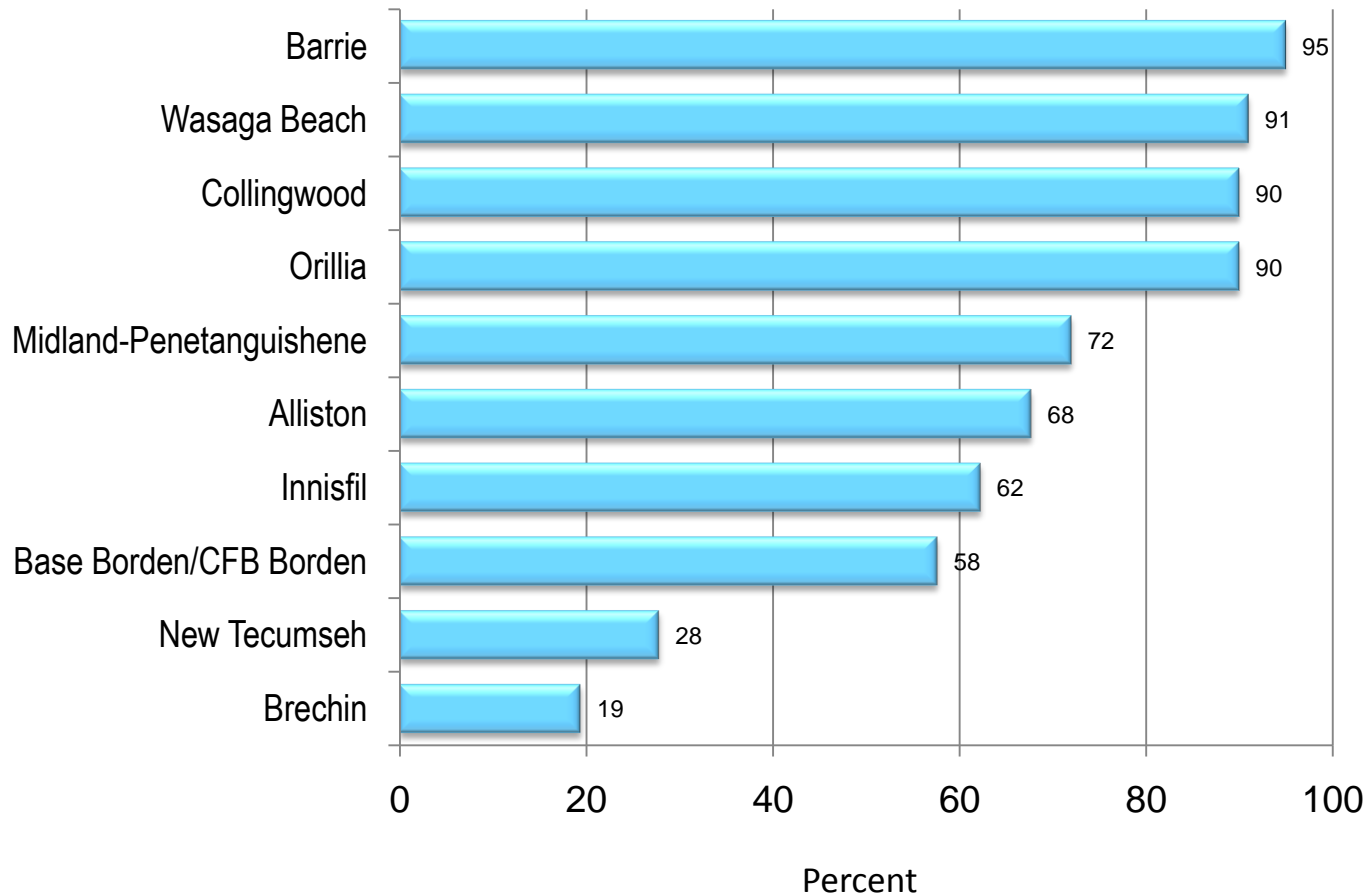


Awareness/Experience
with Simcoe County
Places/Attractions

Aided Awareness of Towns/Places in Simcoe County



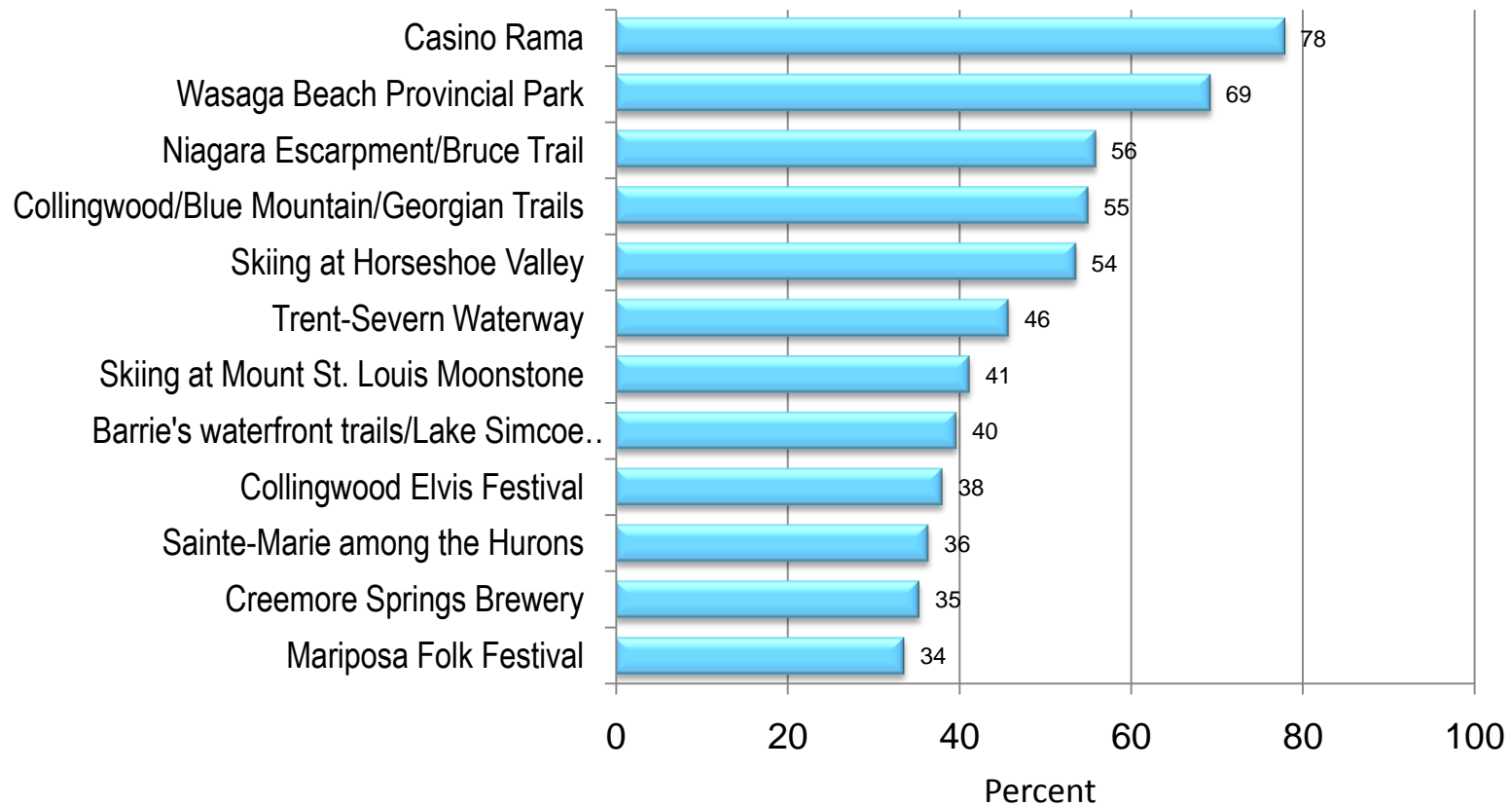
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Simcoe County



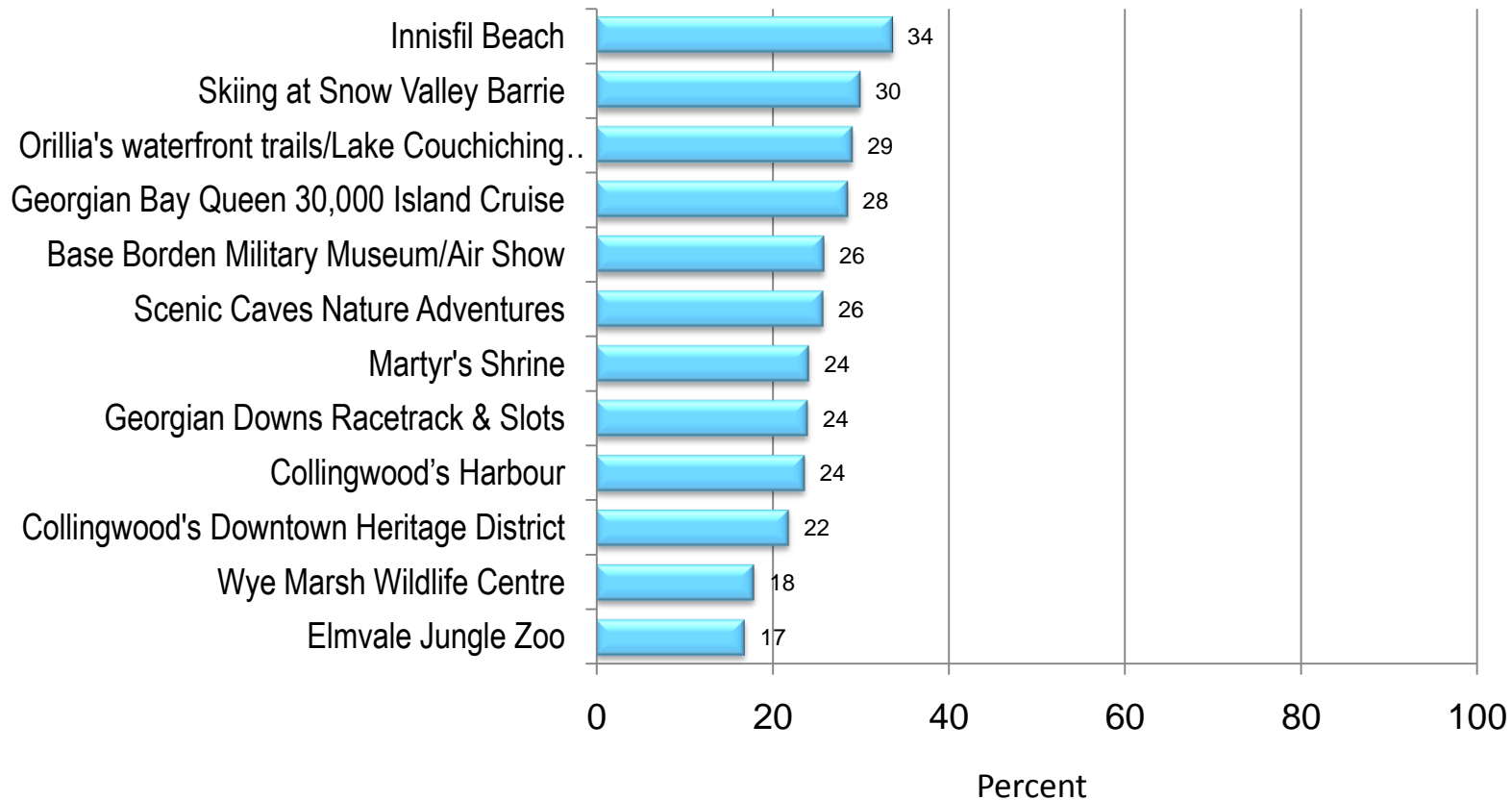
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Simcoe County (Cont'd)



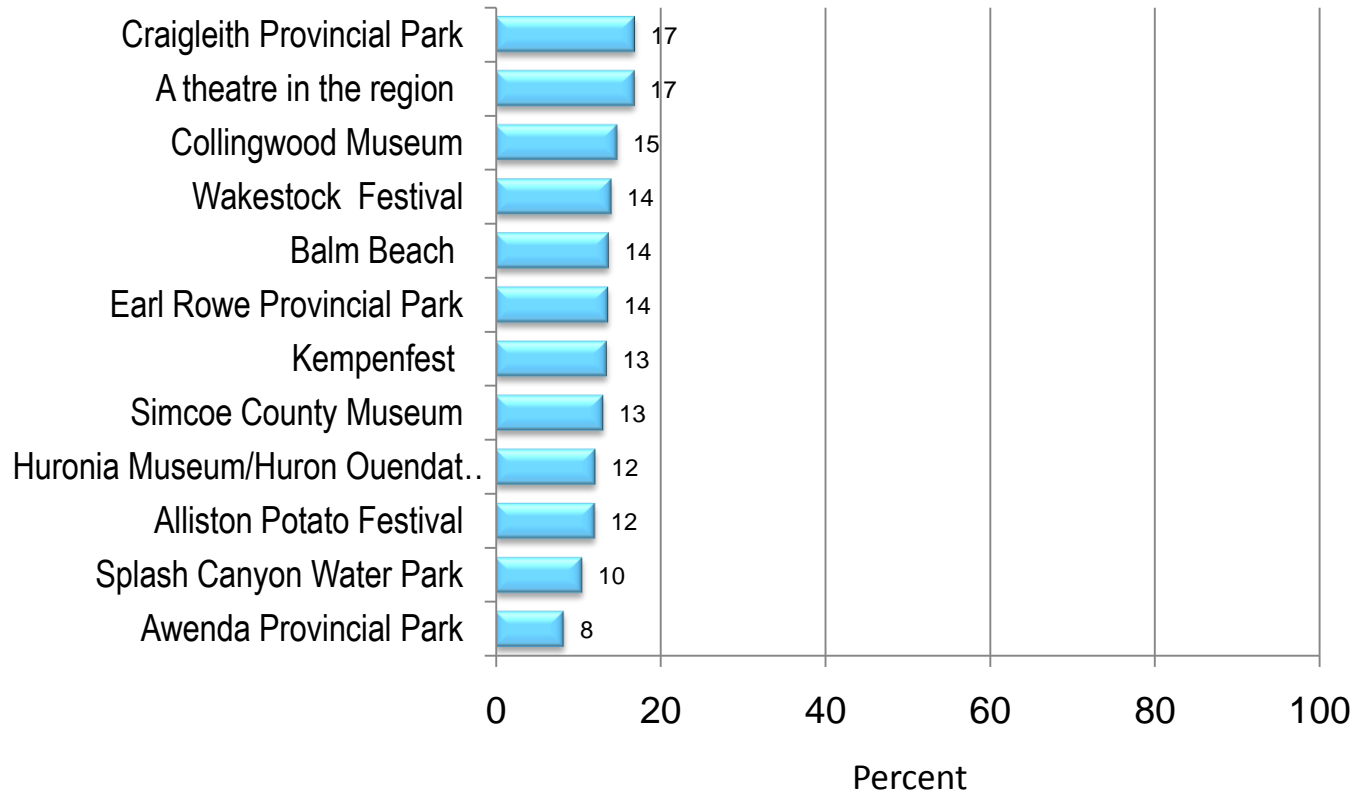
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Simcoe County (Cont'd)



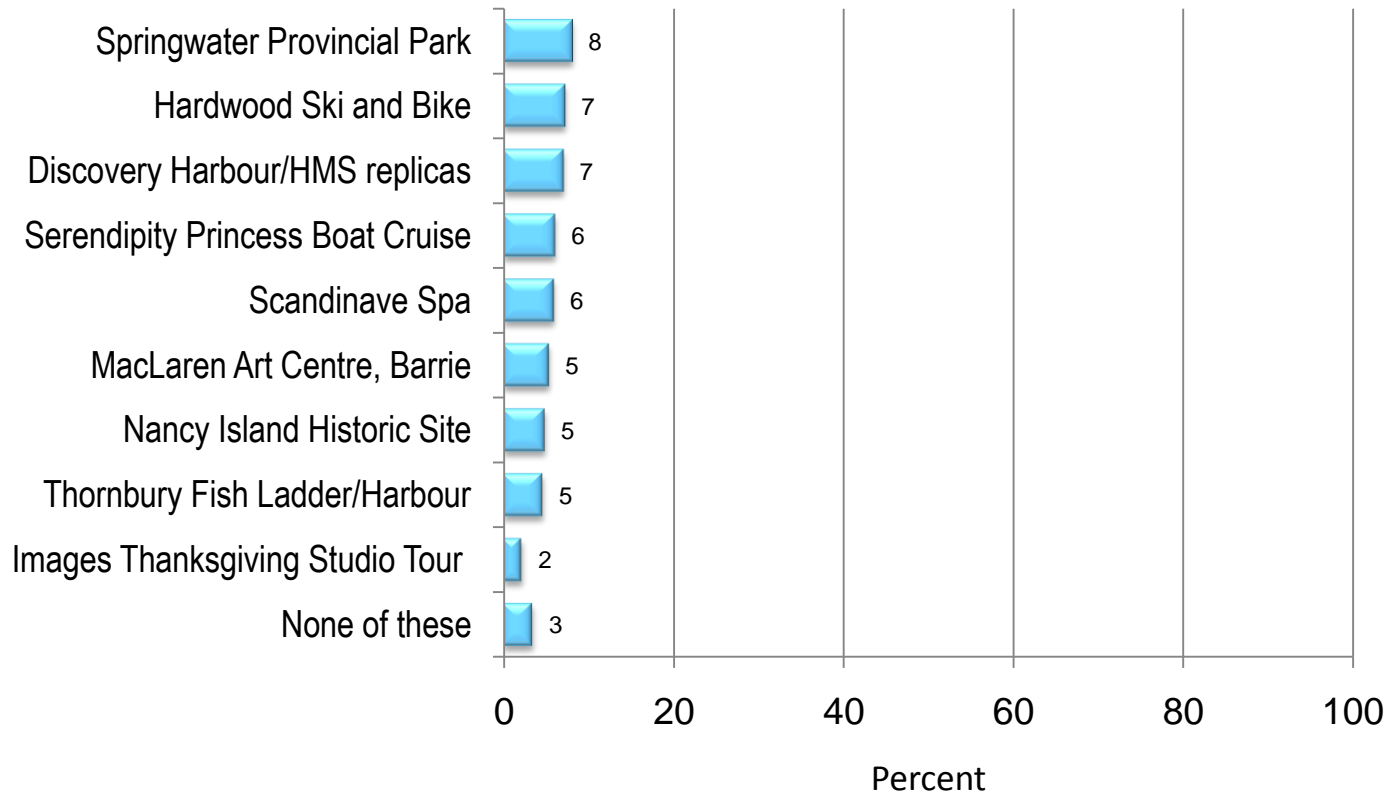
Base: Residents of Ontario



Aided Awareness of Attractions/Events in Simcoe County (Cont'd)



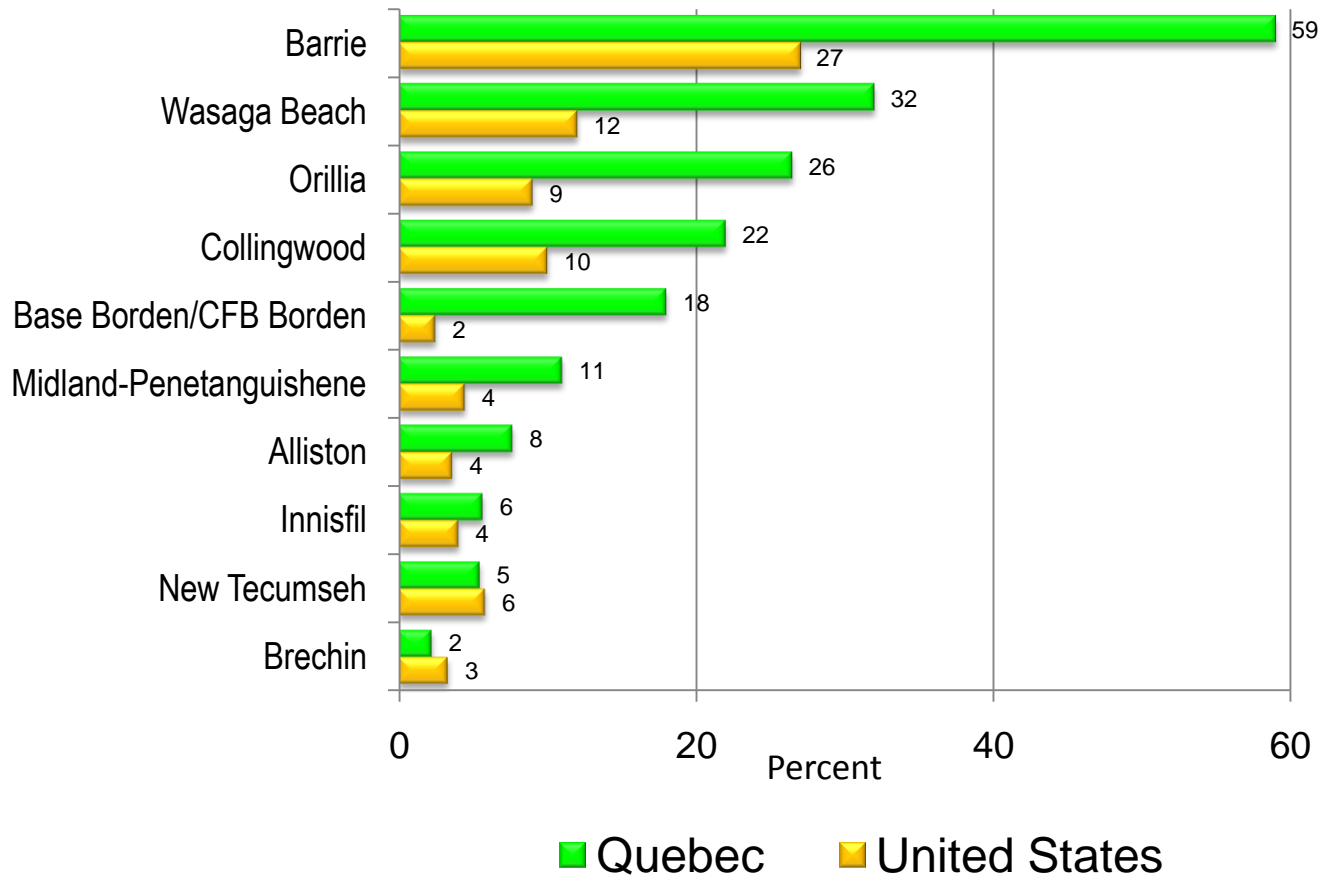
Base: Residents of Ontario



Aided Awareness of Towns/Places in Simcoe County



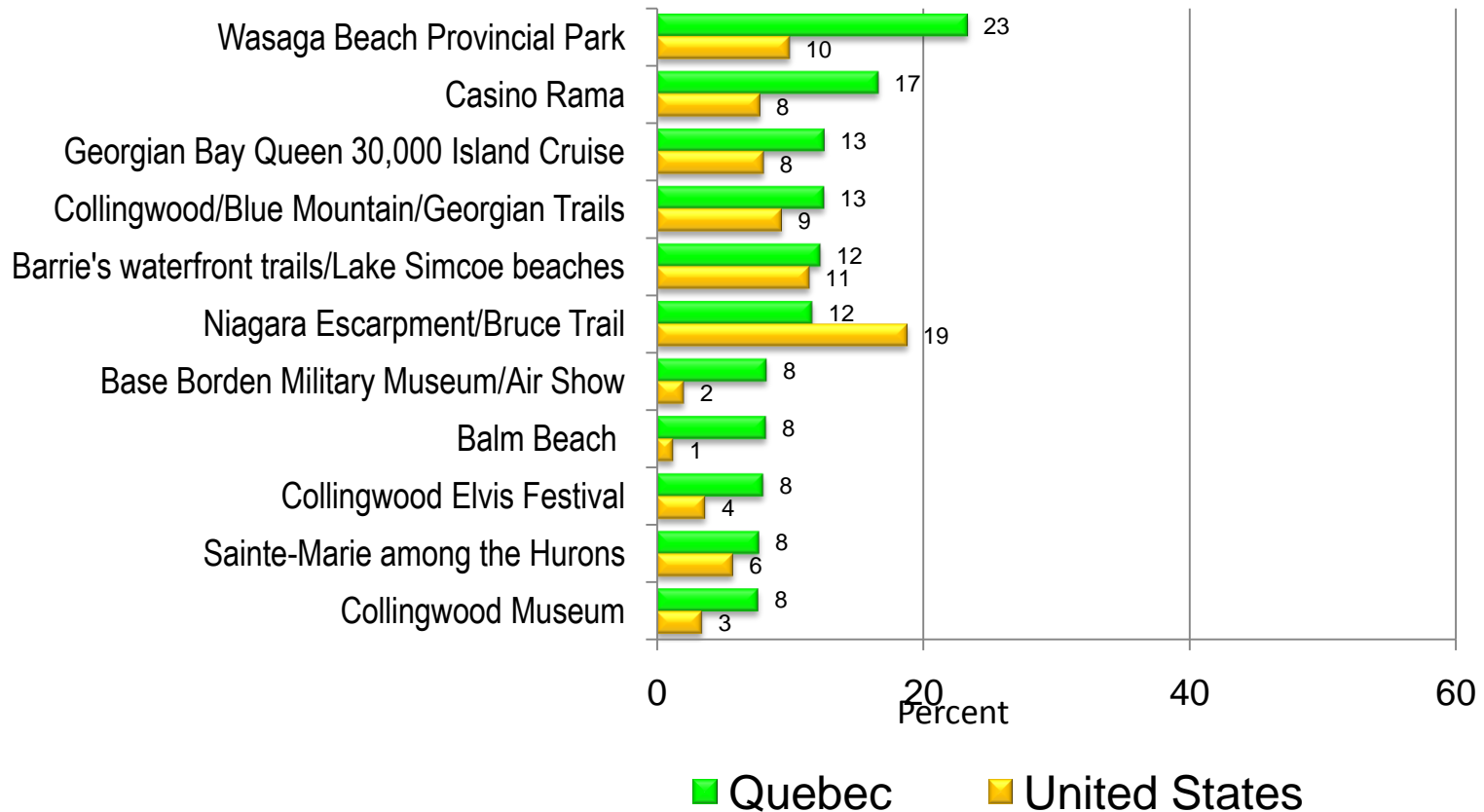
Base: Residents of Quebec/United States



Aided Awareness of Attractions/Events in Simcoe County



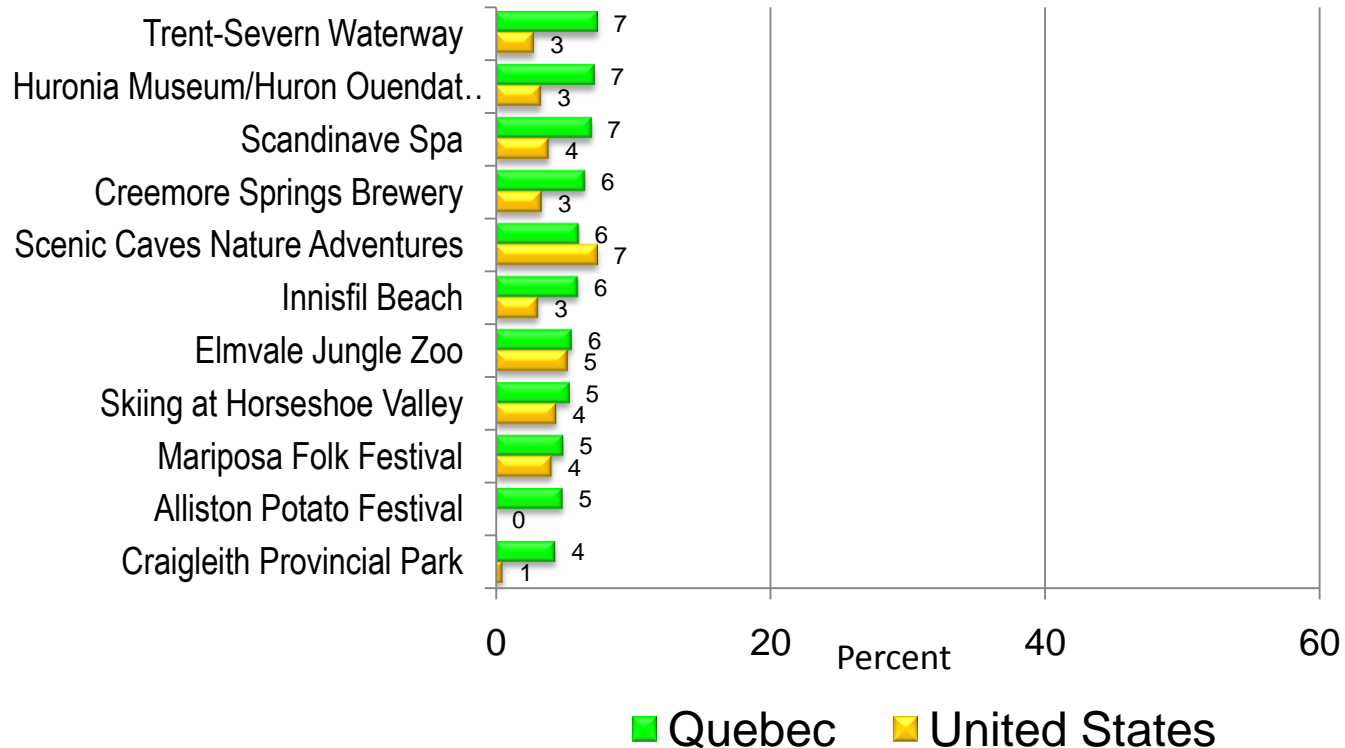
Base: Residents of Quebec/United States



Aided Awareness of Attractions/Events in Simcoe County (Cont'd)



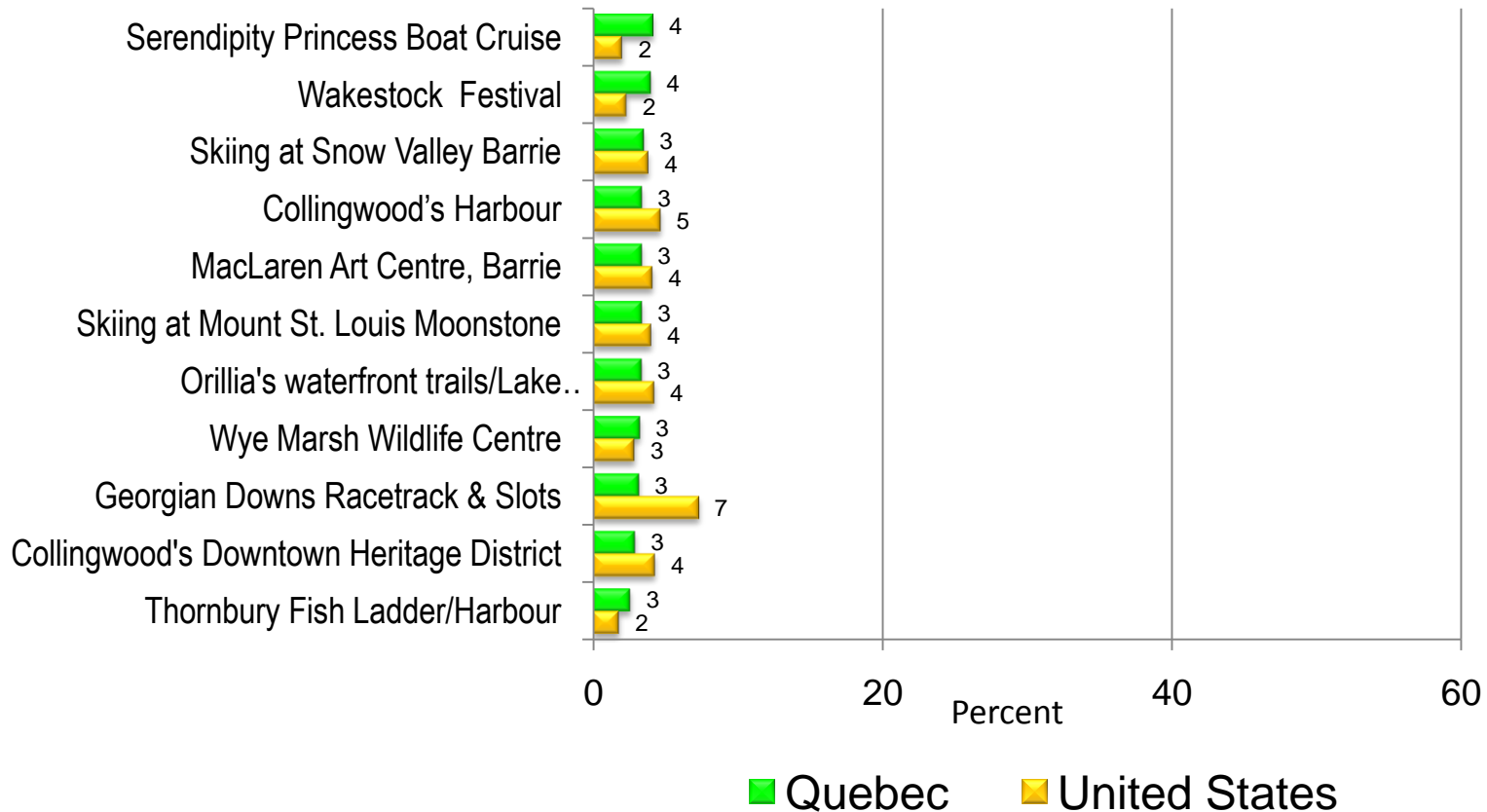
Base: Residents of Quebec/United States



Aided Awareness of Attractions/Events in Simcoe County (Cont'd)



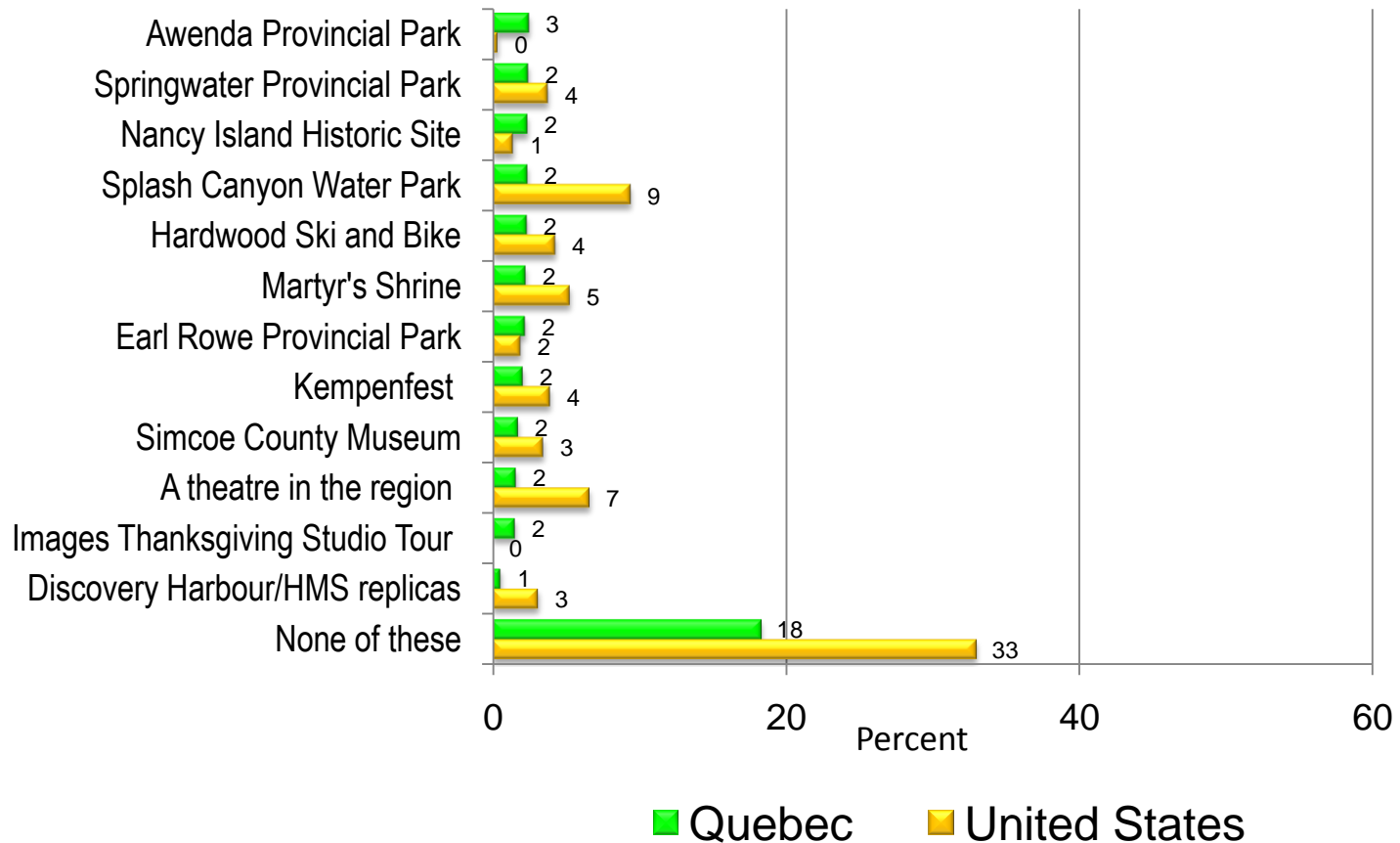
Base: Residents of Quebec/United States



Aided Awareness of Attractions/Events in Simcoe County (Cont'd)



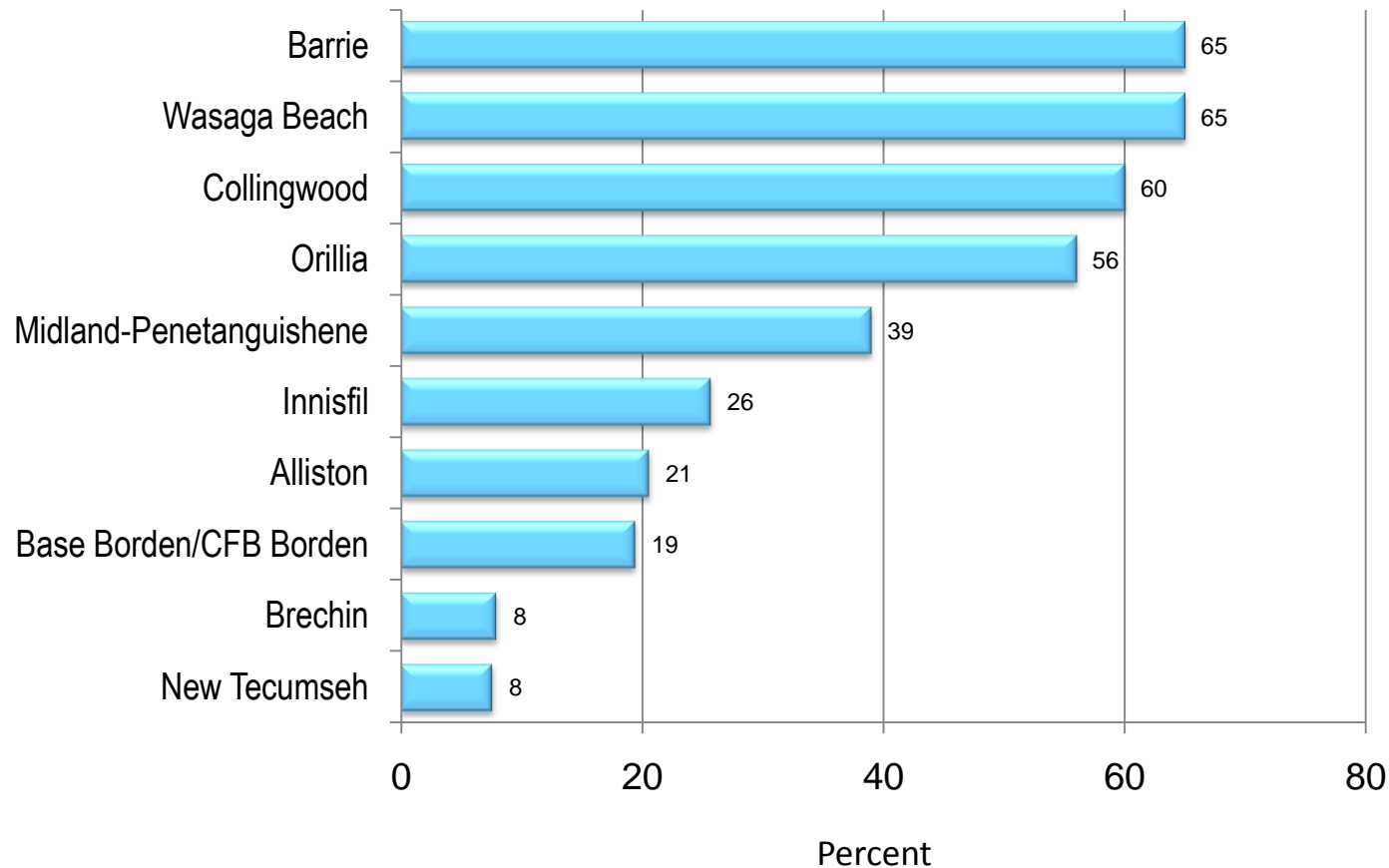
Base: Residents of Quebec/United States



Ever Visited Towns/Places in Simcoe County



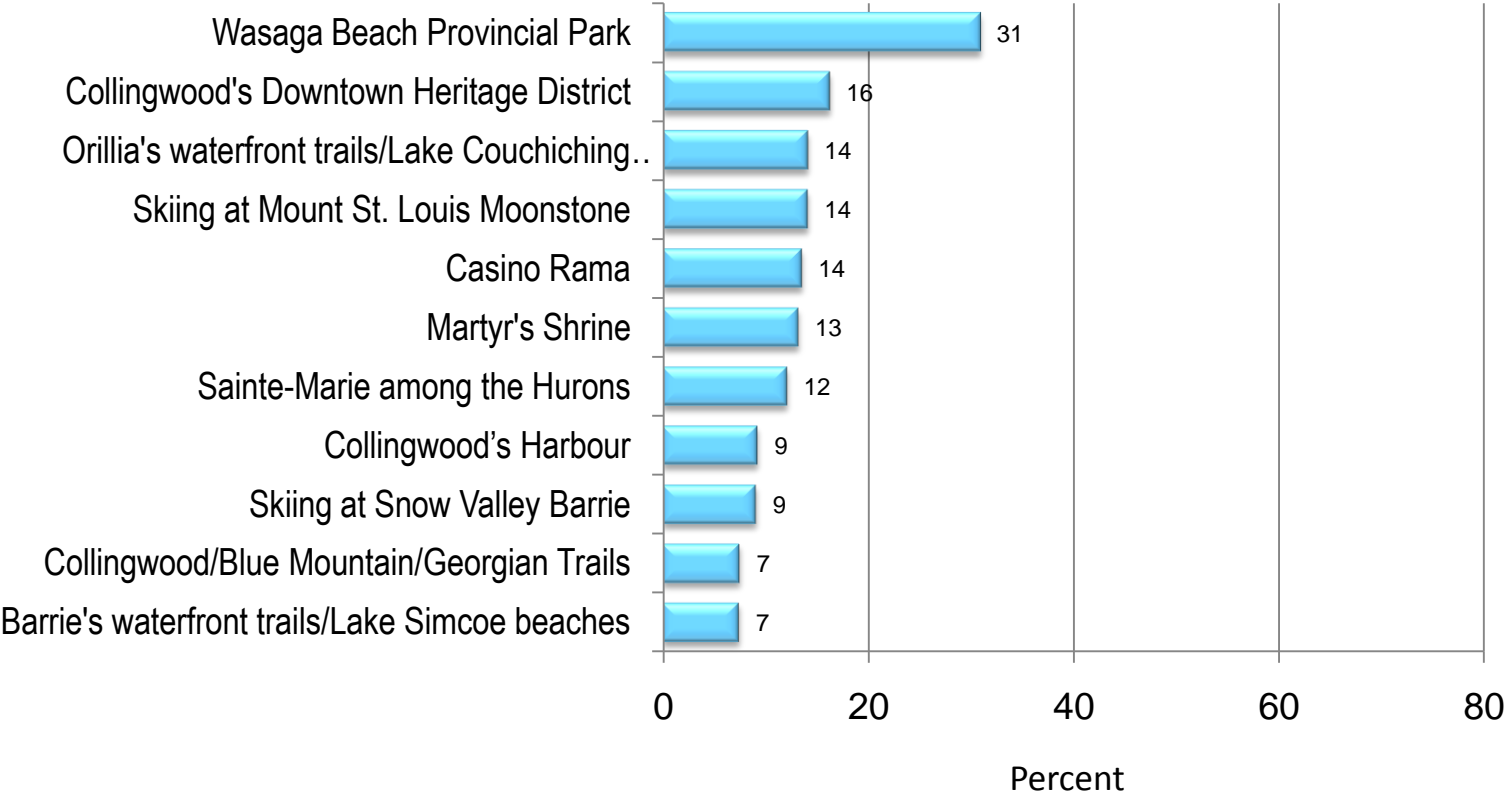
Base: Residents of Ontario



Ever Visited Attractions/Events in Simcoe County



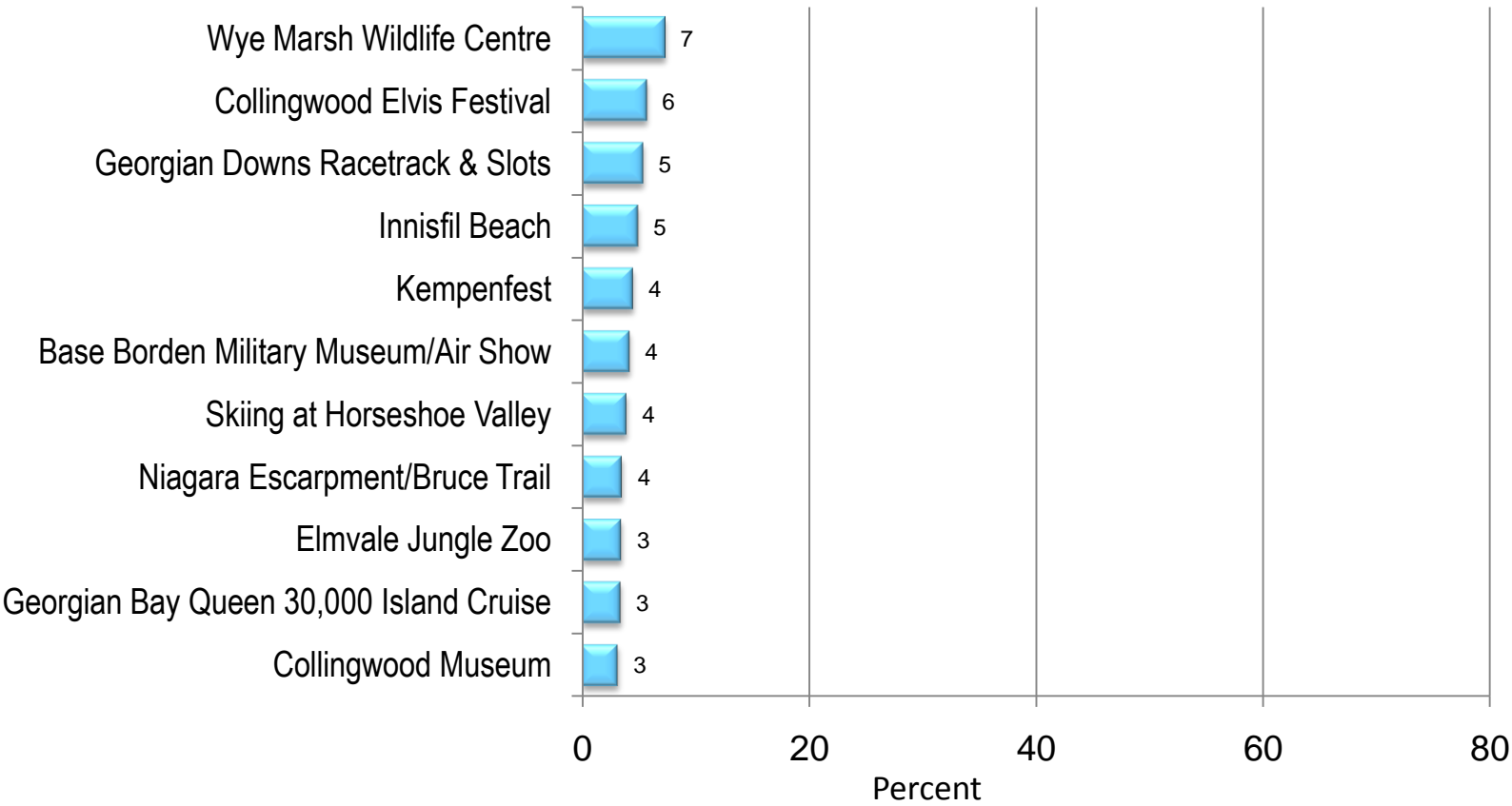
Base: Residents of Ontario



Ever Visited Attractions/Events in Simcoe County (Cont'd)



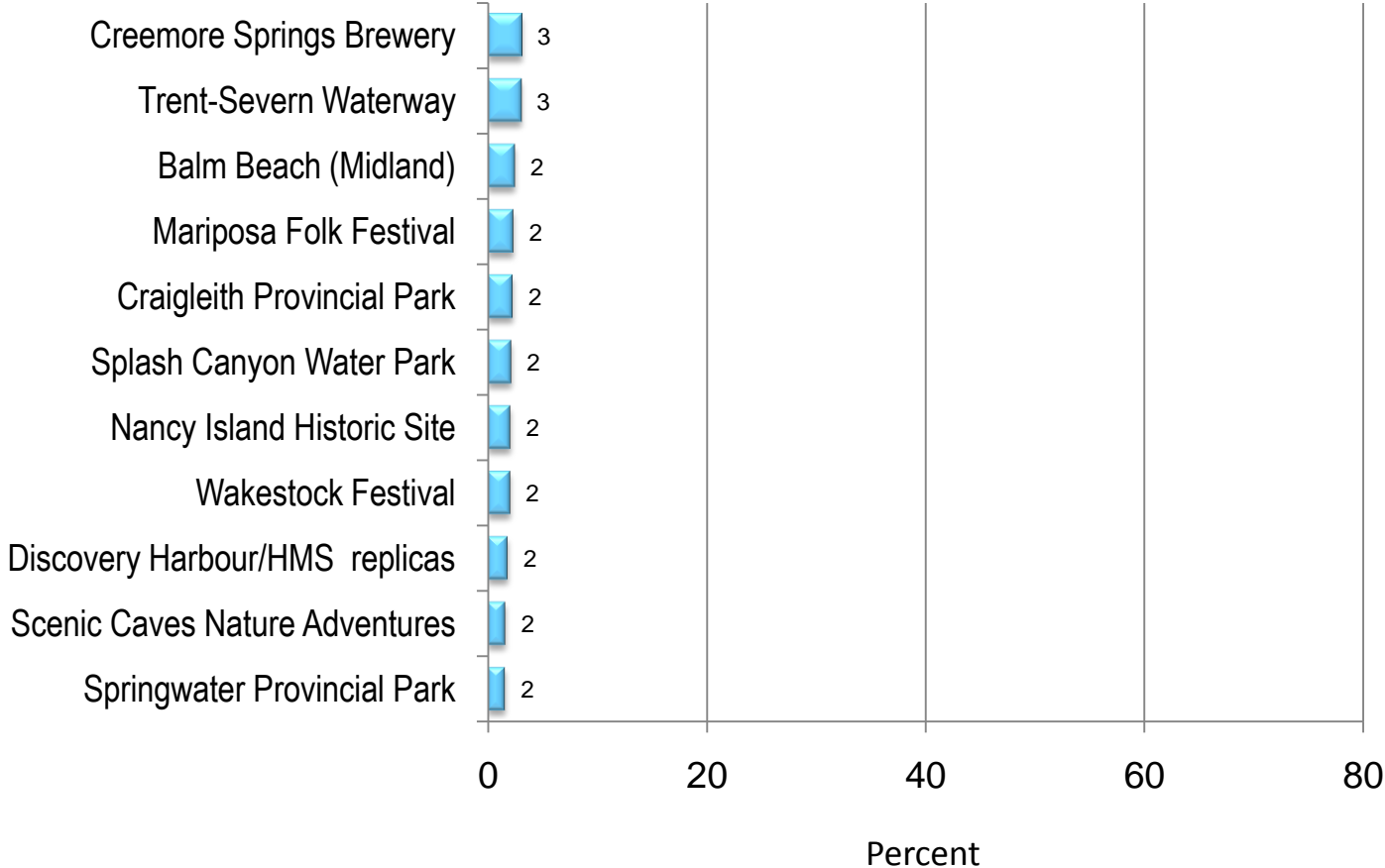
Base: Residents of Ontario



Ever Visited Attractions/Events in Simcoe County (Cont'd)



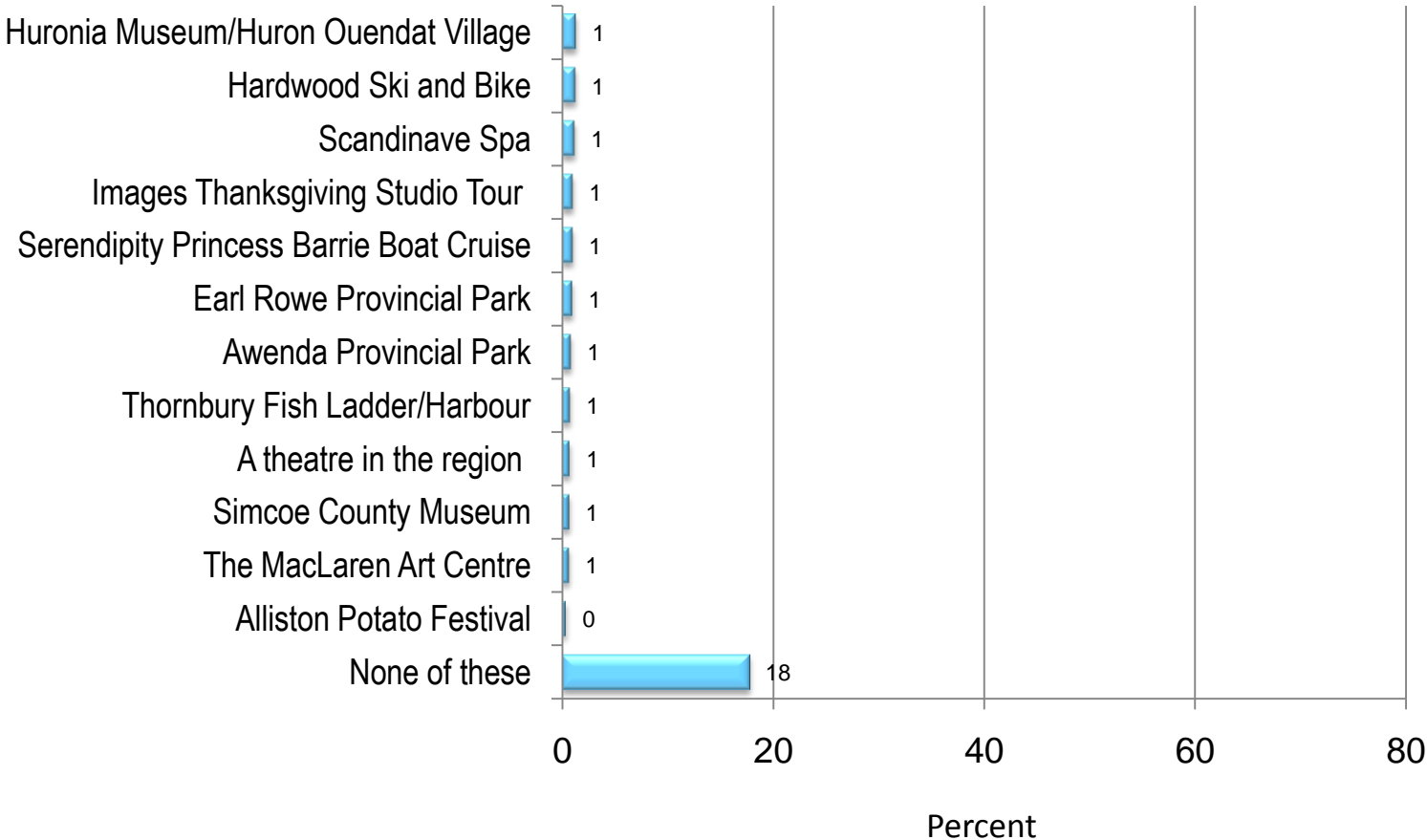
Base: Residents of Ontario



Ever Visited Attractions/Events in Simcoe County (Cont'd)



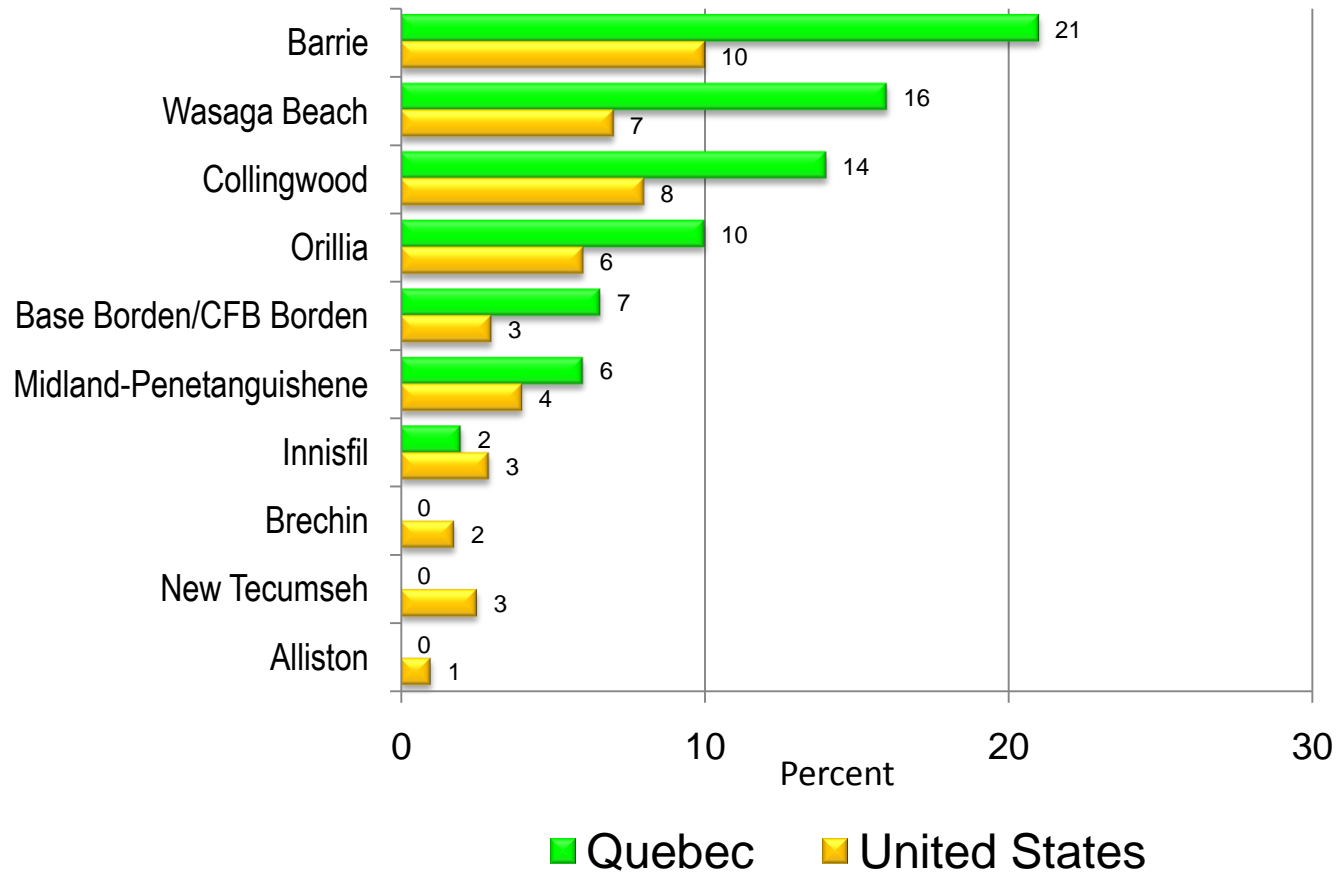
Base: Residents of Ontario



Ever Visited Towns/Places in Simcoe County



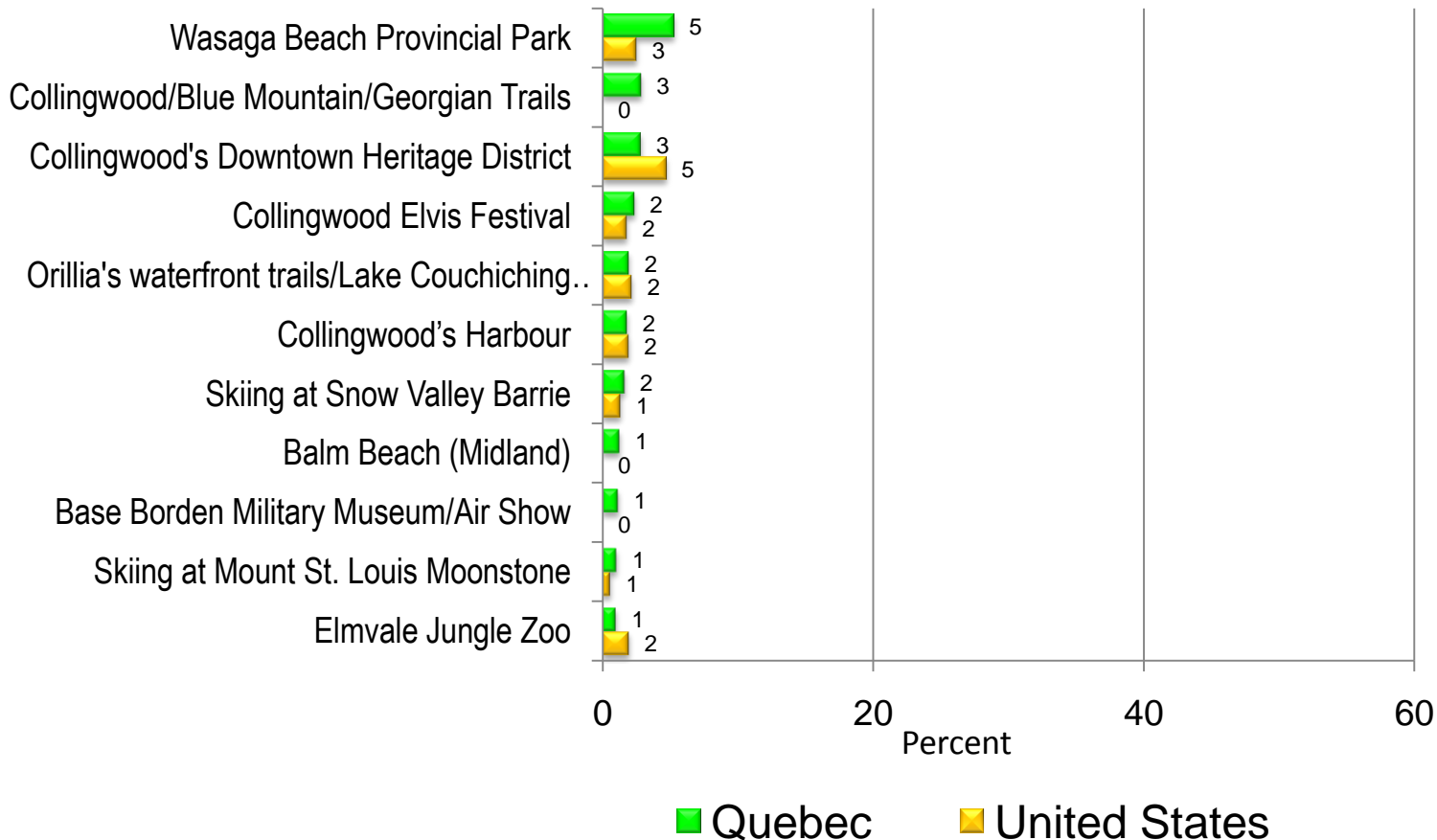
Base: Residents of Quebec/United States



Ever Visited Attractions/Events in Simcoe County



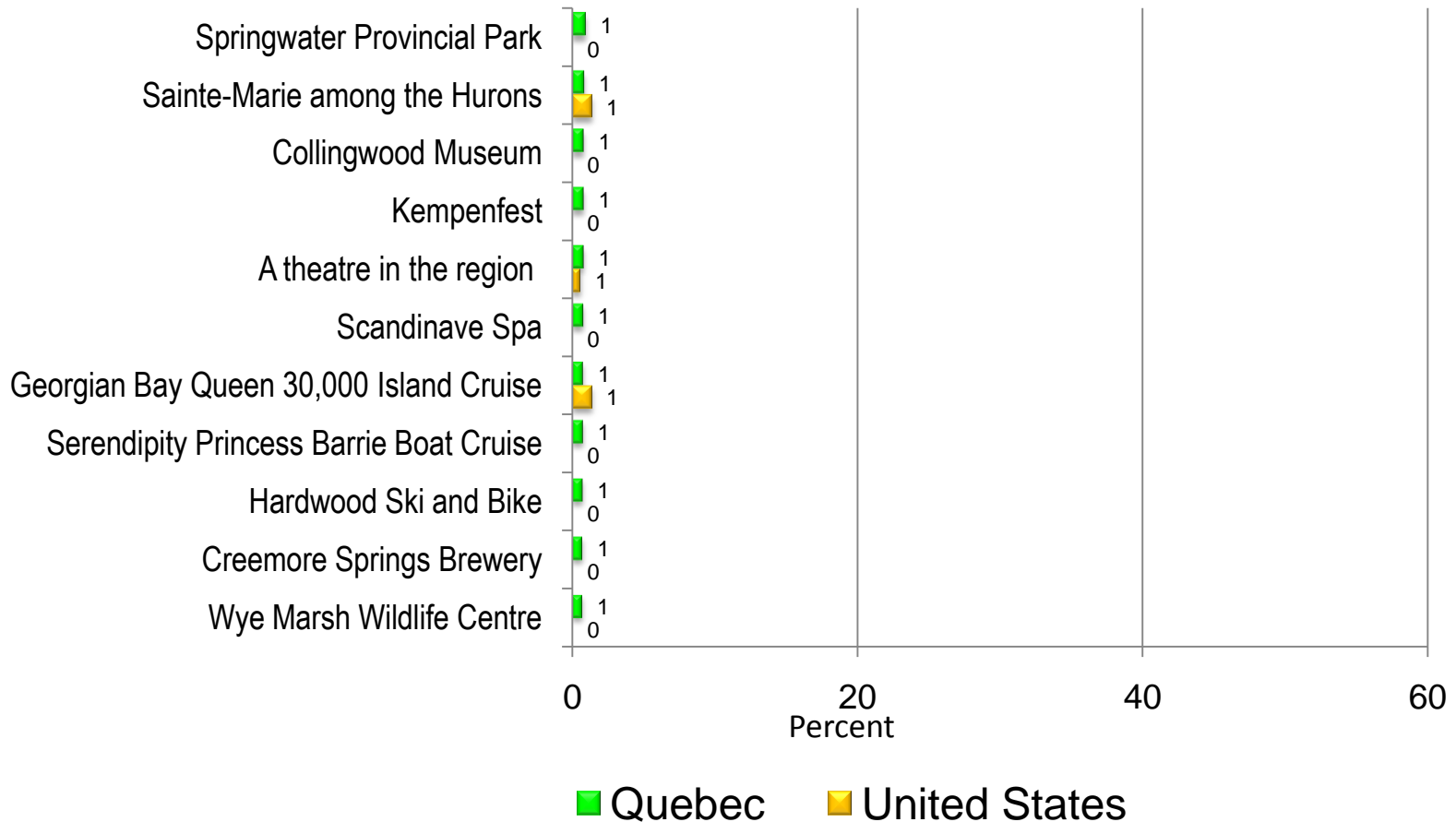
Base: Residents of Quebec/United States



Ever Visited Attractions/Events in Simcoe County (Cont'd)



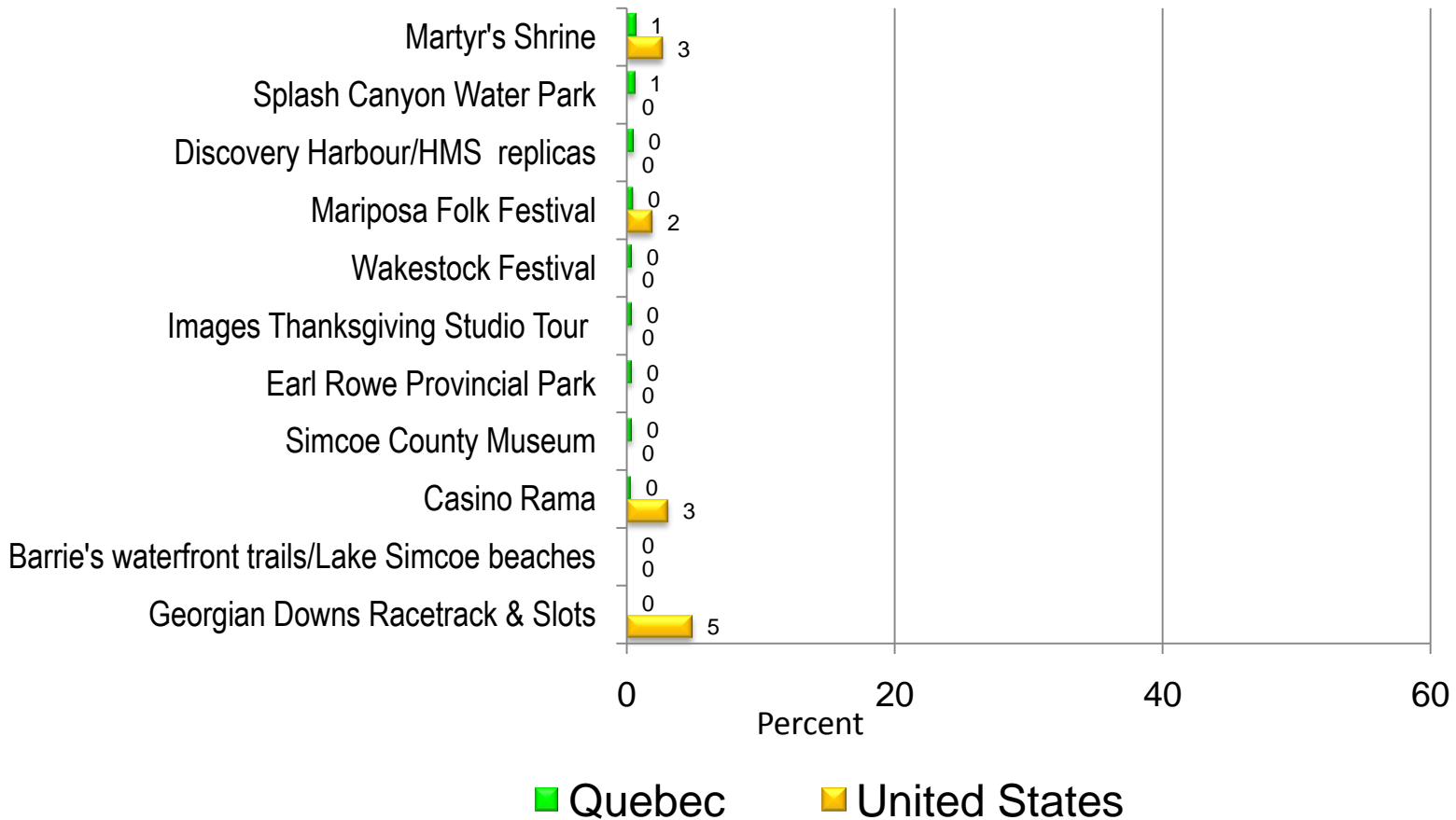
Base: Residents of Quebec/United States



Ever Visited Attractions/Events in Simcoe County (Cont'd)



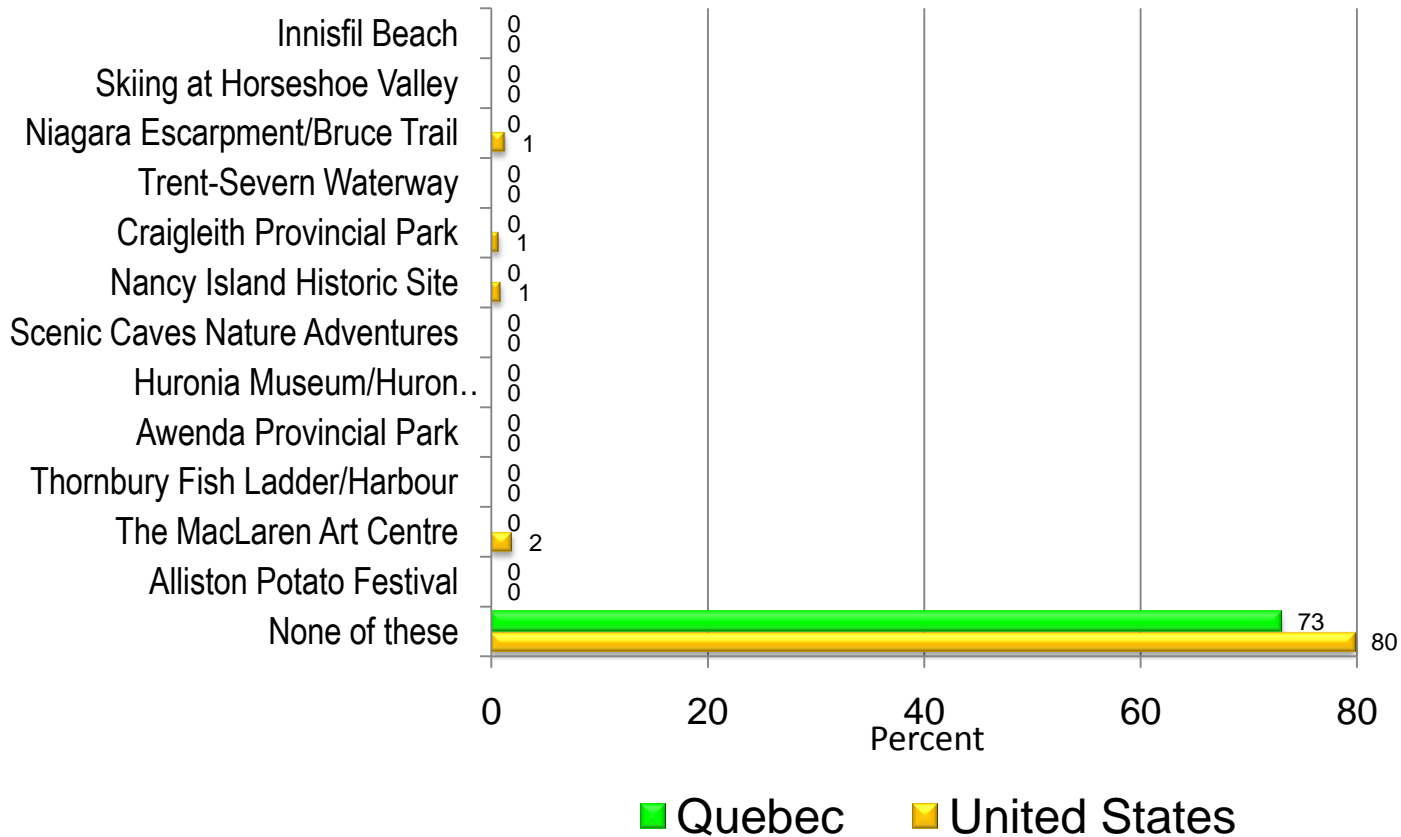
Base: Residents of Quebec/United States



Ever Visited Attractions/Events in Simcoe County (Cont'd)



Base: Residents of Quebec/United States

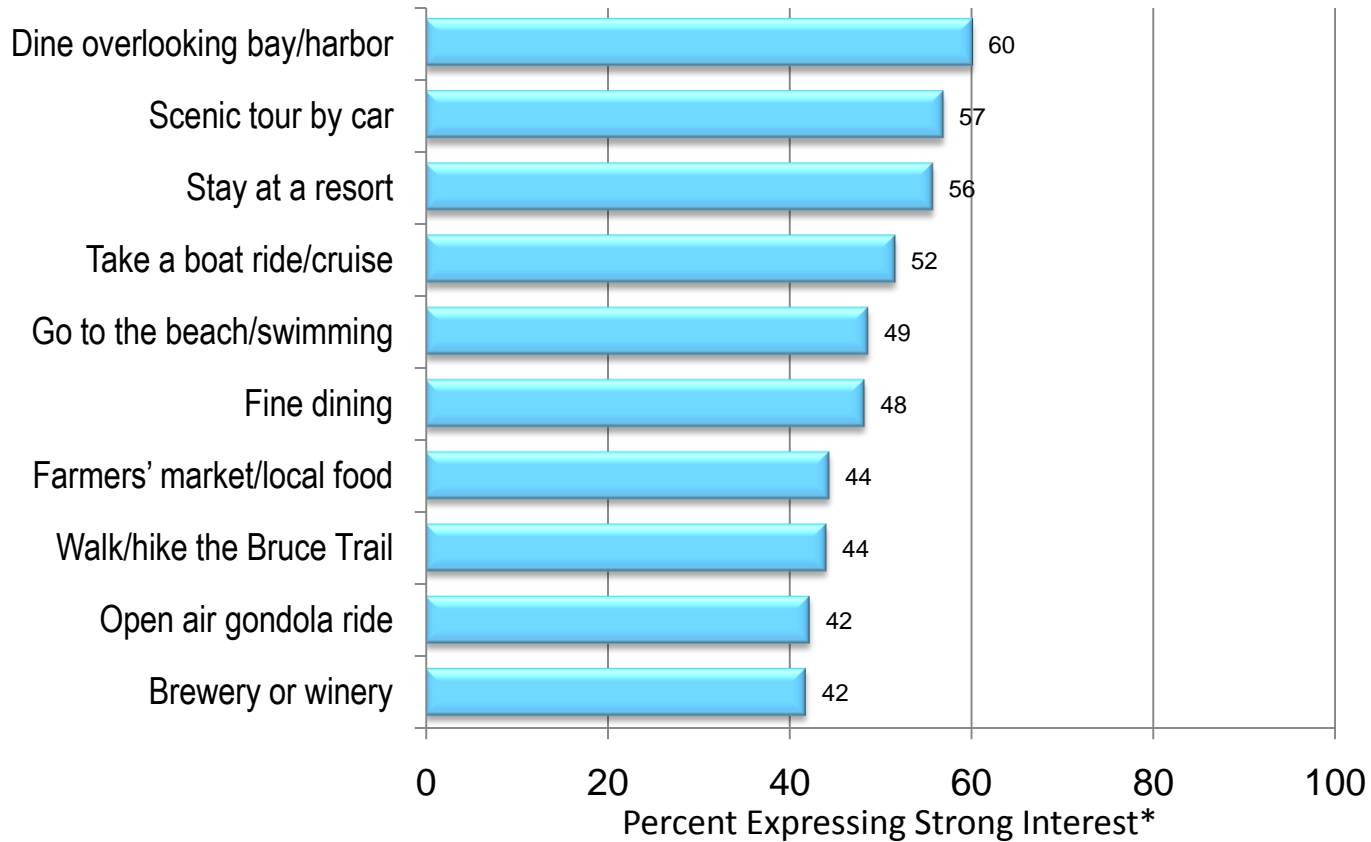


Interest in Types of Activities/Attractions/Events

Interest in Attractions/Activities/Events



Base: Residents of Ontario

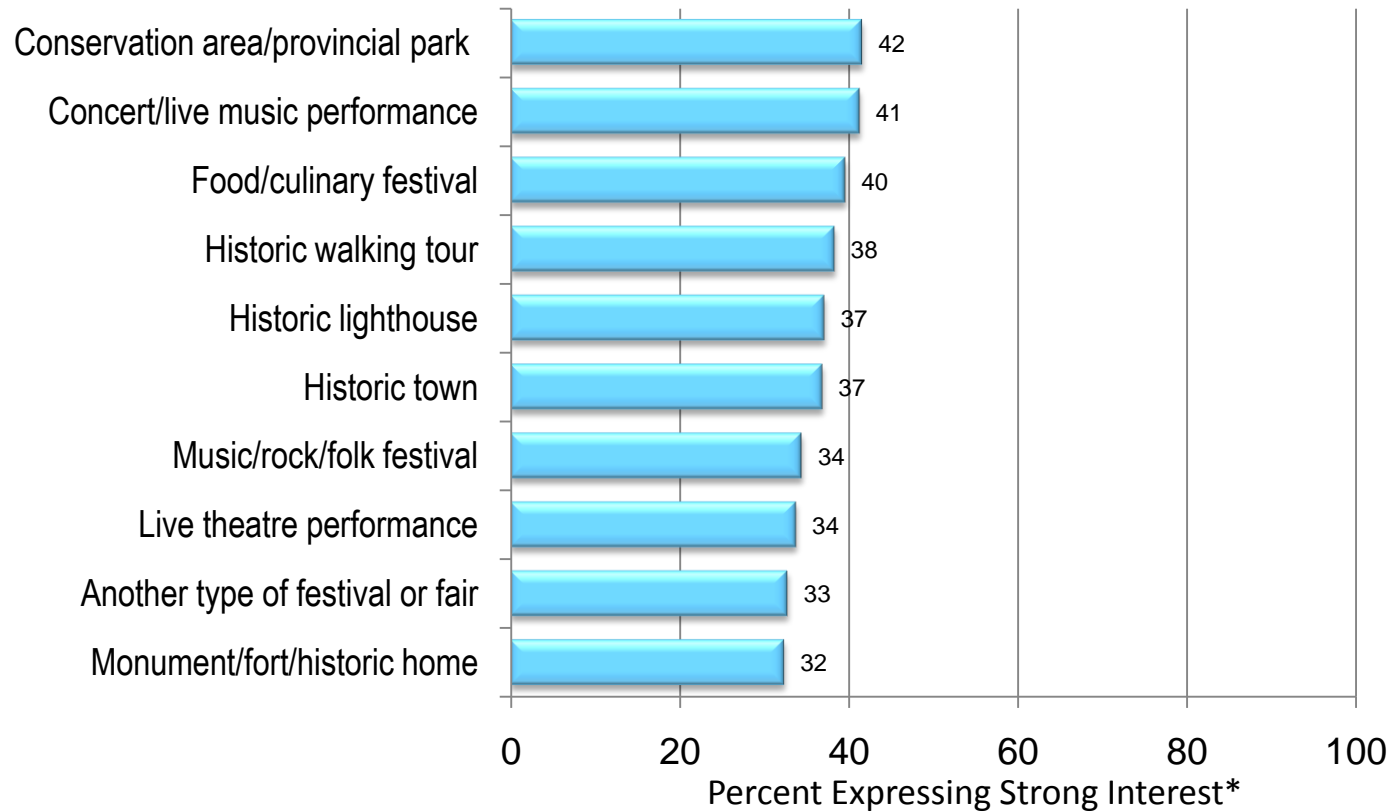


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events (Cont'd)



Base: Residents of Ontario

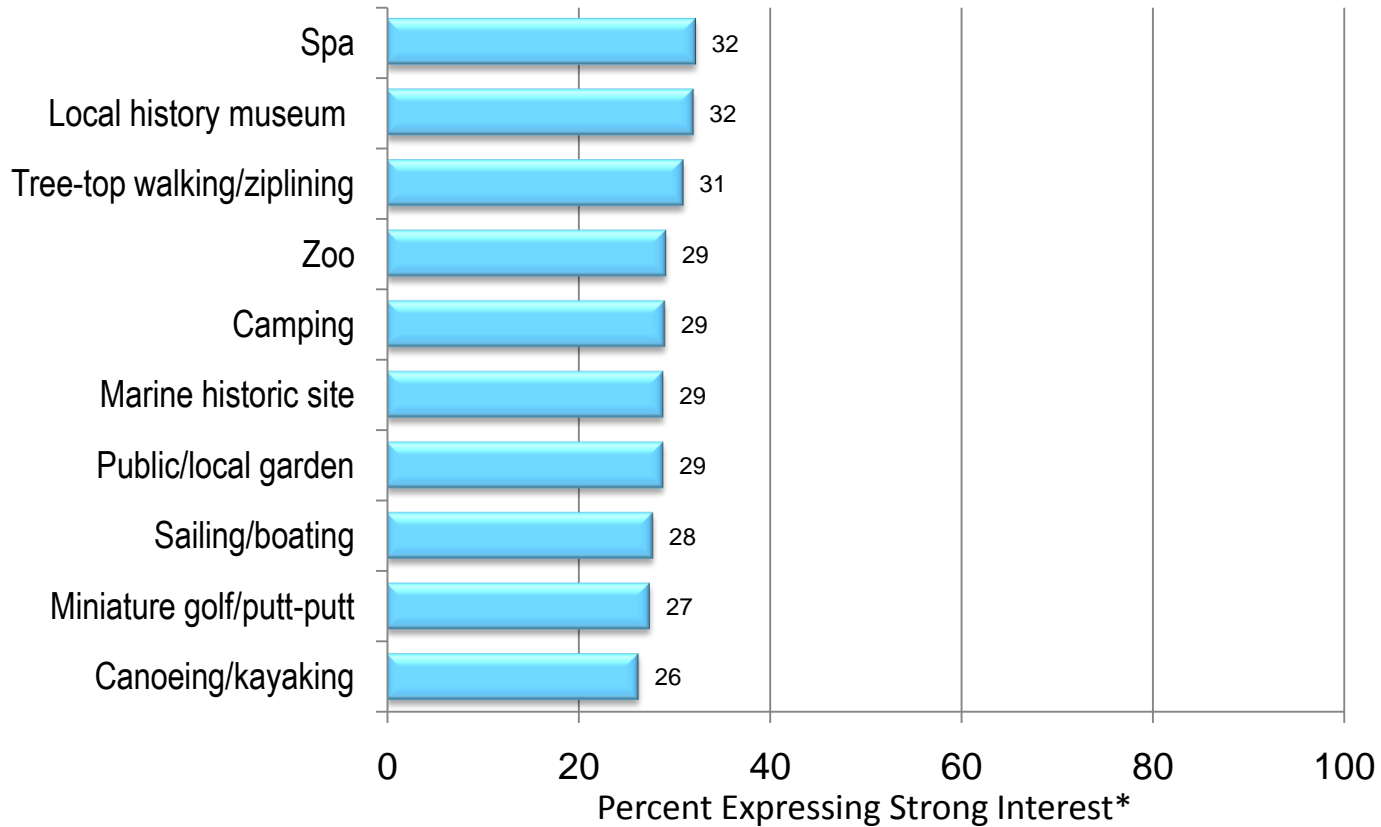


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events (Cont'd)



Base: Residents of Ontario

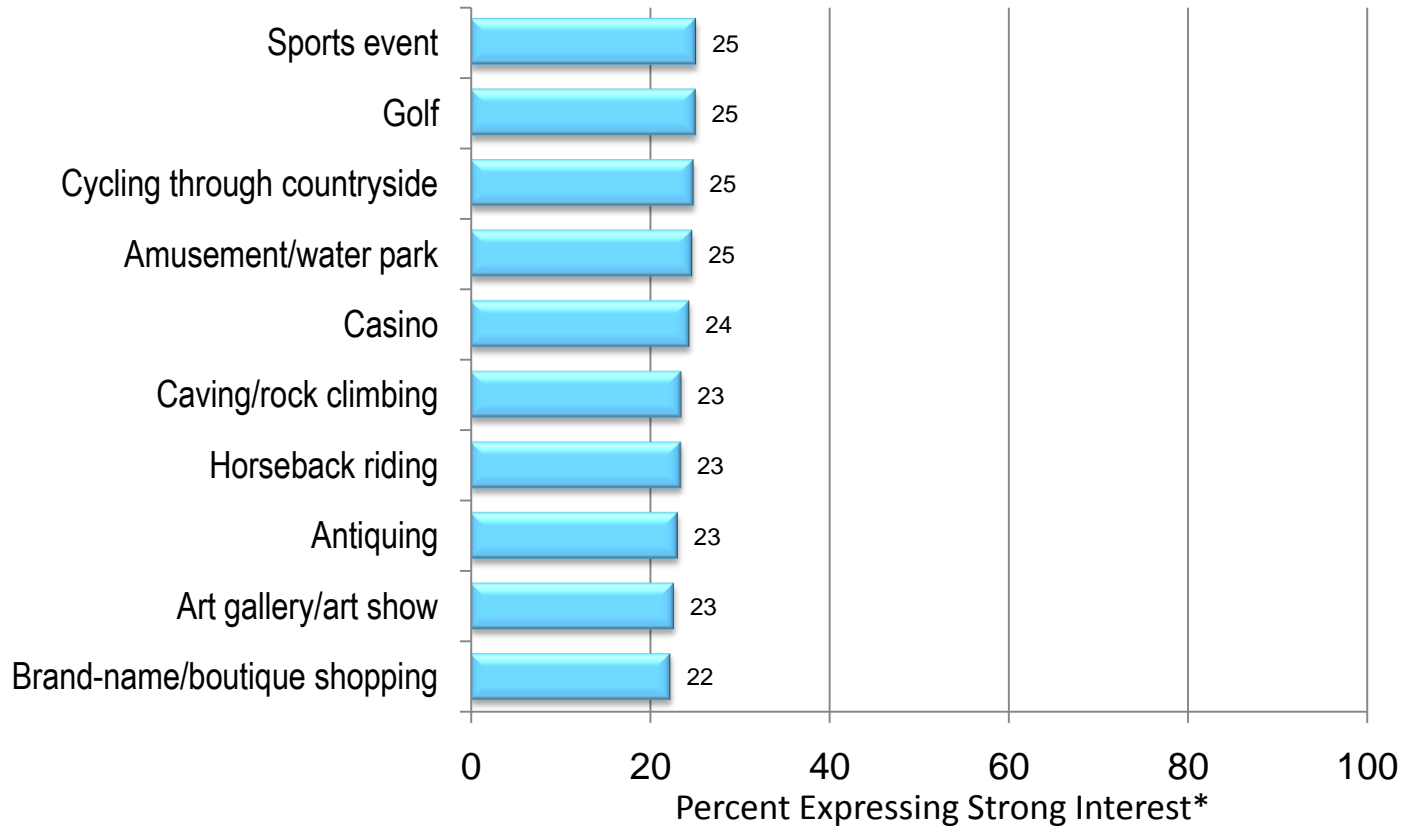


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events (Cont'd)



Base: Residents of Ontario

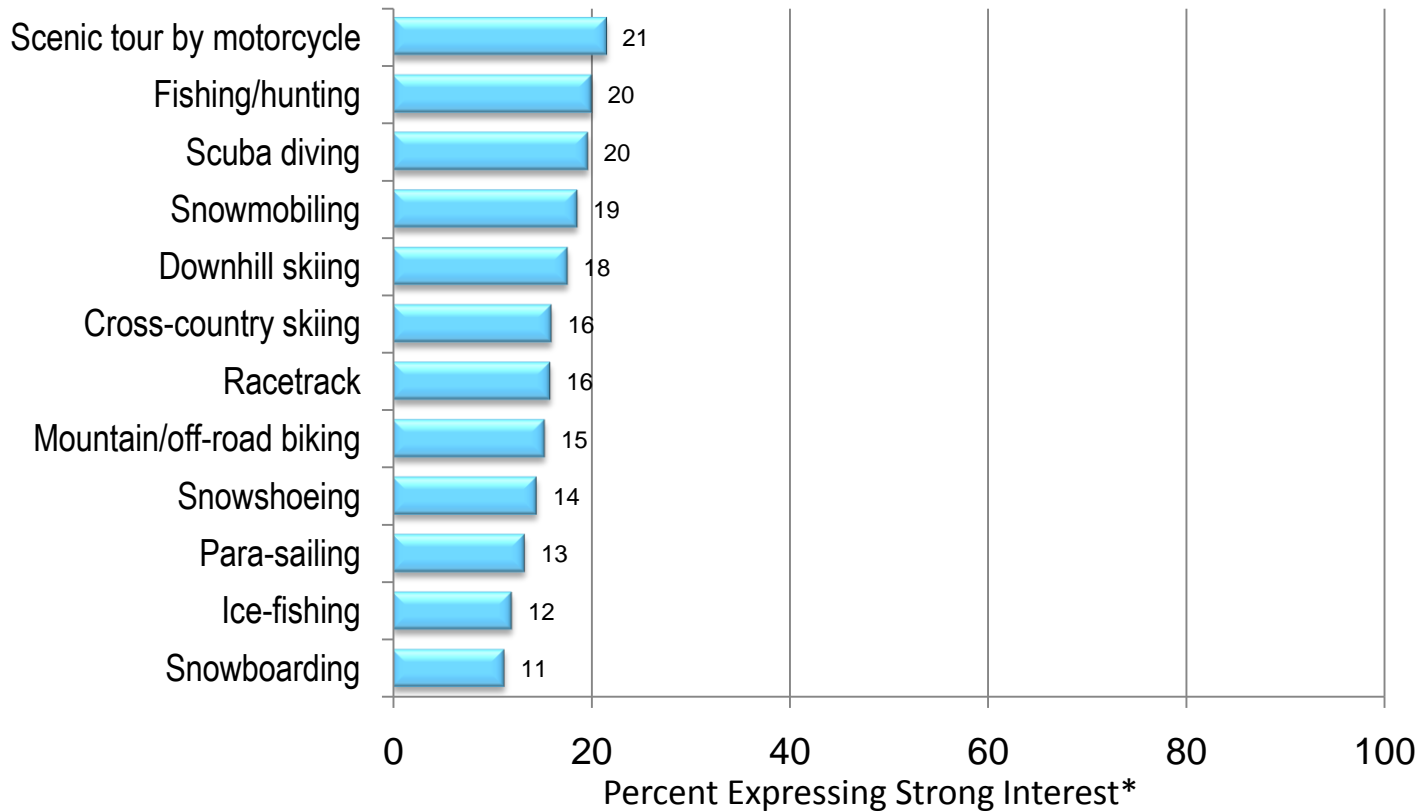


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events (Cont'd)



Base: Residents of Ontario

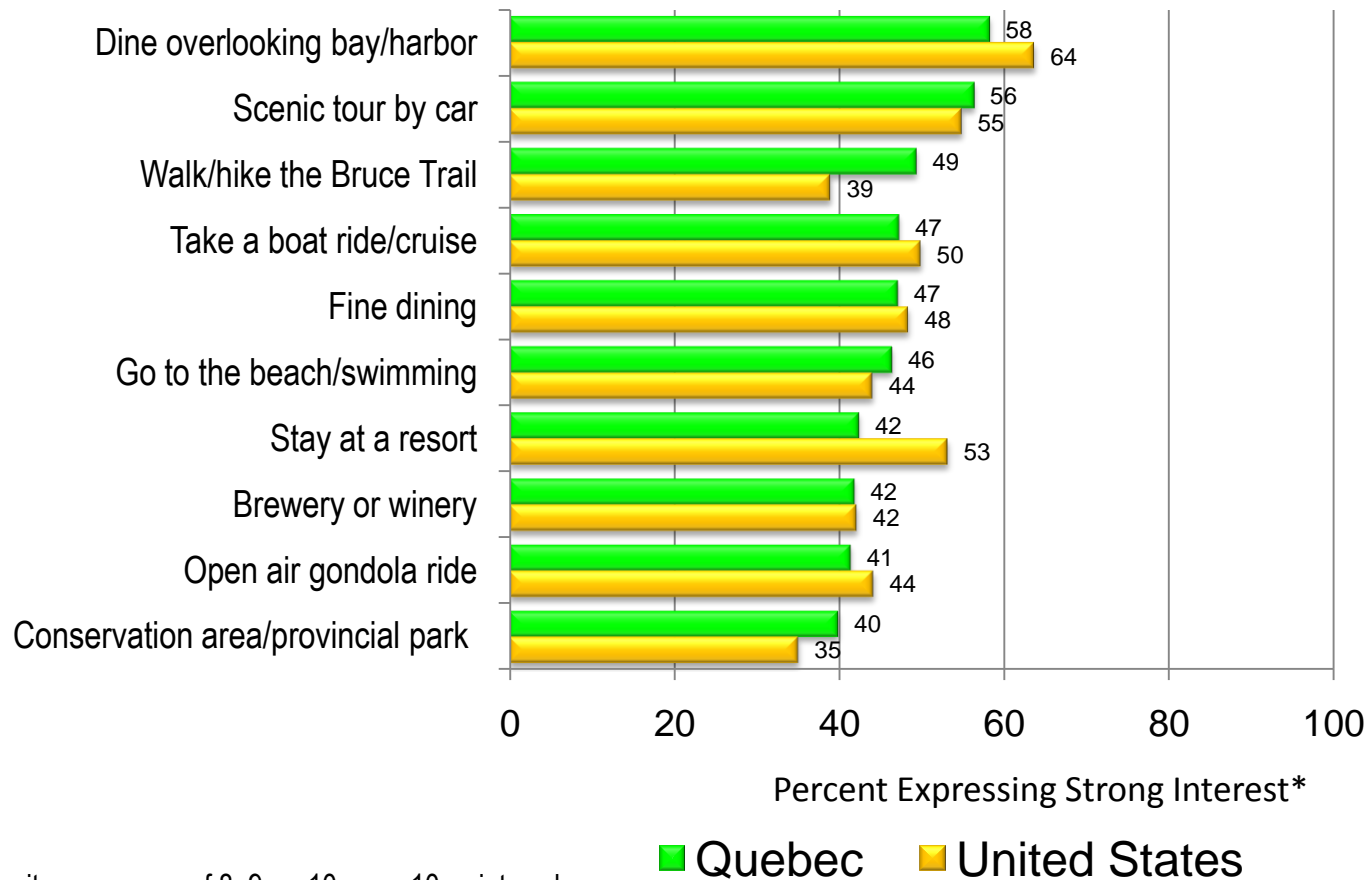


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events



Base: Residents of Quebec/United States

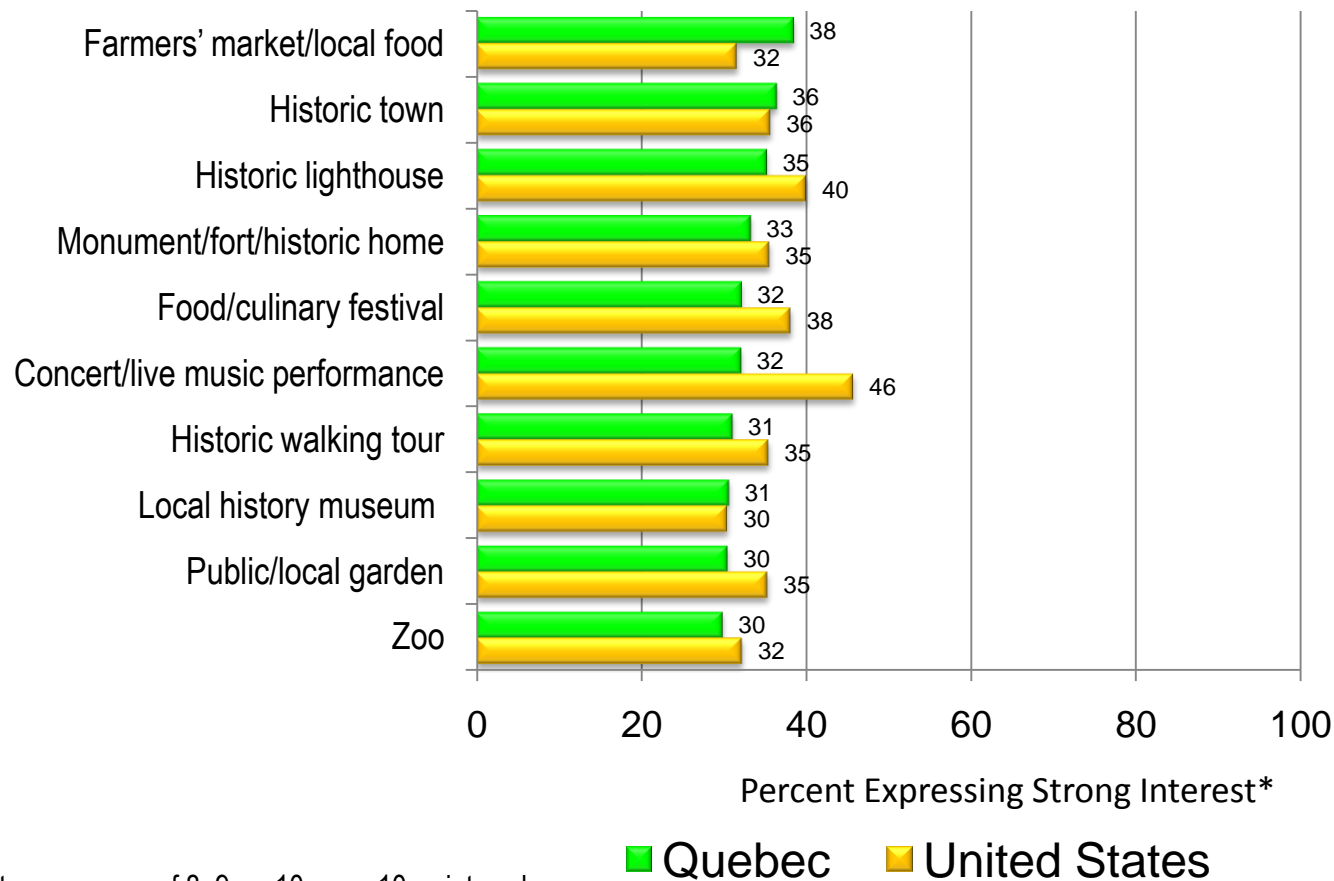


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events (Cont'd)



Base: Residents of Quebec/United States

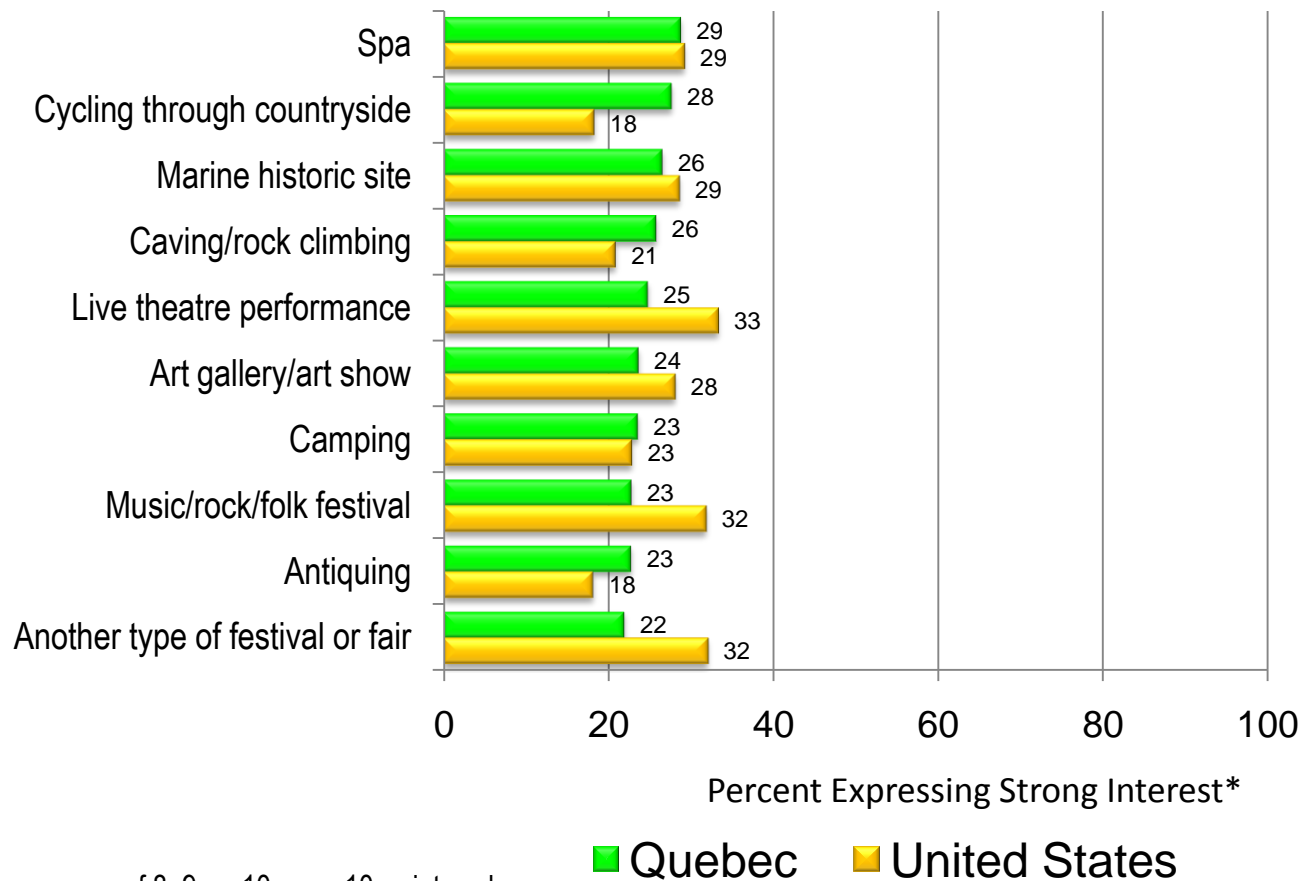


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events (Cont'd)



Base: Residents of Quebec/United States

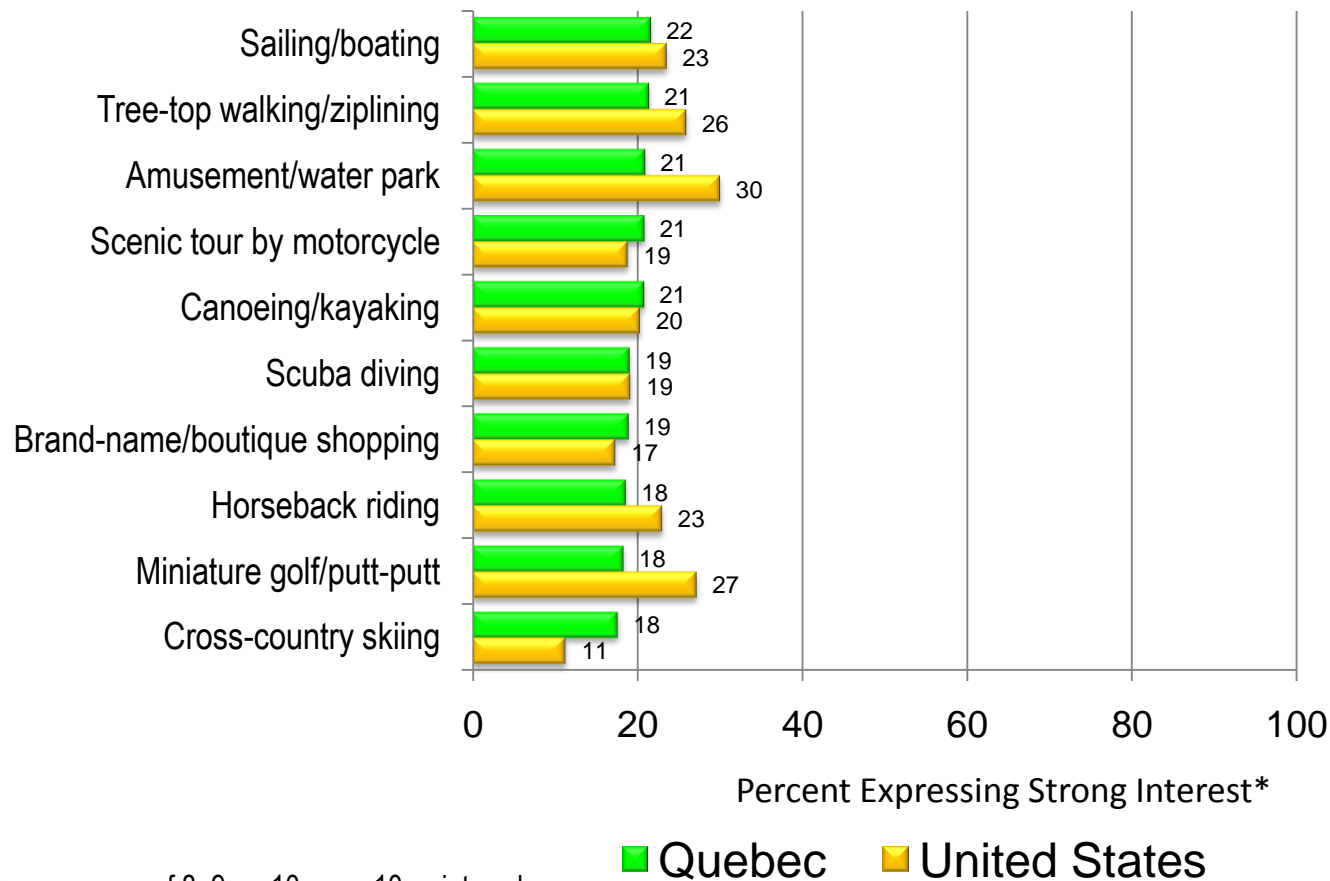


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events (Cont'd)



Base: Residents of Quebec/United States

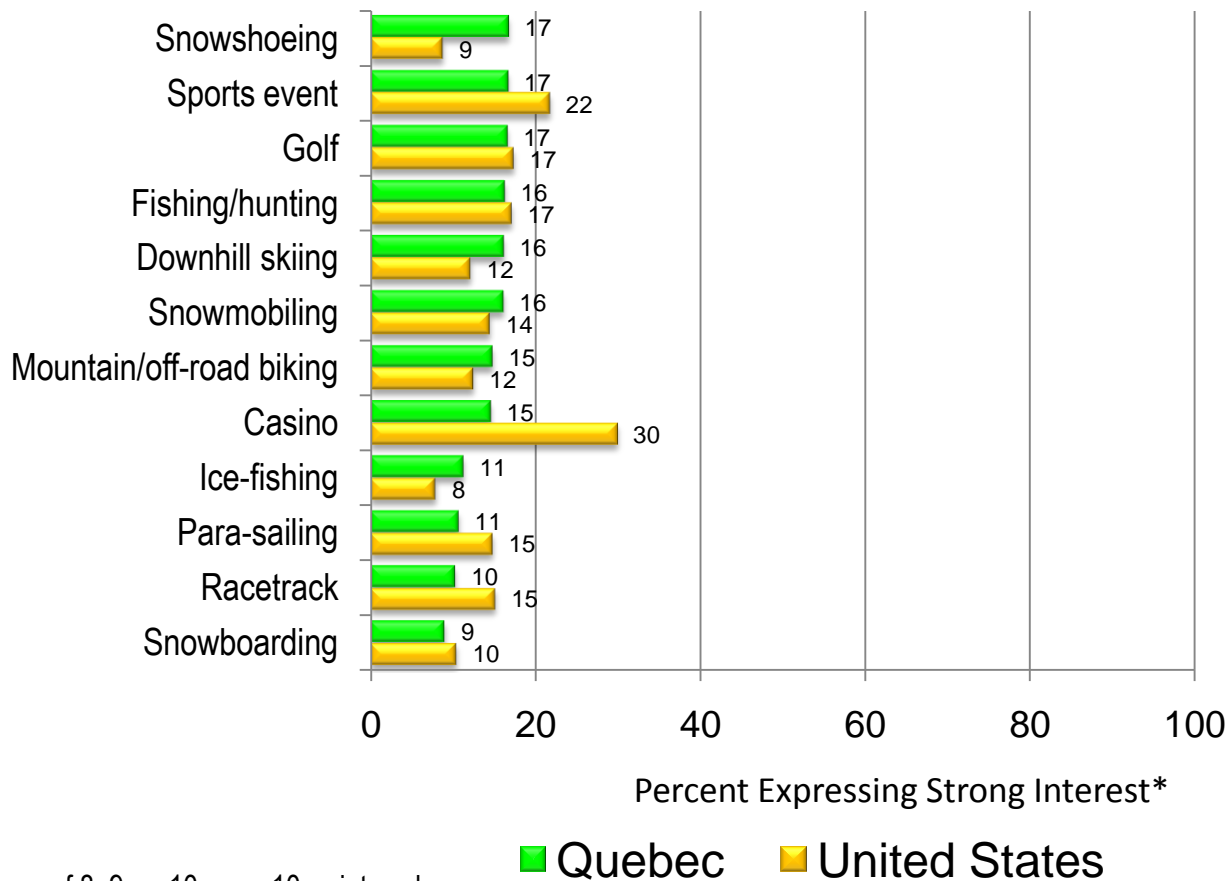


*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events (Cont'd)



Base: Residents of Quebec/United States



*Percent giving items a score of 8, 9, or 10, on a 10-point scale

Interest in Attractions/Activities/Events by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Concert/ live music	41	36	46	42	43	38
Music/rock/folk festival	32	28	35	34	36	24
Food/culinary festival	38	31	45	42	40	29
Other type of festival or fair	31	23	38	34	34	23
Live theatre	32	26	38	31	31	35
Sports event	23	26	19	29	24	14
Dine overlooking bay/harbour	61	54	68	59	62	61
Fine dining	48	44	52	48	47	49
Antiquing	22	18	25	24	21	19
Brand-name/boutique shopping	20	15	26	26	21	12

Interest in Attractions/Activities/Events by Demographics (Cont'd)



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Caving/rock climbing	23	23	23	34	24	8
Fishing/ hunting	19	23	14	25	18	10
Ice fishing	11	14	8	15	11	5
Camping	26	28	25	33	30	13
Sailing/boating	26	26	25	30	28	17
Canoeing/ kayaking	24	24	23	29	27	13
Cross-country skiing	15	15	14	19	16	8
Downhill skiing	16	17	14	23	17	6
Snowboarding	11	12	9	19	9	2
Snowshoeing	13	13	14	18	14	6

Interest in Attractions/Activities/Events by Demographics (Cont'd)



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Cycling on local roads/trails	23	24	23	29	26	12
Mountain/off-road biking	14	17	11	22	15	4
Snowmobiling	17	20	14	25	18	6
Para-sailing	13	14	13	22	12	4
Horseback riding	22	18	27	29	25	10
Amusement/water park	26	24	28	36	29	9
Beach/swimming	47	41	53	54	50	34
Scuba diving	19	22	17	29	19	8
Golfing on golf courses	21	28	15	22	22	21
Miniature golf/putt-putt	26	25	27	31	27	17

Interest in Attractions/Activities/Events by Demographics (Cont'd)



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Boat ride/short cruise	50	45	56	47	52	53
Open air mountain gondola ride	43	39	46	45	45	36
Scenic car tour	56	52	61	51	57	62
Scenic motorcycle tour	21	22	19	28	21	10
Historic town walking tour	36	32	41	35	38	35
Tree-top walking/ziplining	28	27	29	39	30	12
Conservation area/provincial park	39	34	45	44	40	33
Historic lighthouse	38	33	42	37	38	38
Museum	31	28	35	30	32	32
Public/local garden	31	25	37	32	30	30
Spa	31	20	41	39	33	17

Interest in Attractions/Activities/Events by Demographics (Cont'd)



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Brewery or winery	42	39	45	46	44	35
Historic shipbuilding/marine site	28	30	27	29	28	28
Monument, fort or historic home	33	33	34	33	34	33
Interesting restored homes/shops	36	31	42	34	37	38
Art gallery/art show	24	20	28	28	22	22
Zoo	30	24	36	36	32	20
Local farmers' market/shop	40	33	47	40	42	36
Hiking along the Bruce Trail	43	40	47	48	47	33
Racetrack	15	14	15	20	15	9
Casino	24	24	25	27	25	20
Resort	53	48	58	52	55	50

Interest in Attractions/Activities/Events by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Concert/ live music	41	42	39	41	31	46
Music/rock/folk festival	32	31	32	32	25	38
Food/culinary festival	38	39	38	37	41	45
Other type of festival or fair	31	31	31	30	29	37
Live theatre	32	32	32	32	22	40
Sports event	23	19	25	22	22	29
Dine overlooking bay/harbour	61	59	63	62	54	58
Fine dining	48	43	52	48	48	52
Antiquing	22	25	20	21	21	24
Brand-name/boutique shopping	20	19	21	18	31	31

Interest in Attractions/Activities/Events by Demographics (Cont'd)



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Caving/rock climbing	23	24	24	22	27	30
Fishing/ hunting	19	18	20	17	29	27
Ice fishing	11	11	11	9	20	20
Camping	26	29	26	25	35	32
Sailing/boating	26	26	27	24	30	33
Canoeing/ kayaking	24	24	24	23	26	31
Cross-country skiing	15	12	16	14	19	20
Downhill skiing	16	11	18	15	24	19
Snowboarding	11	10	11	8	21	25
Snowshoeing	13	11	14	12	19	20

Interest in Attractions/Activities/Events by Demographics (Cont'd)



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/ S.Asian	Other
	%	%	%	%	%	%
Cycling on local roads/trails	23	22	25	22	32	31
Mountain/off-road biking	14	14	15	12	27	27
Snowmobiling	17	16	18	16	20	26
Para-sailing	13	13	13	12	21	23
Horseback riding	22	24	22	21	26	31
Amusement/water park	26	27	26	23	40	45
Beach/swimming	47	50	47	47	38	58
Scuba diving	19	21	20	18	26	29
Golfing on golf courses	21	16	24	21	23	24
Miniature golf/putt-putt	26	28	25	25	23	32

Interest in Attractions/Activities/Events by Demographics (Cont'd)



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Boat ride/short cruise	50	51	51	51	41	50
Open air mountain gondola ride	43	42	44	43	42	44
Scenic car tour	56	57	57	57	48	51
Scenic motorcycle tour	21	20	22	19	28	28
Historic town walking tour	36	35	37	36	37	43
Tree-top walking/ziplining	28	25	30	27	37	30
Conservation area/provincial park	39	42	39	39	39	41
Historic lighthouse	38	41	37	38	30	42
Museum	31	35	30	31	28	36
Public/local garden	31	35	29	31	28	35
Spa	31	32	30	31	25	39

Interest in Attractions/Activities/Events by Demographics (Cont'd)



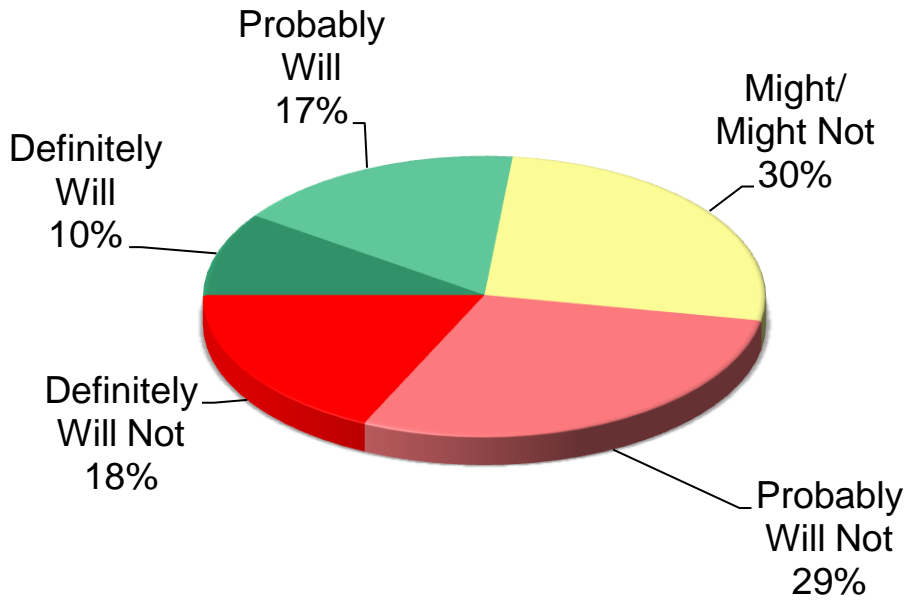
	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/ S.Asian	Other
	%	%	%	%	%	%
Brewery or winery	42	40	44	43	33	40
Historic shipbuilding/marine site	28	28	29	28	25	32
Monument, fort or historic home	33	37	33	33	31	39
Interesting restored homes/shops	36	40	36	37	32	39
Art gallery/art show	24	26	24	24	25	33
Zoo	30	35	29	29	32	40
Local farmers' market/shop	40	37	41	40	37	42
Hiking along the Bruce Trail	43	43	45	43	45	47
Racetrack	15	16	15	13	21	29
Casino	24	26	24	23	27	35
Resort	53	48	54	53	49	59

Intent to Visit RTO7 on Day/Overnight Trip in Next 12 Months

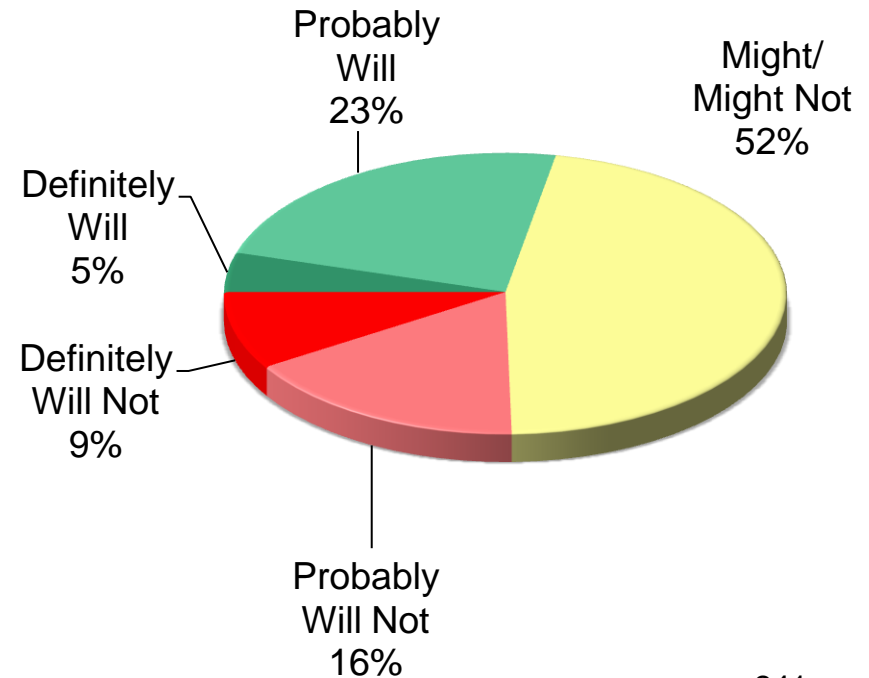


Base: Residents of Quebec

Aware of RTO7



Unaware – Post-Description

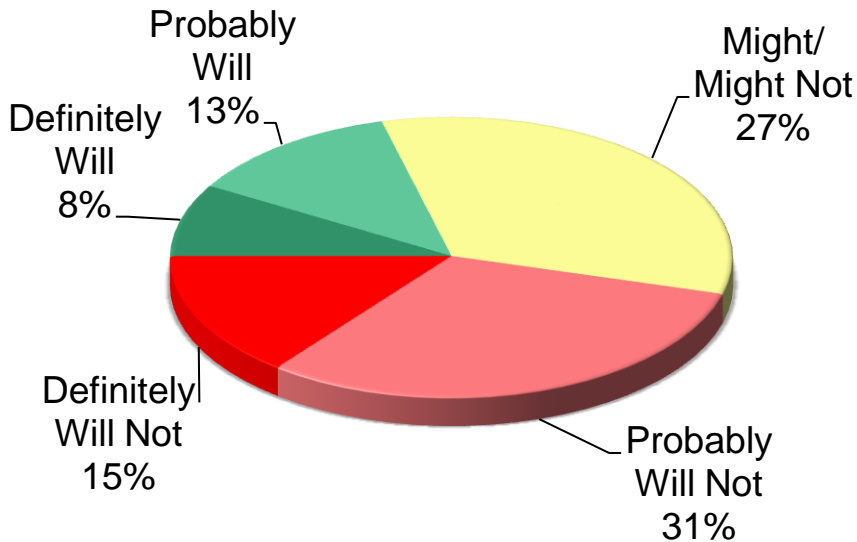


Intent to Visit RTO7 on Day/Overnight Trip in Next 12 Months



Base: Residents of United States

Aware of RTO7



Unaware – Post-Description

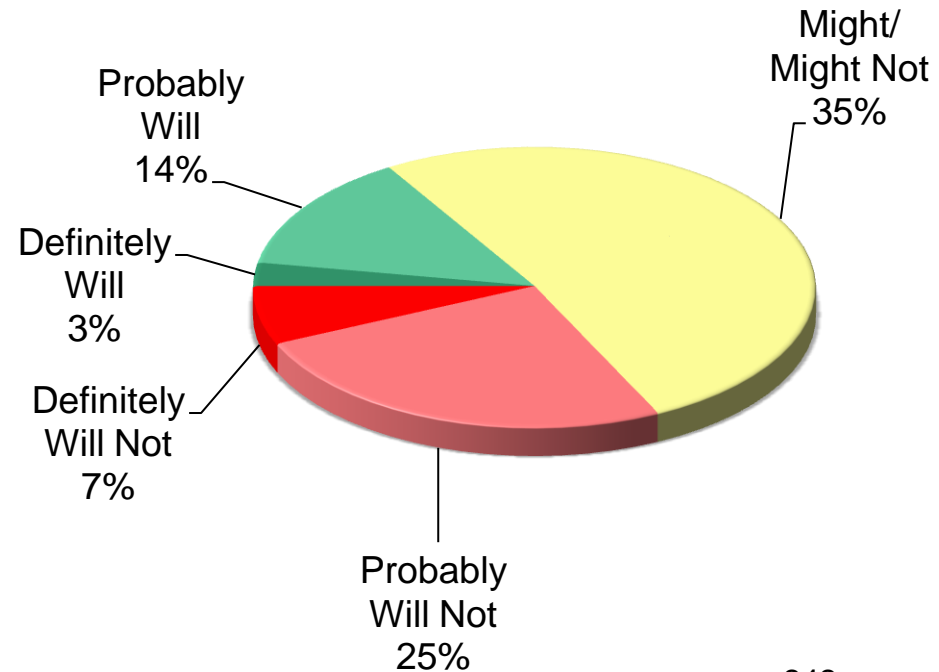


Image Hot Buttons

Travel Motivators



Most Important Individual Dimensions



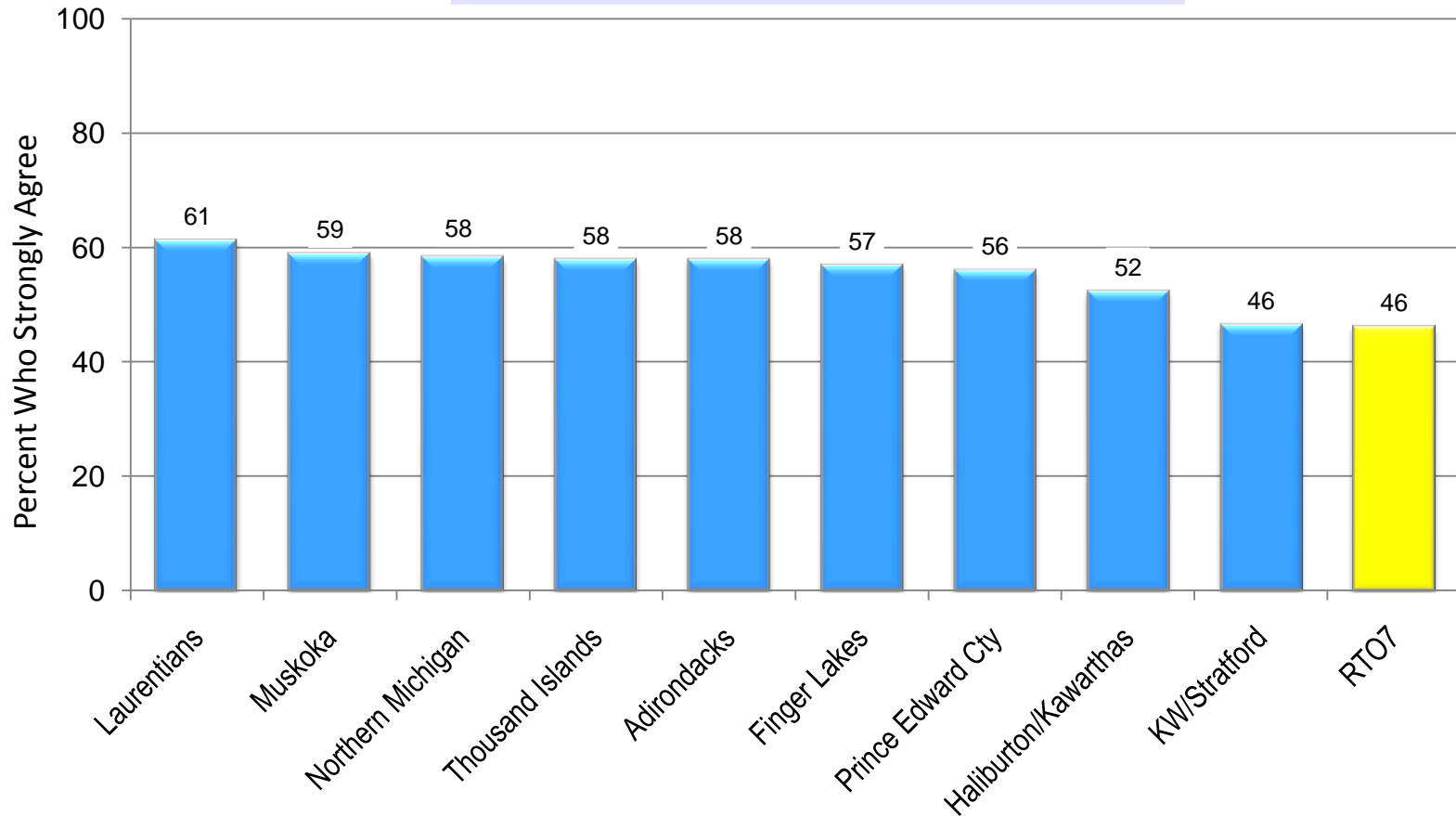
1. A fun place
2. Good for couples
3. Good for families
4. Must-see destination
5. Good for an adult vacation
6. Unique travel experience
7. Children would especially enjoy
8. Good place to relax
9. An exciting place
10. Great for sightseeing

RTO7's Image vs. Competitors

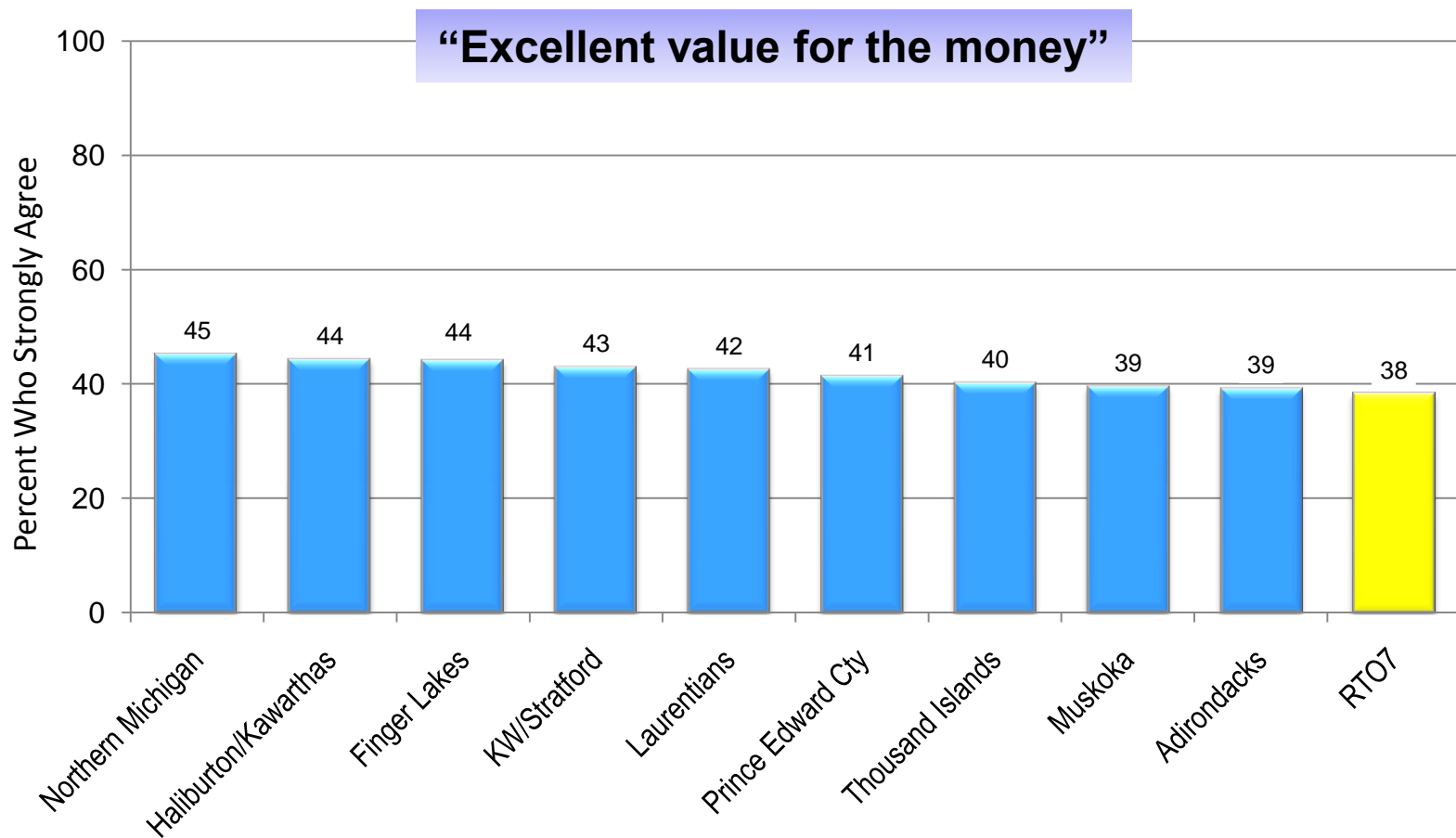
RTO7's Image vs. Competitors



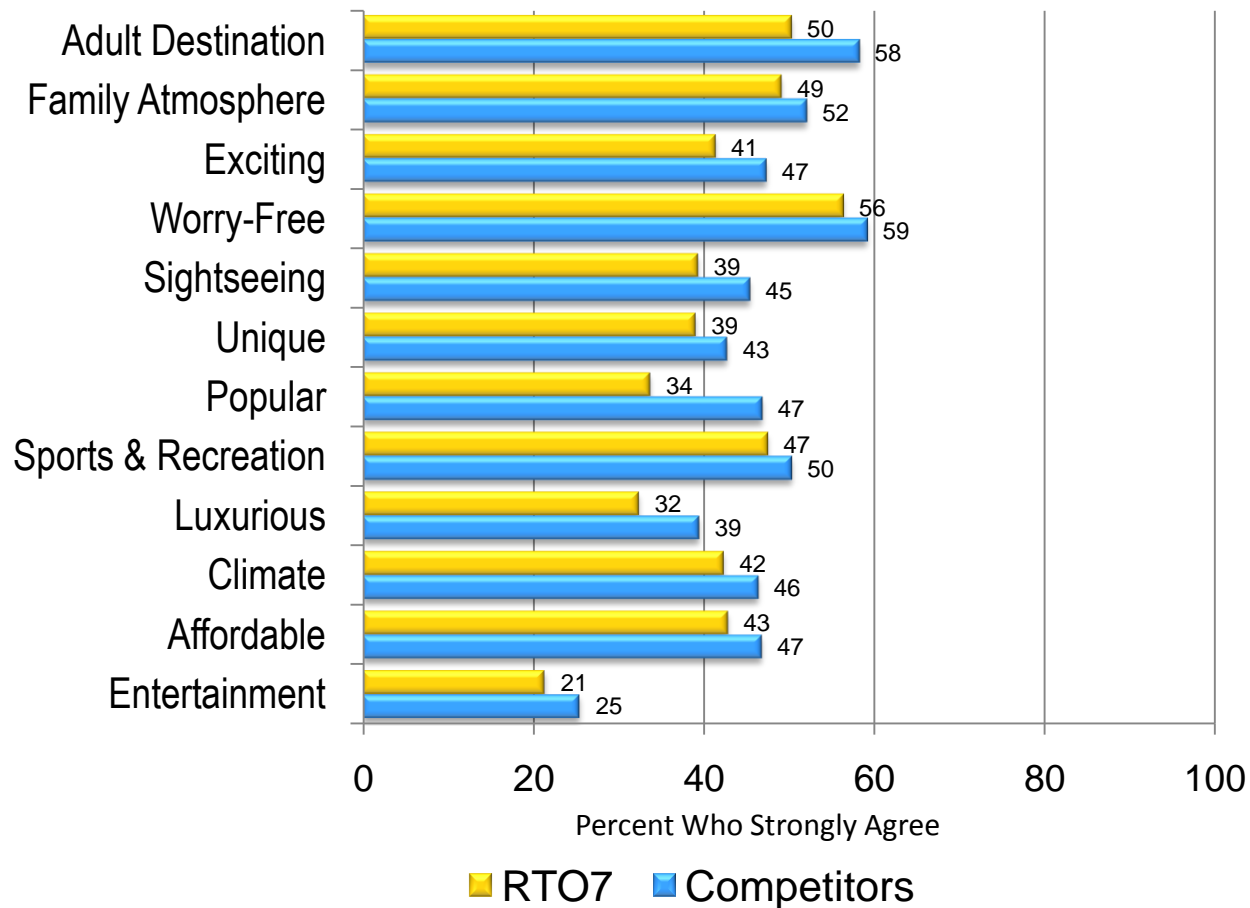
“A place I'd really enjoy visiting”



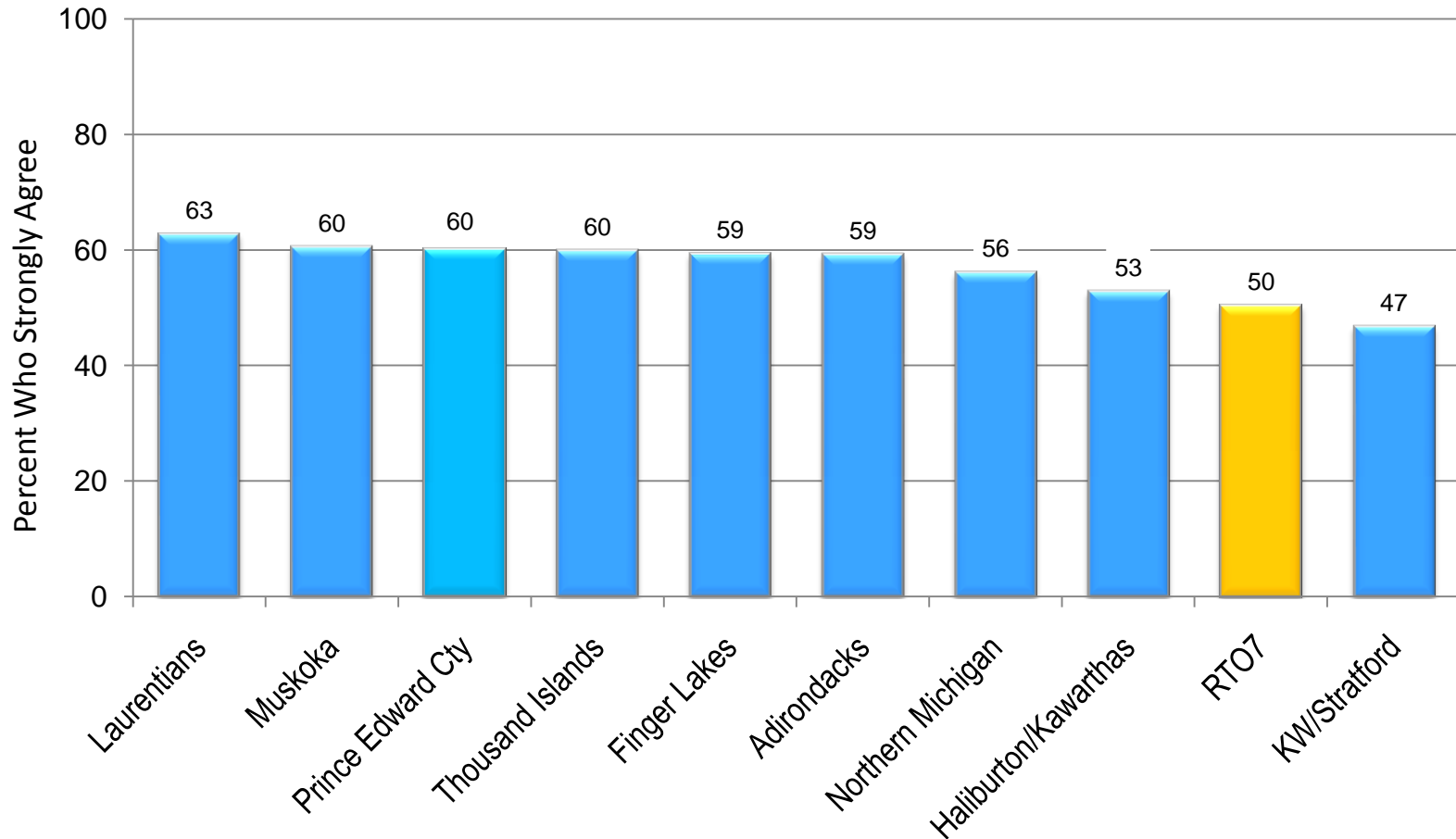
RTO7's Image vs. Competitors



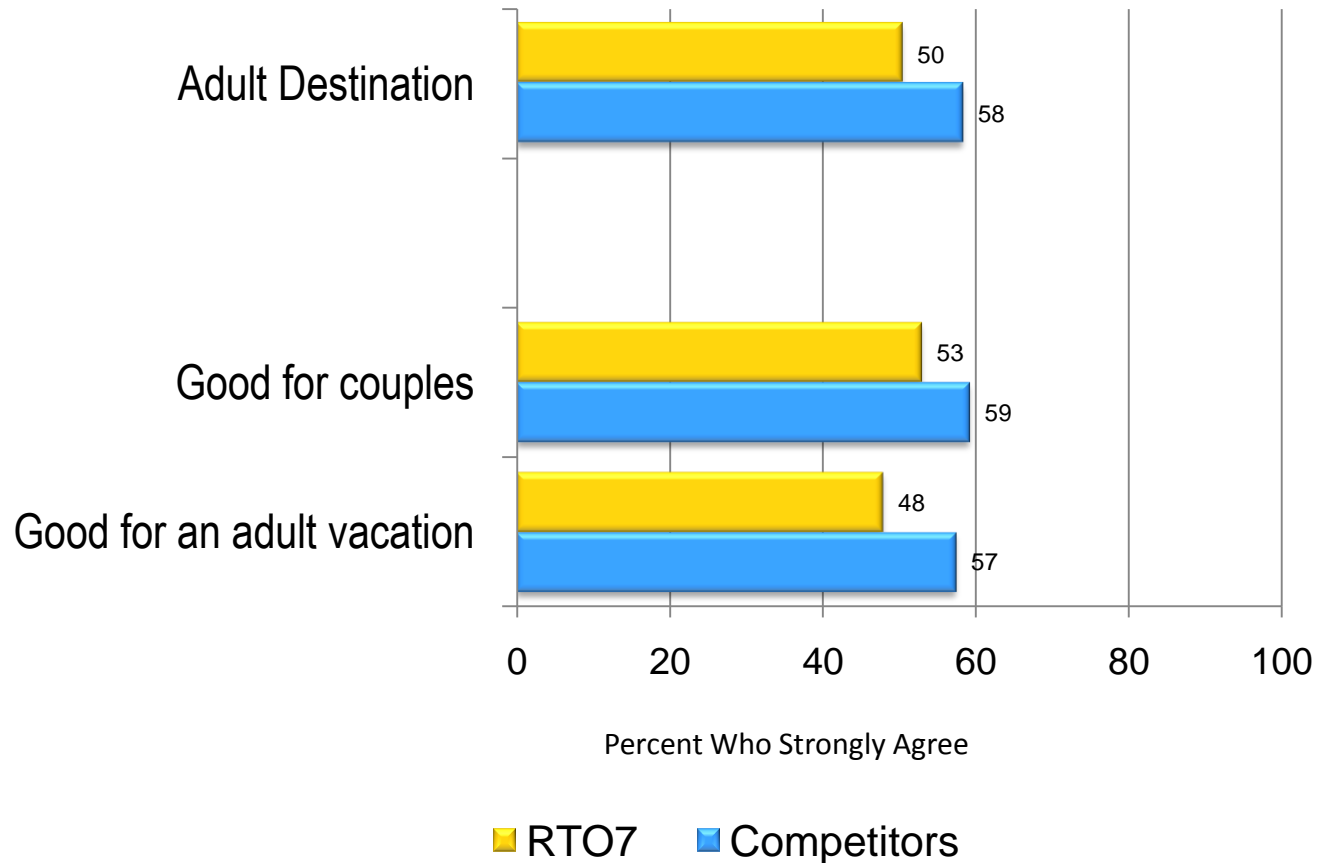
RTO7's Overall Image vs. Competitors



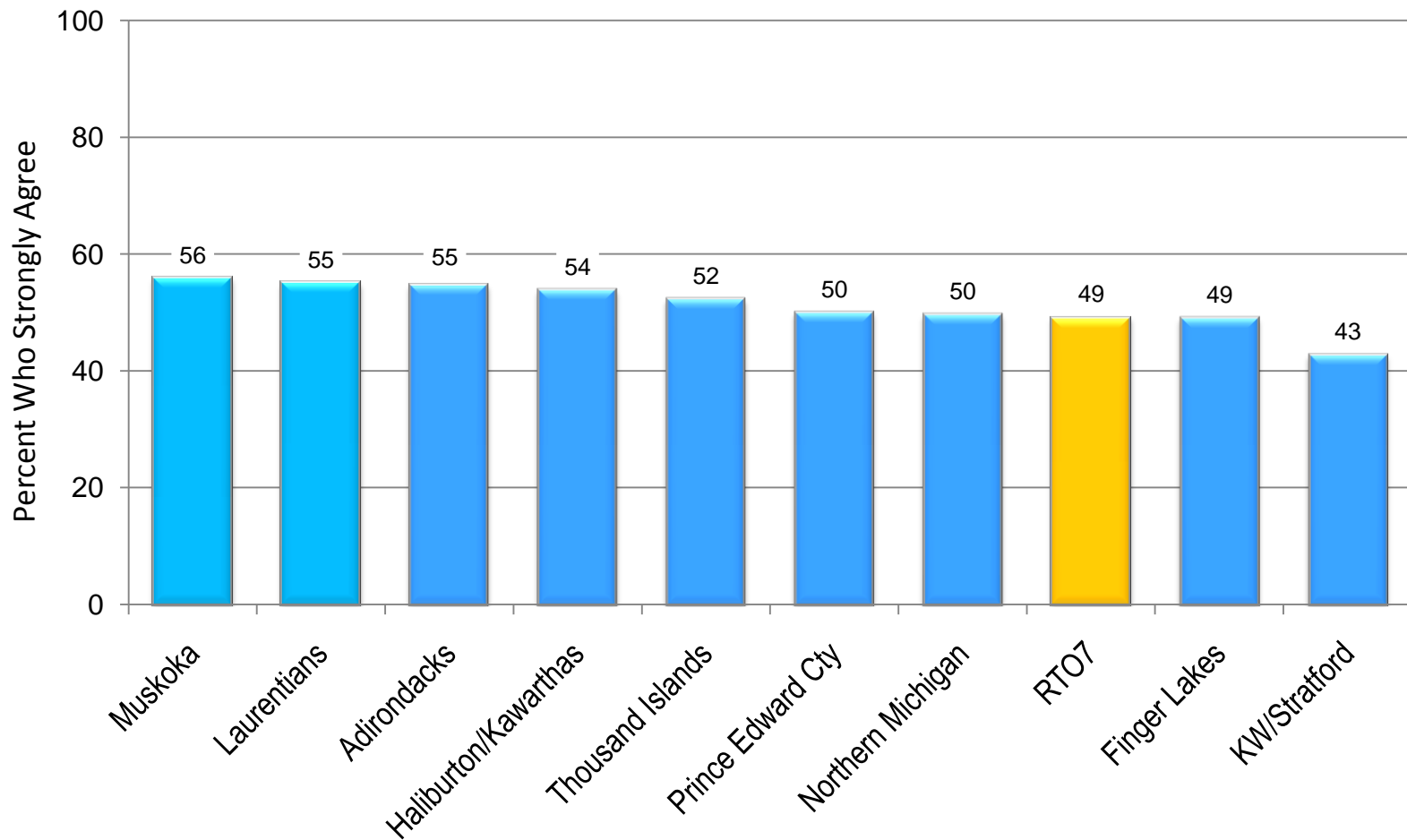
RTO7's Image vs. Competitors – Adult Destination



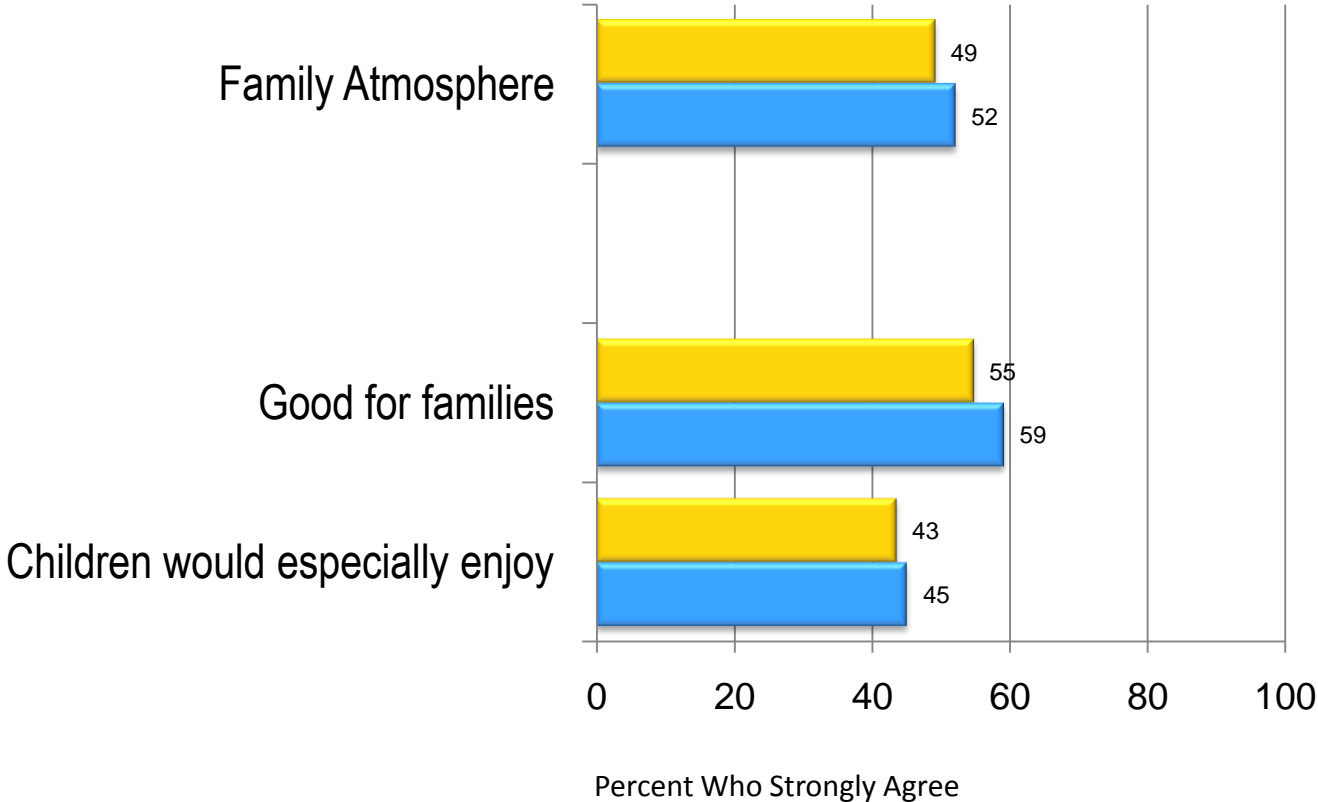
RTO7's Image vs. Competitors – Adult Destination



RTO7's Image vs. Competitors – Family Atmosphere

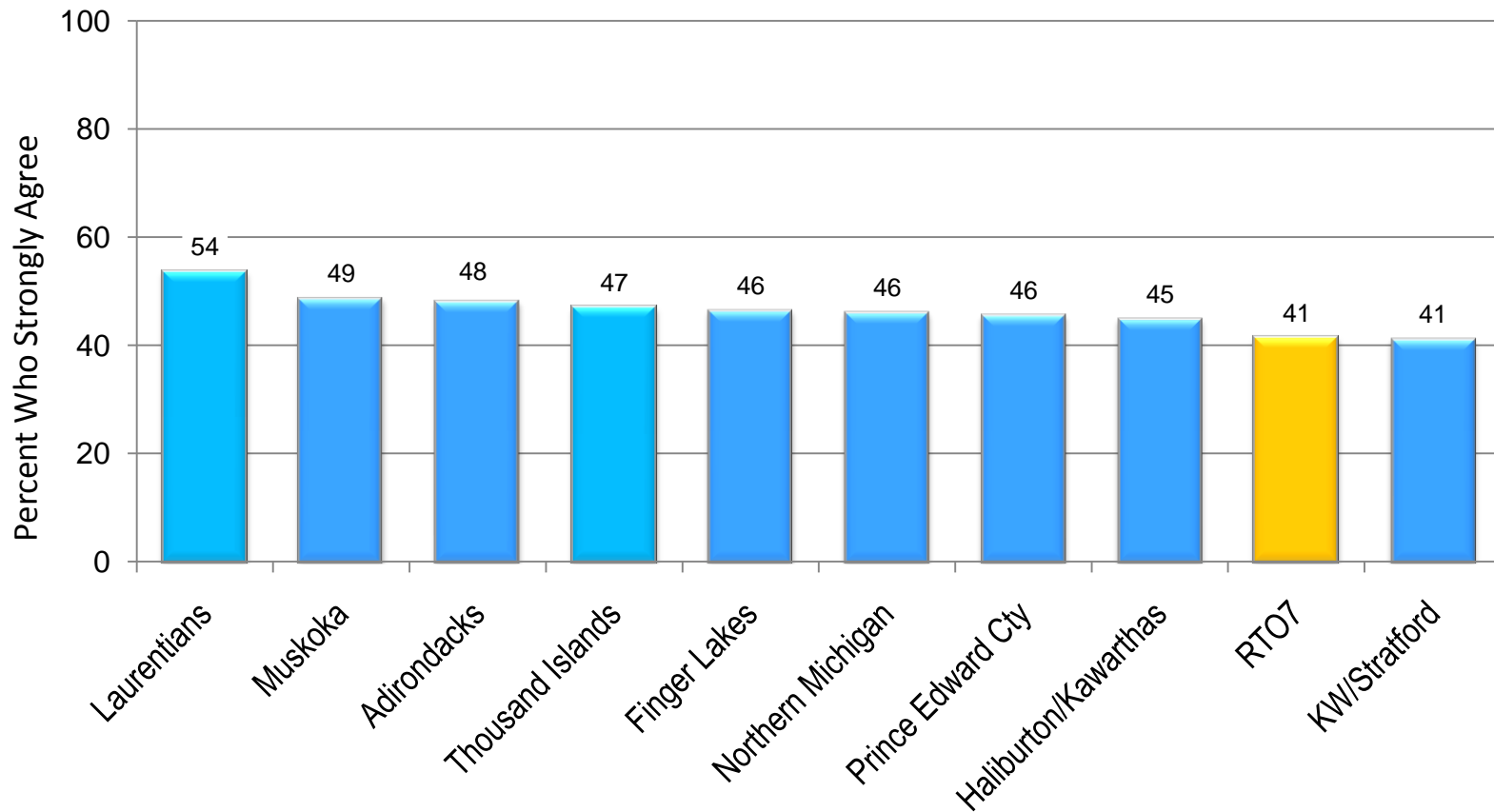


RTO7's Image vs. Competitors – Family Atmosphere

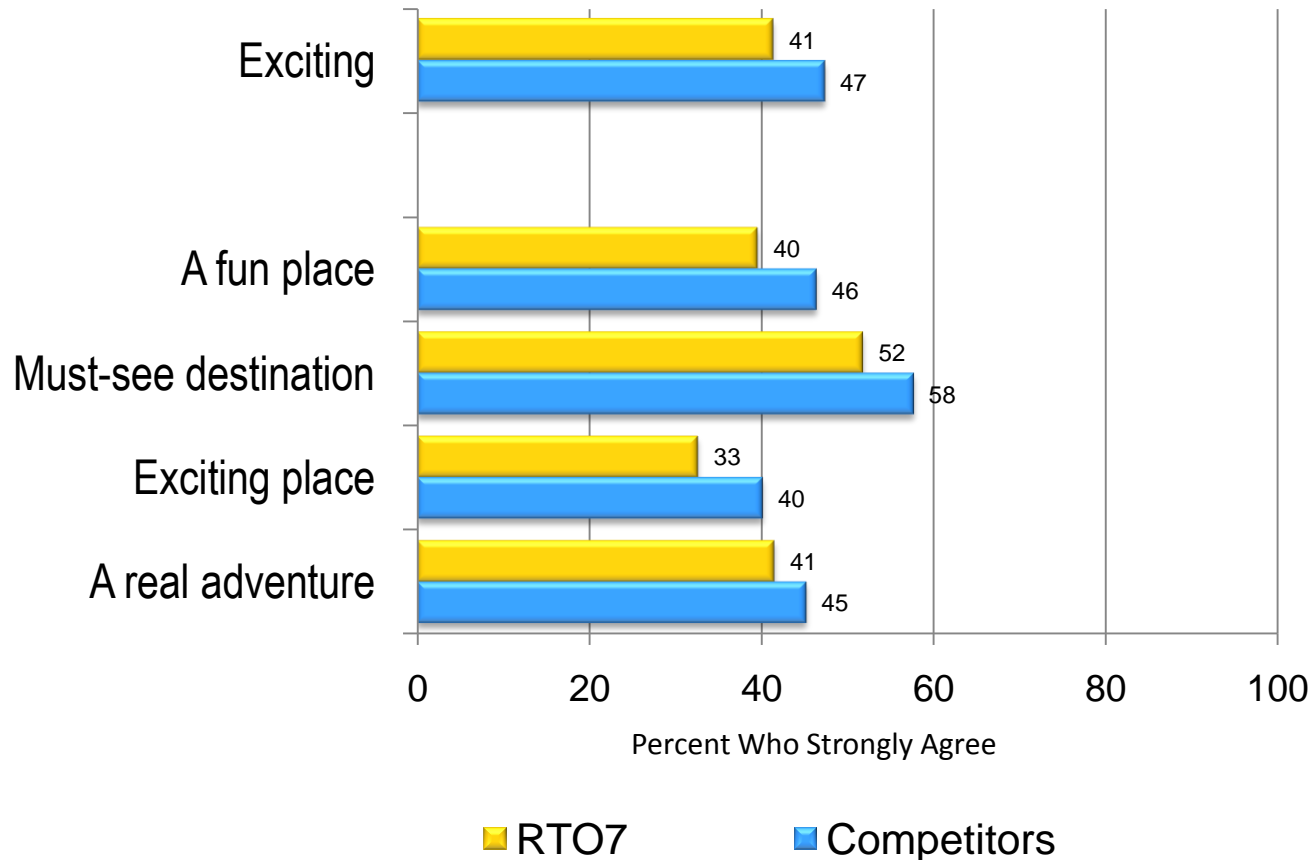


■ RTO7 ■ Competitors

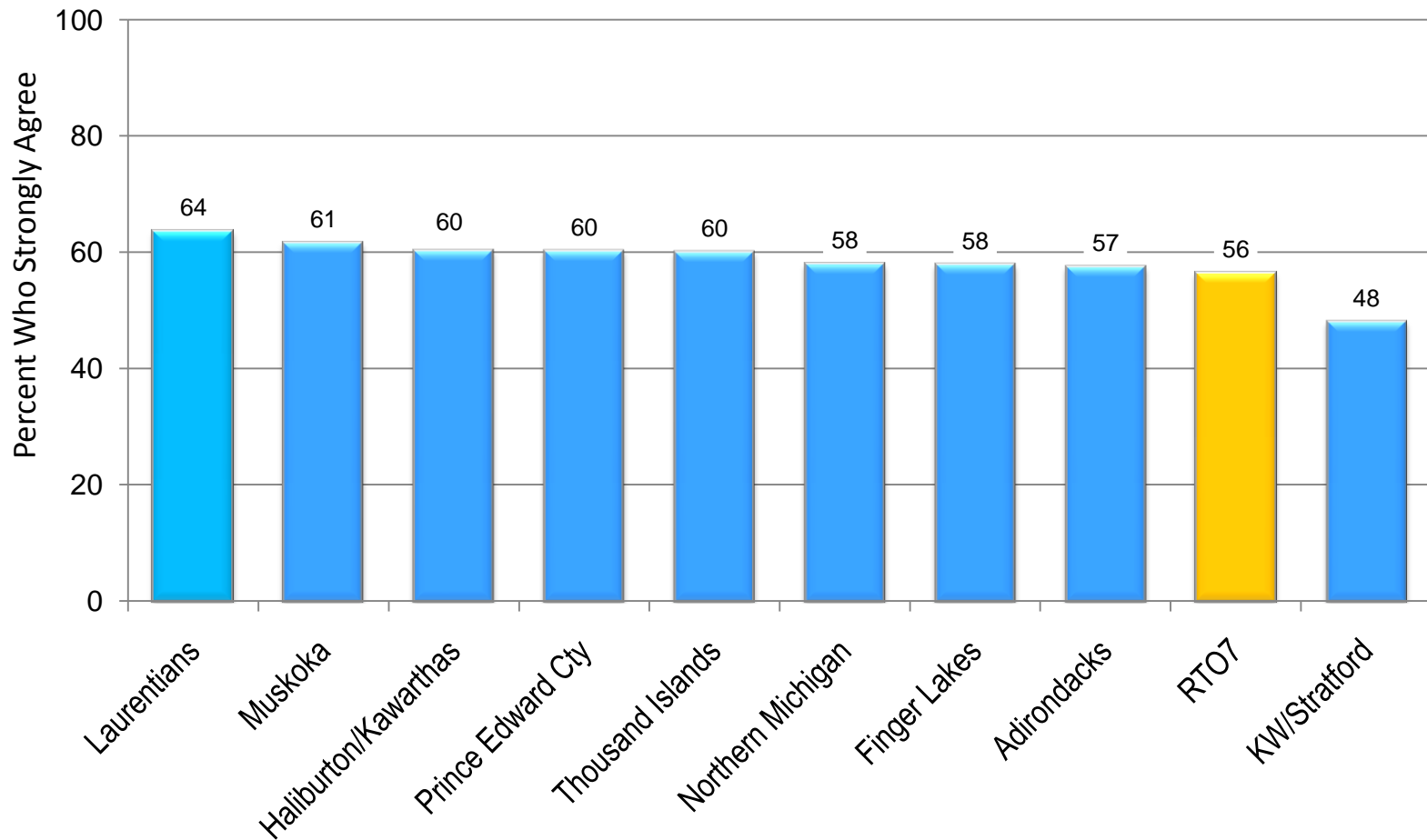
RTO7's Image vs. Competitors – Exciting



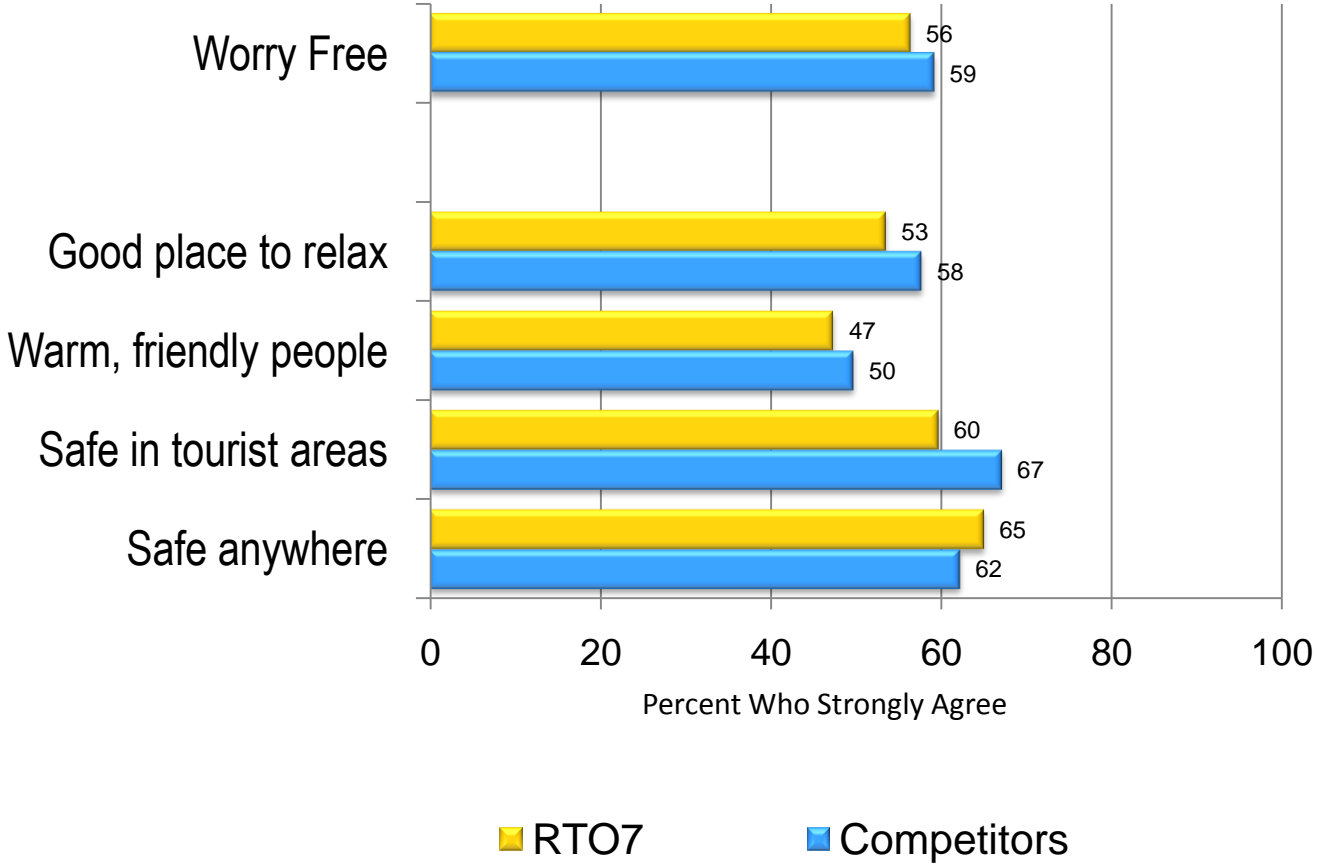
RTO7's Image vs. Competitors – Exciting



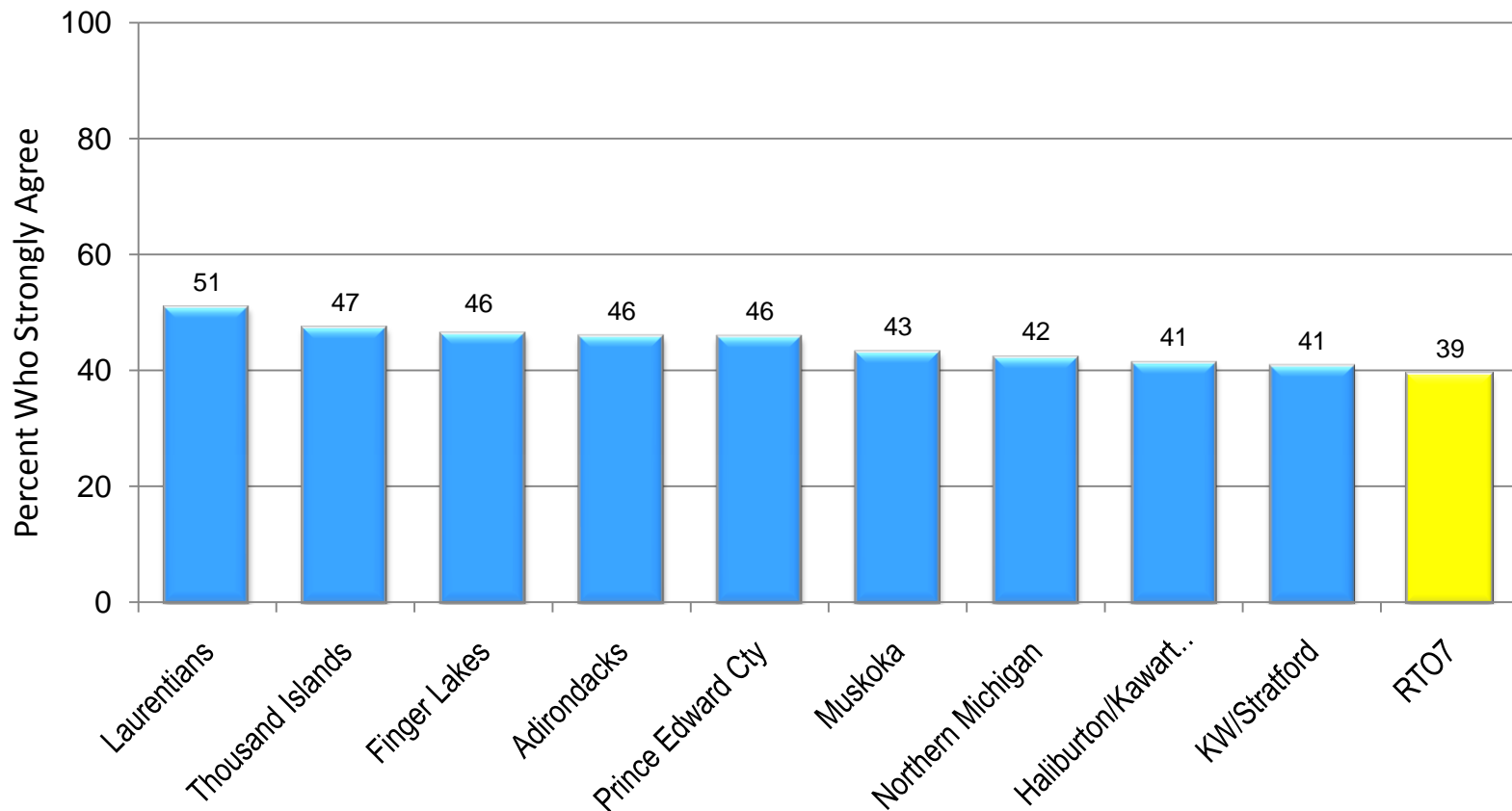
RTO7's Image vs. Competitors – Worry Free



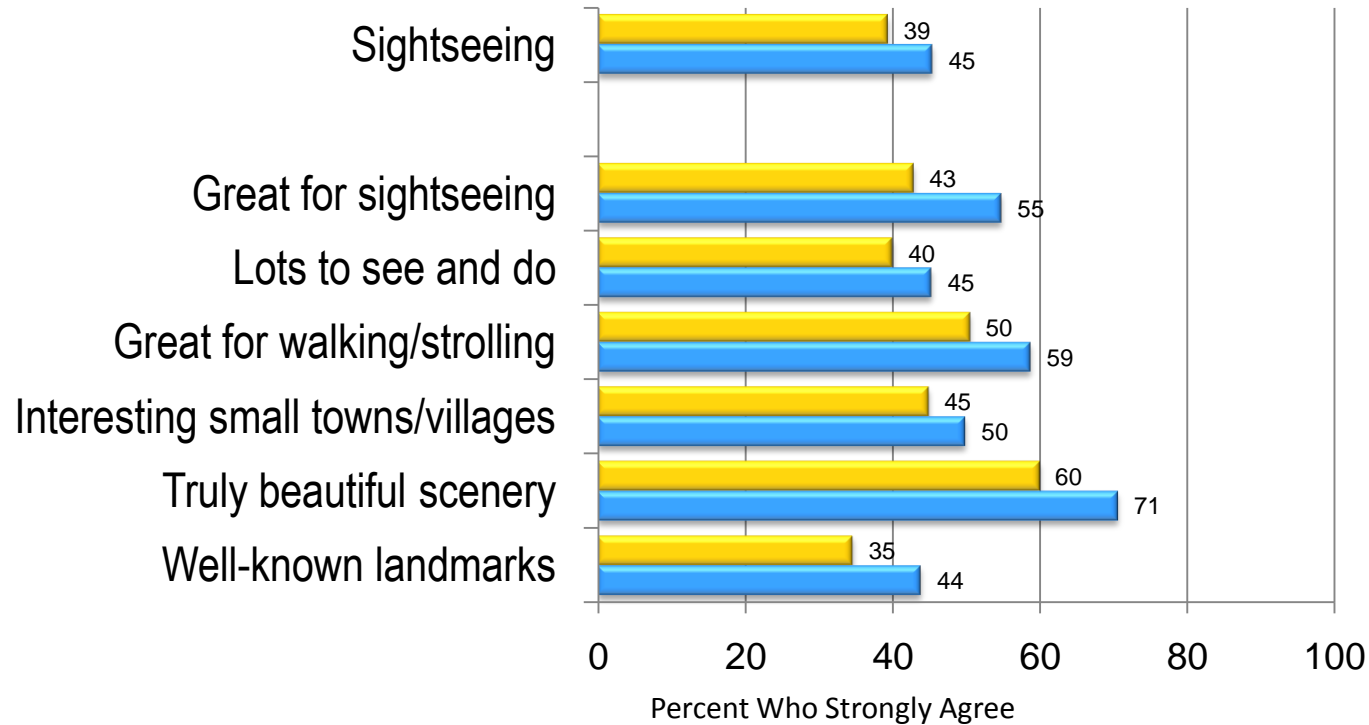
RTO7's Image vs. Competitors – Worry Free



RTO7's Image vs. Competitors – Sightseeing



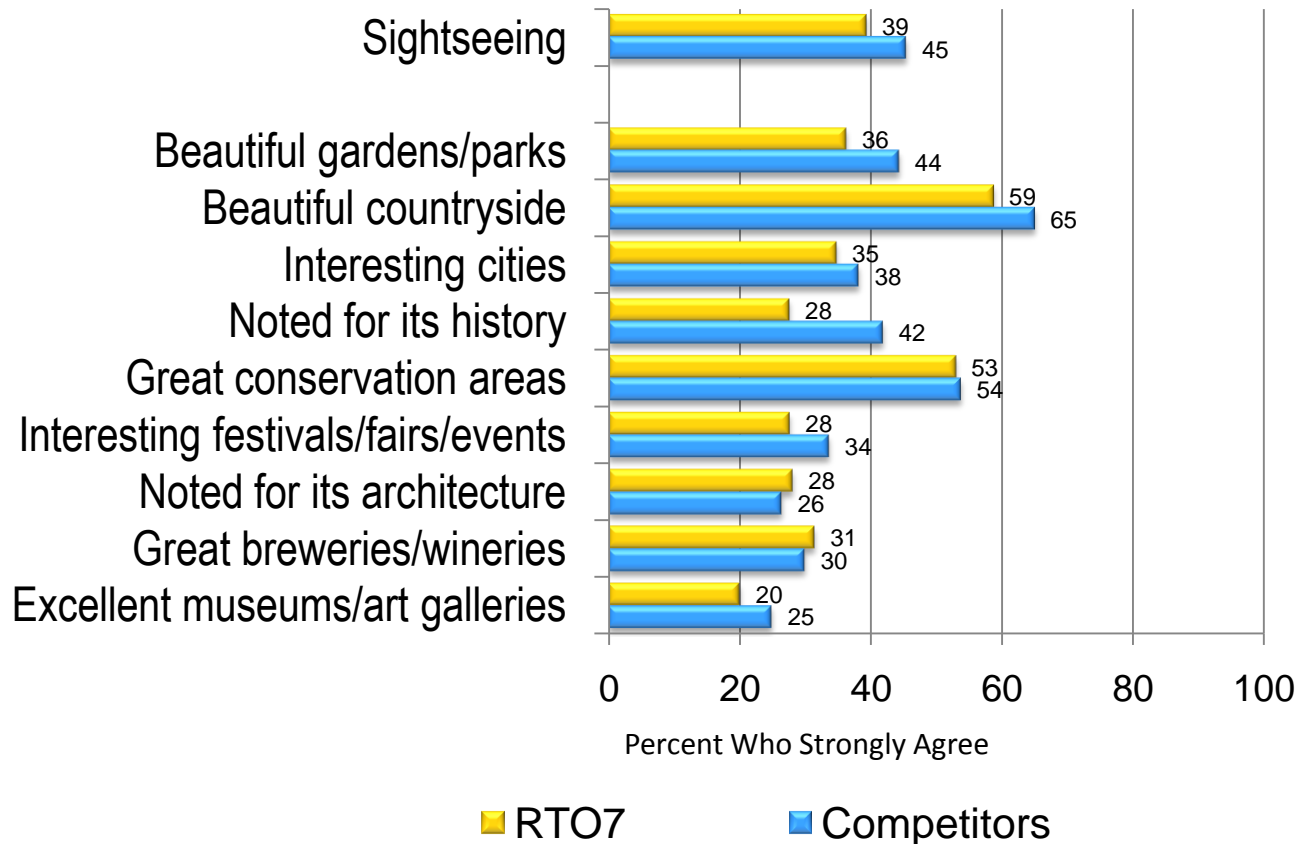
RTO7's Image vs. Competitors – Sightseeing



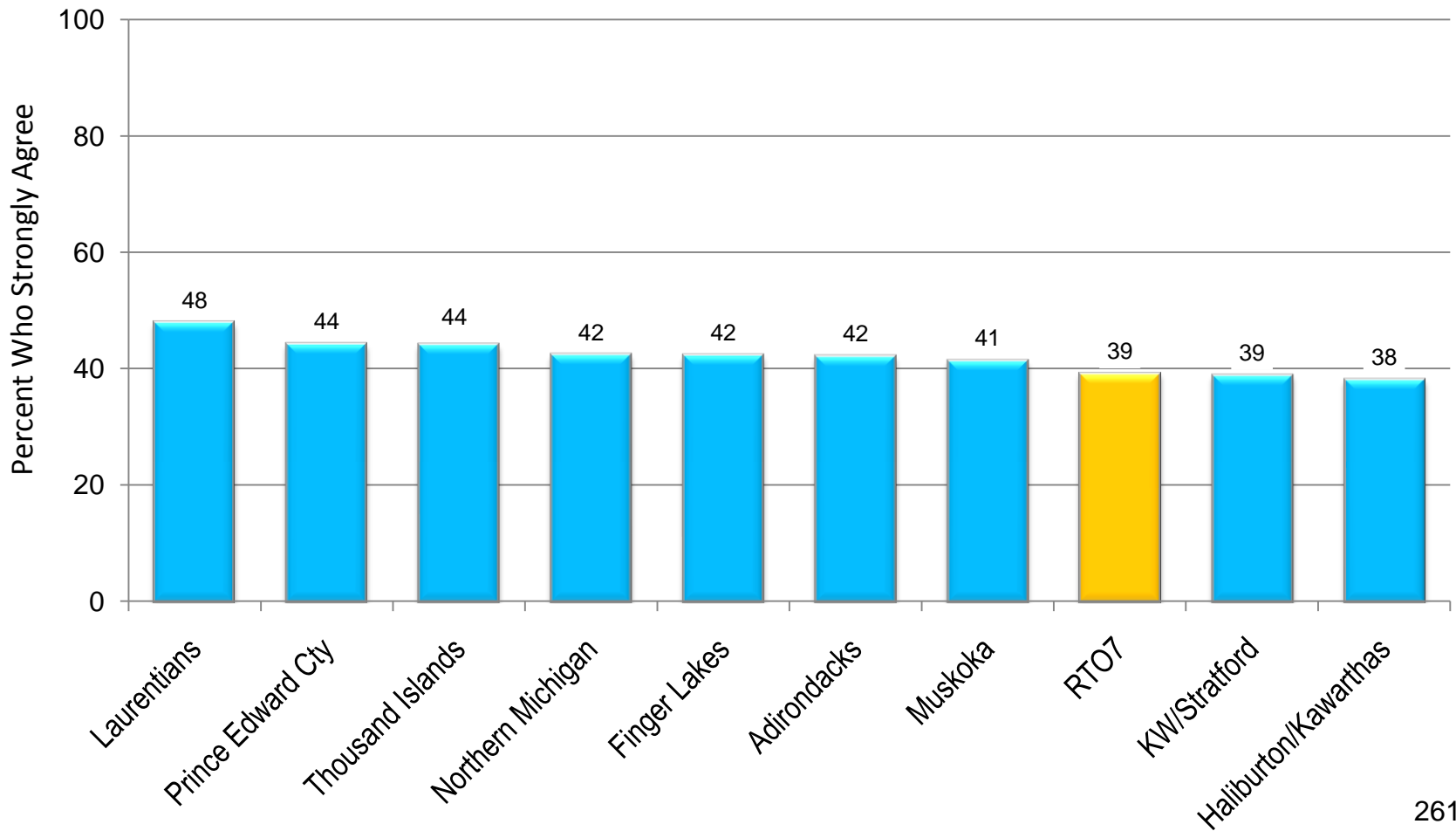
■ RTO7

■ Competitors

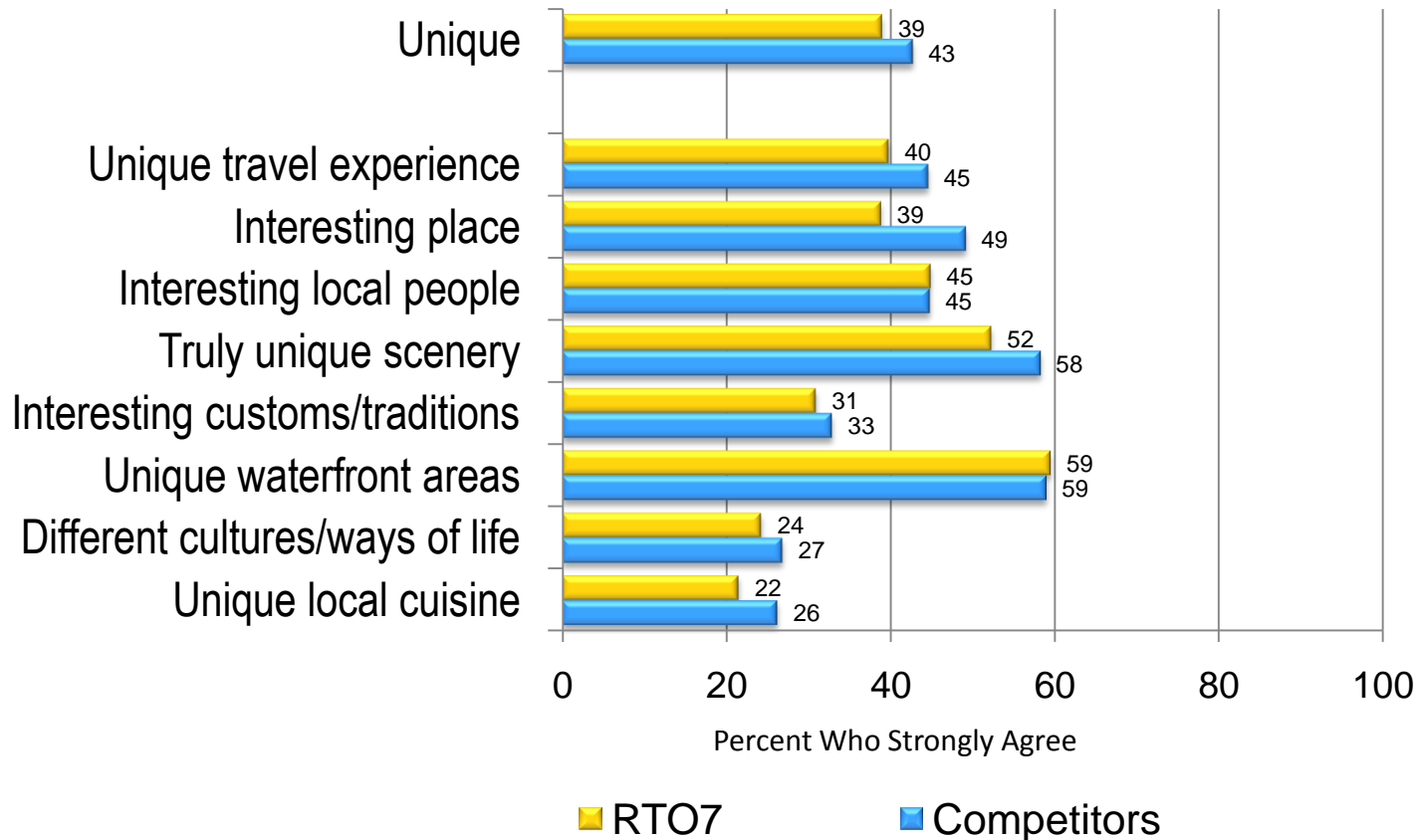
RTO7's Image vs. Competitors – Sightseeing (Cont'd)



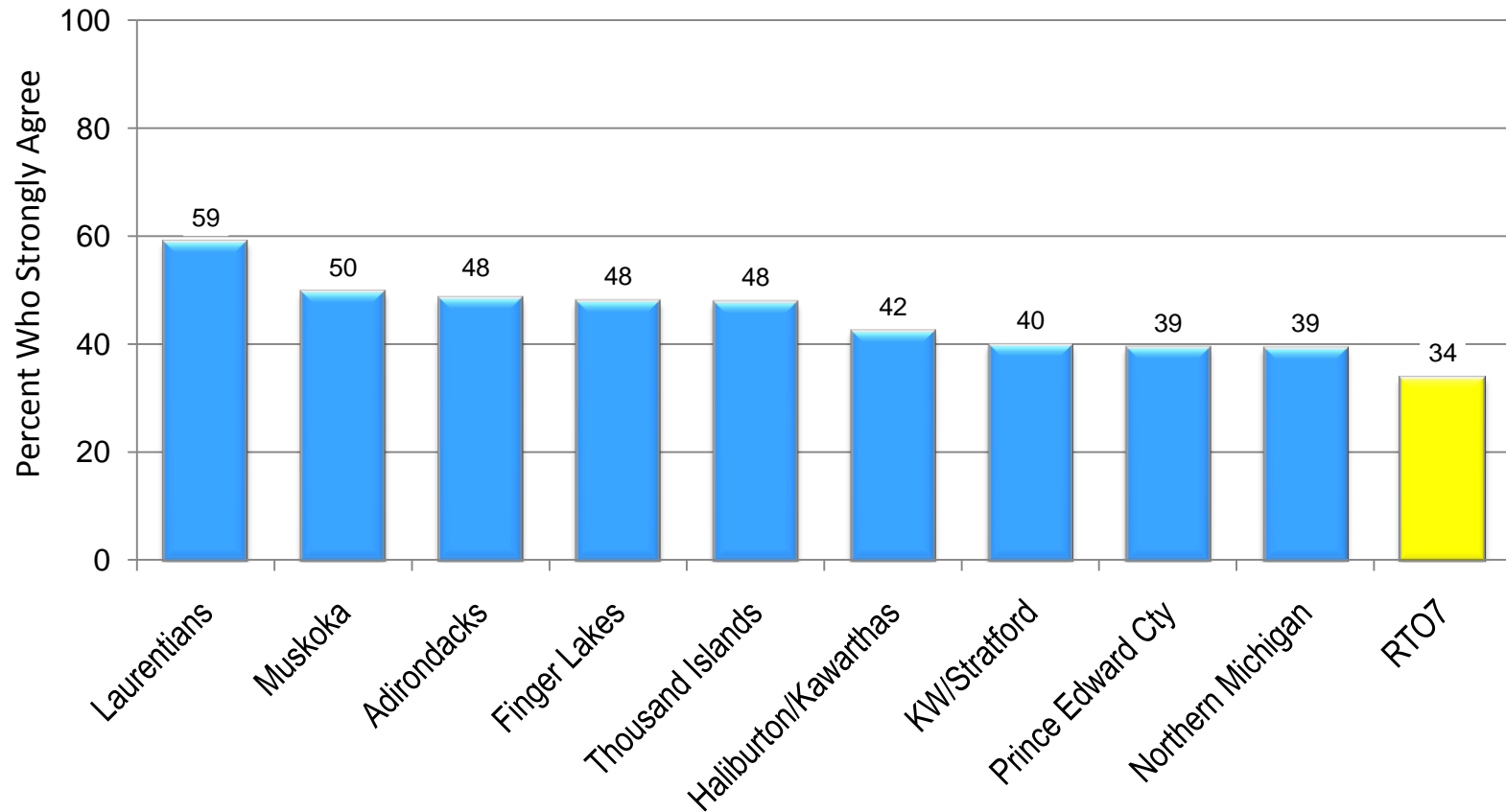
RTO7's Image vs. Competitors – Unique



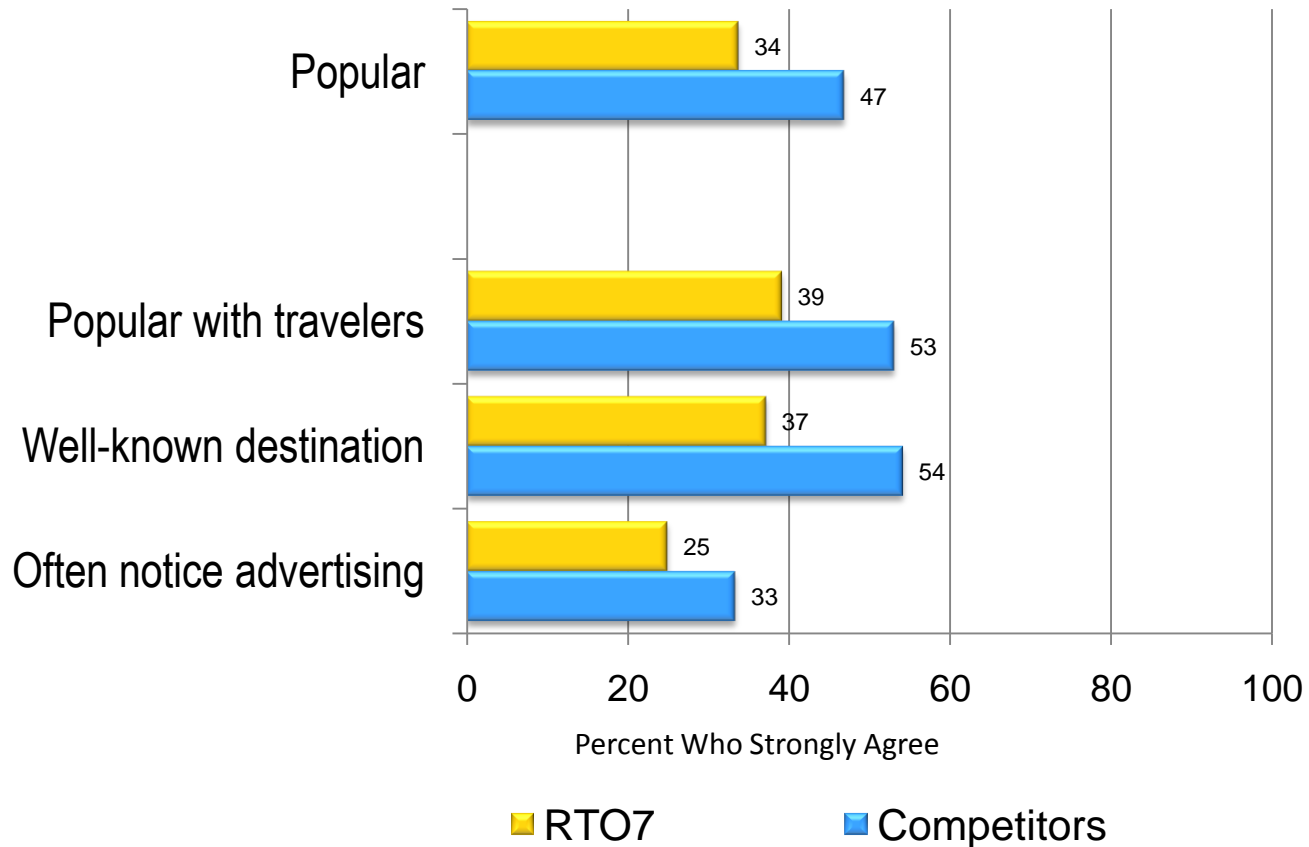
RTO7's Image vs. Competitors – Unique



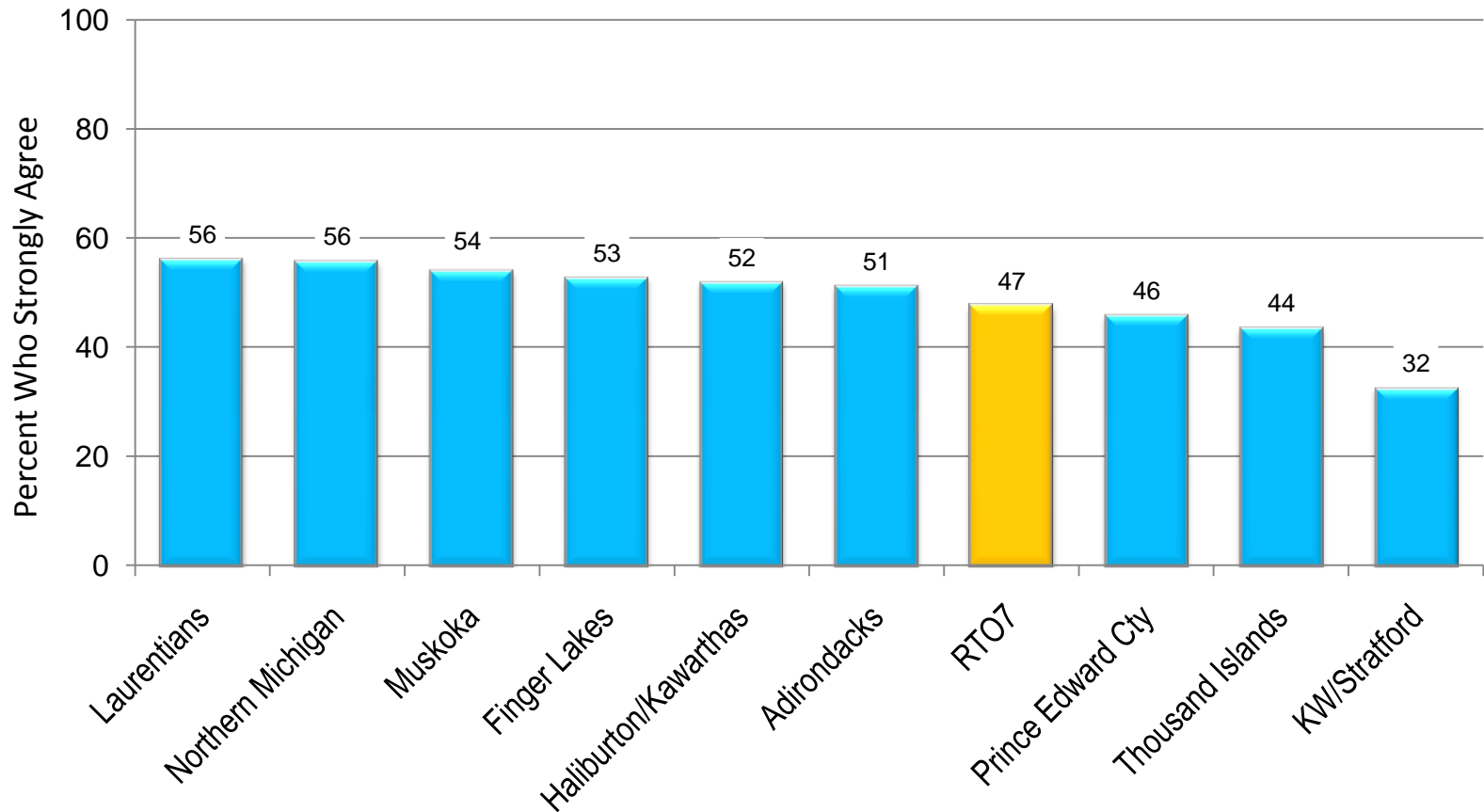
RTO7's Image vs. Competitors – Popular



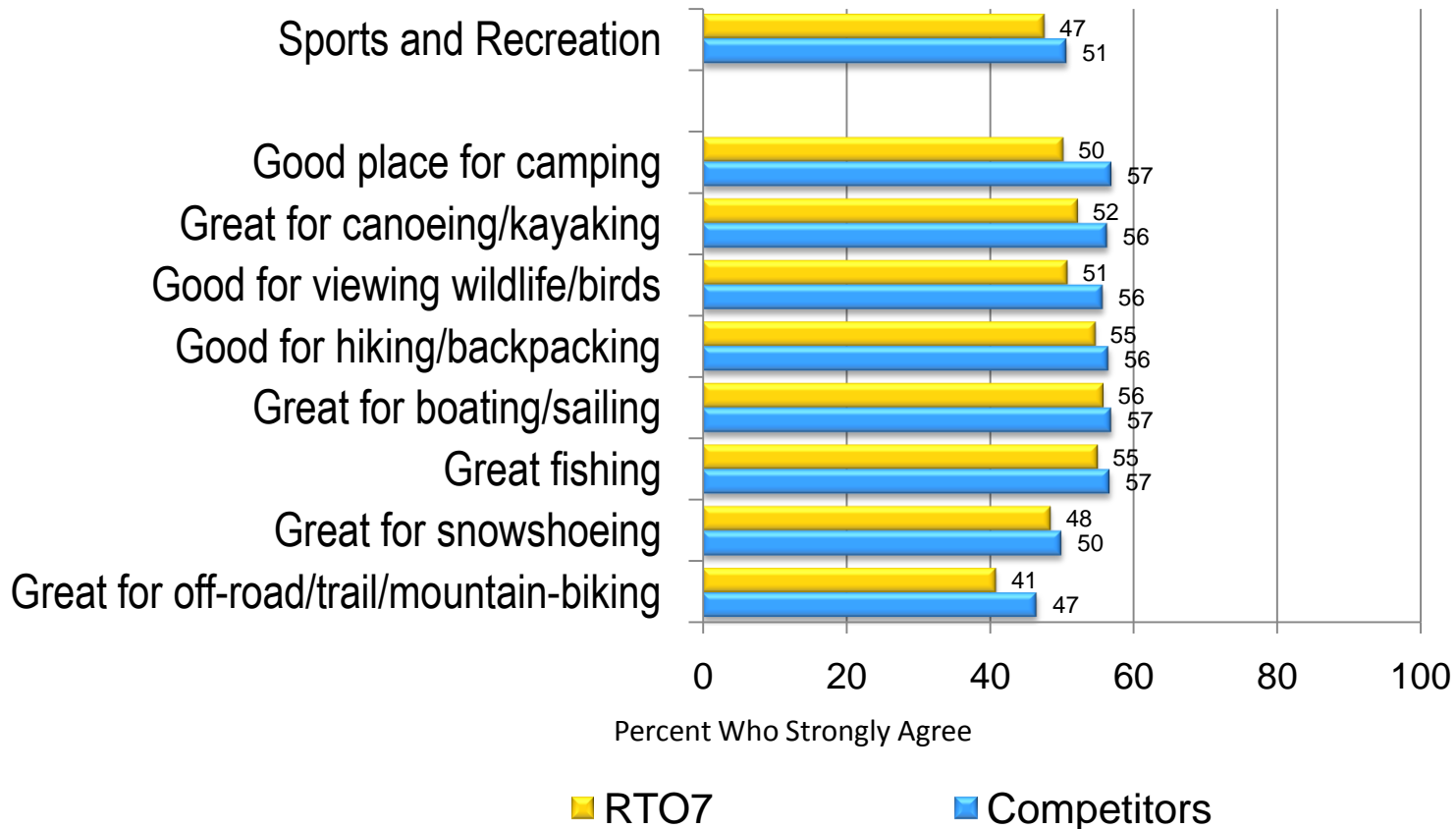
RTO7's Image vs. Competitors – Popular



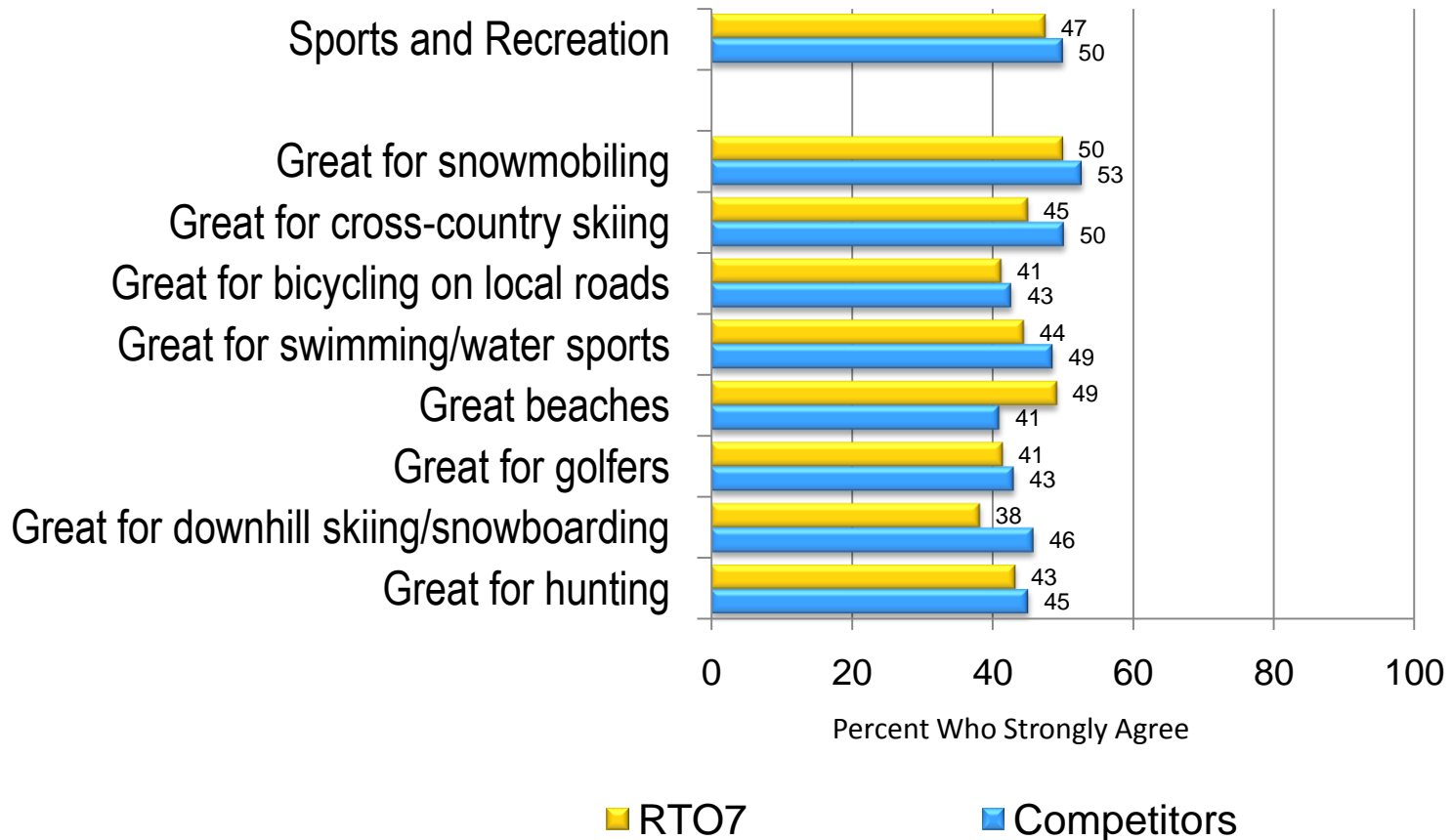
RTO7's Image vs. Competitors – Sports and Recreation



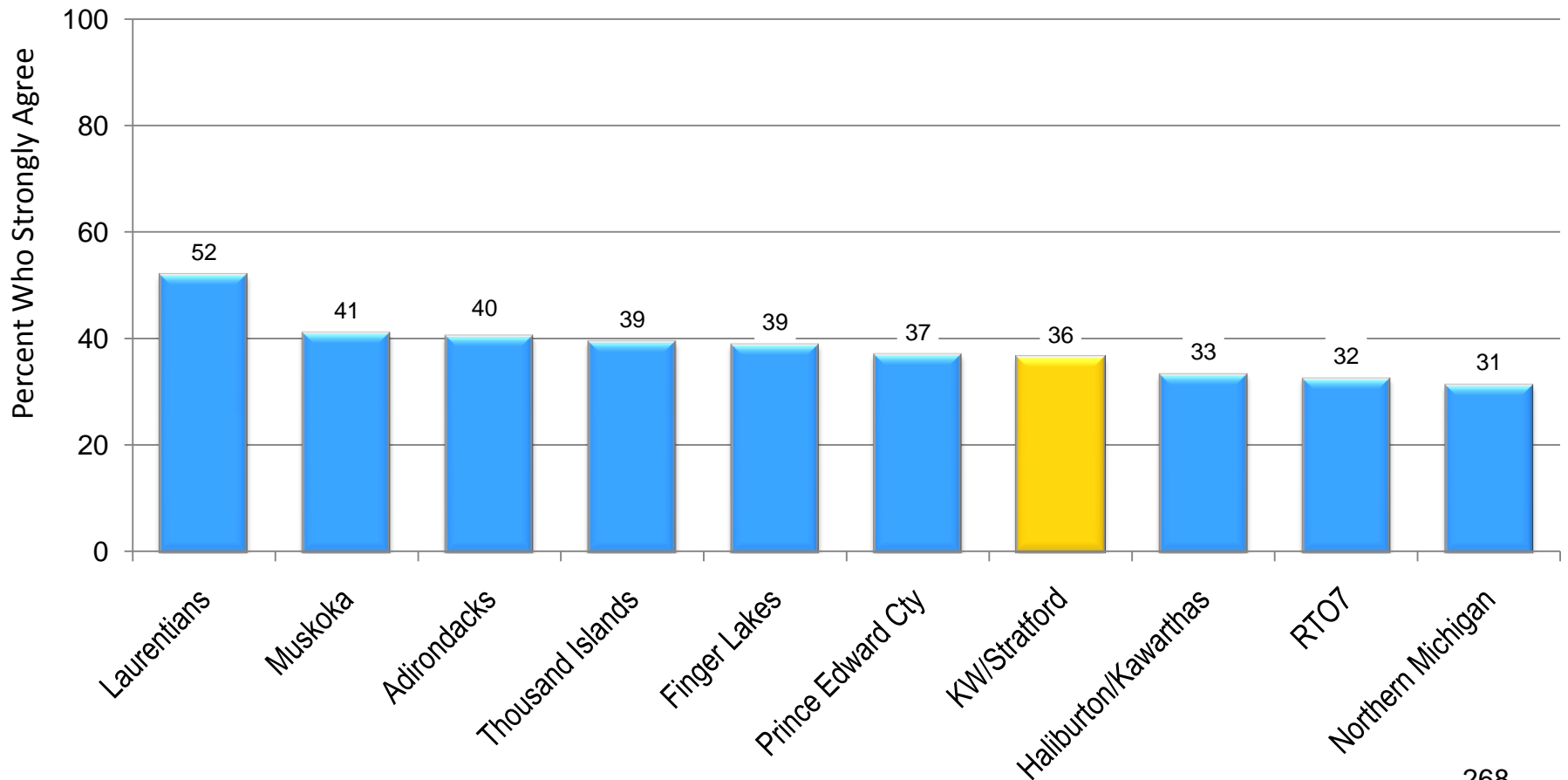
RTO7's Image vs. Competitors – Sports and Recreation



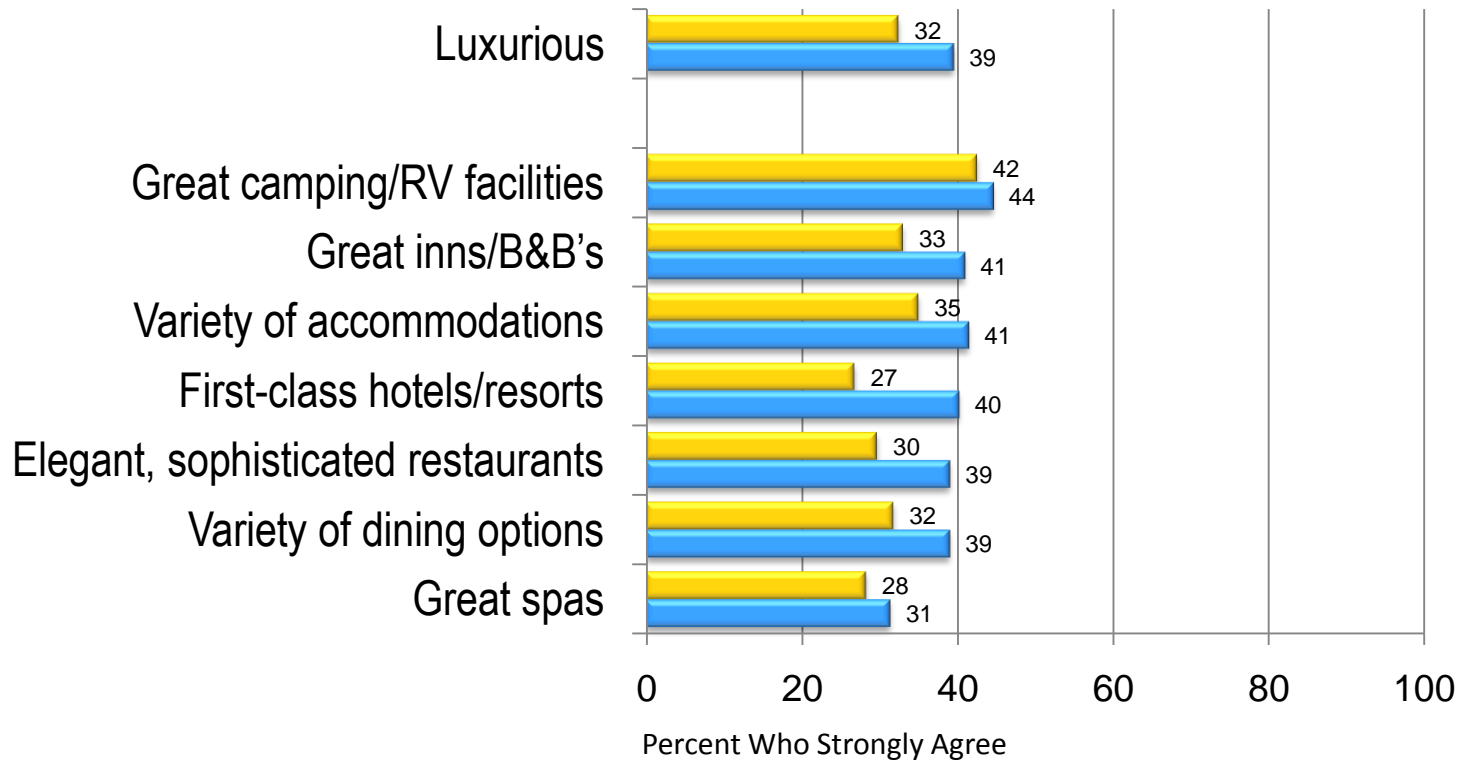
RTO7's Image vs. Competitors – Sports and Recreation (Cont'd)



RTO7's Image vs. Competitors – Luxurious



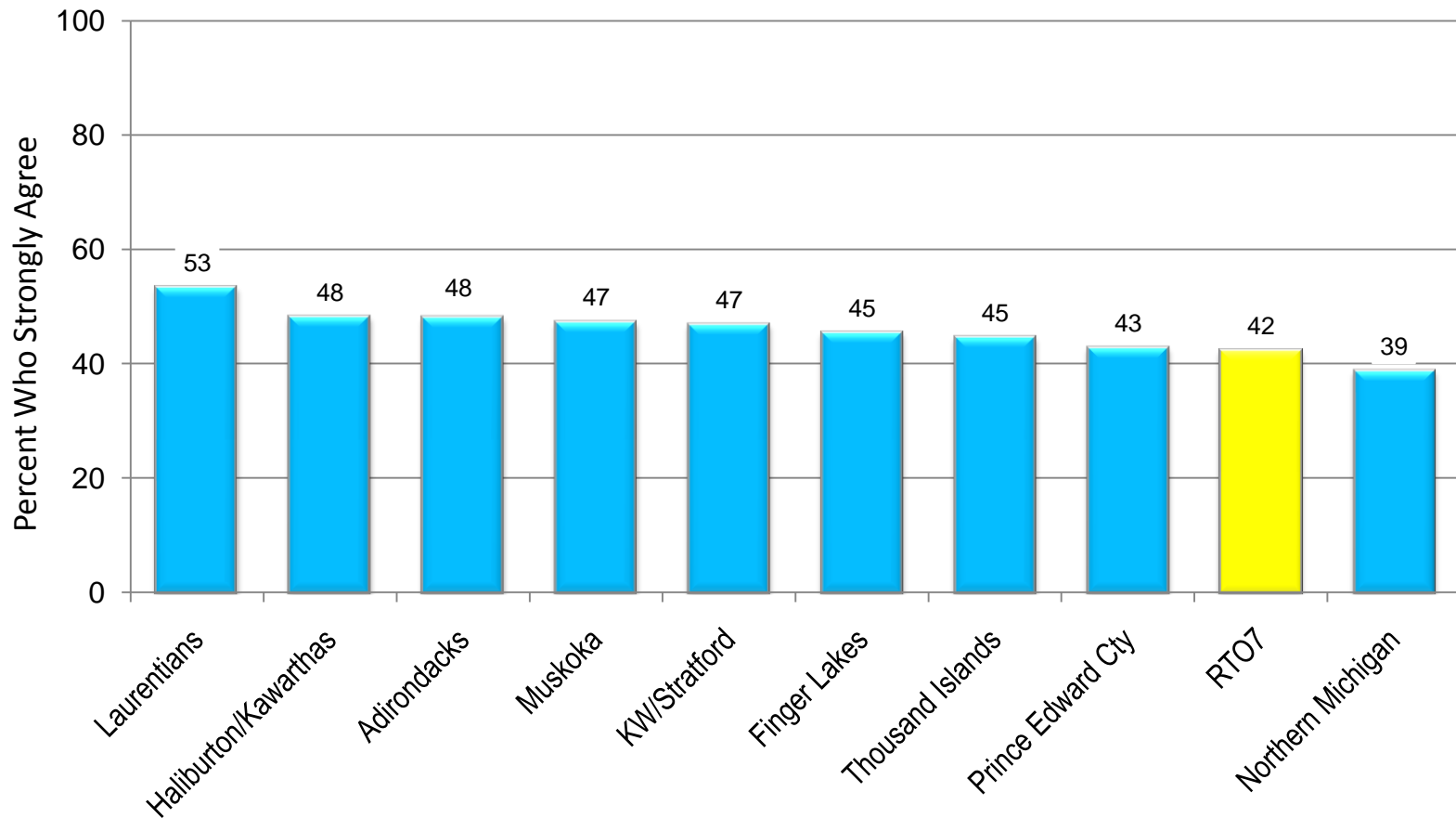
RTO7's Image vs. Competitors – Luxurious



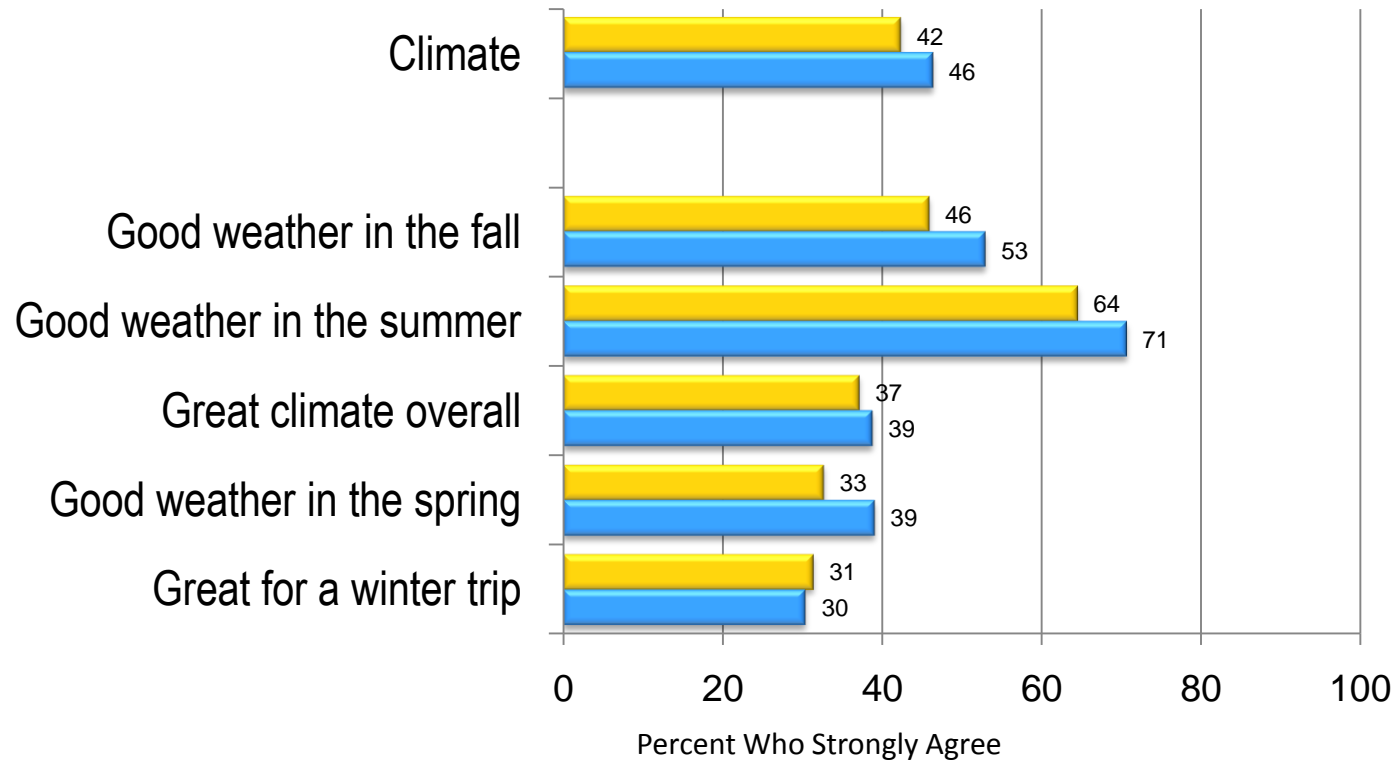
■ RTO7

■ Competitors

RTO7's Image vs. Competitors – Climate



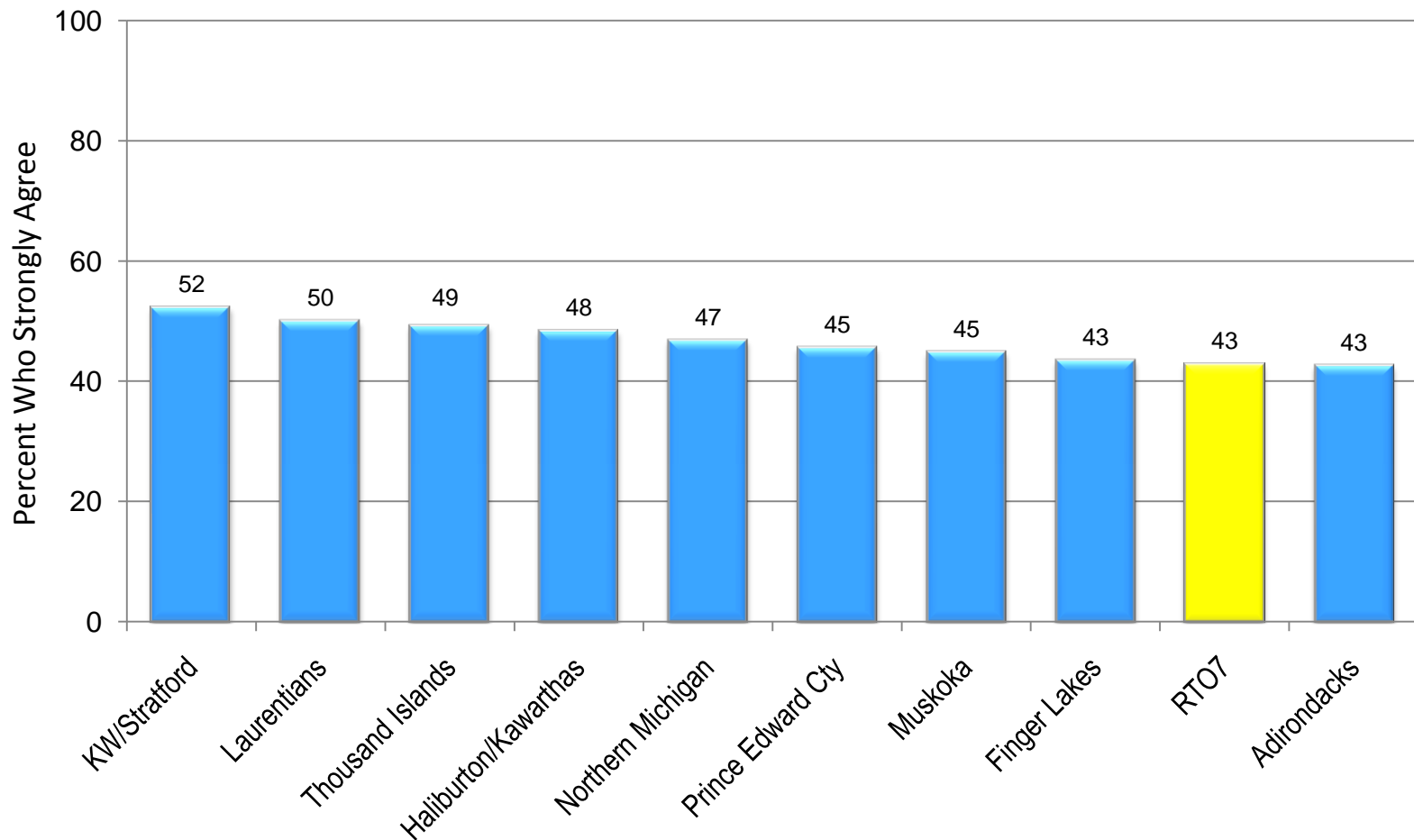
RTO7's Overall Image vs. Competitors – Climate



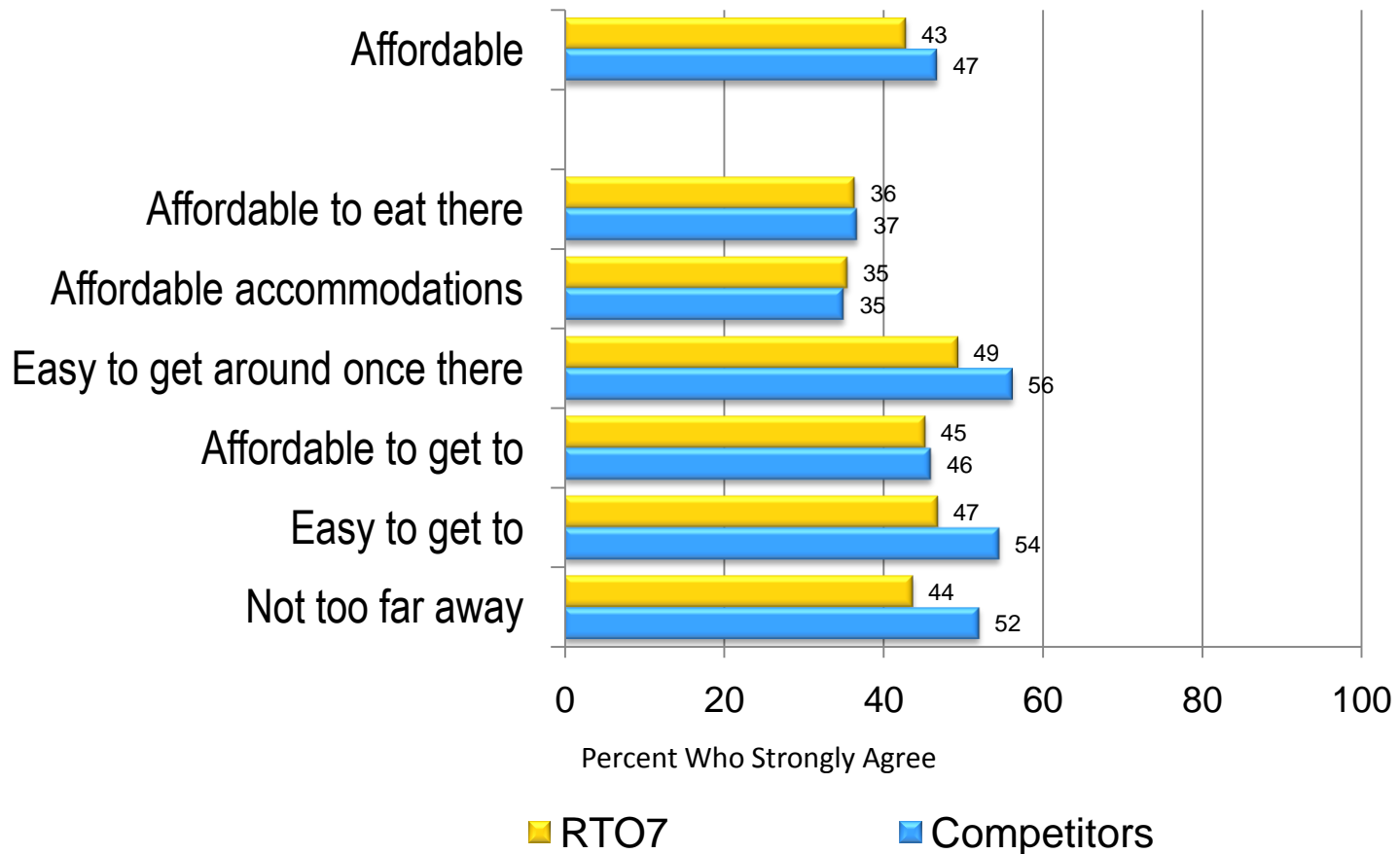
■ RTO7

■ Competitors

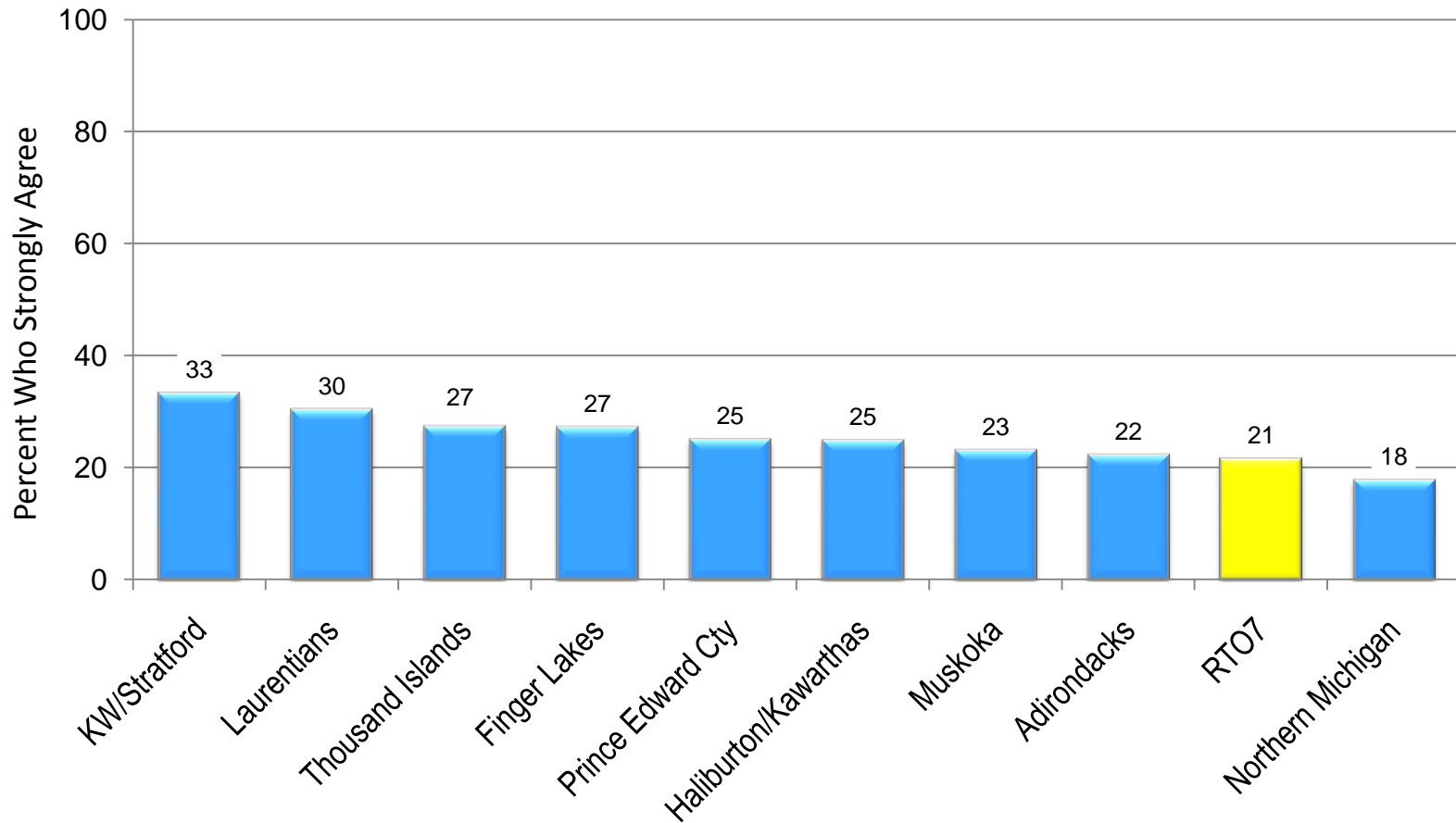
RTO7's Image vs. Competitors – Affordable



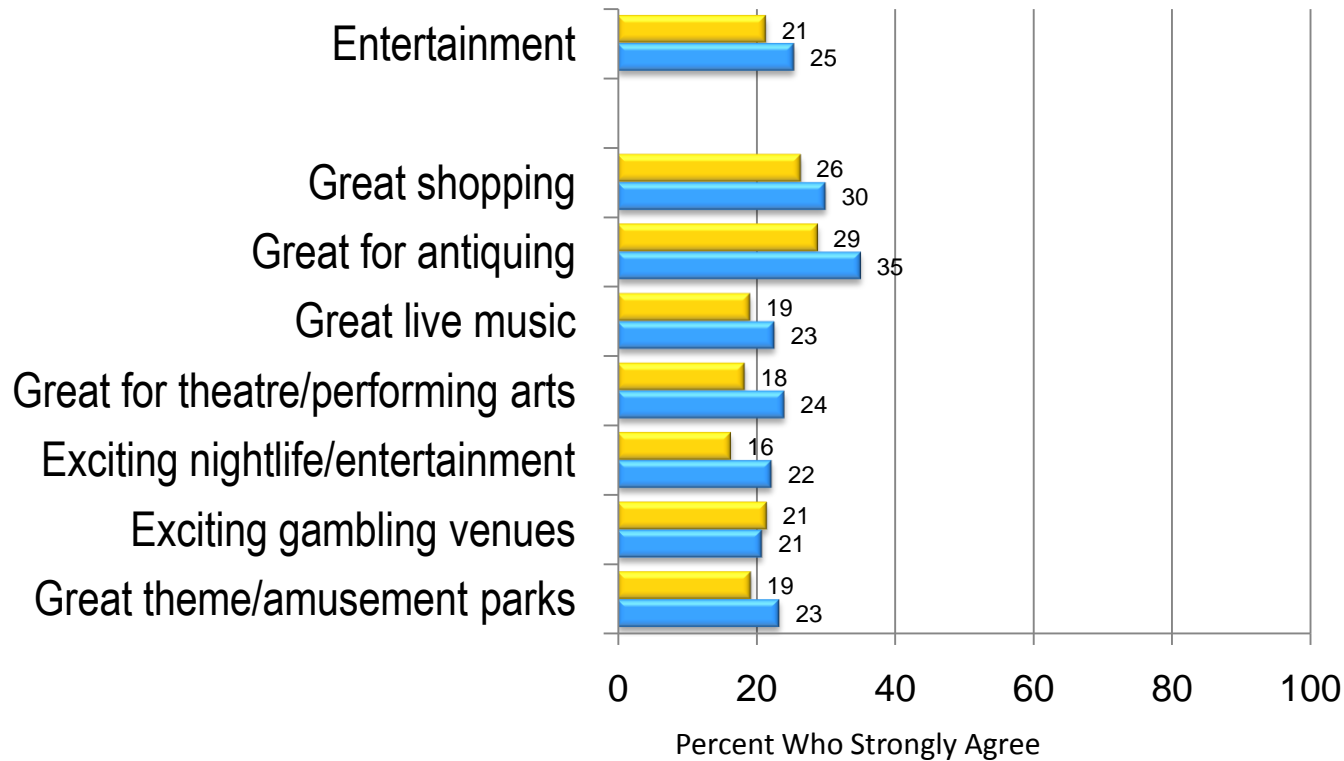
RTO7's Image vs. Competitors – Affordable



RTO7's Image vs. Competitors – Entertainment



RTO7's Image vs. Competitors – Entertainment



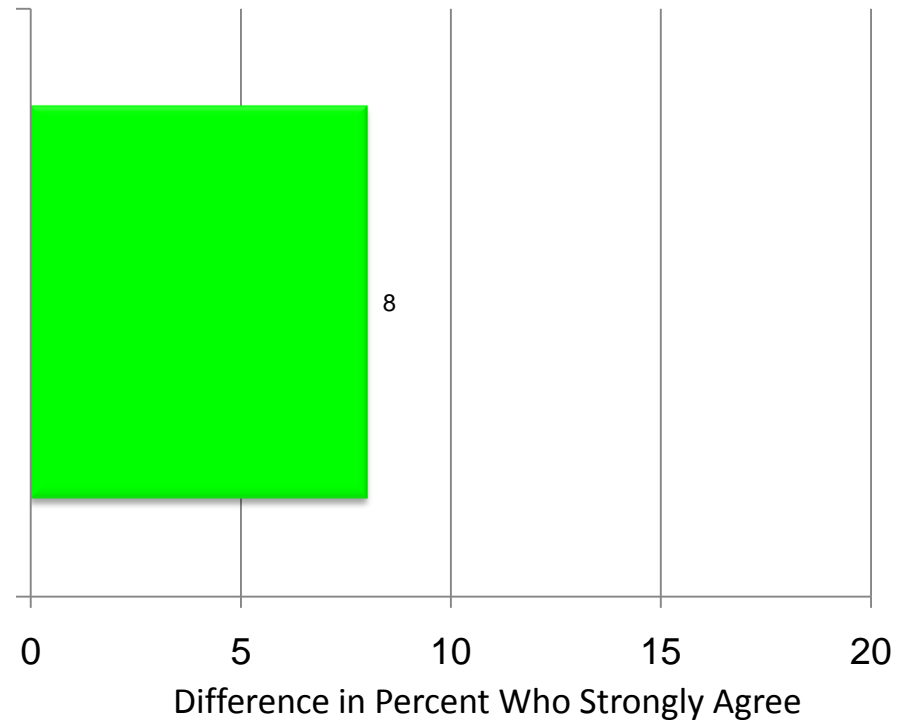
■ RTO7

■ Competitors

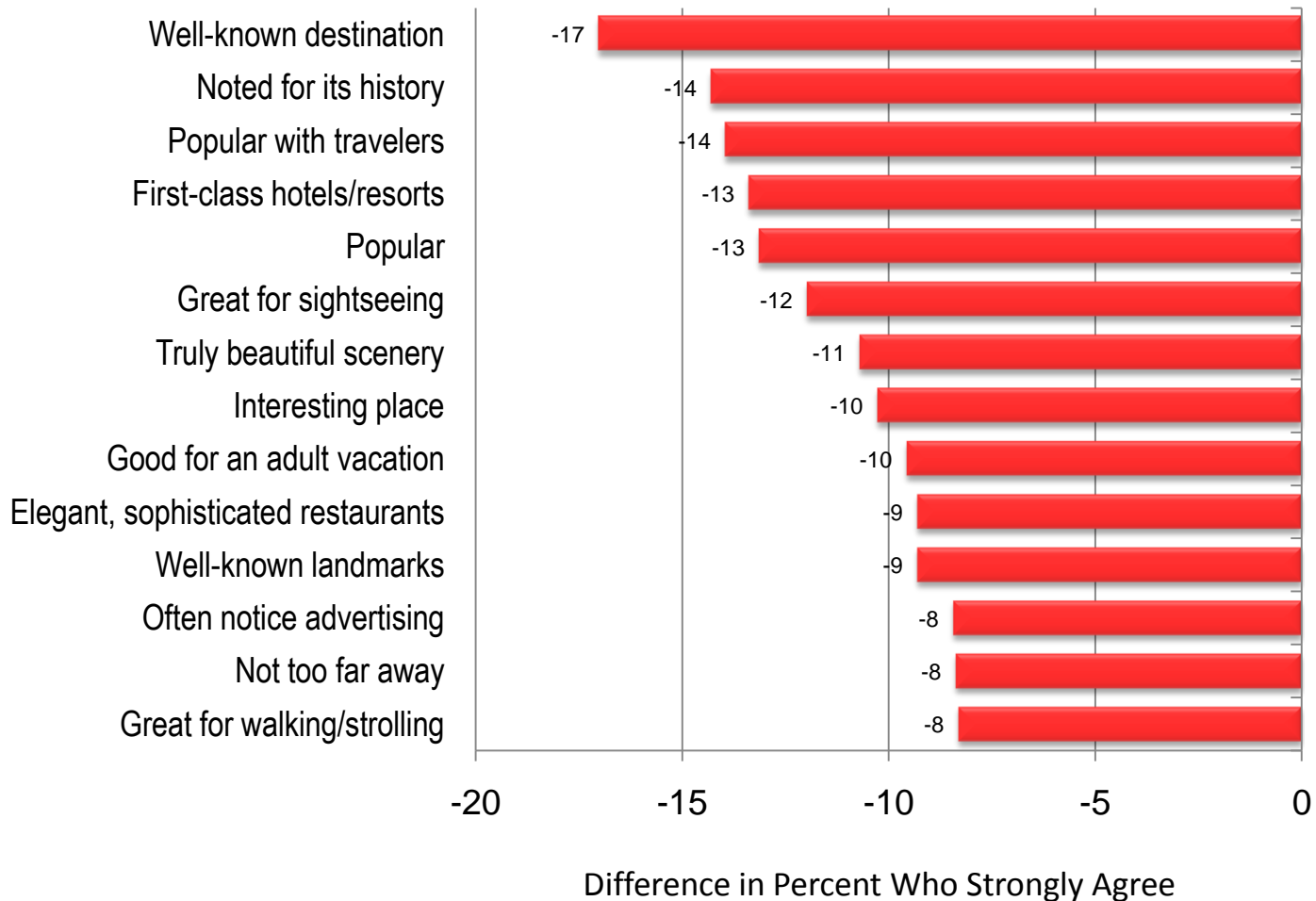
RTO7's Image Strengths vs. the Combined Competition



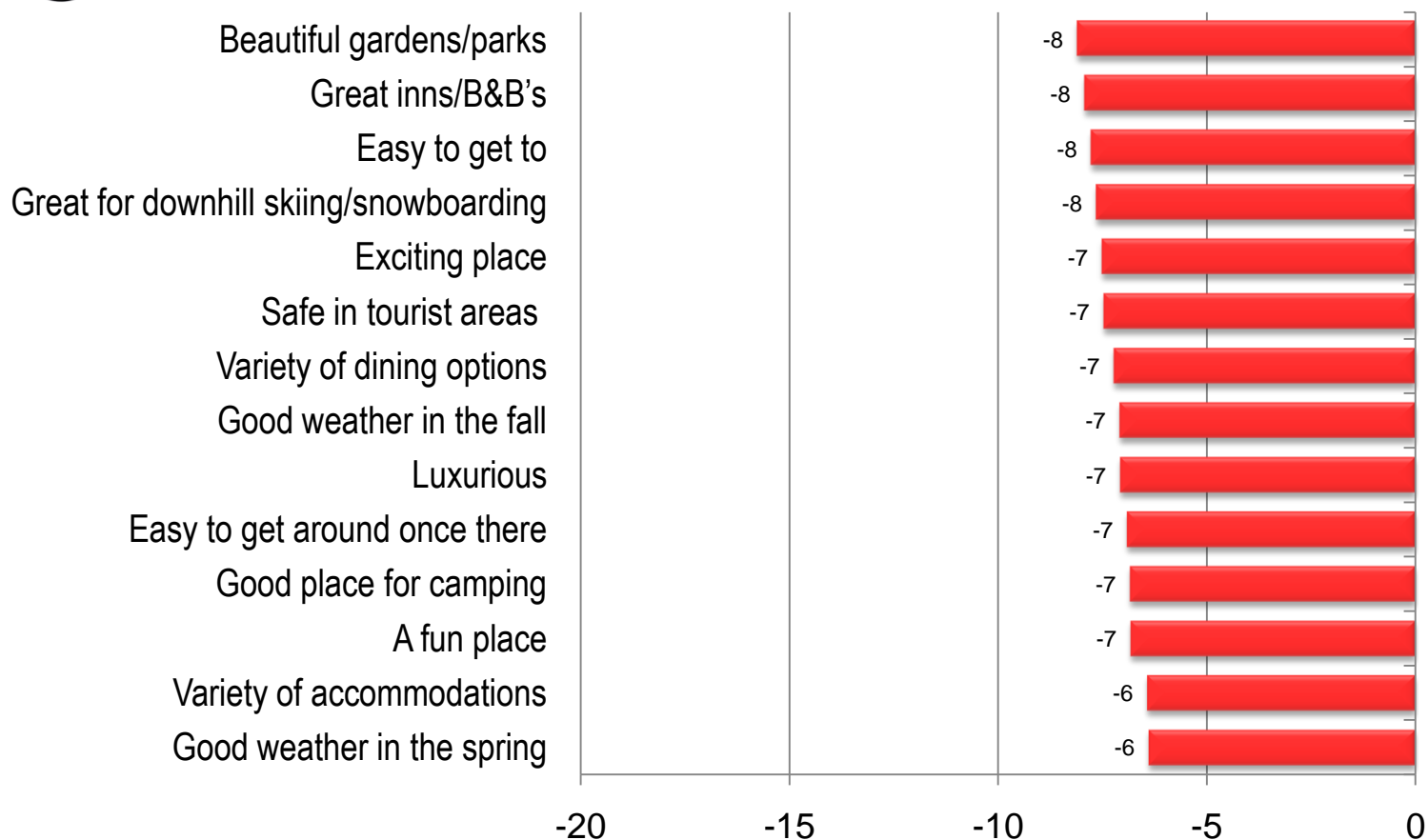
Great beaches



RTO7's Image Weaknesses vs. the Combined Competition



RTO7's Image Weaknesses vs. the Combined Competition (Cont'd)



Difference in Percent Who Strongly Agree

RTO7's Image Weaknesses vs. the Combined Competition (Cont'd)

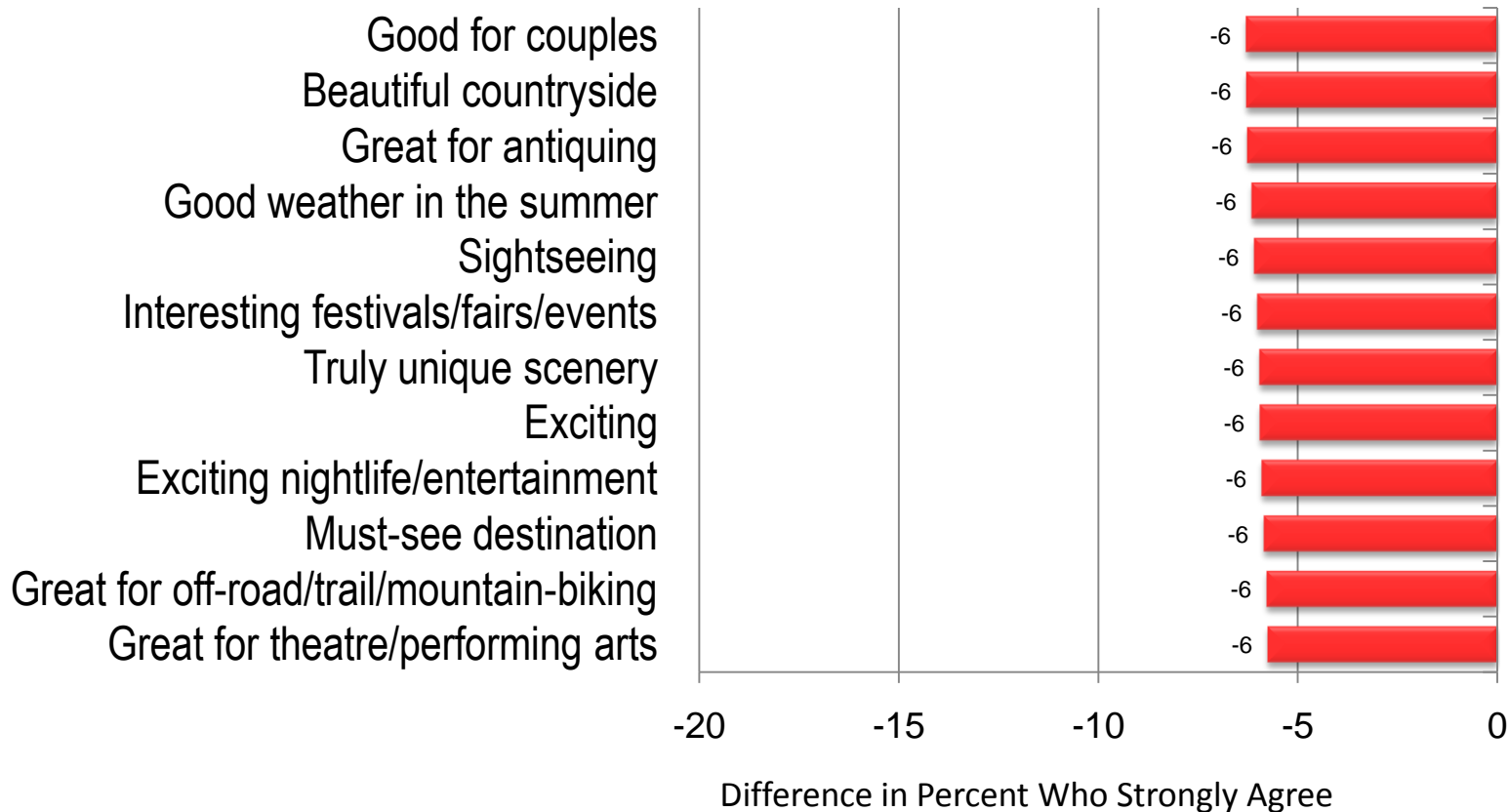
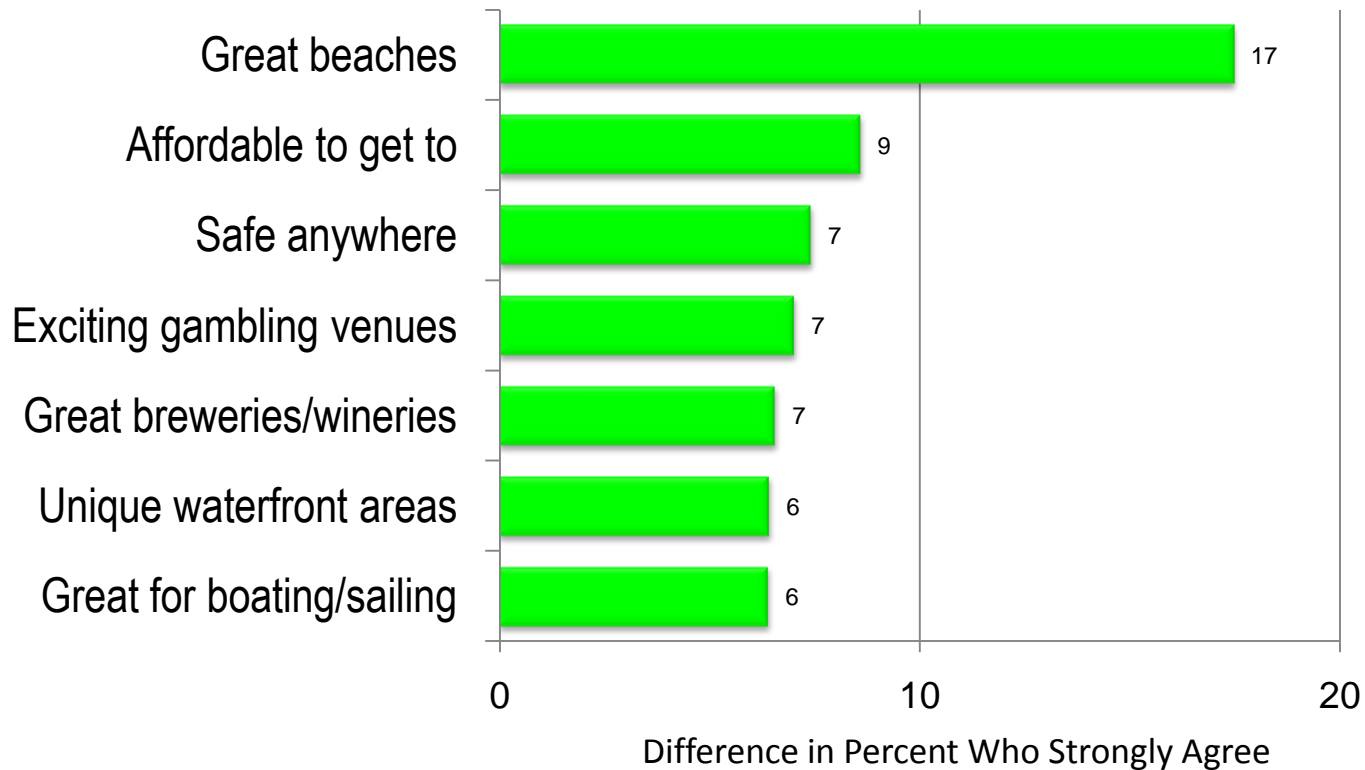


Image Strengths & Weaknesses vs. Individual Competitors

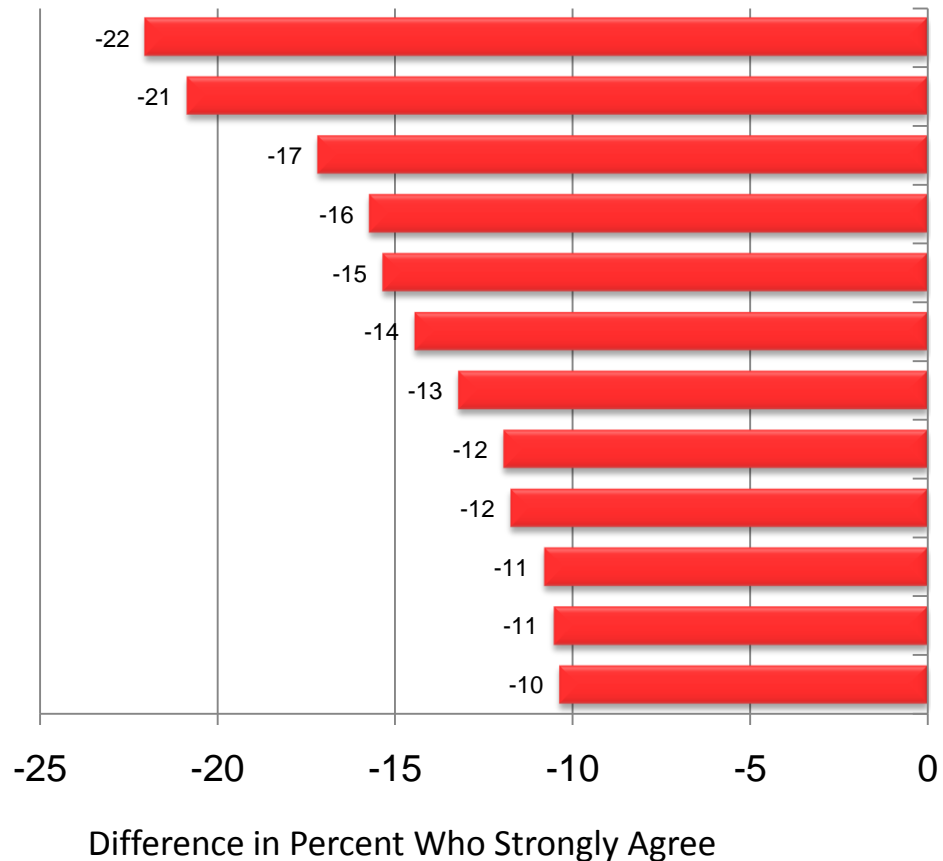
RTO7's Image Strengths vs. The Adirondacks



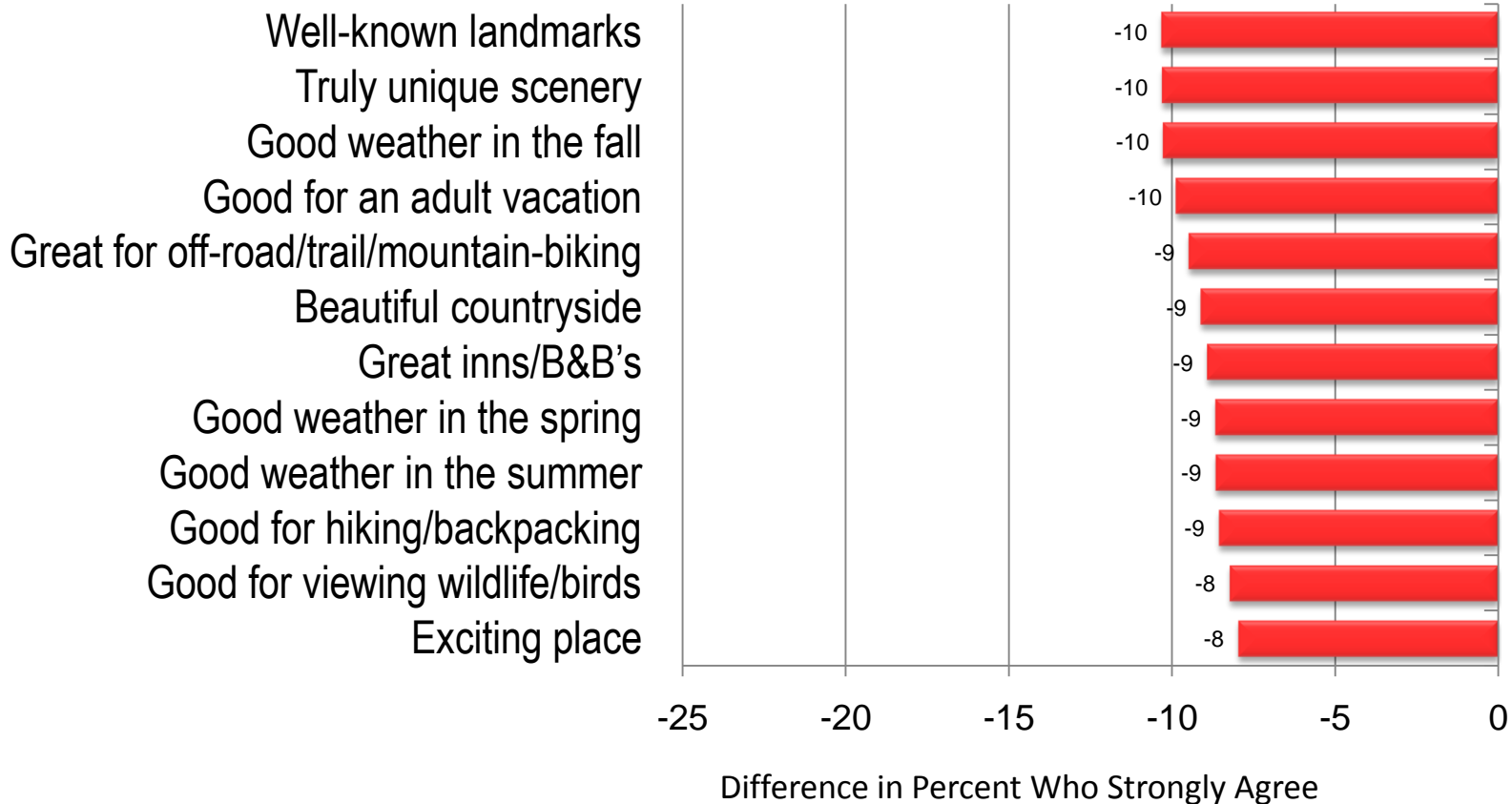
RTO7's Image Weaknesses vs. the Adirondacks



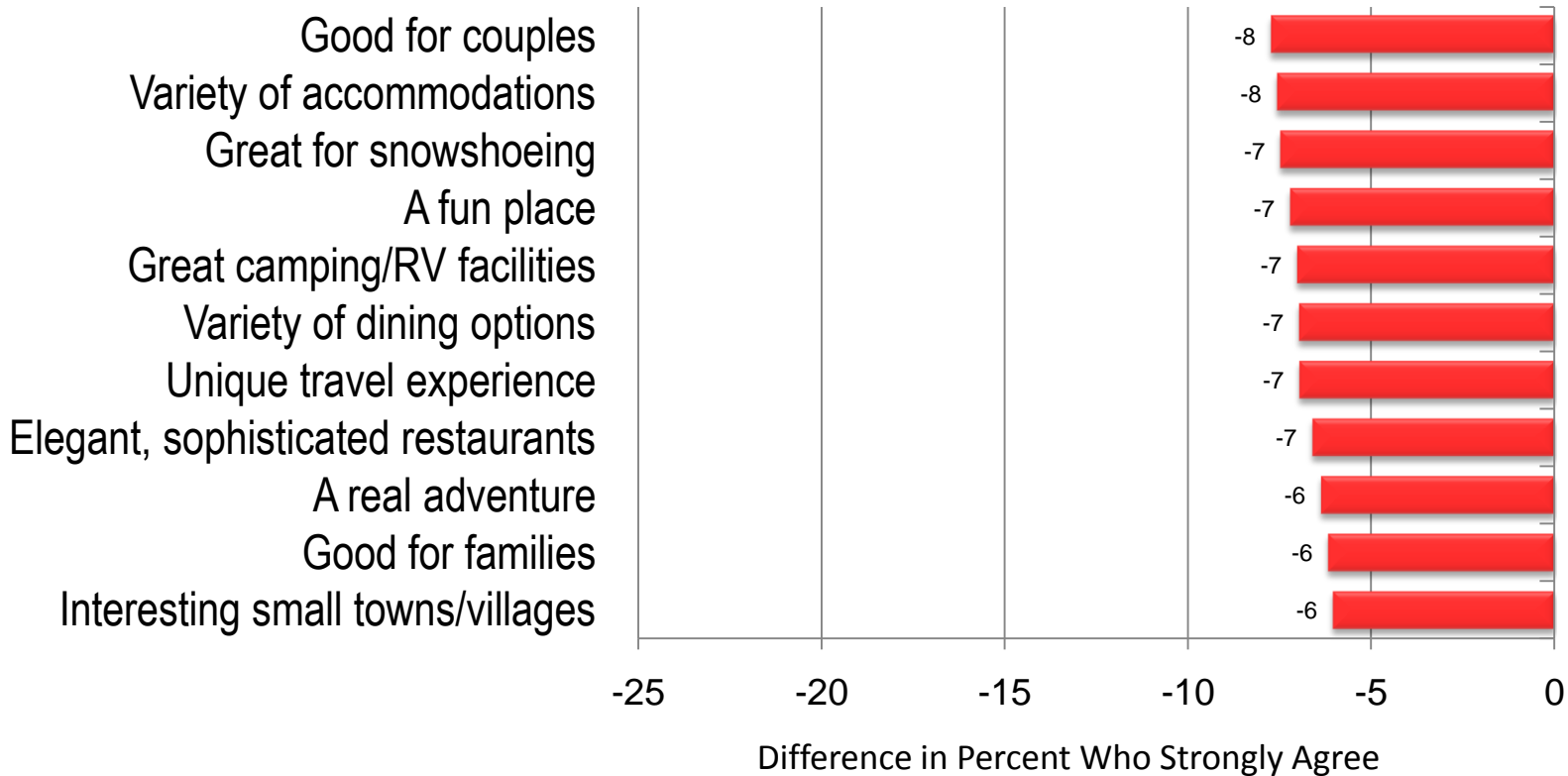
- Great for downhill skiing/snowboarding
- Well-known destination
- Popular with travelers
- Noted for its history
- Great for sightseeing
- Truly beautiful scenery
- First-class hotels/resorts
- Great for cross-country skiing
- Interesting place
- Good place for camping
- Beautiful gardens/parks
- Great for walking/strolling



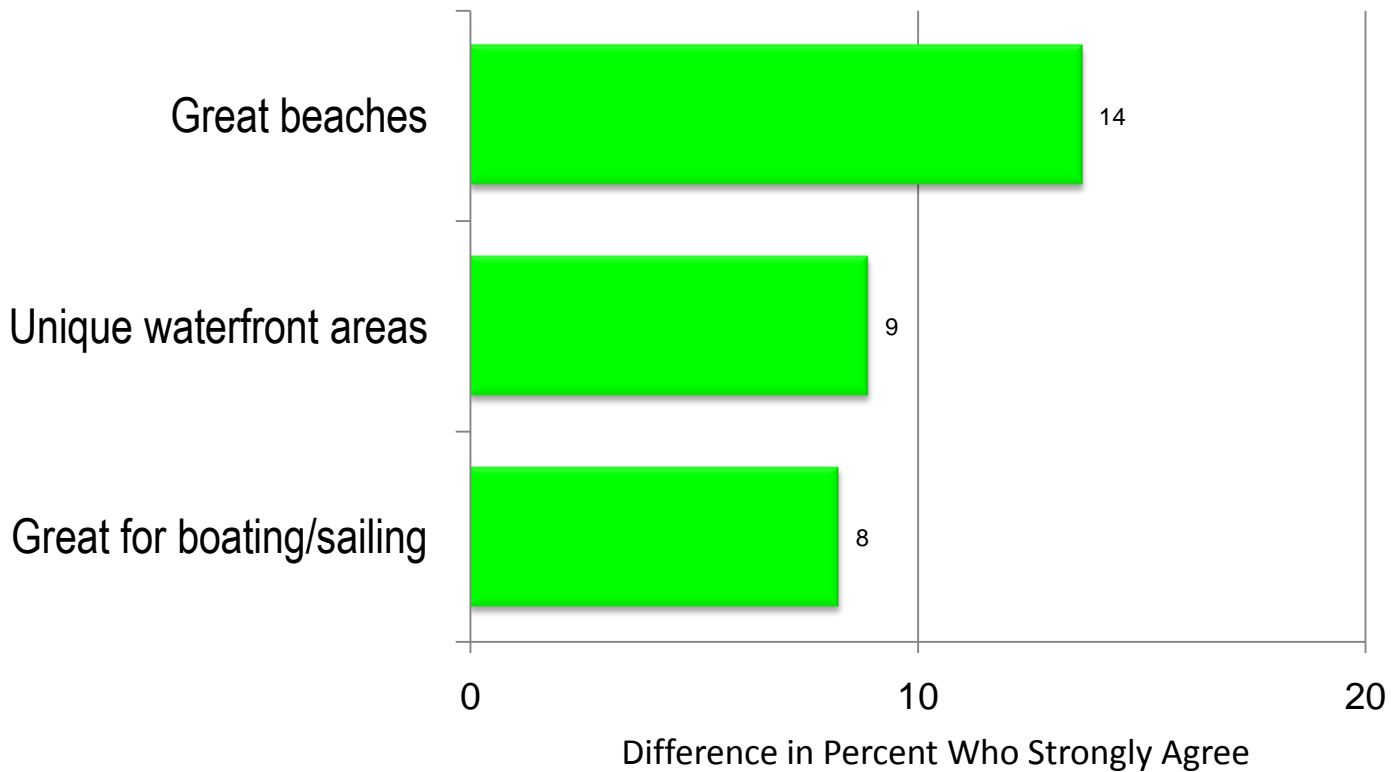
RTO7's Image Weaknesses vs. the Adirondacks (Cont'd)



RTO7's Image Weaknesses vs. the Adirondacks (Cont'd)



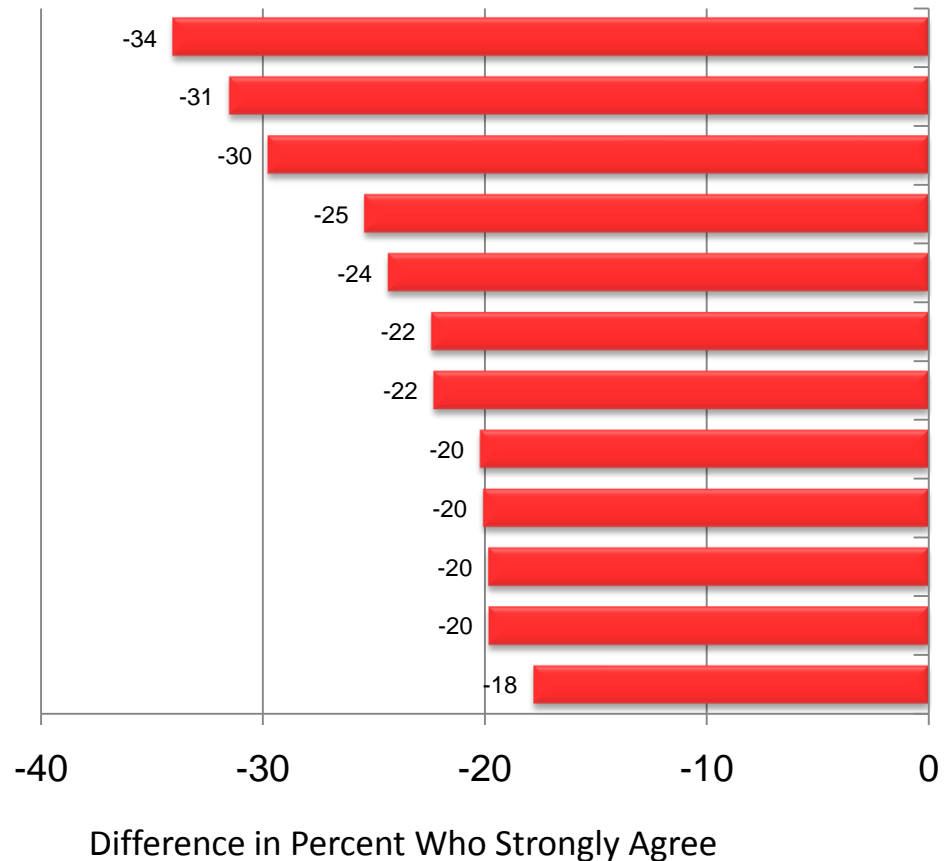
RTO7's Image Strengths vs. The Laurentians



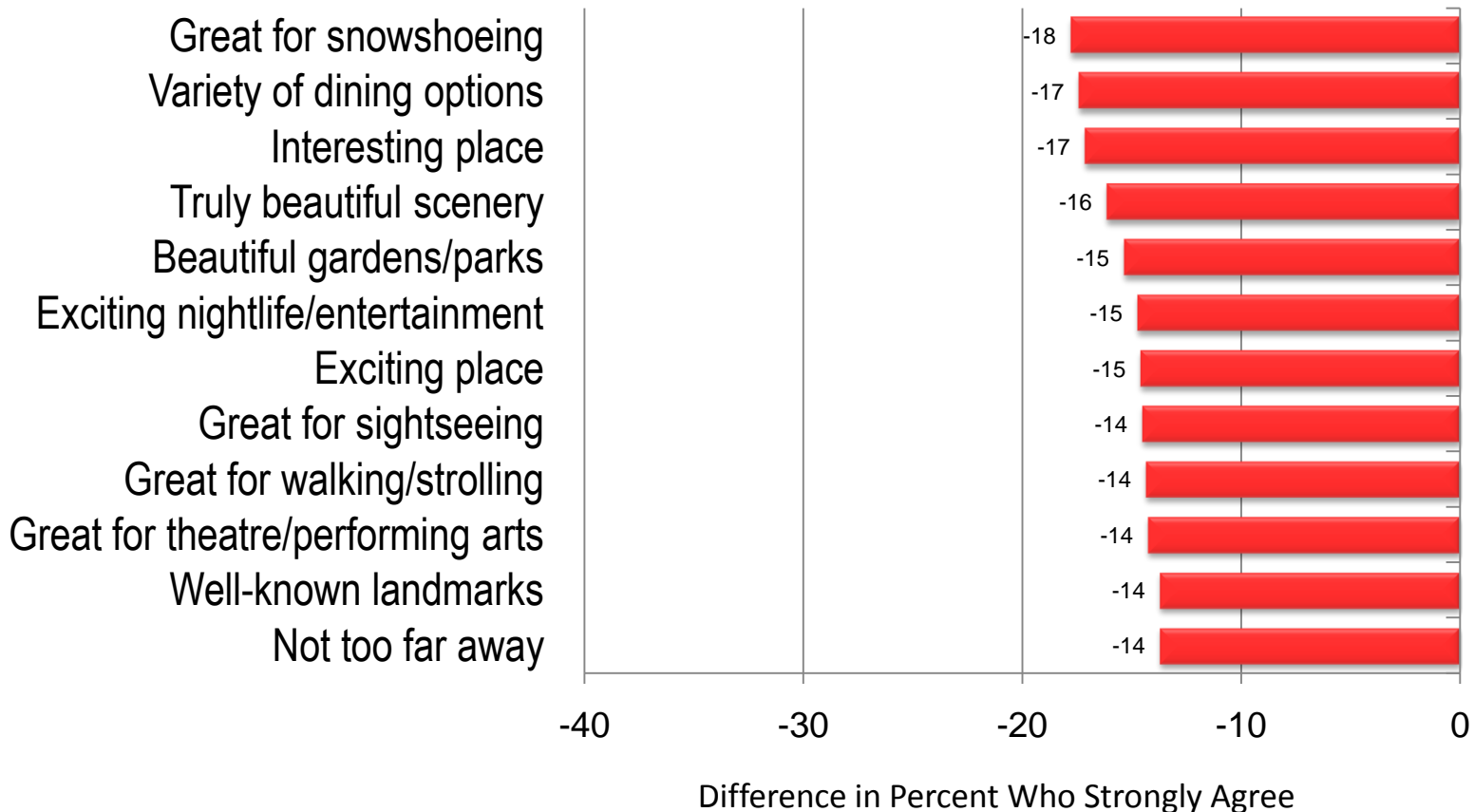
RTO7's Image Weaknesses vs. the Laurentians



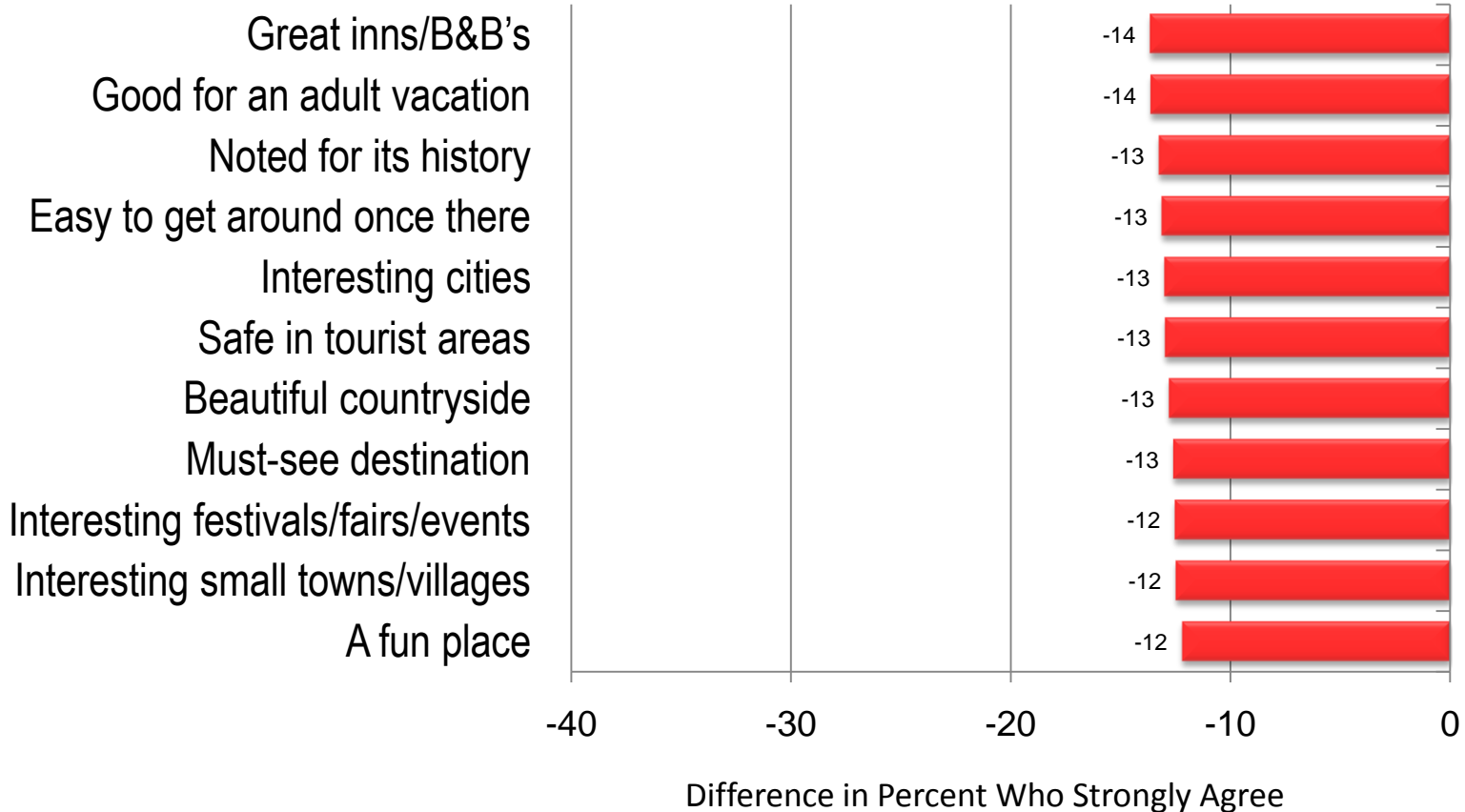
Great for downhill skiing/snowboarding
First-class hotels/resorts
Well-known destination
Popular with travelers
Elegant, sophisticated restaurants
Great spas
Great for a winter trip
Great for cross-country skiing
Often notice advertising
Unique local cuisine
Variety of accommodations
Great for snowmobiling



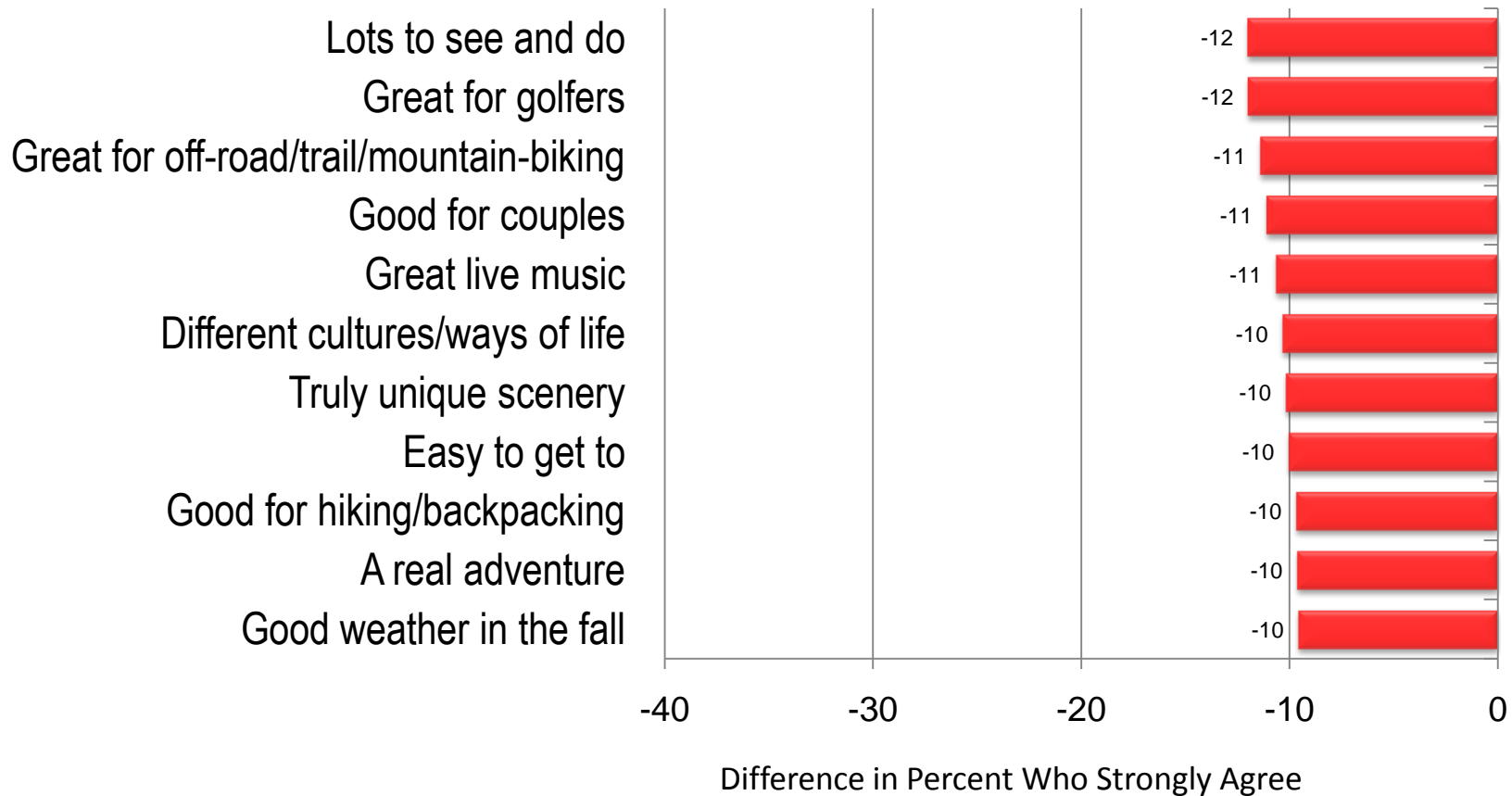
RTO7's Image Weaknesses vs. the Laurentians (Cont'd)



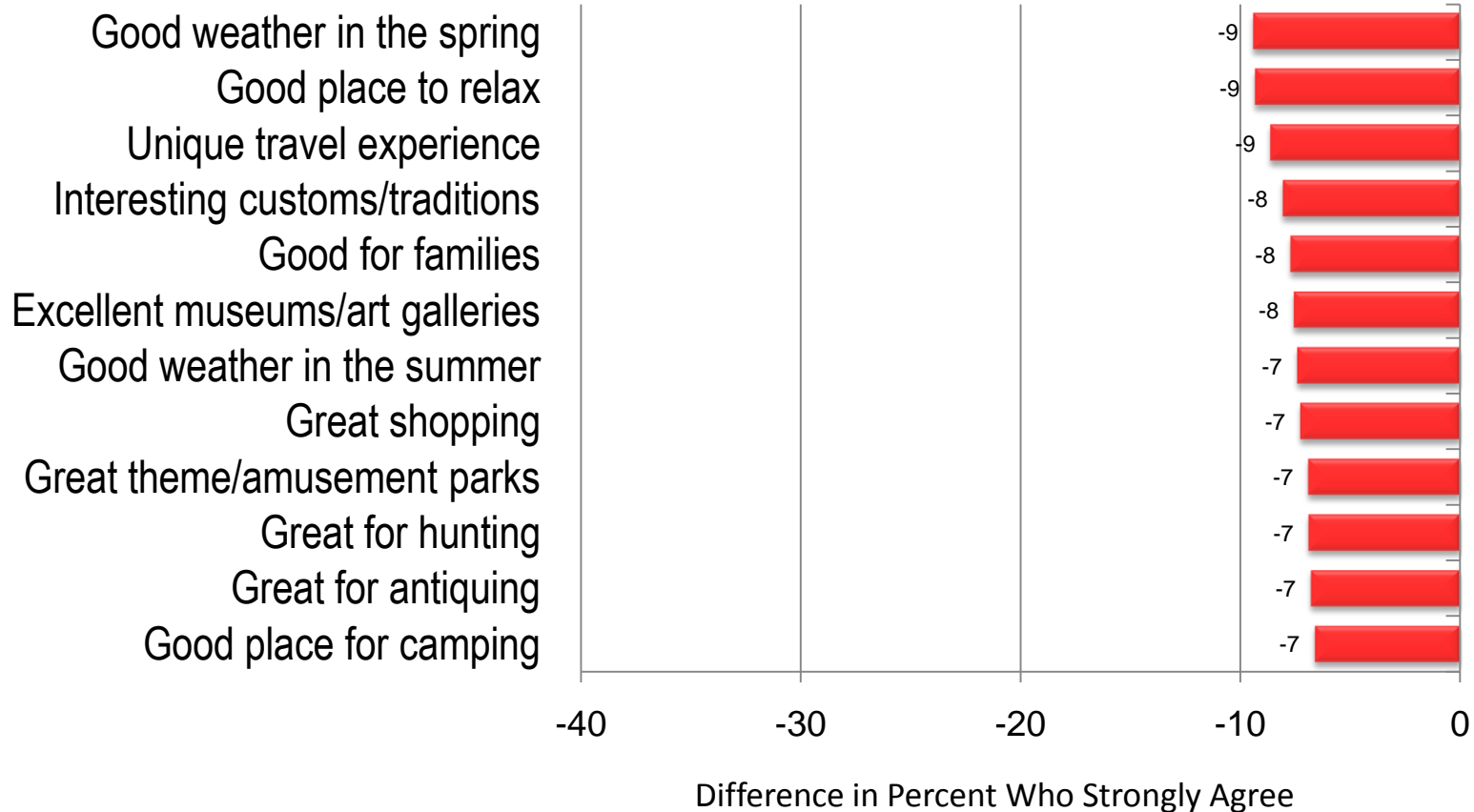
RTO7's Image Weaknesses vs. the Laurentians (Cont'd)



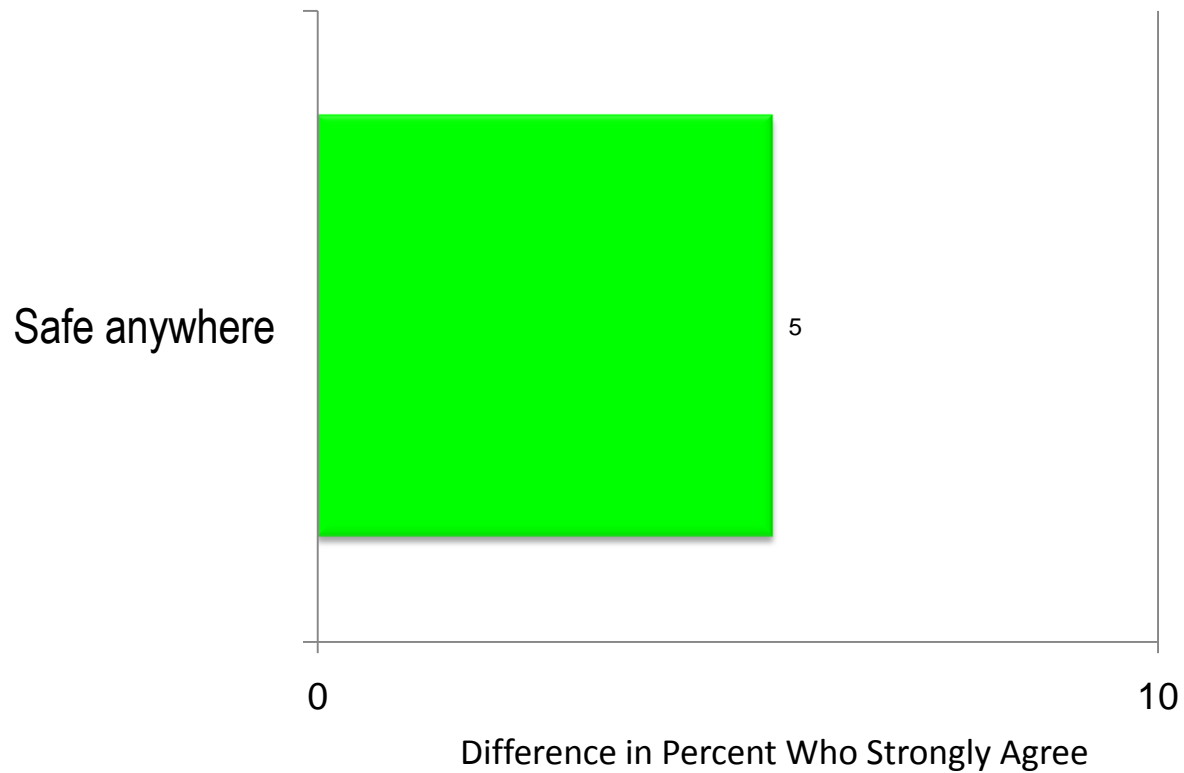
RTO7's Image Weaknesses vs. the Laurentians (Cont'd)



RTO7's Image Weaknesses vs. the Laurentians (Cont'd)



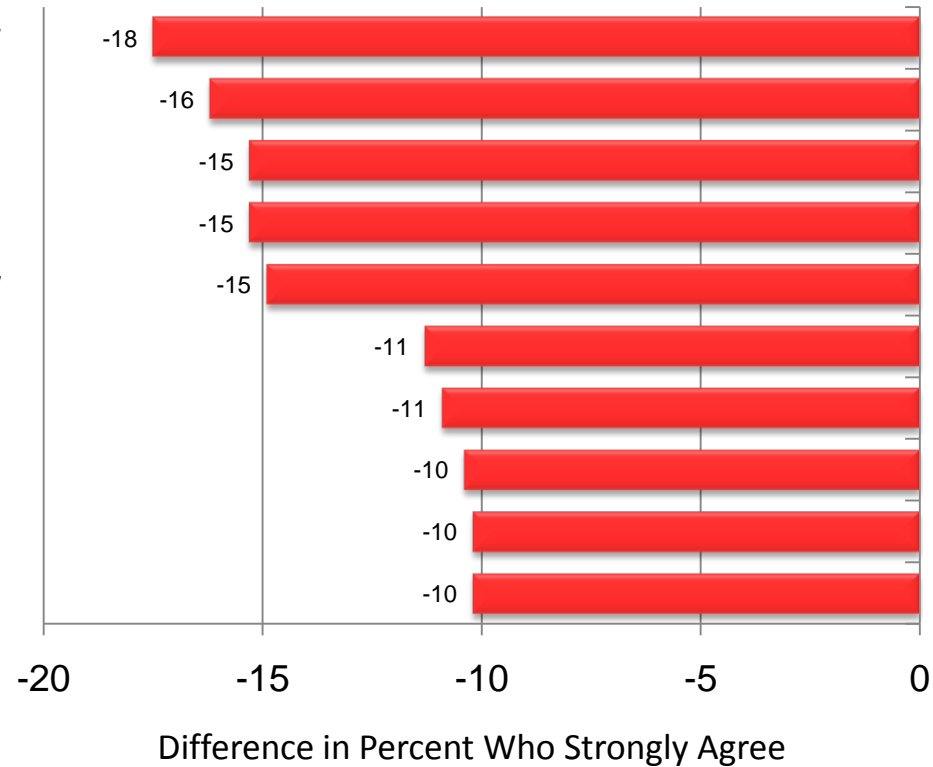
RTO7's Image Strengths vs. Finger Lakes



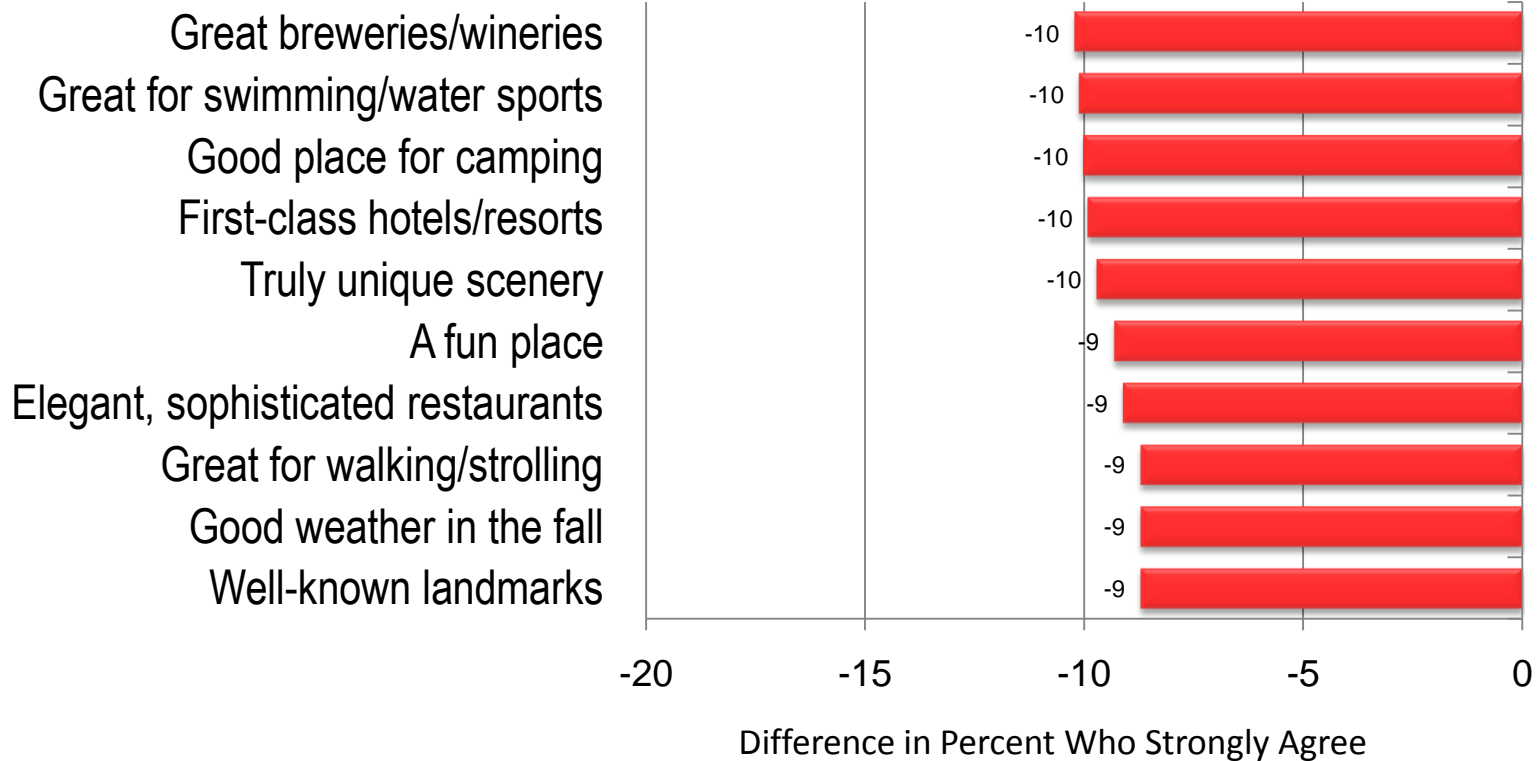
RTO7's Image Weaknesses vs. Finger Lakes



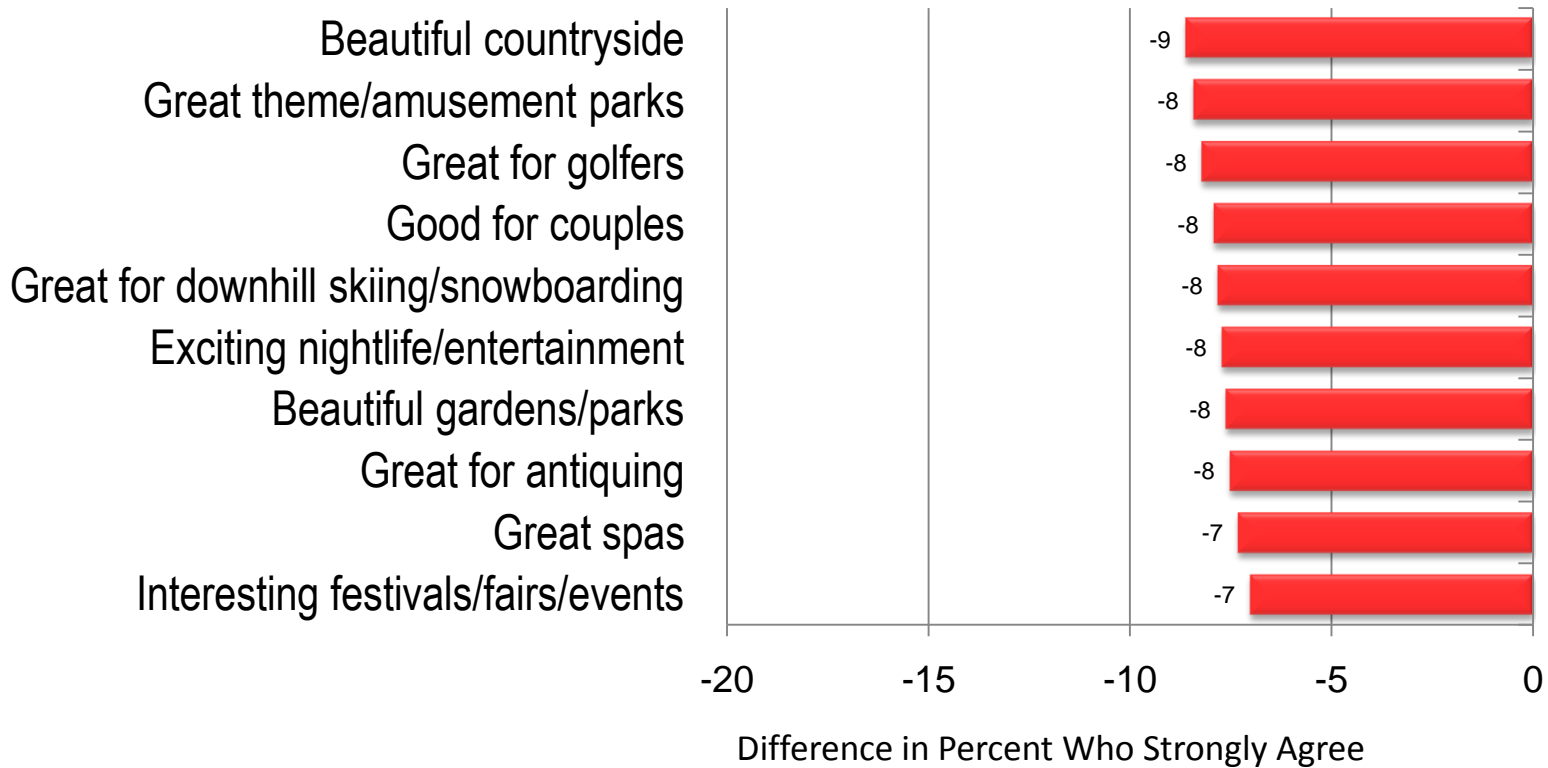
Noted for its history
Well-known destination
Great for sightseeing
Popular with travelers
Truly beautiful scenery
Often notice advertising
Interesting place
Great for canoeing/kayaking
Good for an adult vacation
Great inns/B&B's



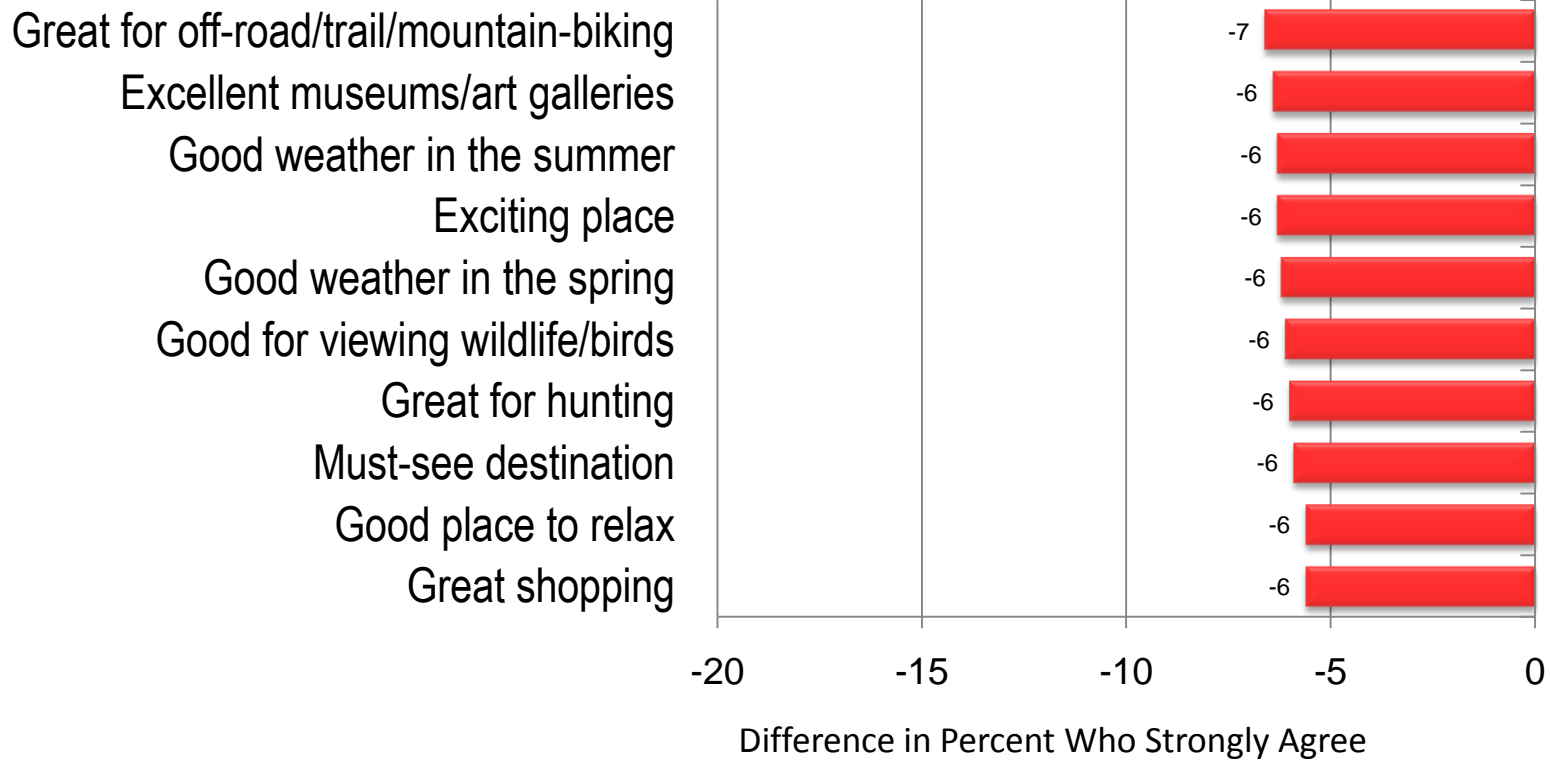
RTO7's Image Weaknesses vs. Finger Lakes (Cont'd)



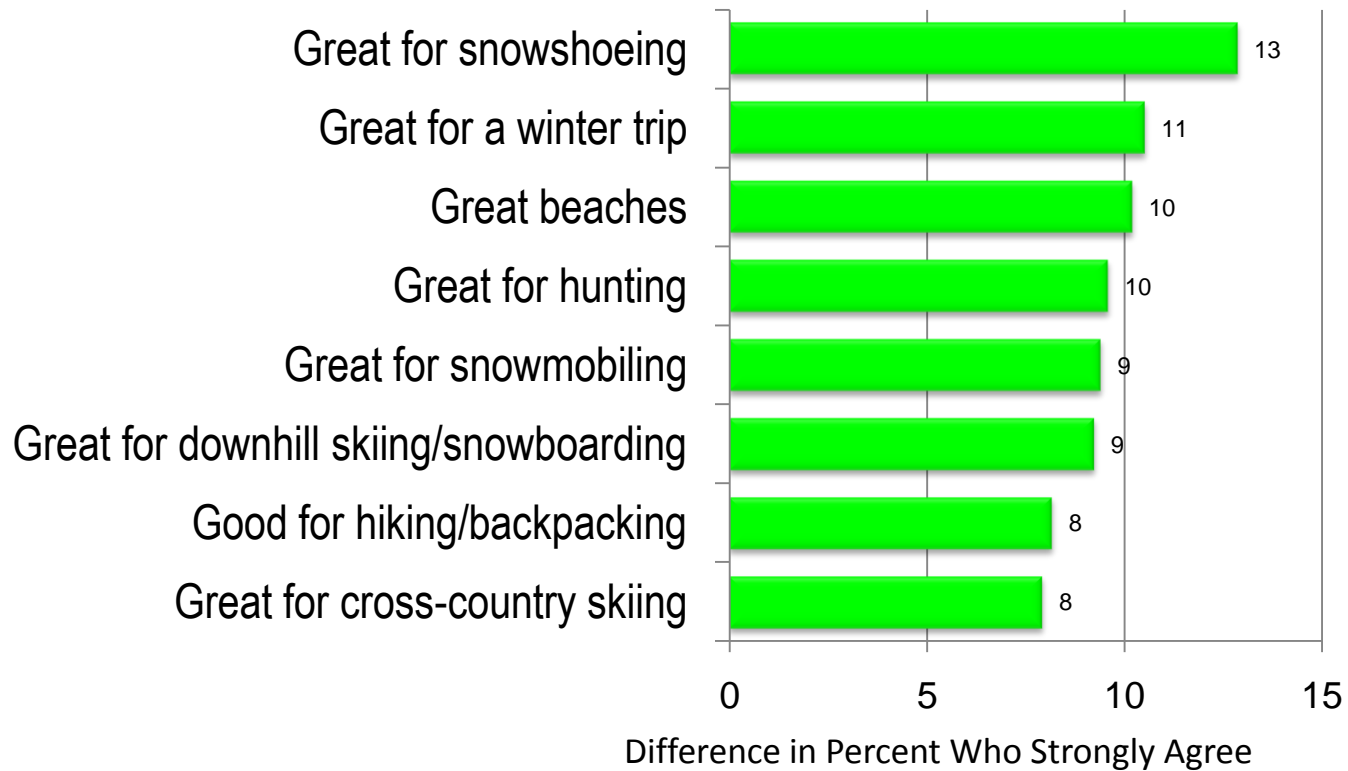
RTO7's Image Weaknesses vs. Finger Lakes (Cont'd)



RTO7's Image Weaknesses vs. Finger Lakes (Cont'd)



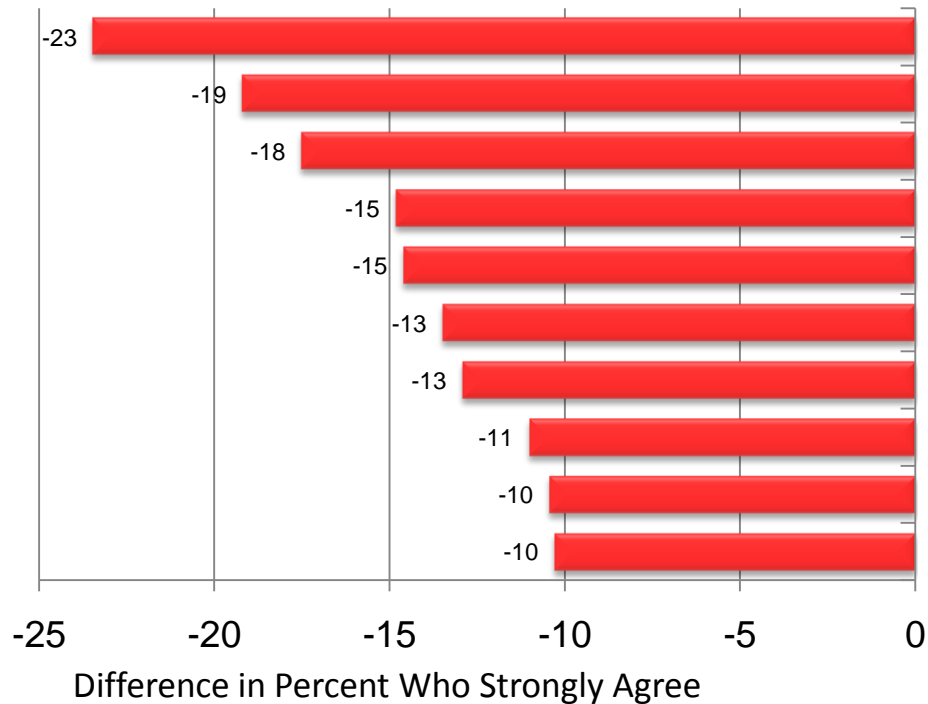
RTO7's Image Strengths vs. Kingston/Thousand Islands



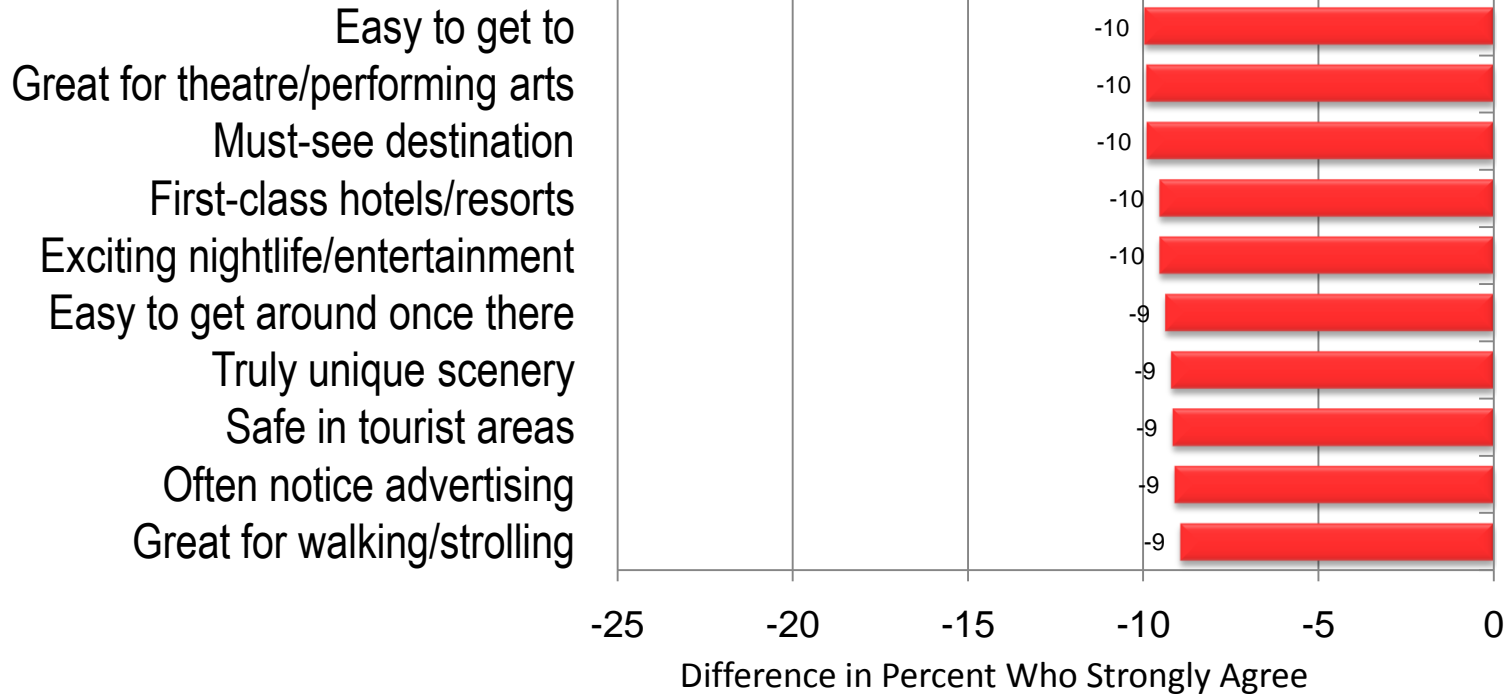
RTO7's Image Weaknesses vs. Kingston/Thousand Islands



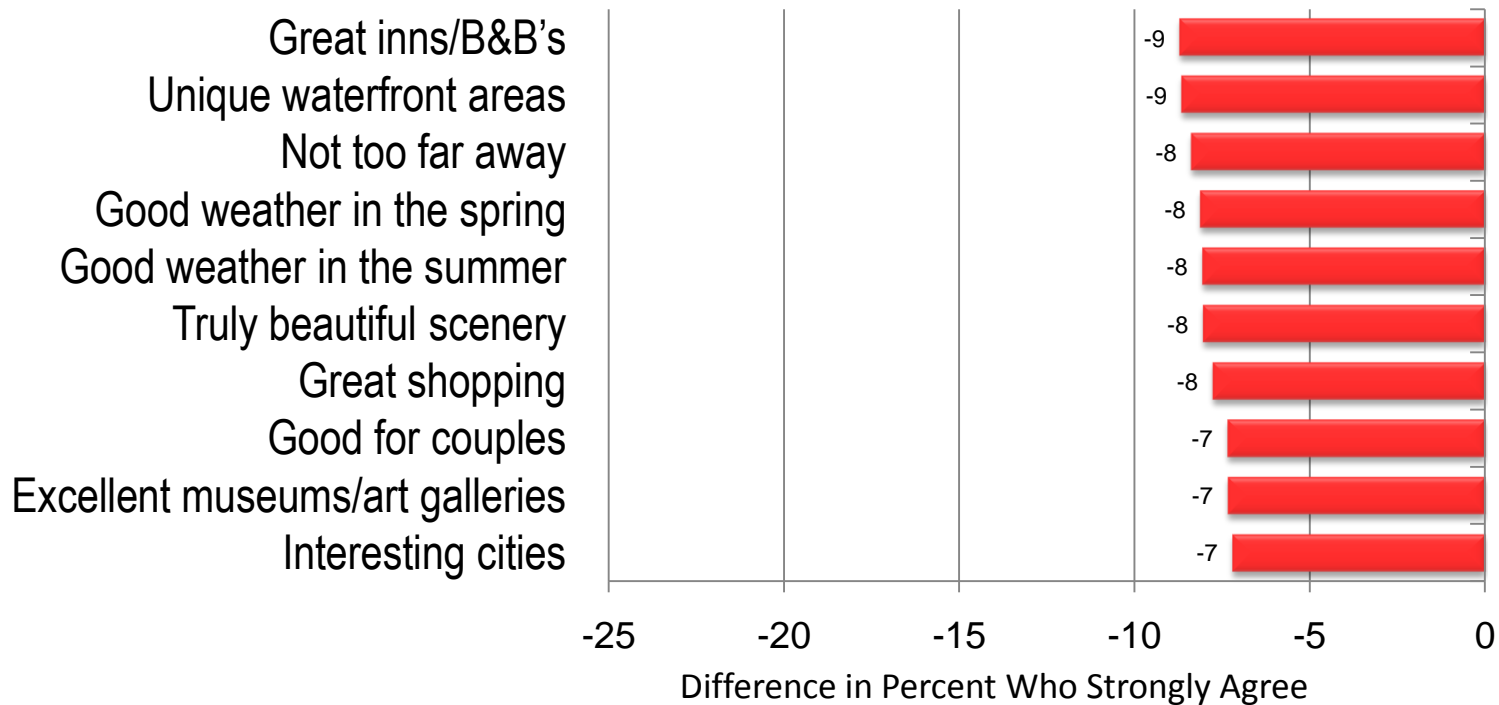
Noted for its history
Well-known destination
Well-known landmarks
Great for sightseeing
Popular with travelers
Beautiful gardens/parks
Interesting place
Variety of dining options
Good for an adult vacation
Elegant, sophisticated restaurants



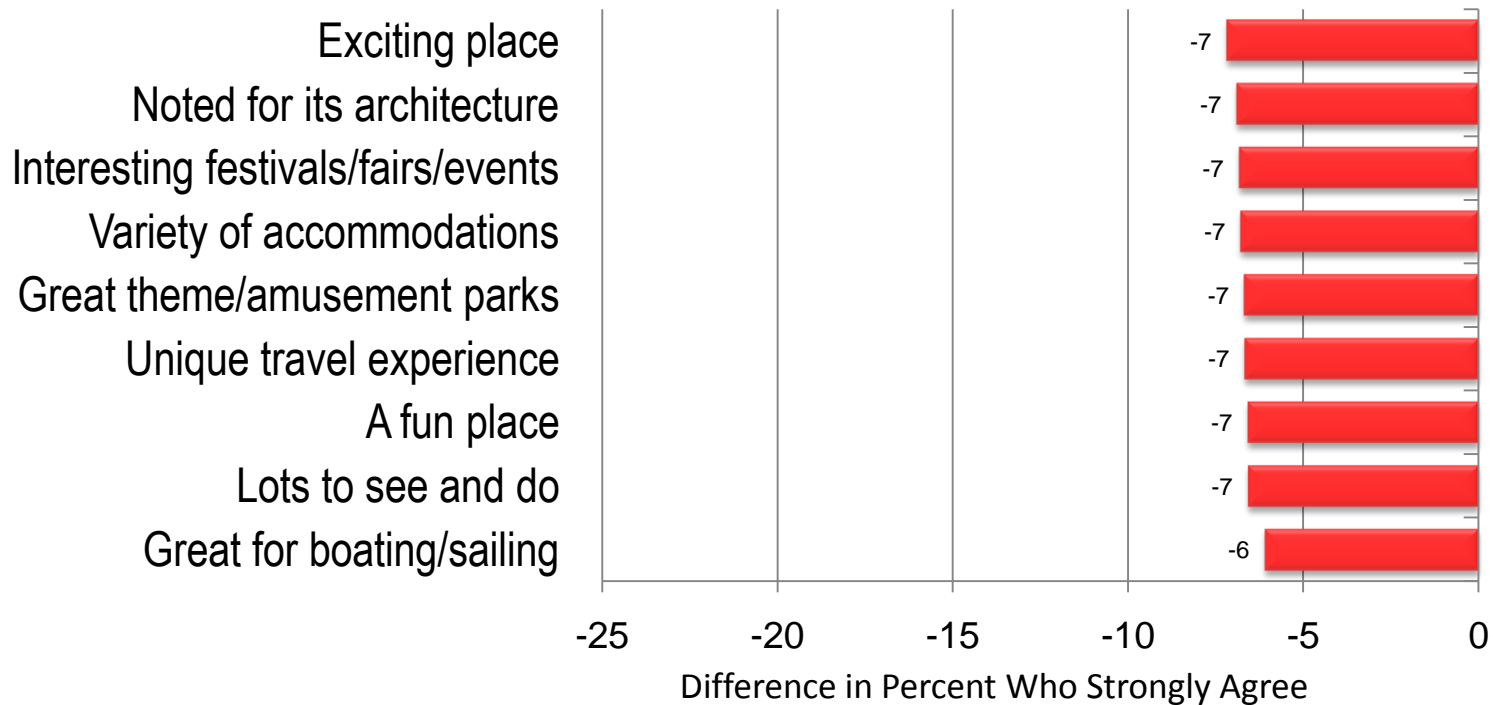
RTO7's Image Weaknesses vs. Kingston/Thousand Islands (Cont'd)



RTO7's Image Weaknesses vs. Kingston/Thousand Islands (Cont'd)



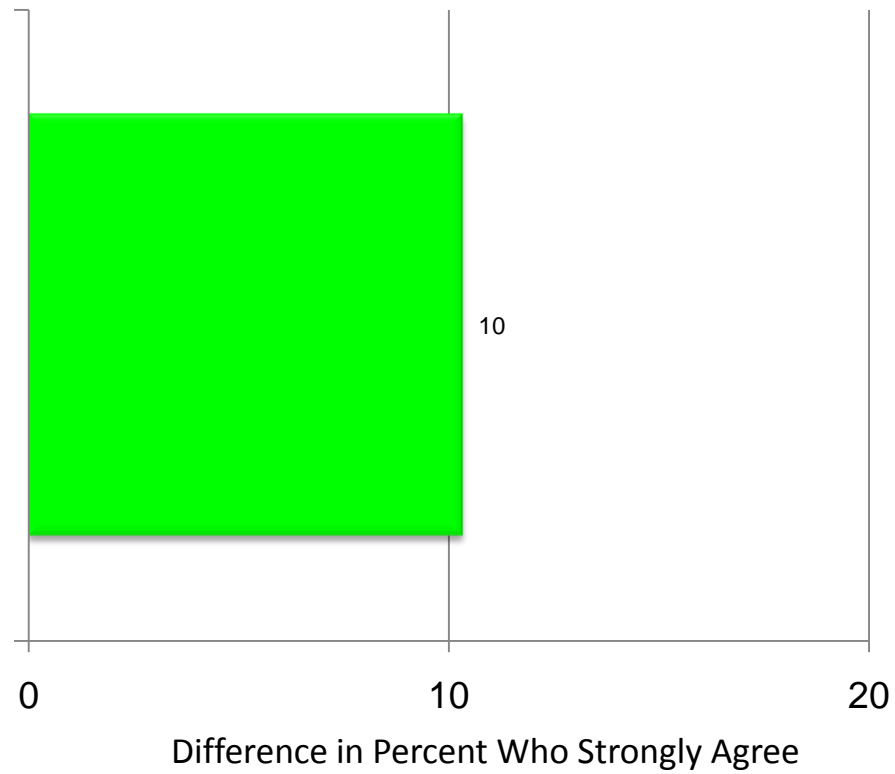
RTO7's Image Weaknesses vs. Kingston/Thousand Islands (Cont'd)



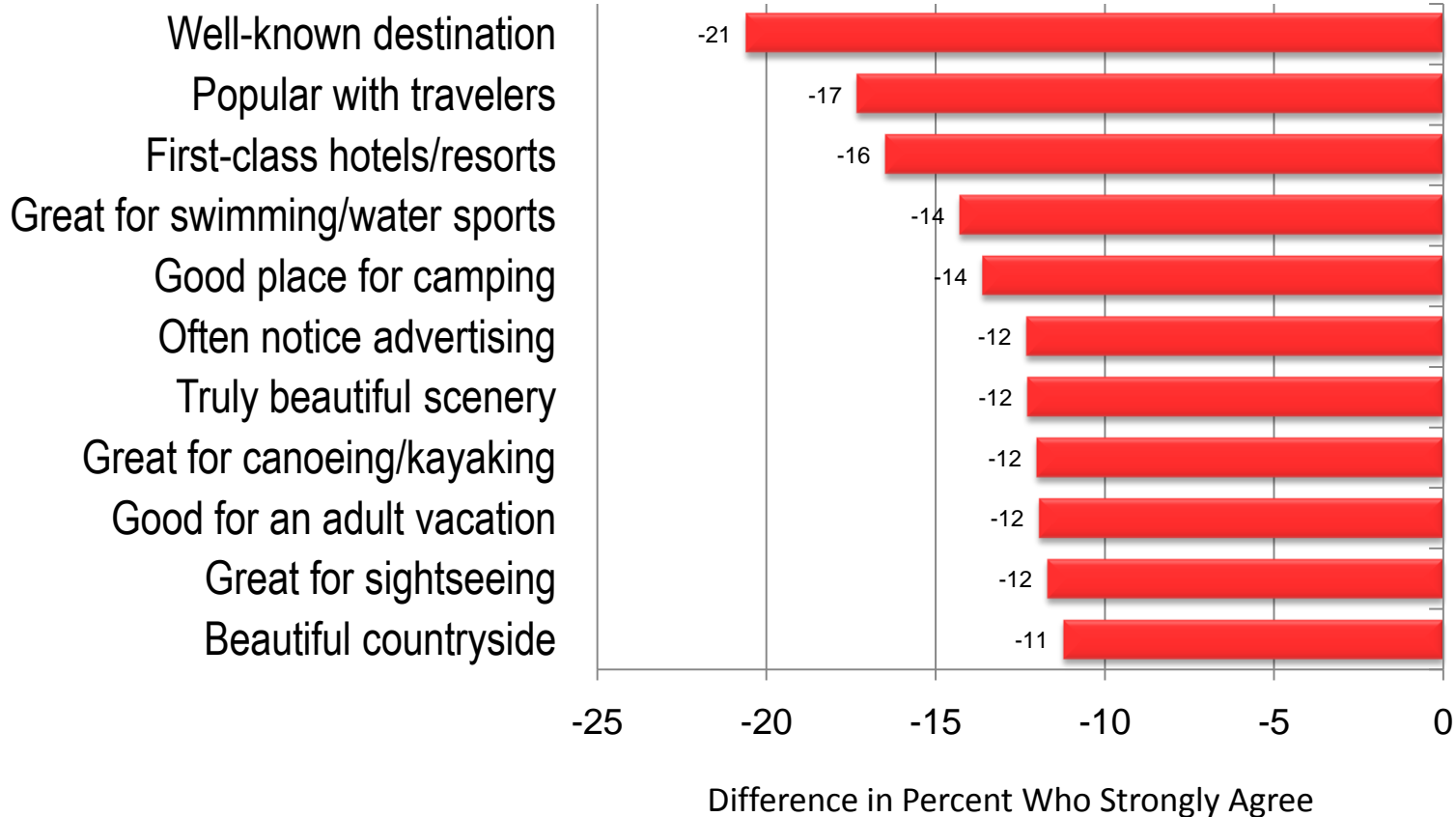
RTO7's Image Strengths vs. Muskoka



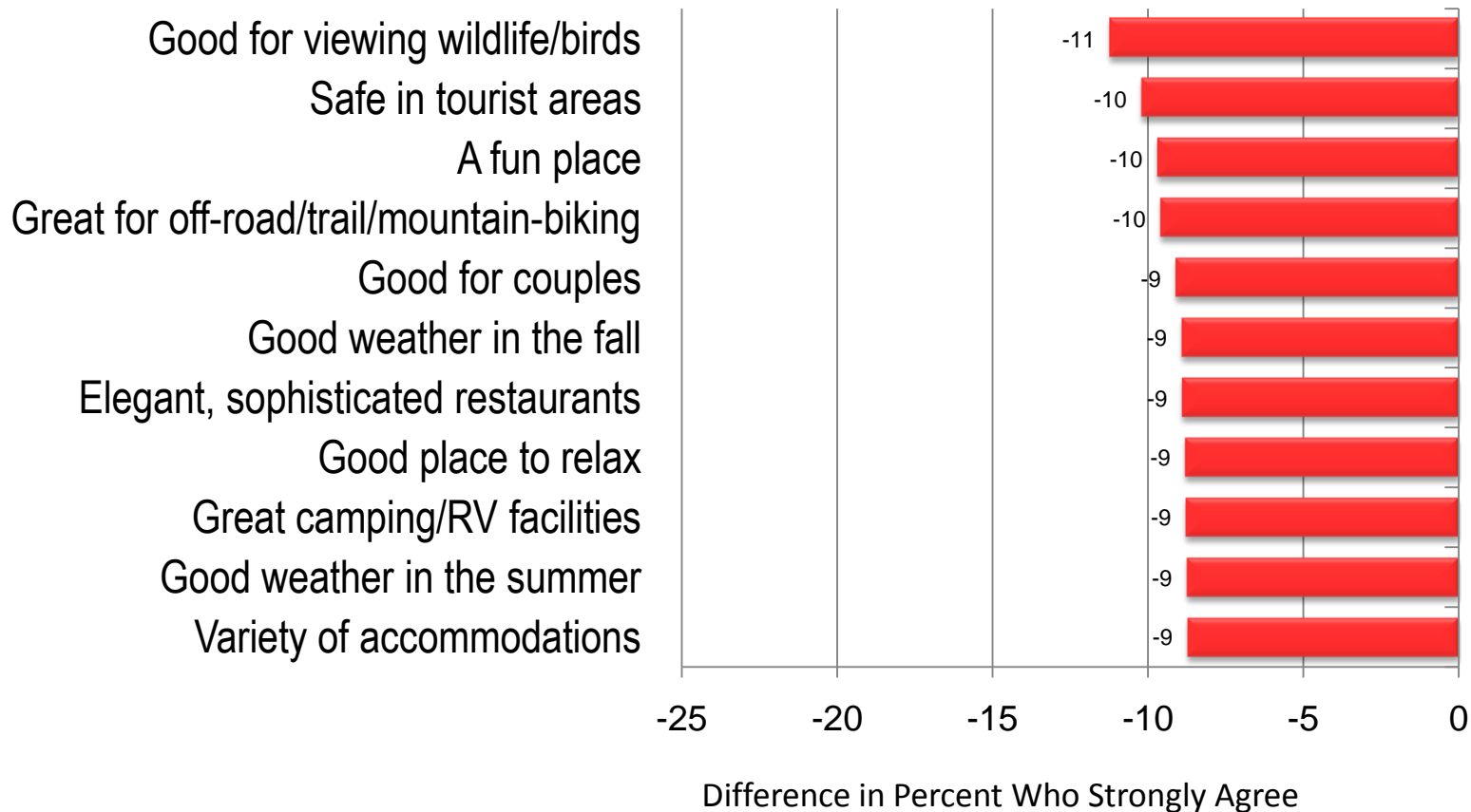
Great breweries/wineries



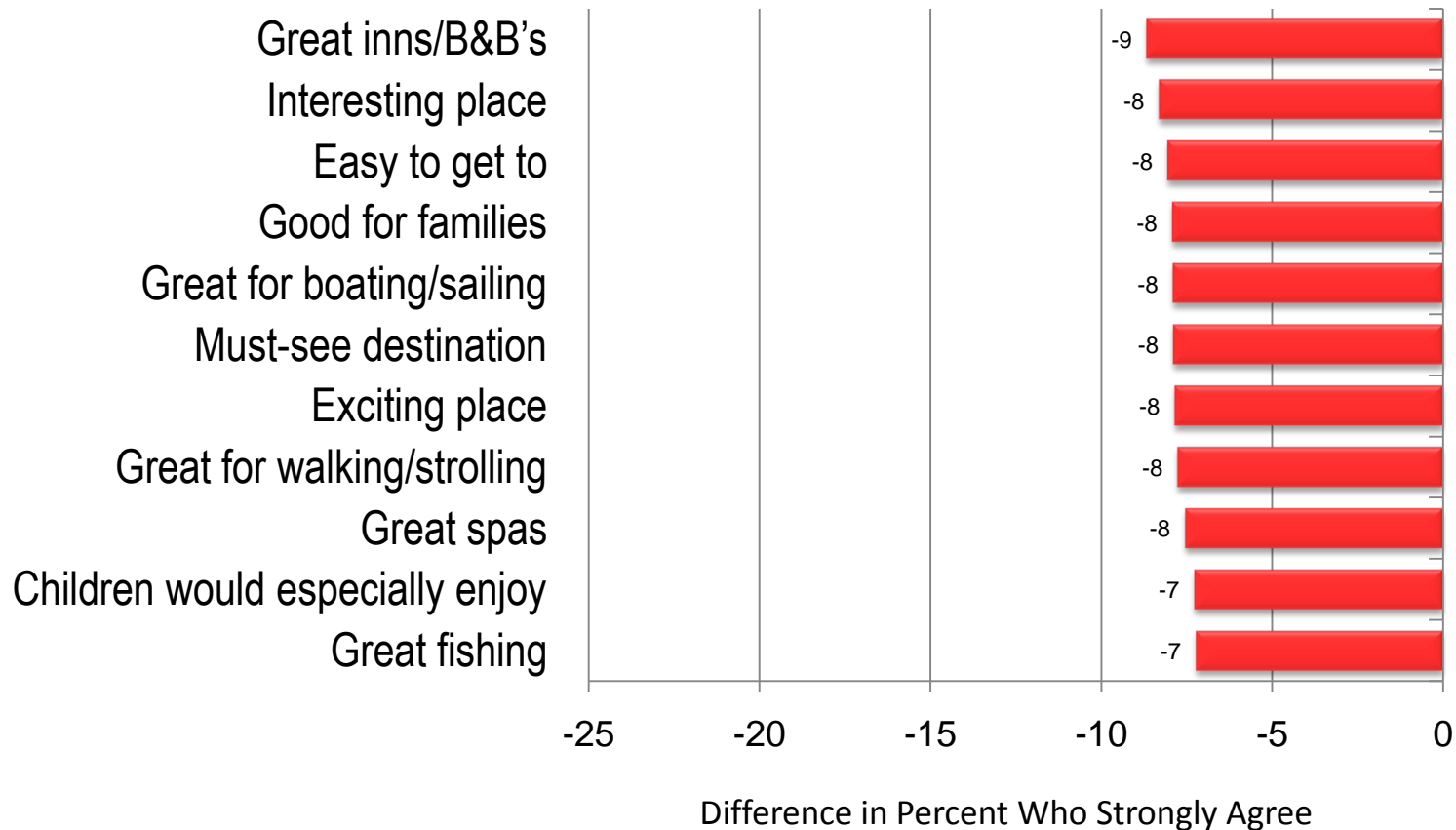
RTO7's Image Weaknesses vs. Muskoka



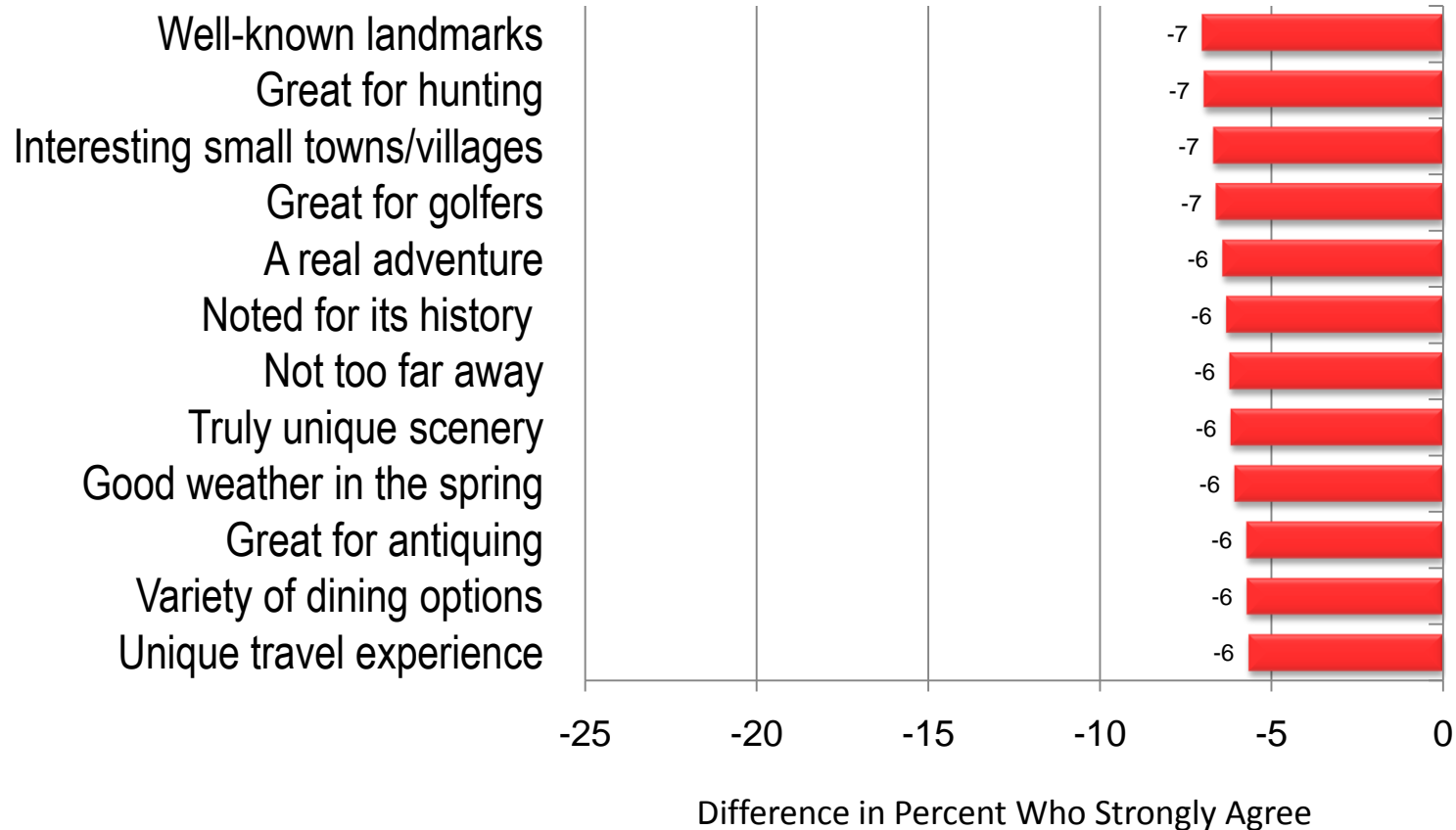
RTO7's Image Weaknesses vs. Muskoka (Cont'd)



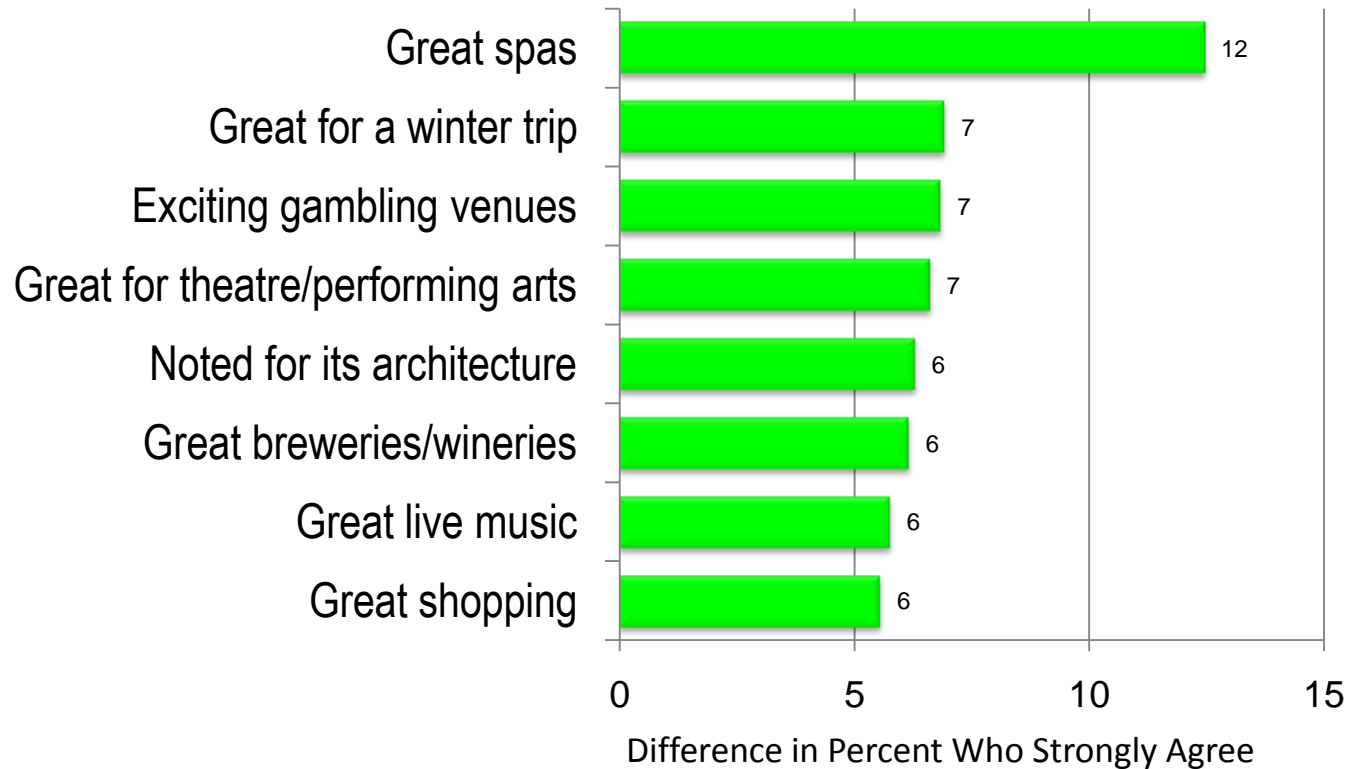
RTO7's Image Weaknesses vs. Muskoka (Cont'd)



RTO7's Image Weaknesses vs. Muskoka (Cont'd)



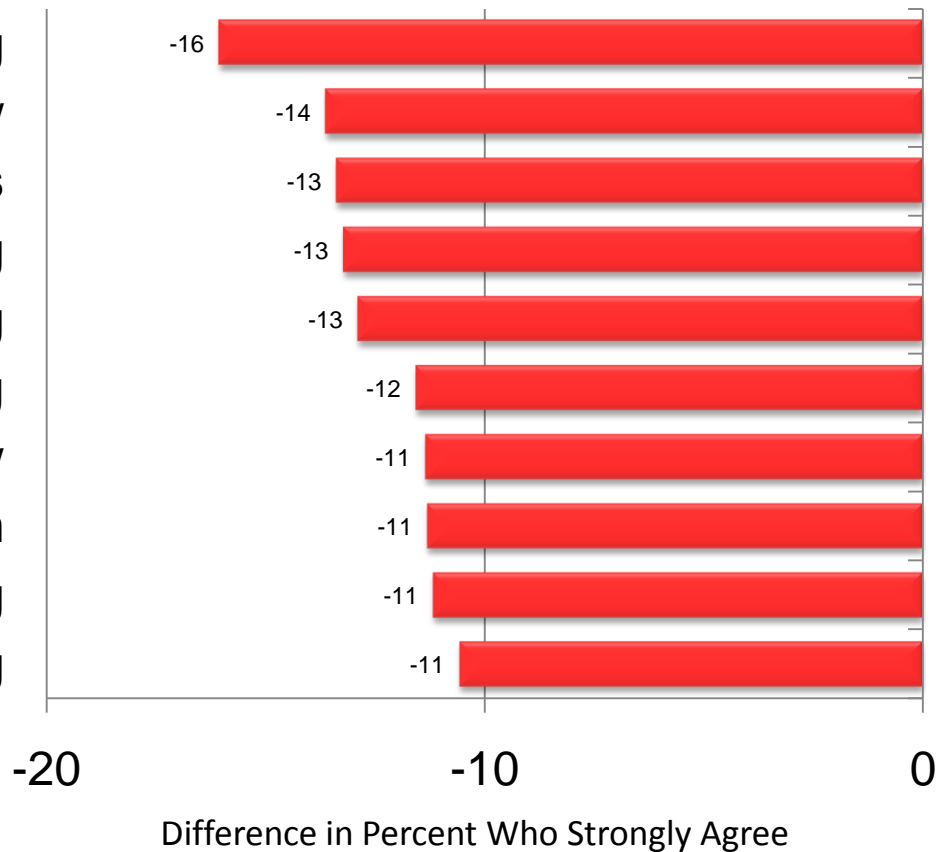
RTO7's Image Strengths vs. Northern Michigan



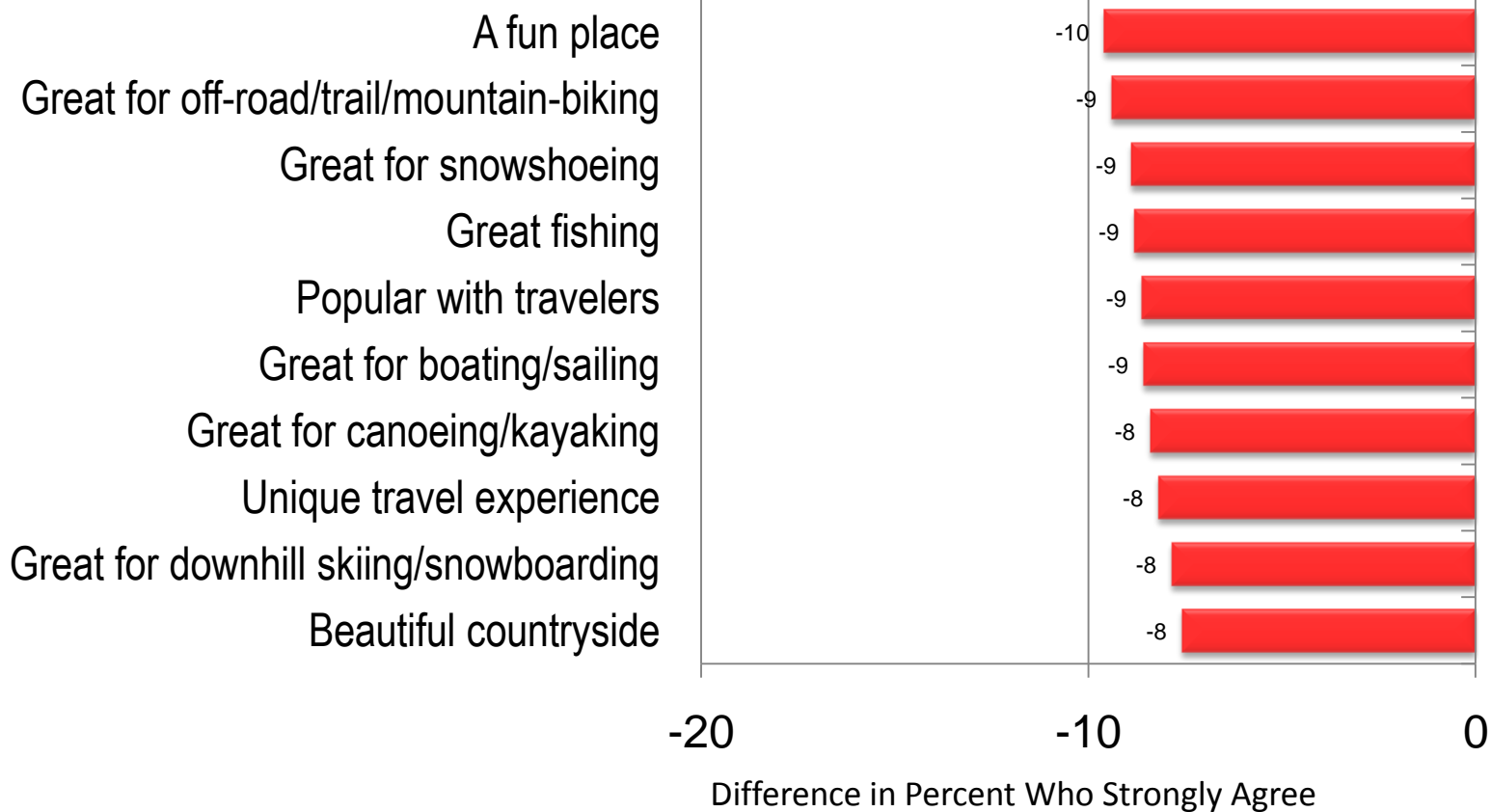
RTO7's Image Weaknesses vs. Northern Michigan



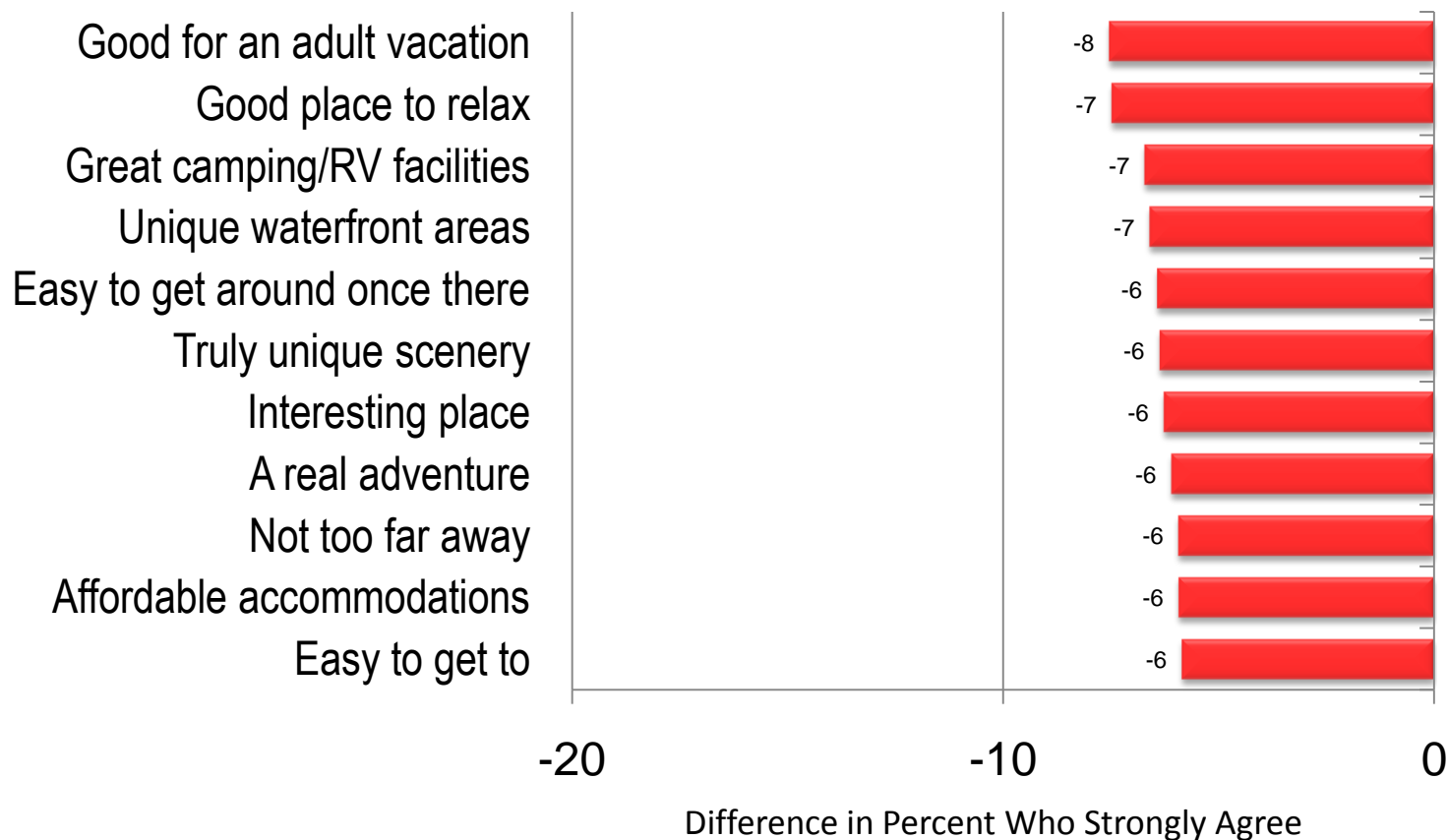
Great for hunting
Truly beautiful scenery
Good for viewing wildlife/birds
Great for sightseeing
Great for snowmobiling
Good for hiking/backpacking
Noted for its history
Well-known destination
Good place for camping
Great for cross-country skiing



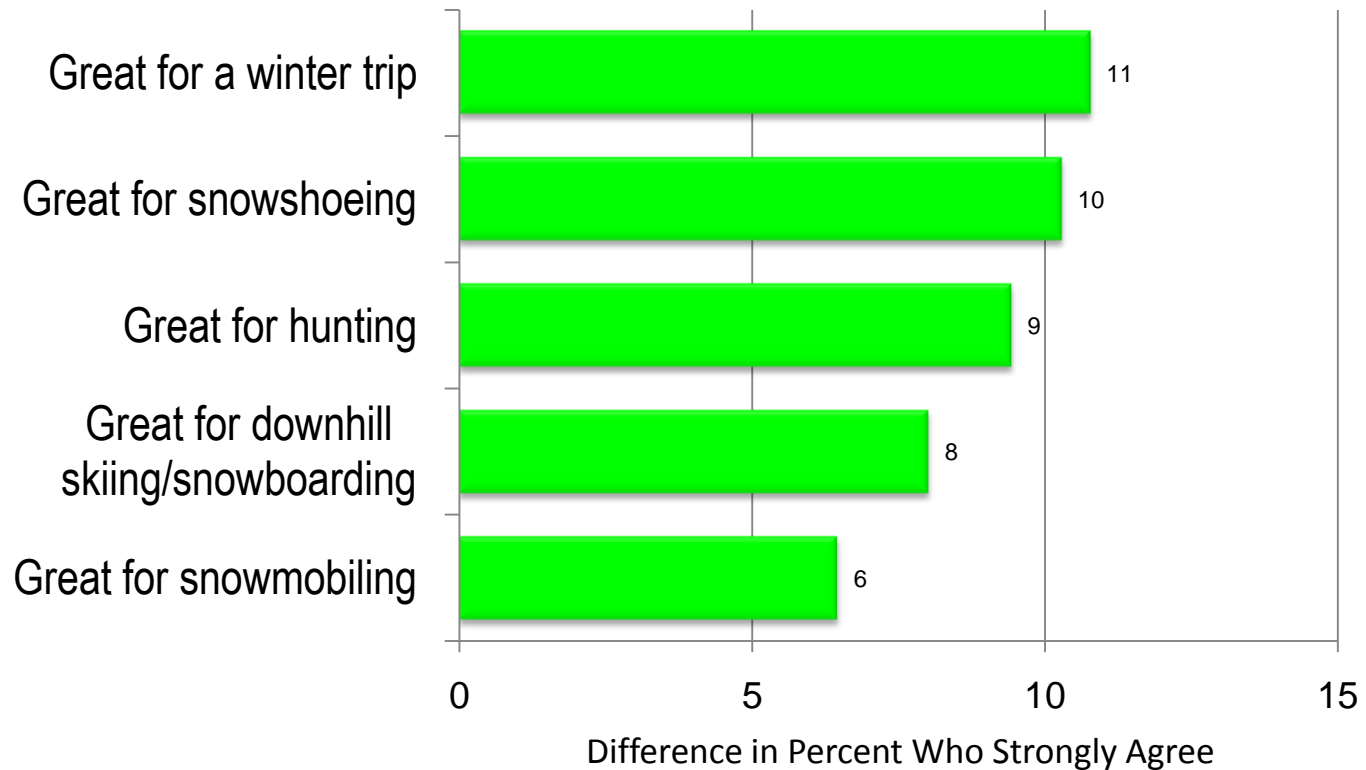
RTO7's Image Weaknesses vs. Northern Michigan (Cont'd)



RTO7's Image Weaknesses vs. Northern Michigan (Cont'd)



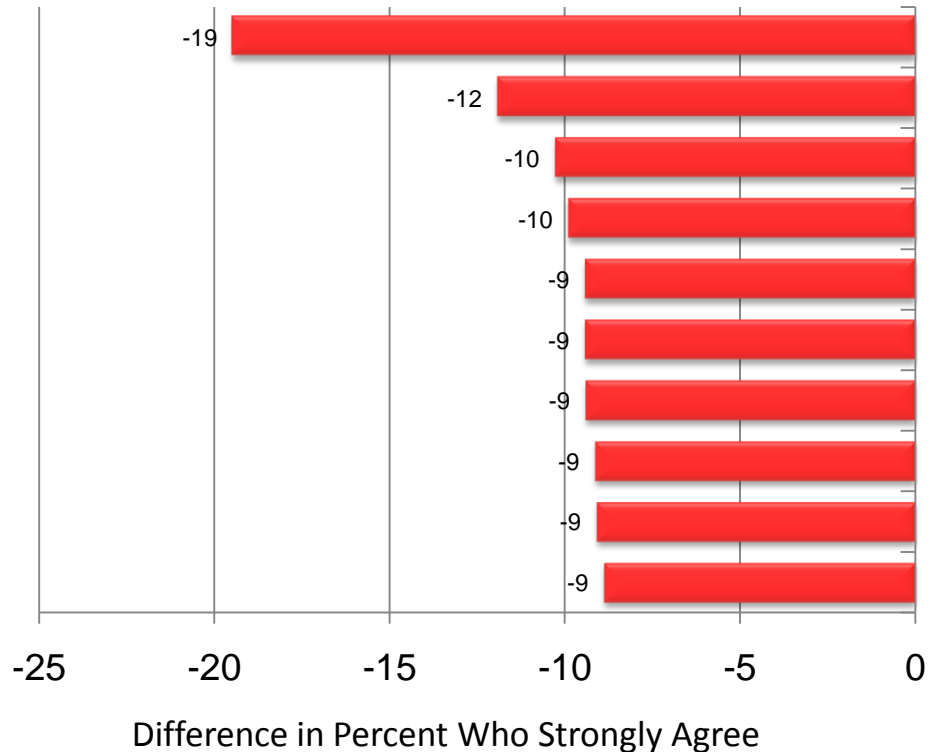
RTO7's Image Strengths vs. Prince Edward County



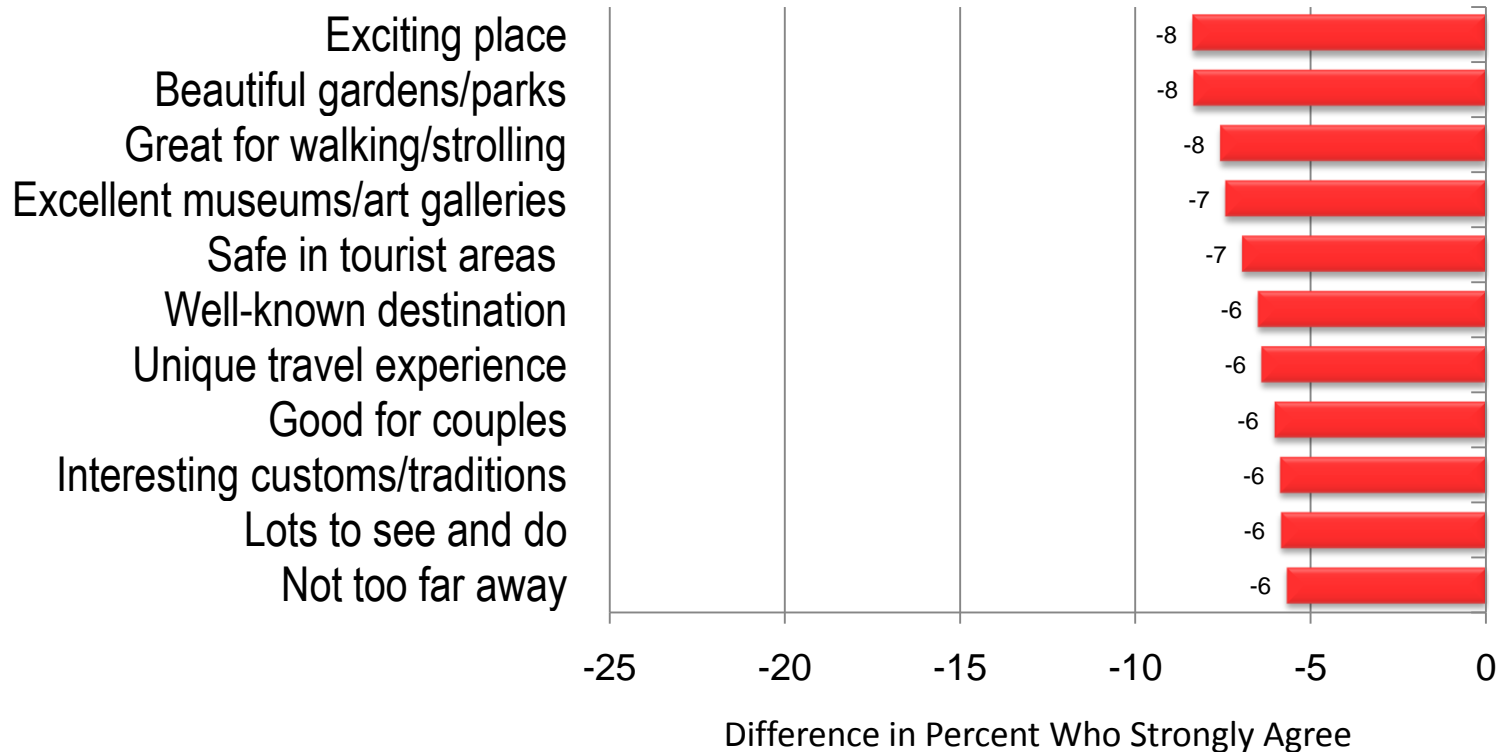
RTO7's Image Weaknesses vs. Prince Edward County



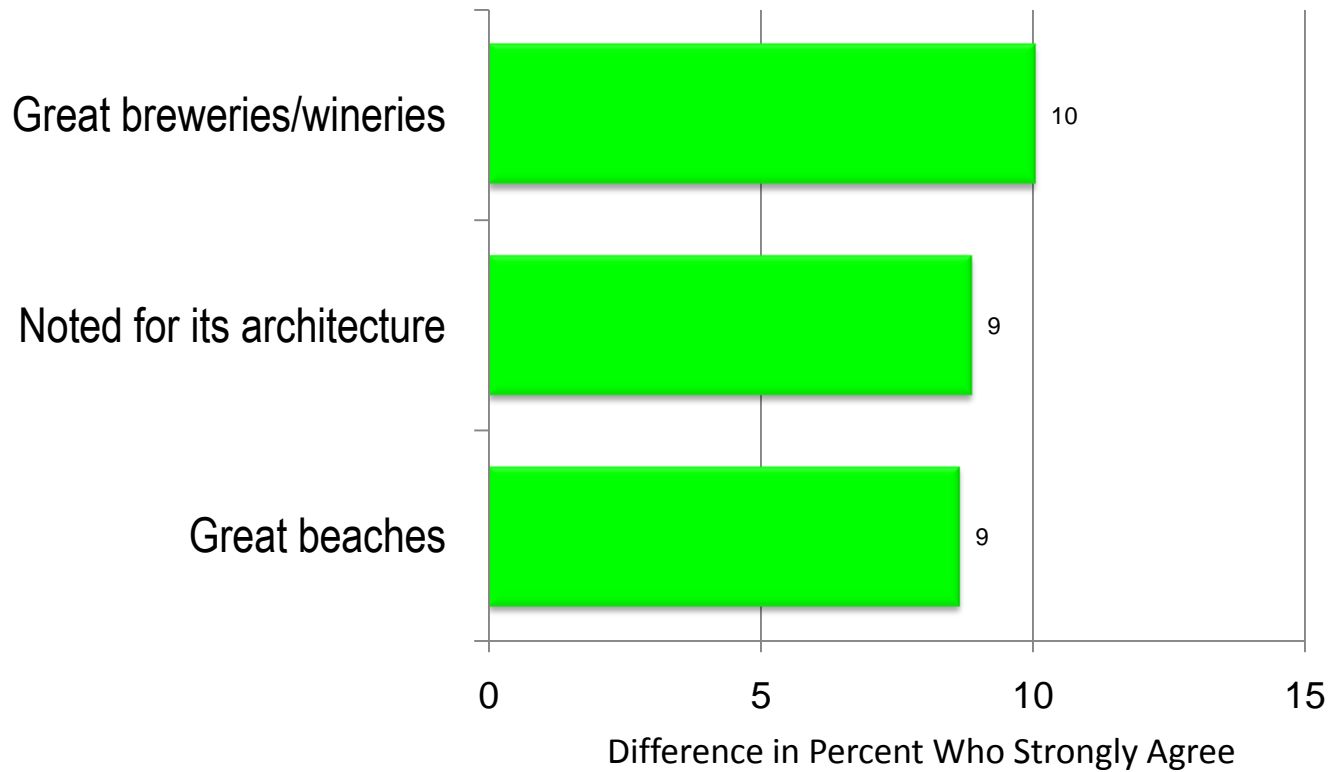
- Noted for its history
- Good for an adult vacation
- First-class hotels/resorts
- Unique local cuisine
- Great for sightseeing
- Great for antiquing
- Great inns/B&B's
- Elegant, sophisticated restaurants
- Truly beautiful scenery
- Interesting place



RTO7's Image Weaknesses vs. Prince Edward County (Cont'd)



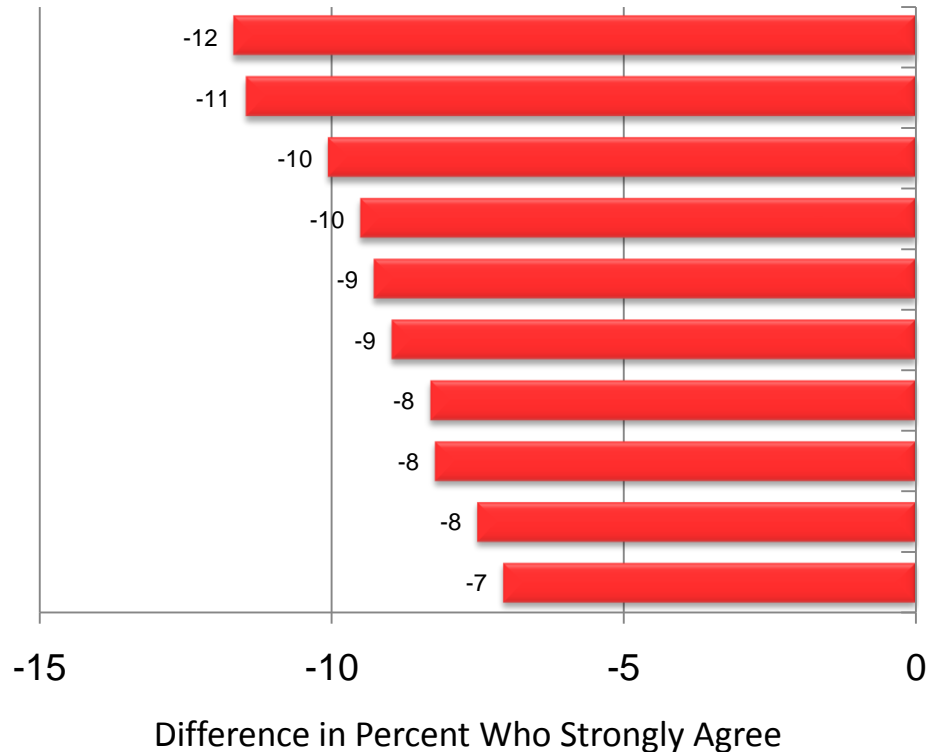
RTO7's Image Strengths vs. Haliburton/Kawarthas



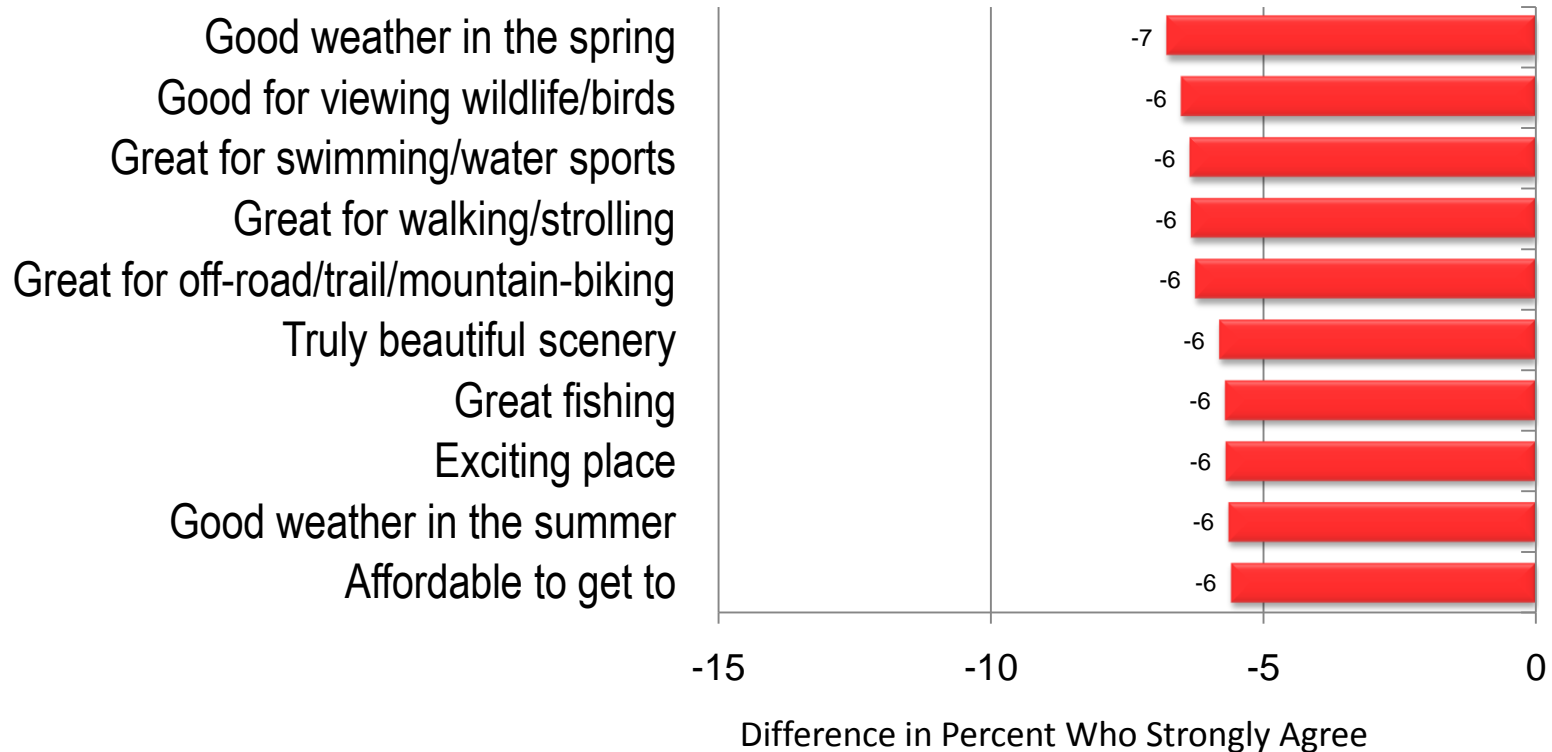
RTO7's Image Weaknesses vs. Haliburton/Kawarthas (Cont'd)



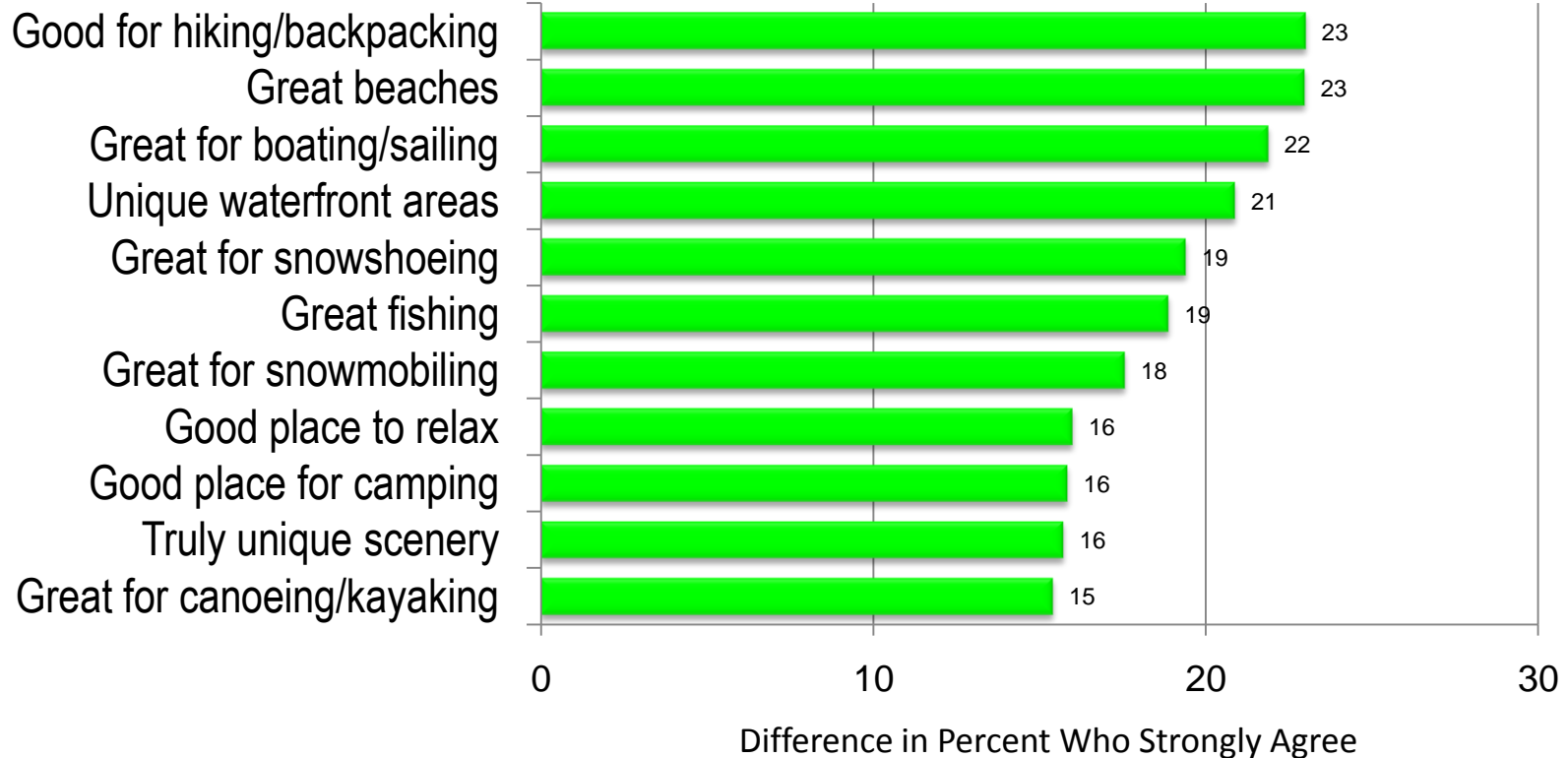
Well-known destination
Easy to get to
Good weather in the fall
Easy to get around once there
Popular with travelers
Great for canoeing/kayaking
Not too far away
Safe in tourist areas
Great for antiques
Good place for camping



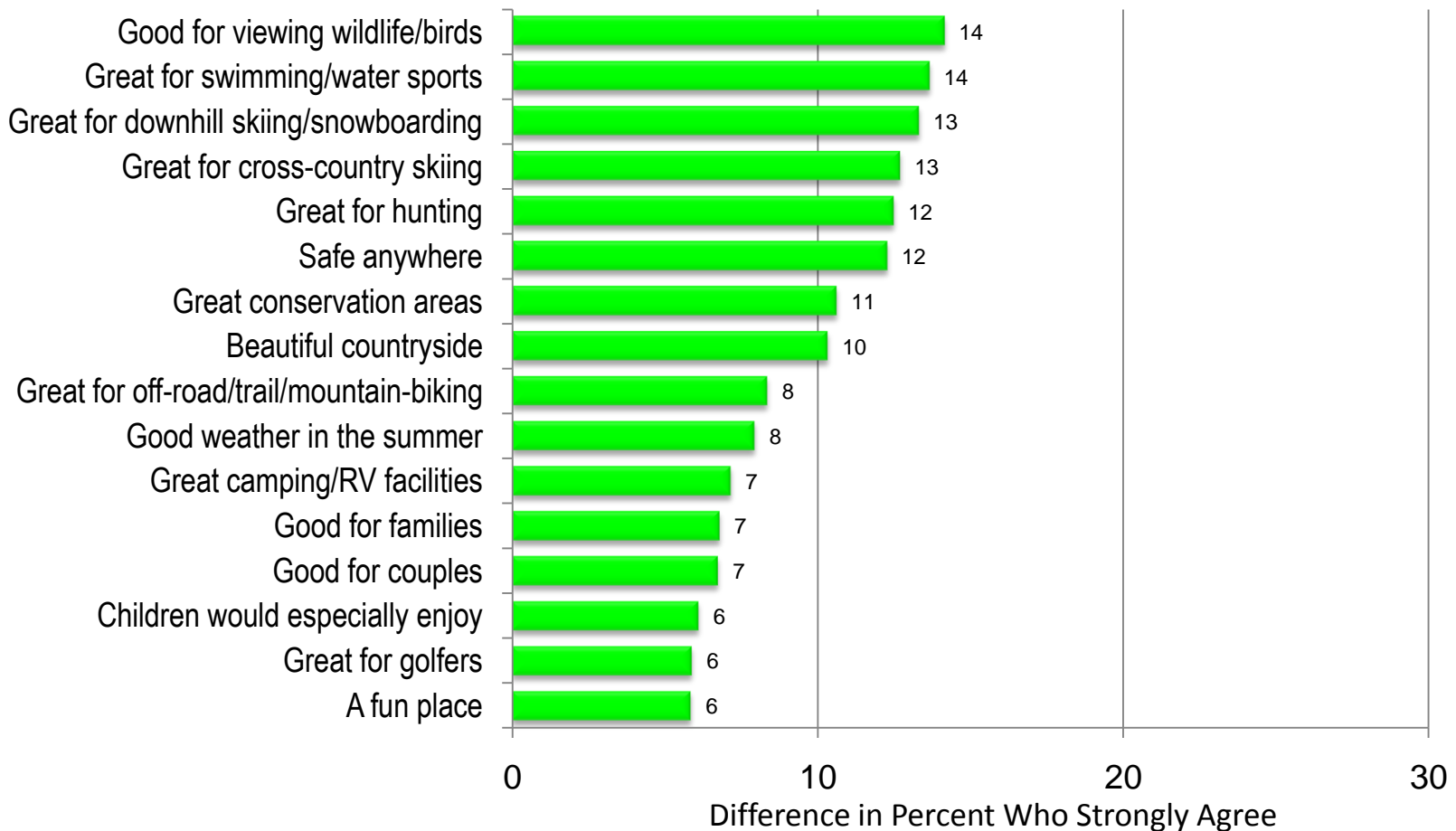
RTO7's Image Weaknesses vs. Haliburton/Kawarthas (Cont'd)



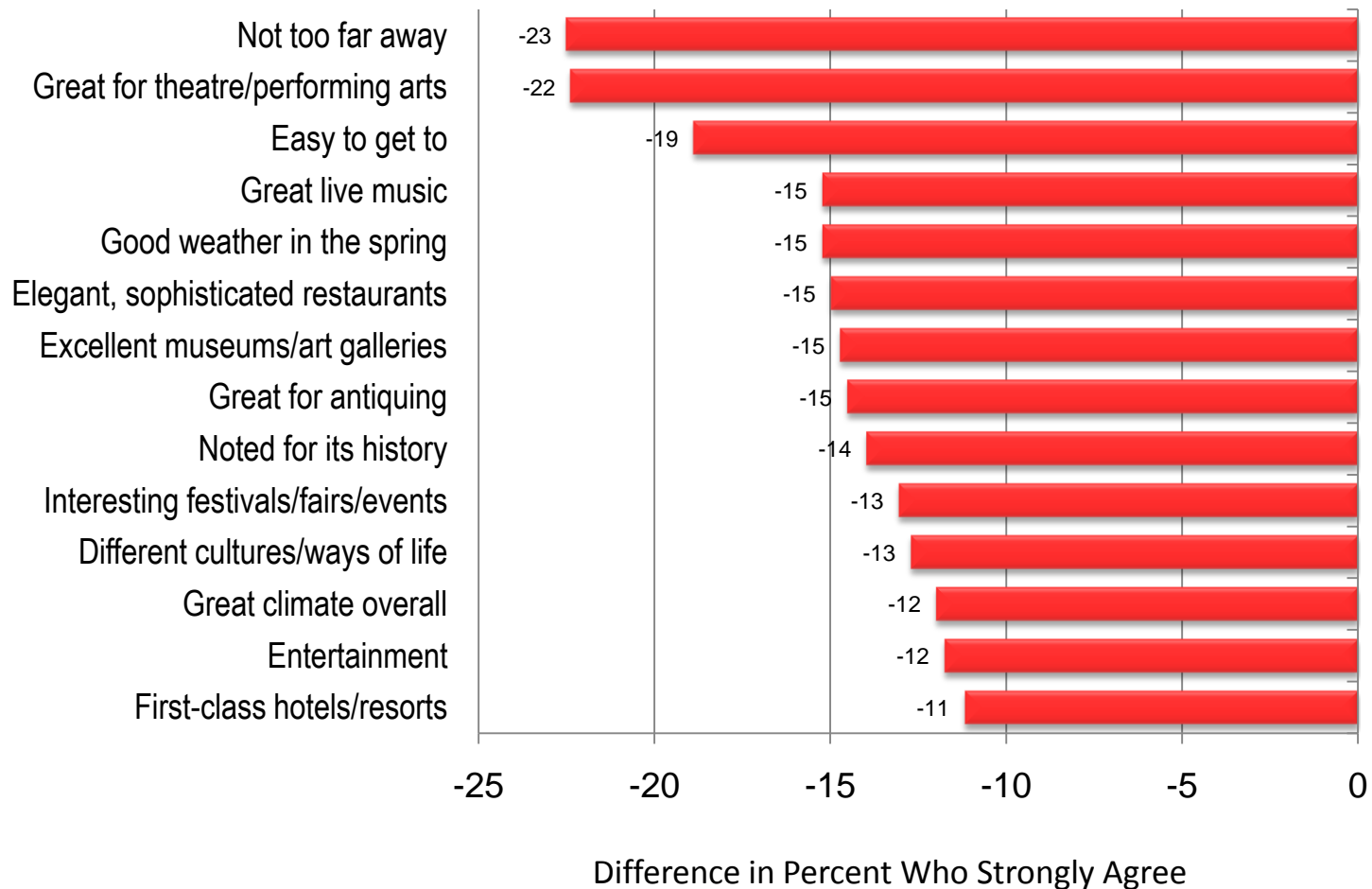
RTO7's Image Strengths vs. KW/Stratford/Goderich



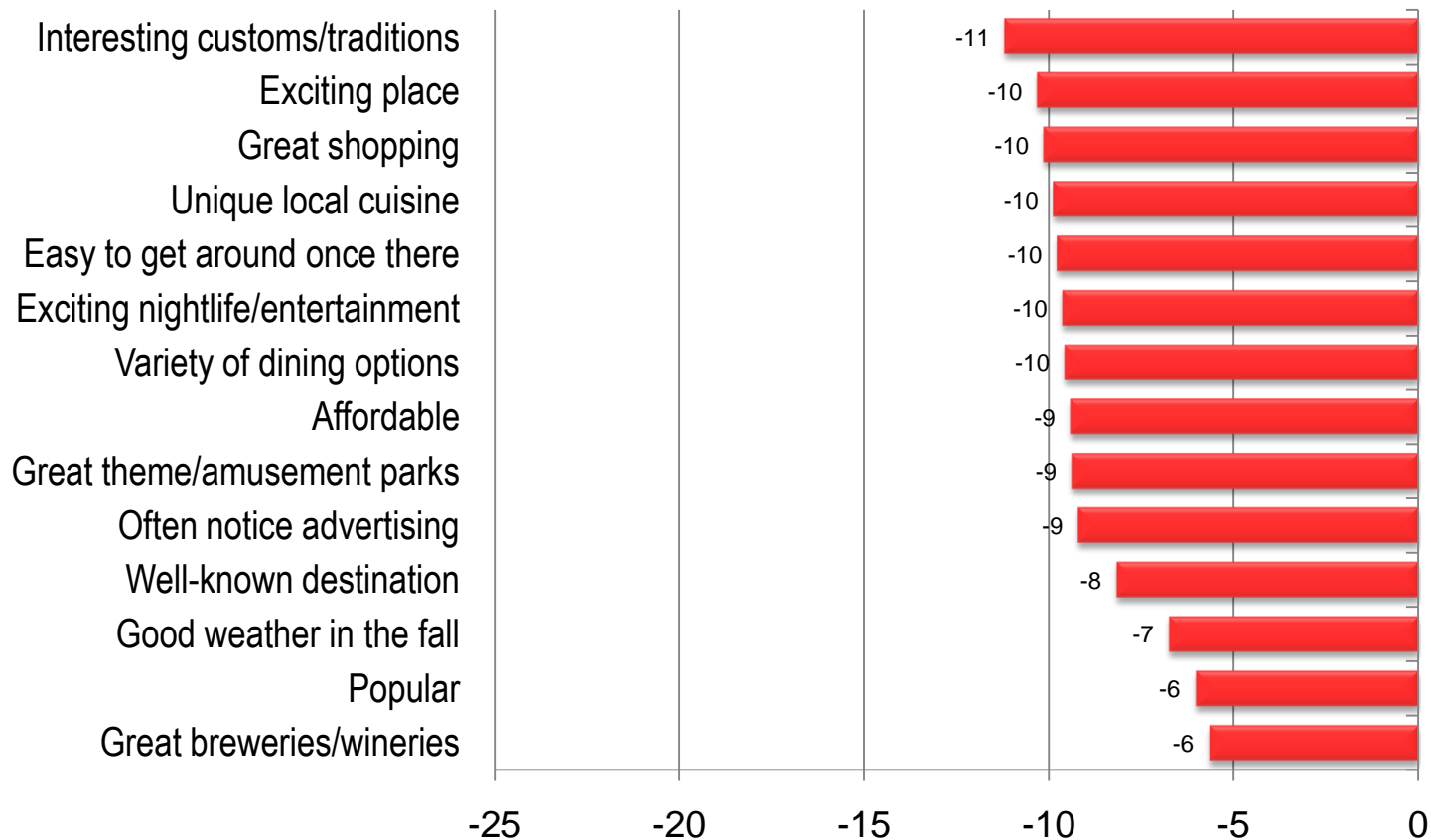
RTO7's Image Strengths vs. KW/Stratford/Goderich (Cont'd)



RTO7's Image Weaknesses vs. KW/Stratford/Goderich



RTO7's Image Weaknesses vs. KW/Stratford/Goderich (Cont'd)



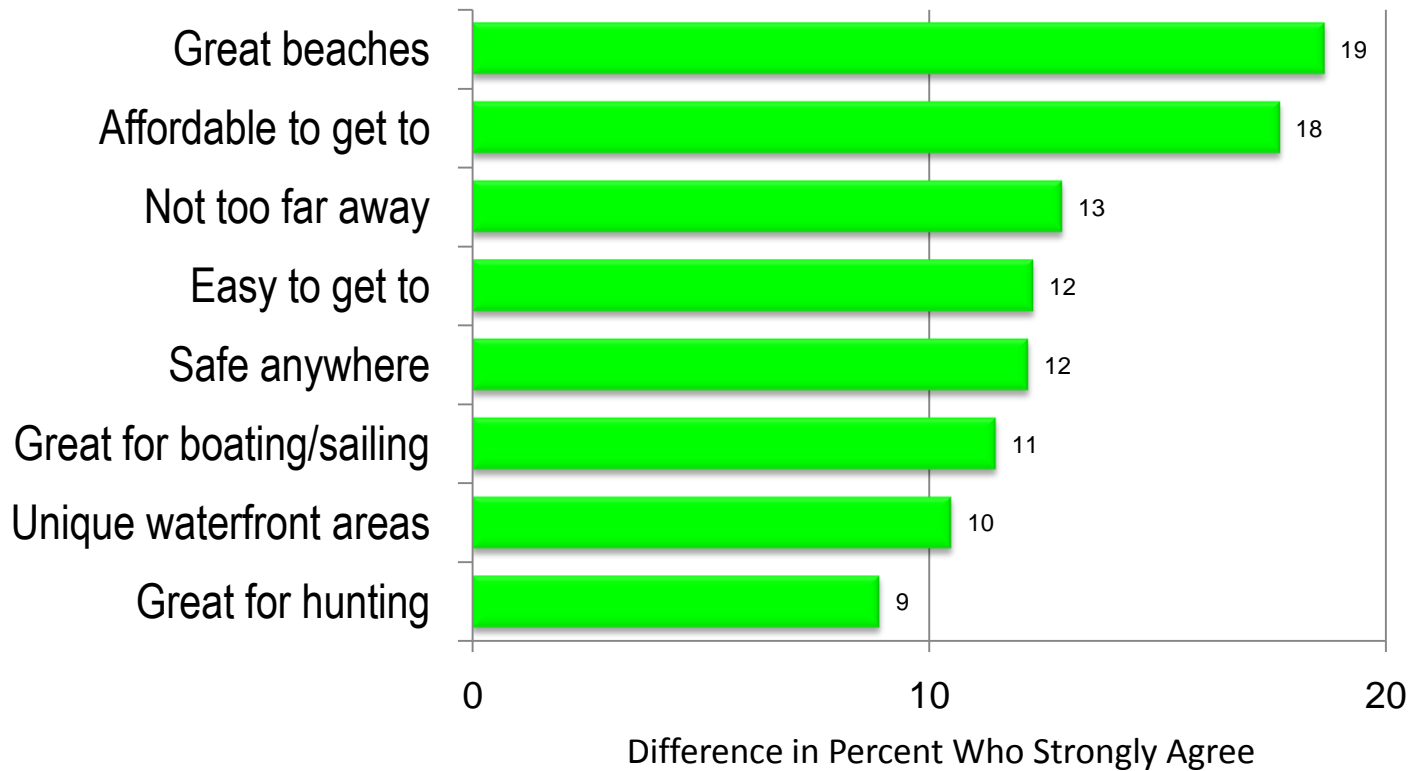
Difference in Percent Who Strongly Agree

Image Strengths &
Weaknesses vs.
Individual Competitors
– Ontario Residents

RTO7's Image Strengths vs. The Adirondacks



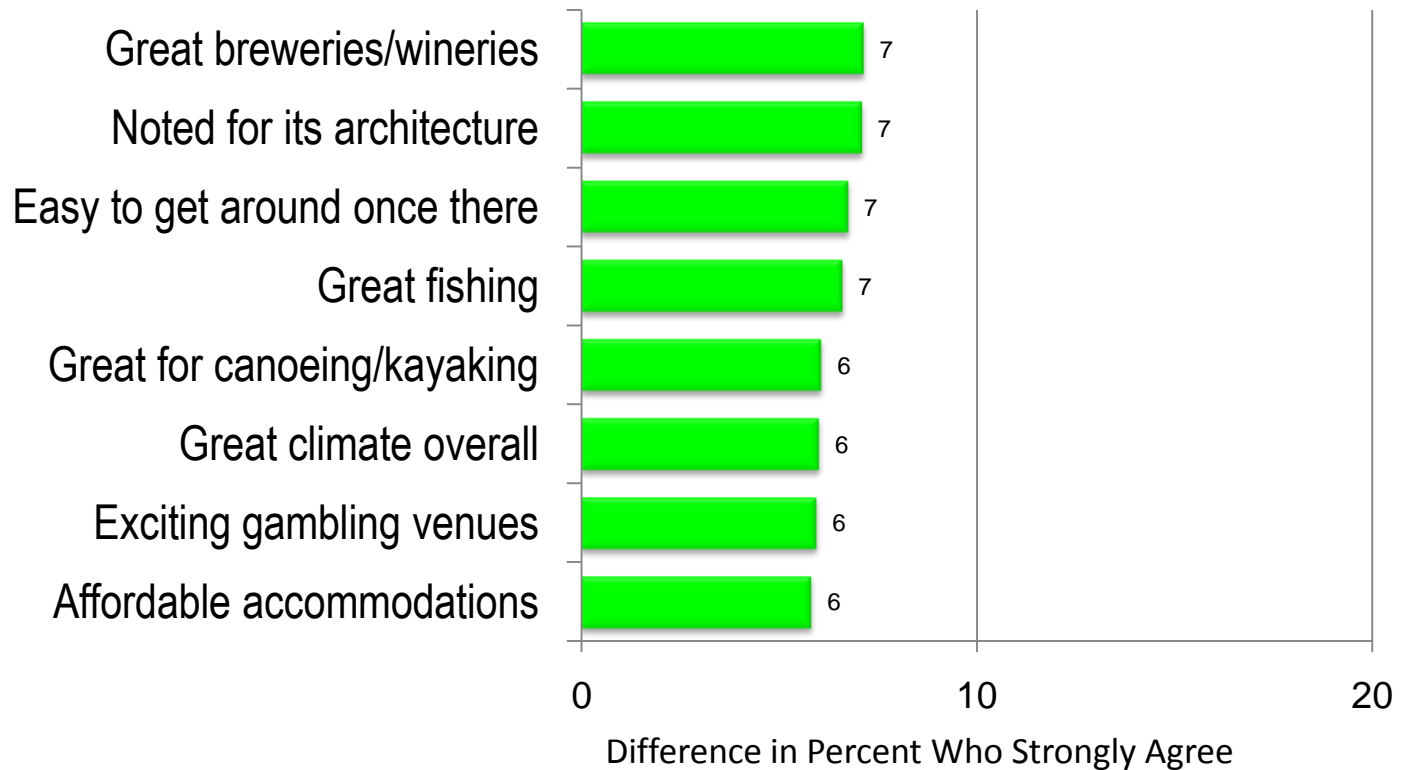
Base: Ontario Residents



RTO7's Image Strengths vs. The Adirondacks (Cont'd)



Base: Ontario Residents

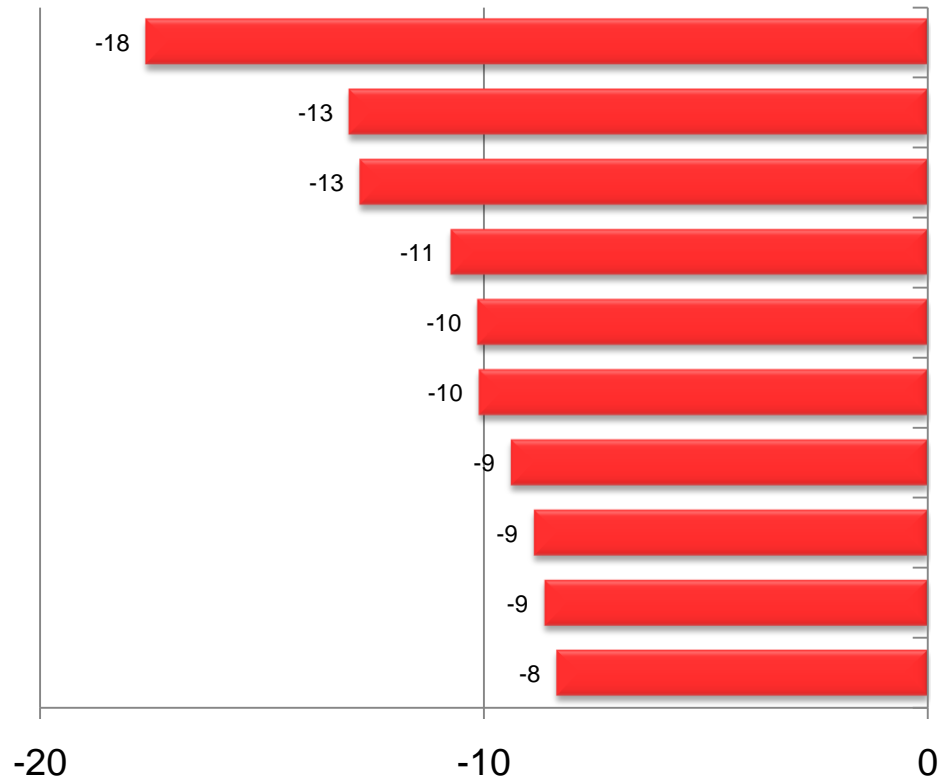


RTO7's Image Weaknesses vs. the Adirondacks



Base: Ontario Residents

- Great for downhill skiing/snowboarding
- First-class hotels/resorts
- Great for sightseeing
- Well-known destination
- Truly beautiful scenery
- Great inns/B&B's
- Popular with travelers
- Great for walking/strolling
- Good for an adult vacation
- Interesting place

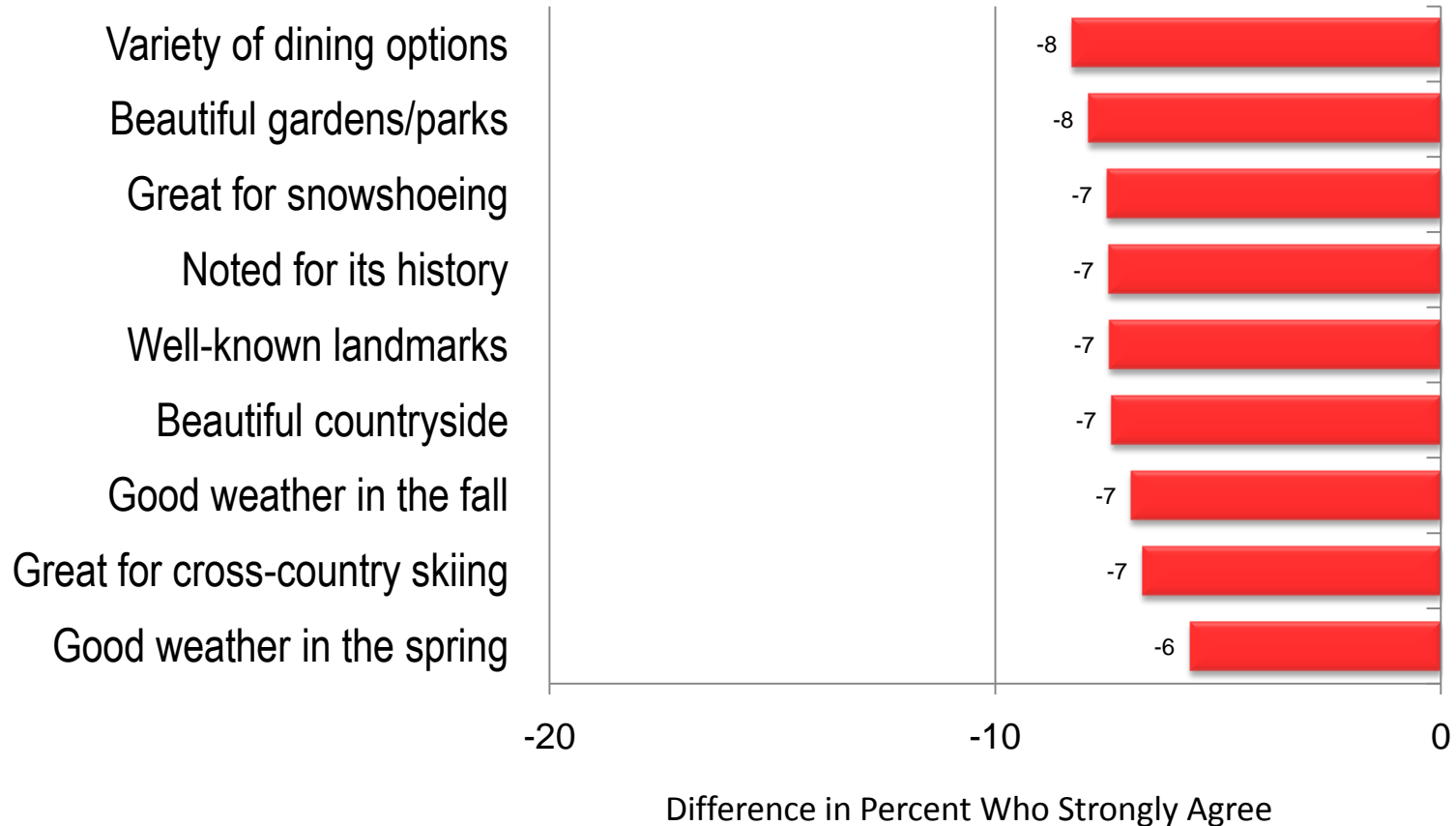


Difference in Percent Who Strongly Agree

RTO7's Image Weaknesses vs. the Adirondacks (Cont'd)



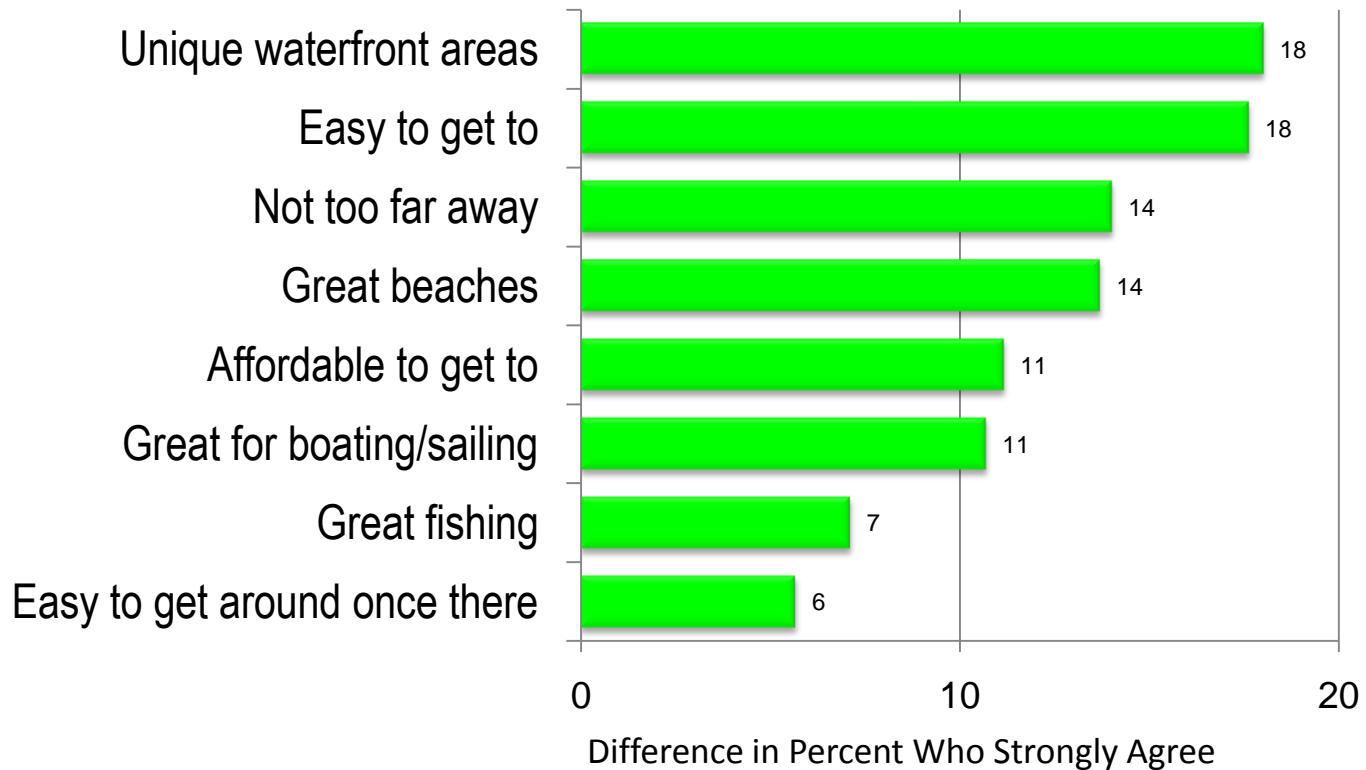
Base: Ontario Residents



RTO7's Image Strengths vs. The Laurentians



Base: Ontario Residents

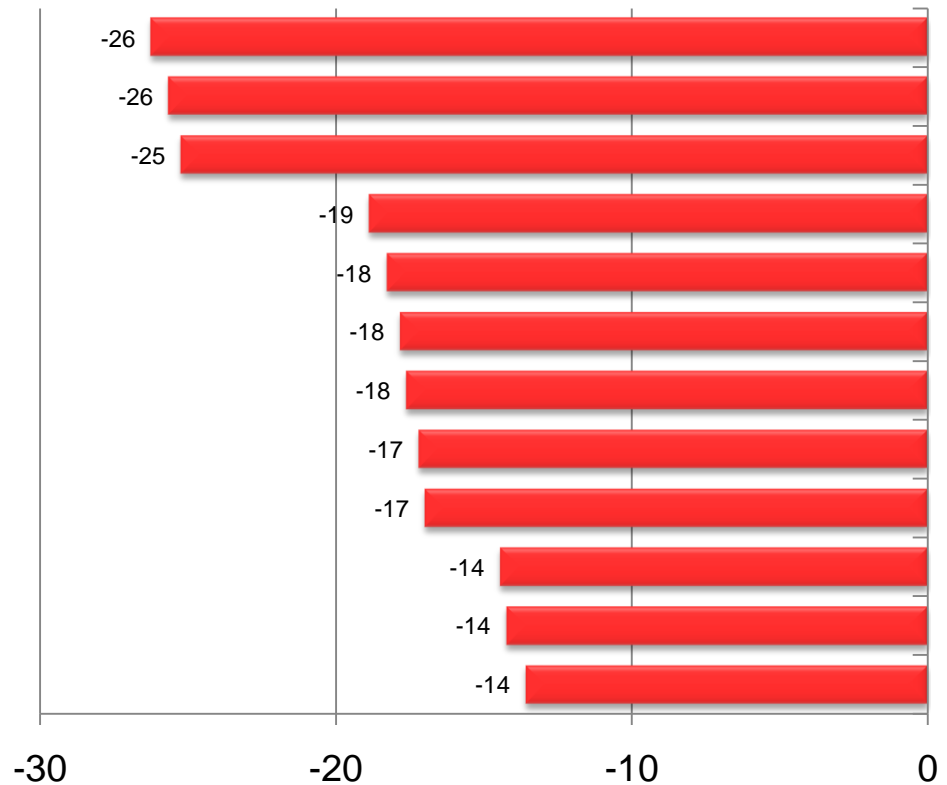


RTO7's Image Weaknesses vs. the Laurentians



Base: Ontario Residents

- Great for downhill skiing/snowboarding
- First-class hotels/resorts
- Unique local cuisine
- Different cultures/ways of life
- Well-known destination
- Noted for its history
- Great for sightseeing
- Elegant, sophisticated restaurants
- Popular with travelers
- Exciting place
- Interesting customs/traditions
- Great inns/B&B's

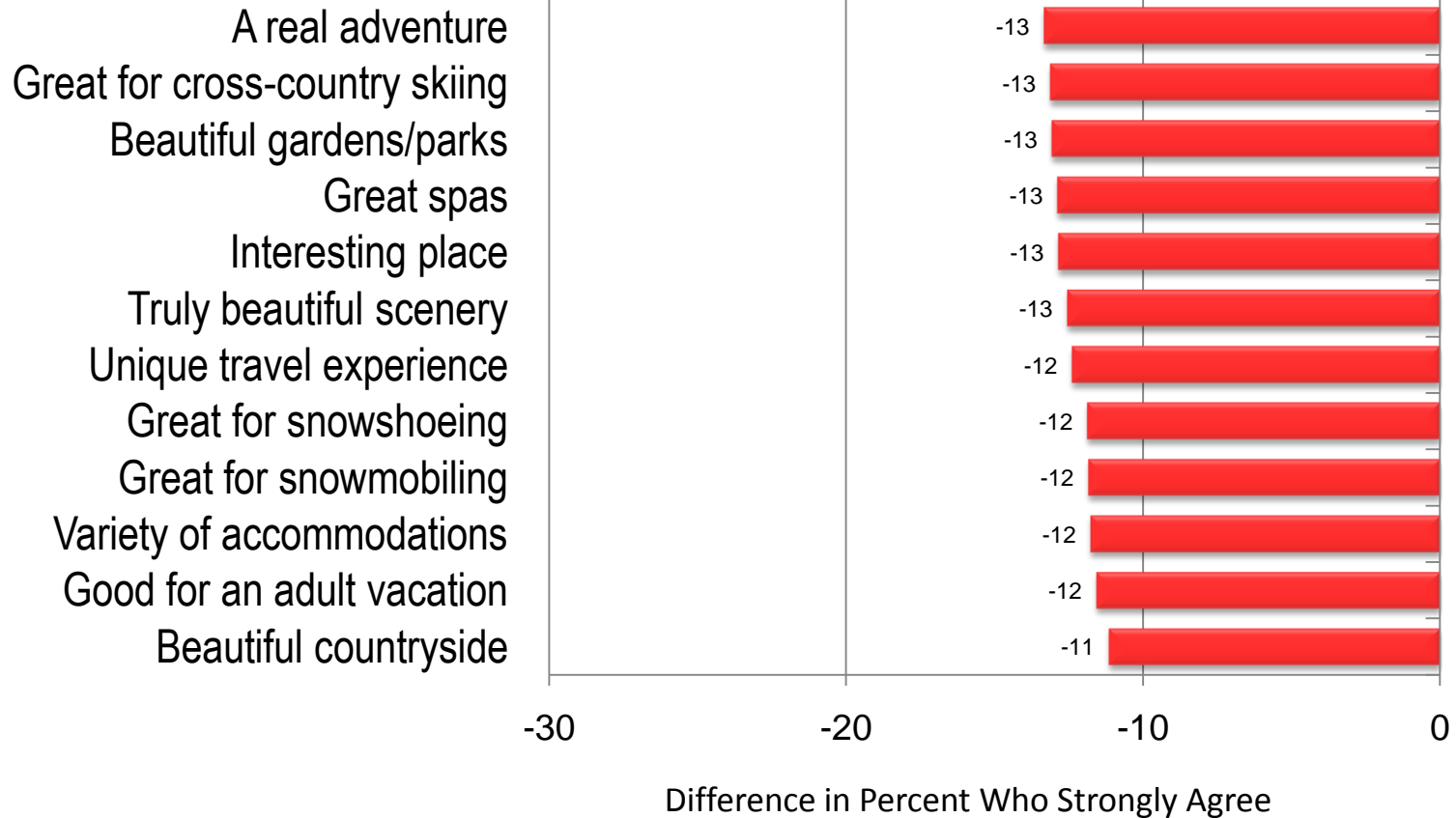


Difference in Percent Who Strongly Agree

RTO7's Image Weaknesses vs. the Laurentians (Cont'd)



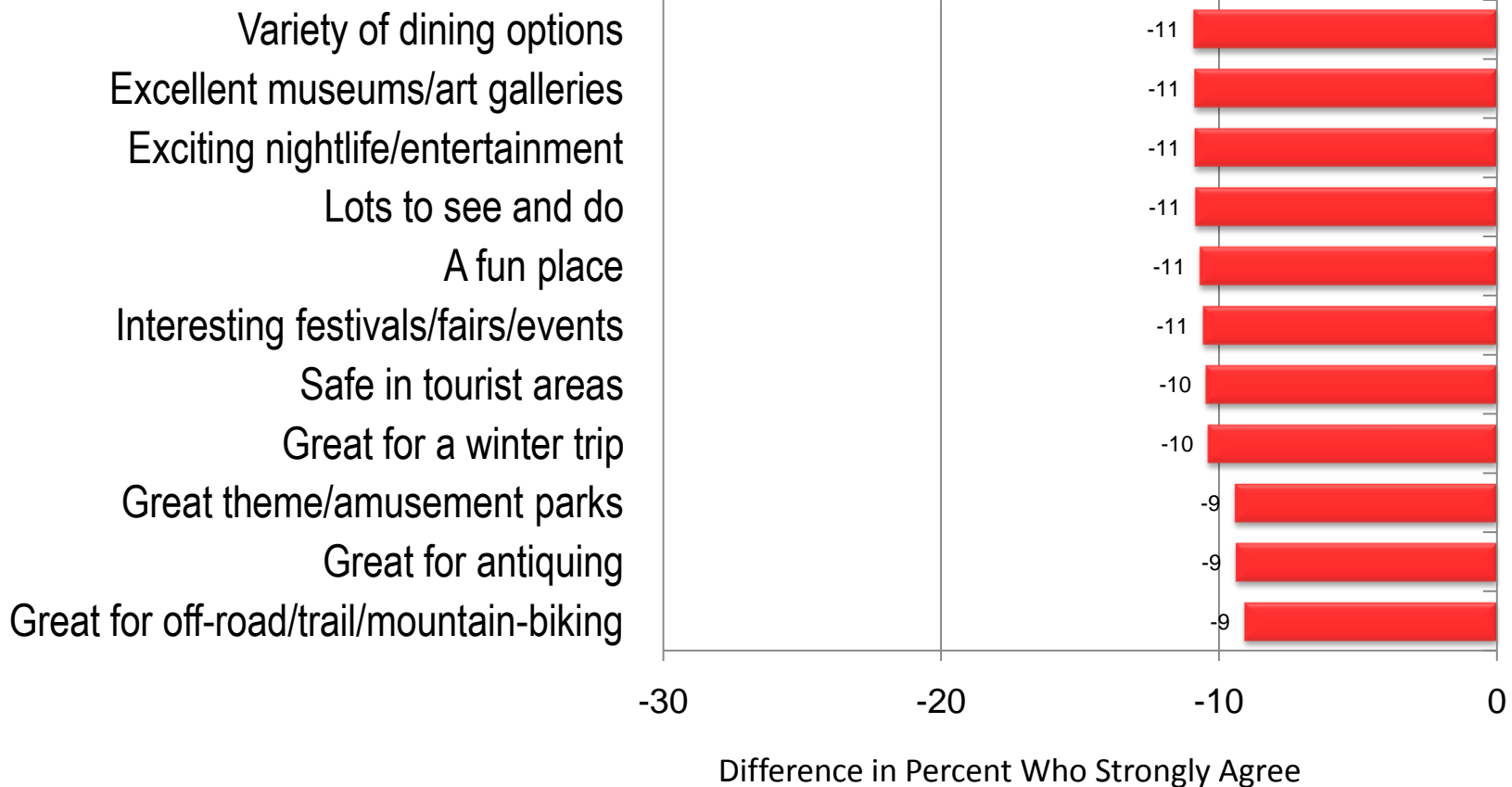
Base: Ontario Residents



RTO7's Image Weaknesses vs. the Laurentians (Cont'd)



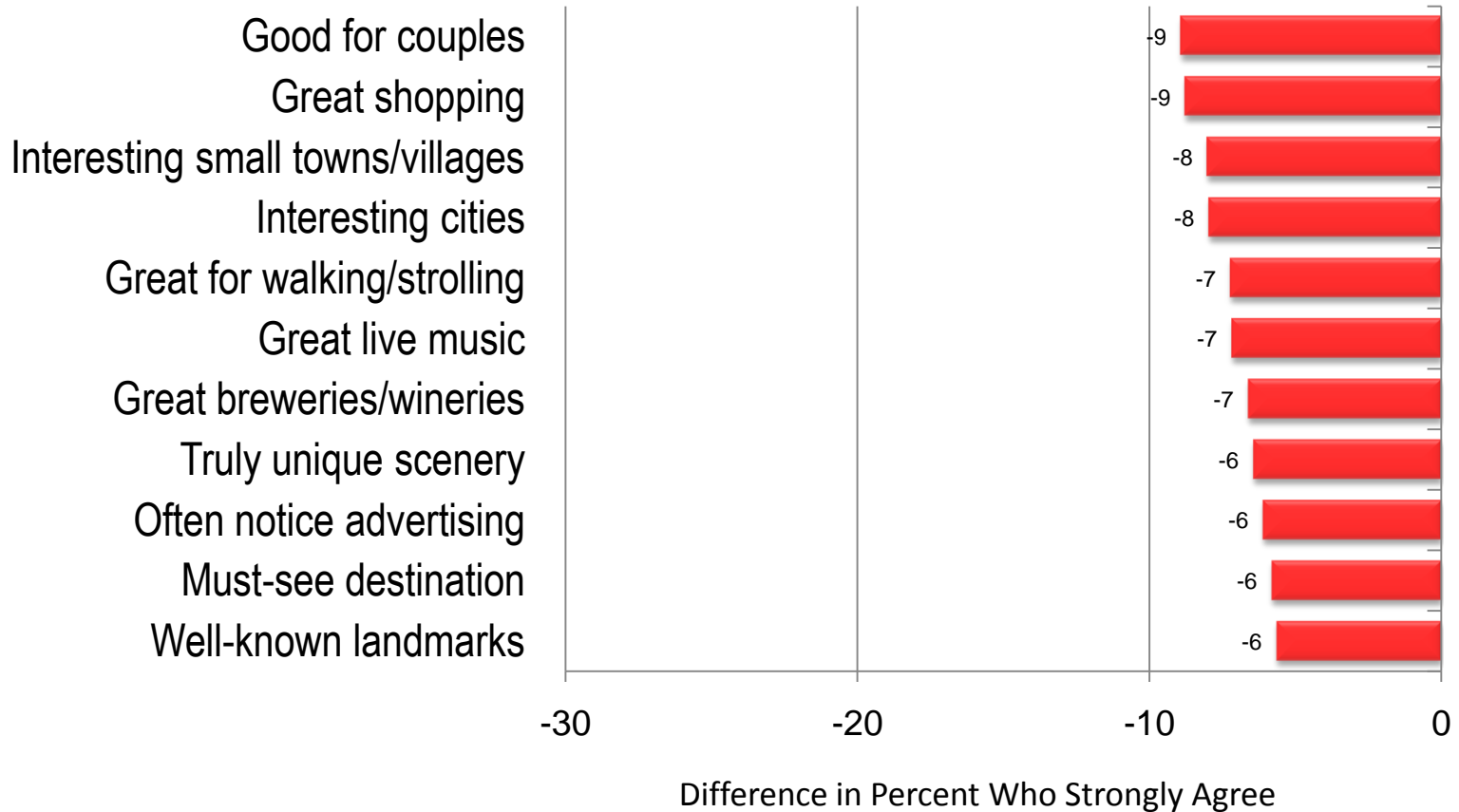
Base: Ontario Residents



RTO7's Image Weaknesses vs. the Laurentians (Cont'd)



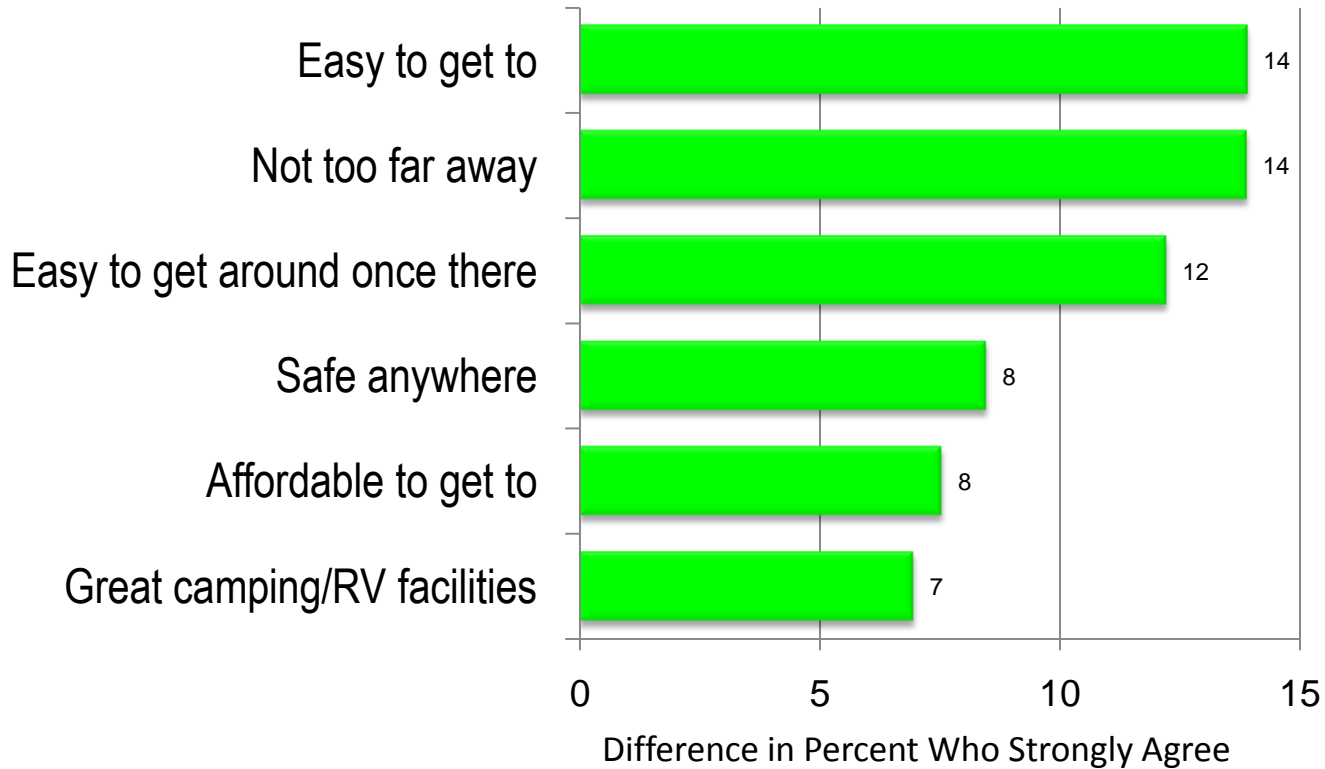
Base: Ontario Residents



RTO7's Image Strengths vs. Finger Lakes



Base: Ontario Residents

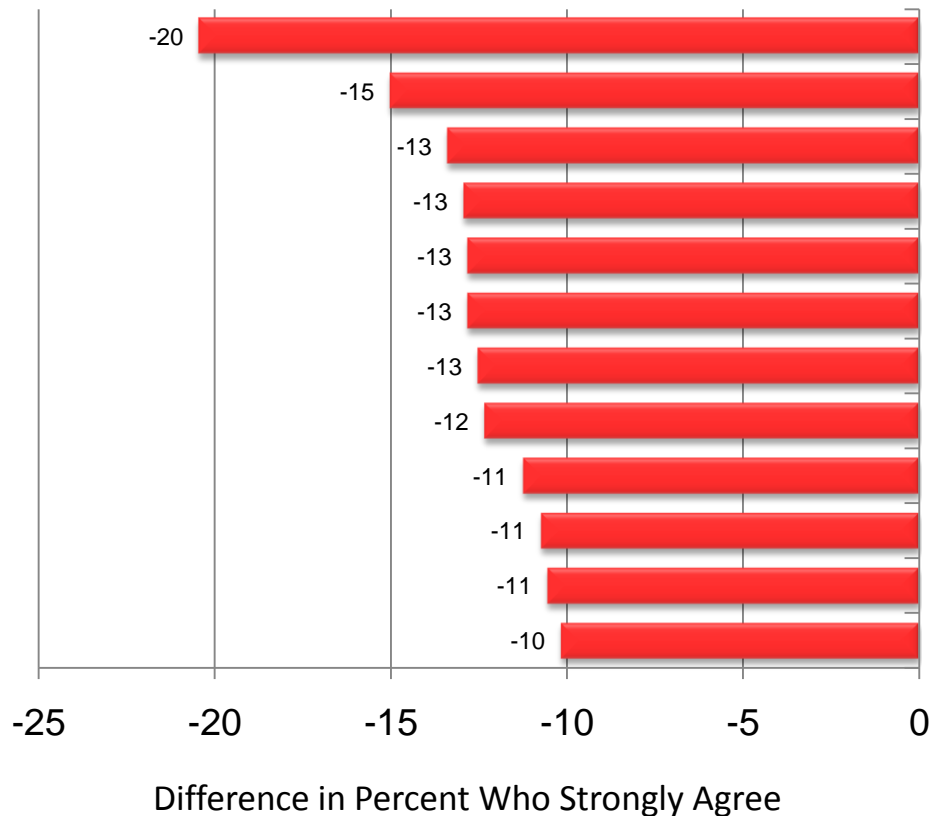


RTO7's Image Weaknesses vs. Finger Lakes



Base: Ontario Residents

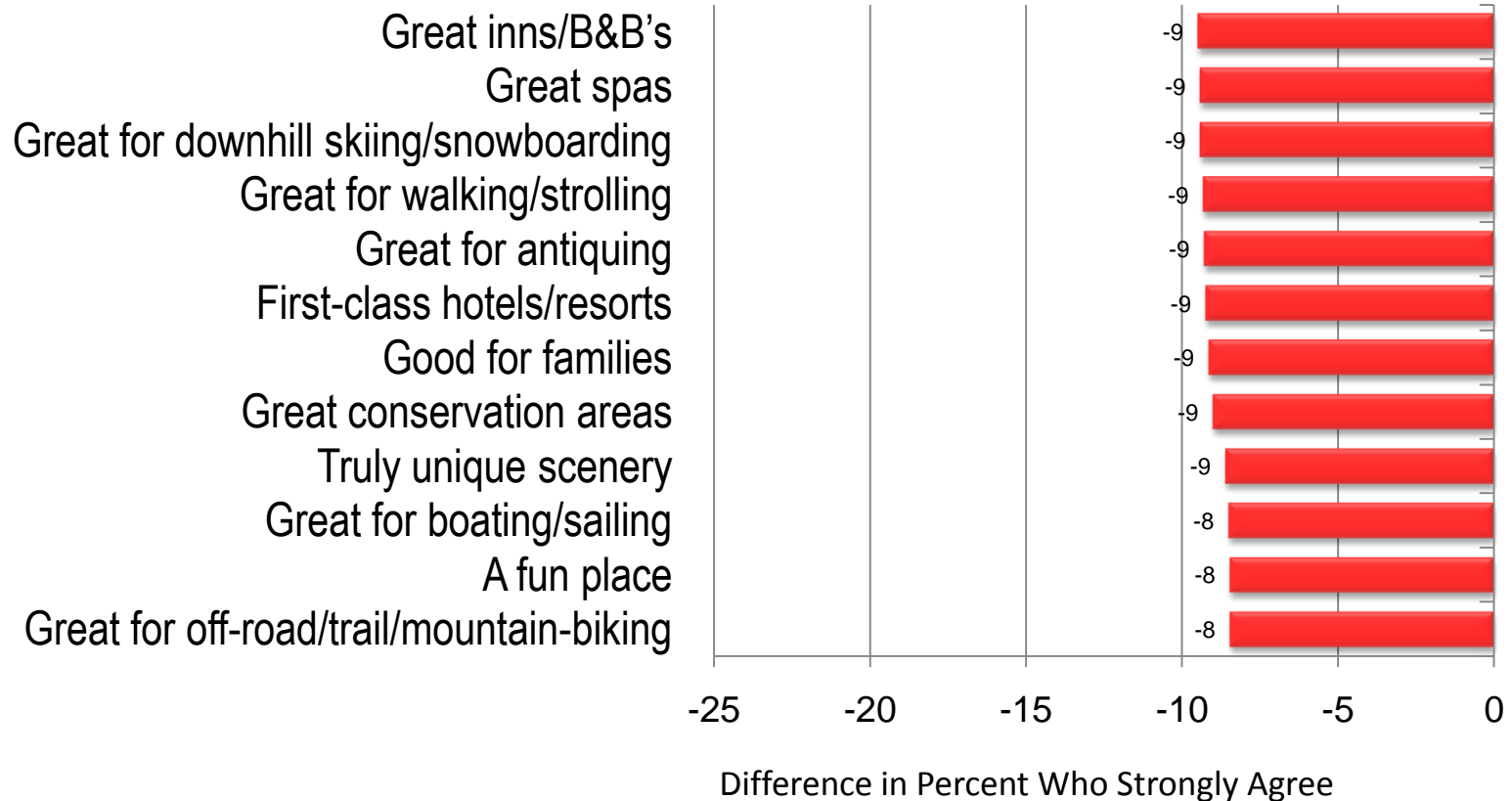
- Noted for its history
- Good for an adult vacation
- Popular with travelers
- Great for sightseeing
- Great theme/amusement parks
- Truly beautiful scenery
- Great for canoeing/kayaking
- Well-known destination
- Good place for camping
- Excellent museums/art galleries
- Interesting place
- Beautiful countryside



RTO7's Image Weaknesses vs. Finger Lakes (Cont'd)



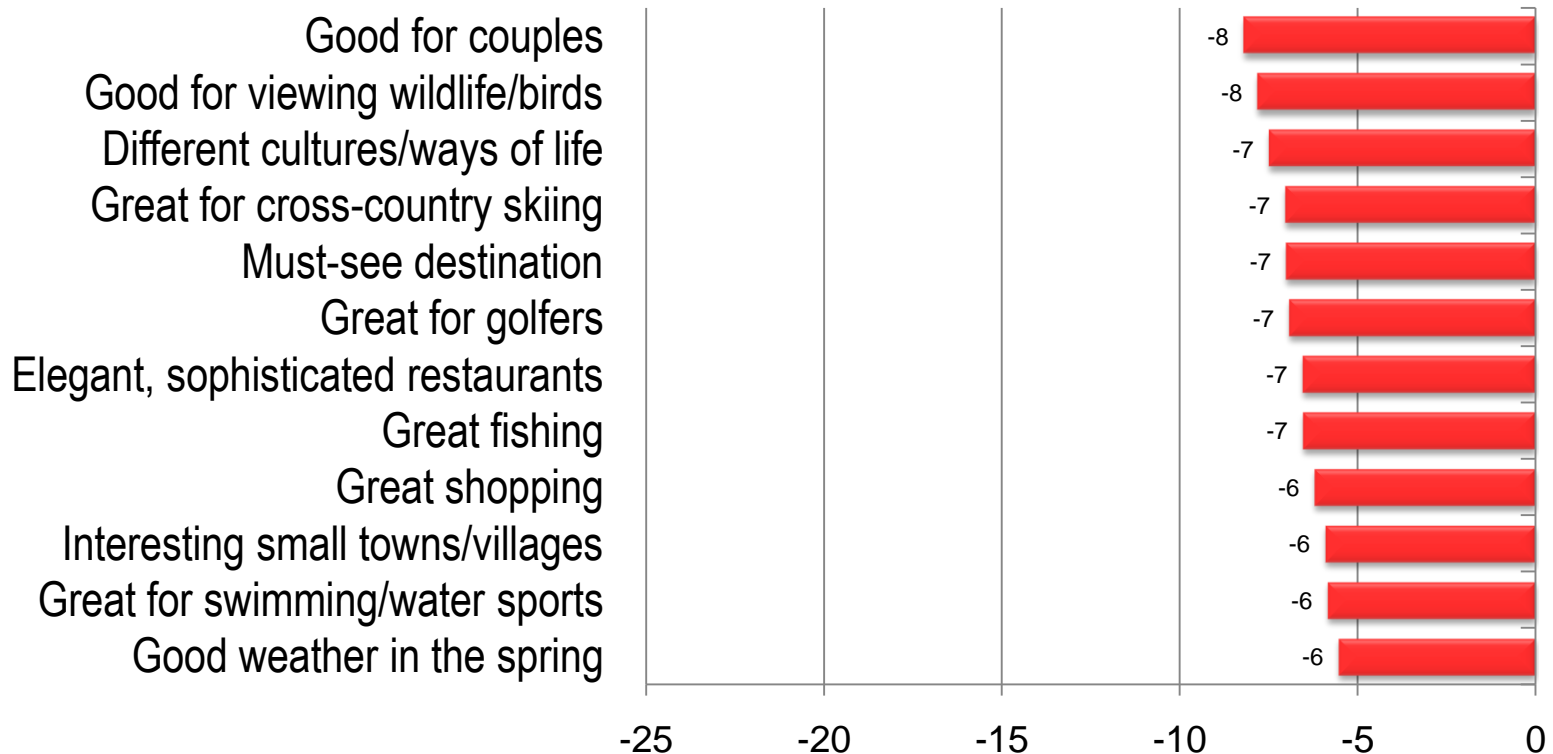
Base: Ontario Residents



RTO7's Image Weaknesses vs. Finger Lakes (Cont'd)



Base: Ontario Residents

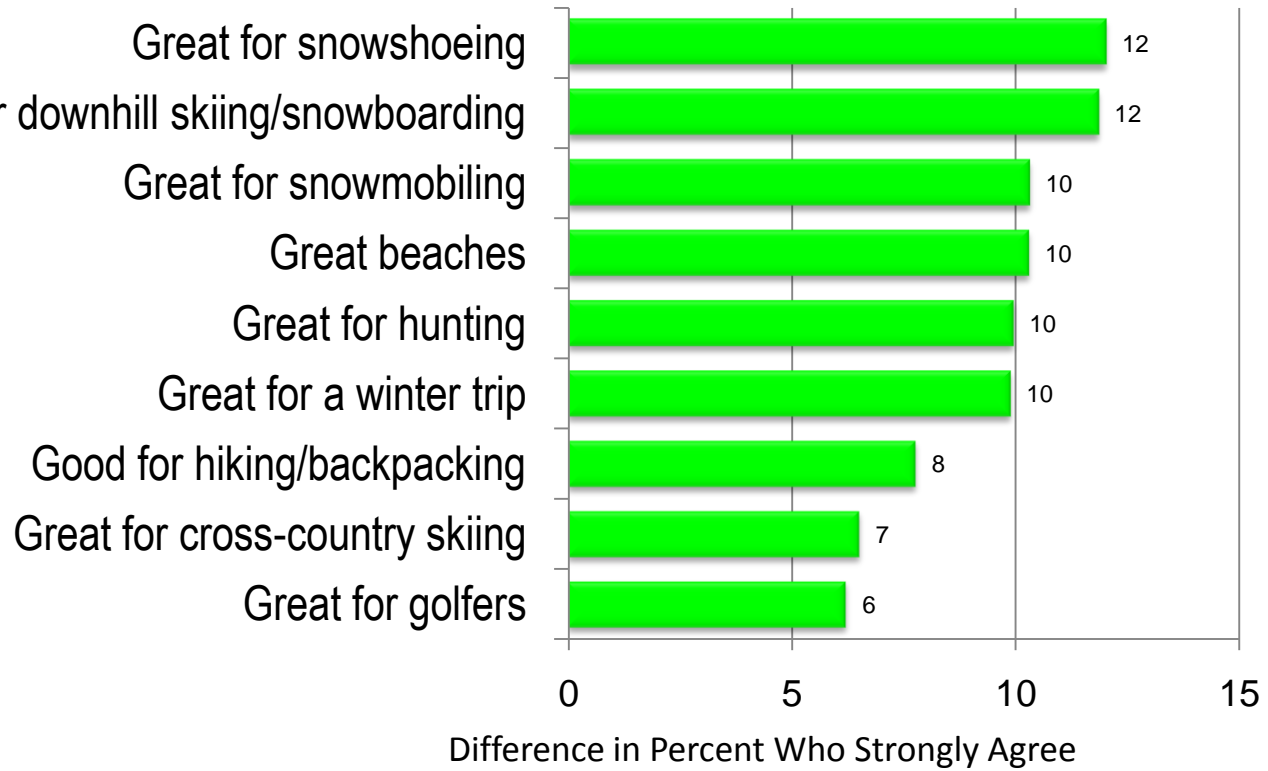


Difference in Percent Who Strongly Agree

RTO7's Image Strengths vs. Kingston/Thousand Islands



Base: Ontario Residents

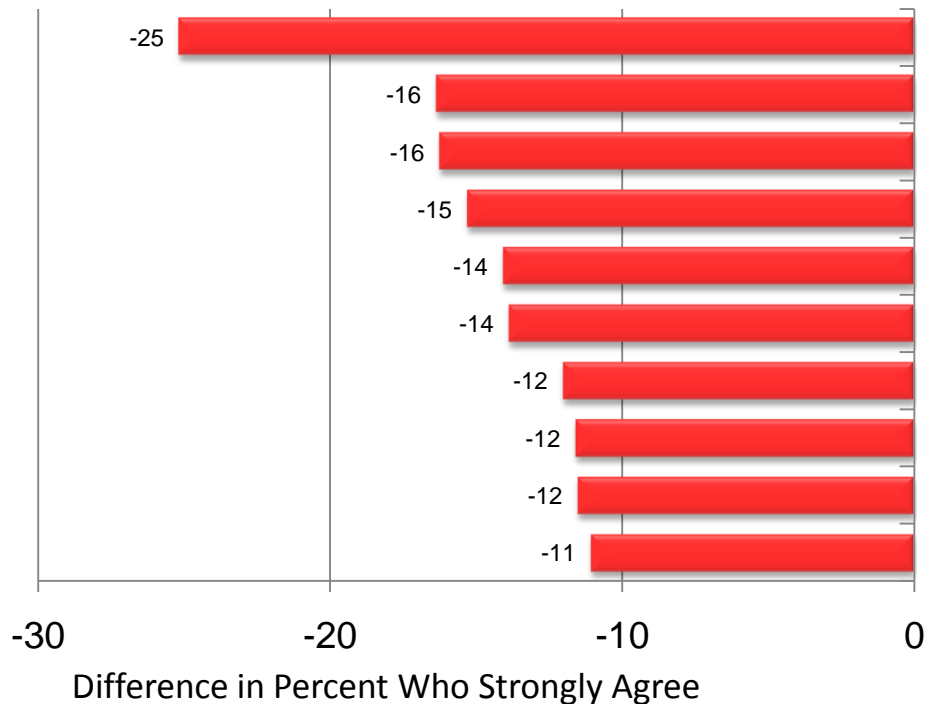


RTO7's Image Weaknesses vs. Kingston/Thousand Islands



Base: Ontario Residents

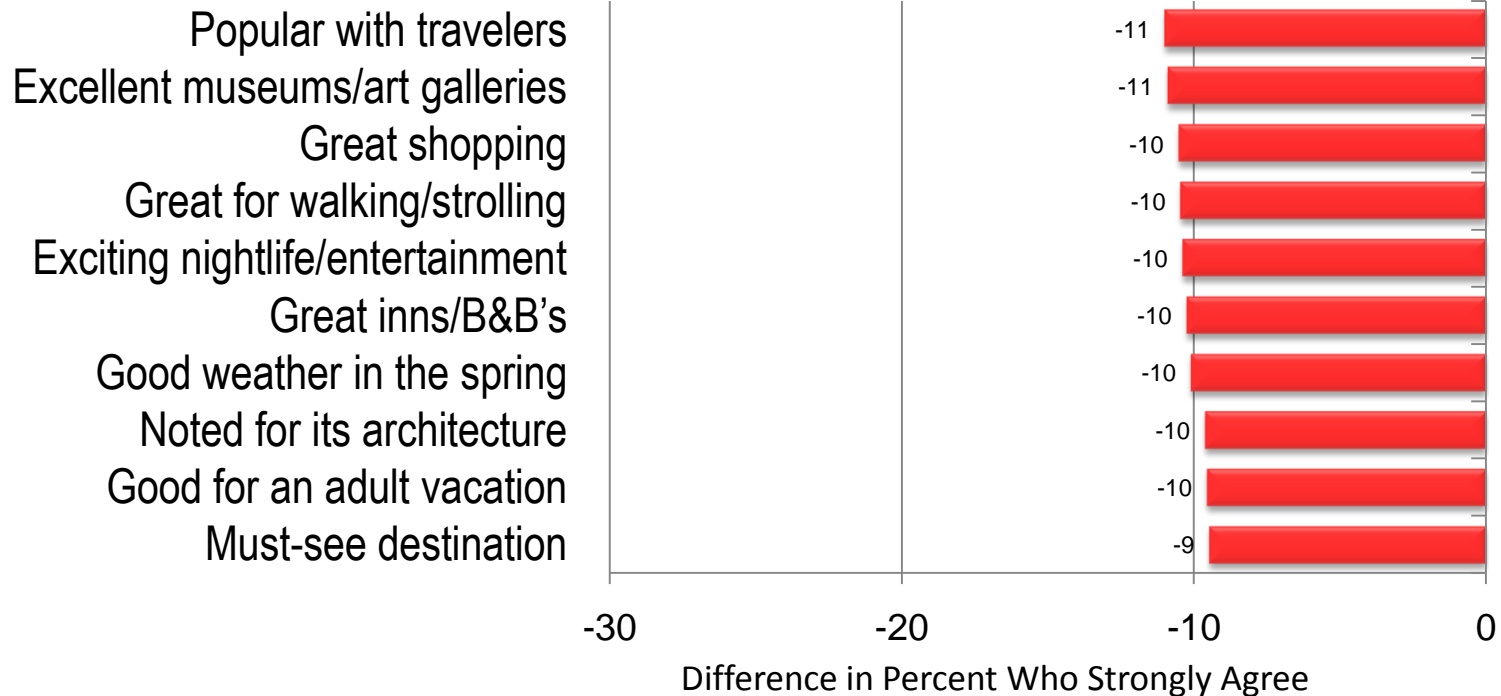
- Noted for its history
- Great for sightseeing
- Beautiful gardens/parks
- Well-known landmarks
- Interesting place
- Well-known destination
- Interesting cities
- Elegant, sophisticated restaurants
- Variety of dining options
- Great for theatre/performing arts



RTO7's Image Weaknesses vs. Kingston/Thousand Islands (Cont'd)



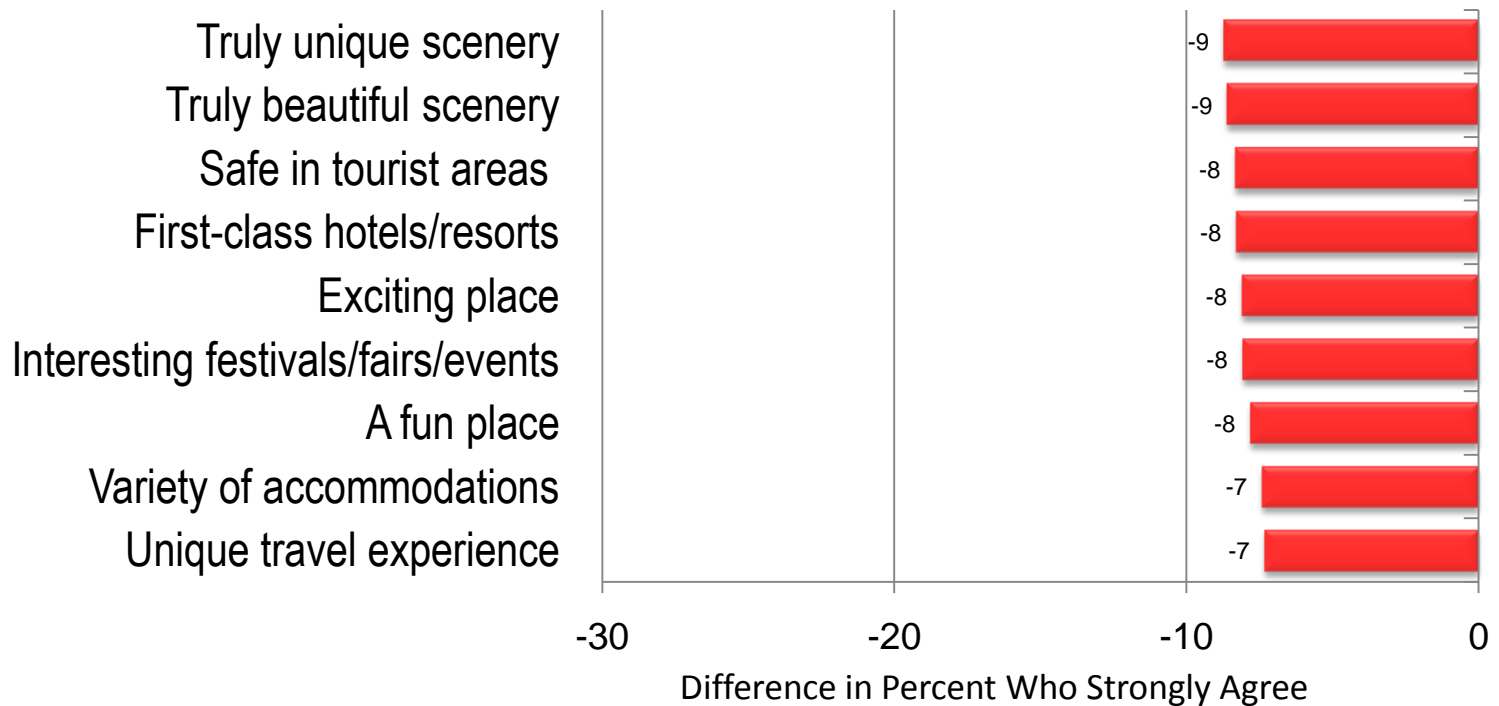
Base: Ontario Residents



RTO7's Image Weaknesses vs. Kingston/Thousand Islands (Cont'd)



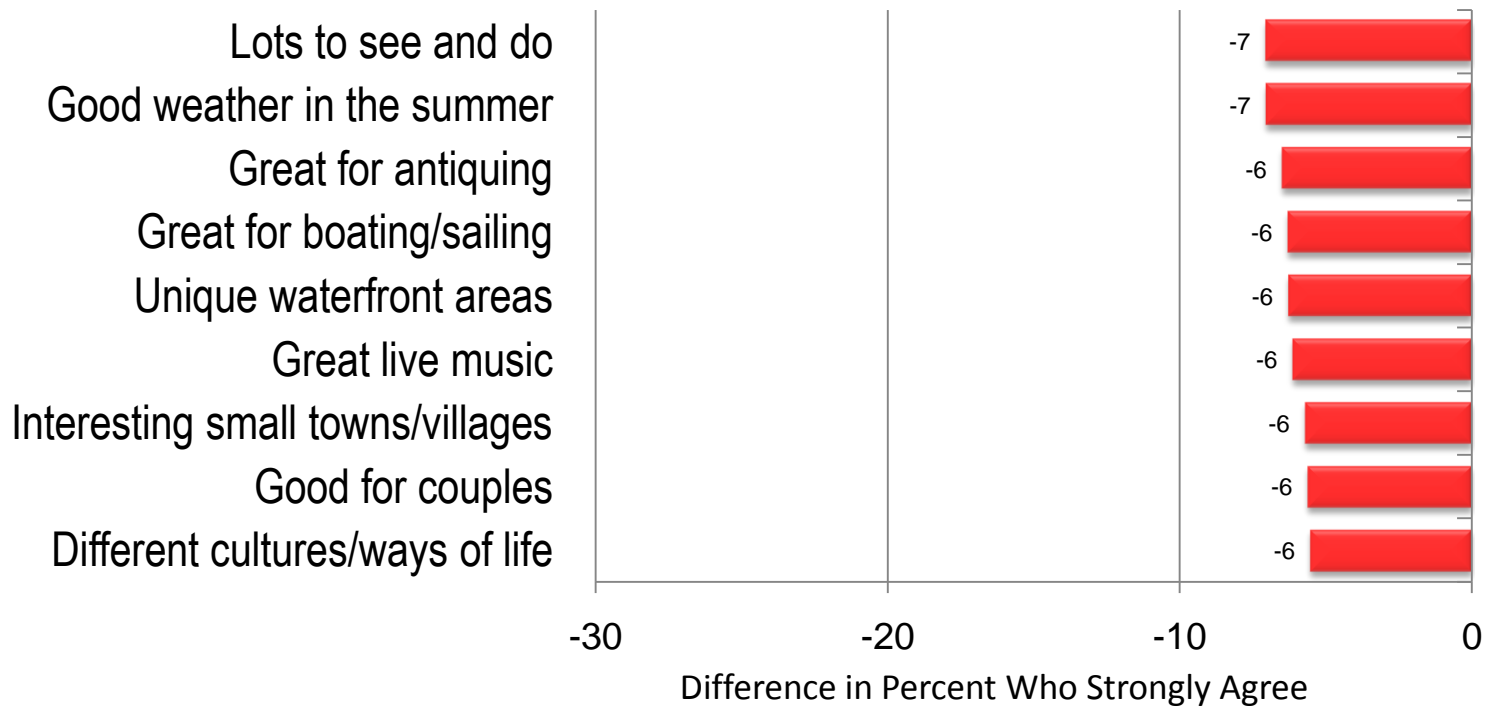
Base: Ontario Residents



RTO7's Image Weaknesses vs. Kingston/Thousand Islands (Cont'd)



Base: Ontario Residents

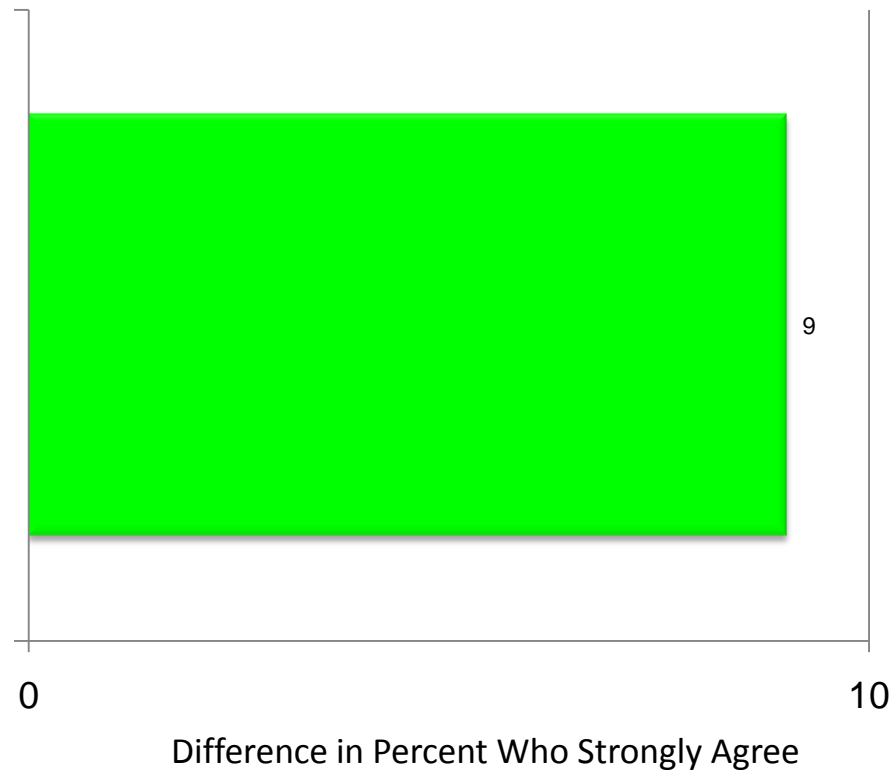


RTO7's Image Strengths vs. Muskoka



Base: Ontario Residents

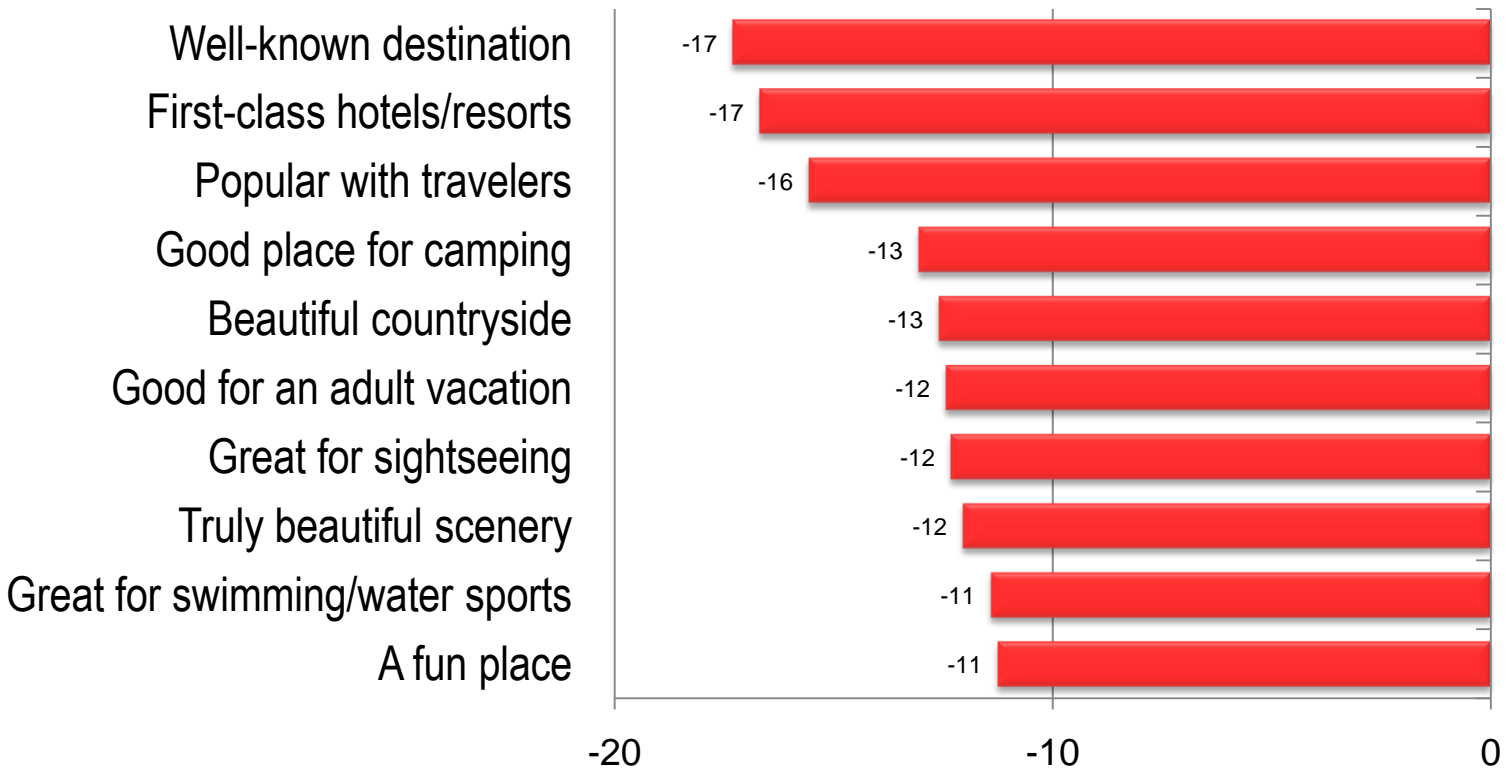
Great breweries/wineries



RTO7's Image Weaknesses vs. Muskoka



Base: Ontario Residents

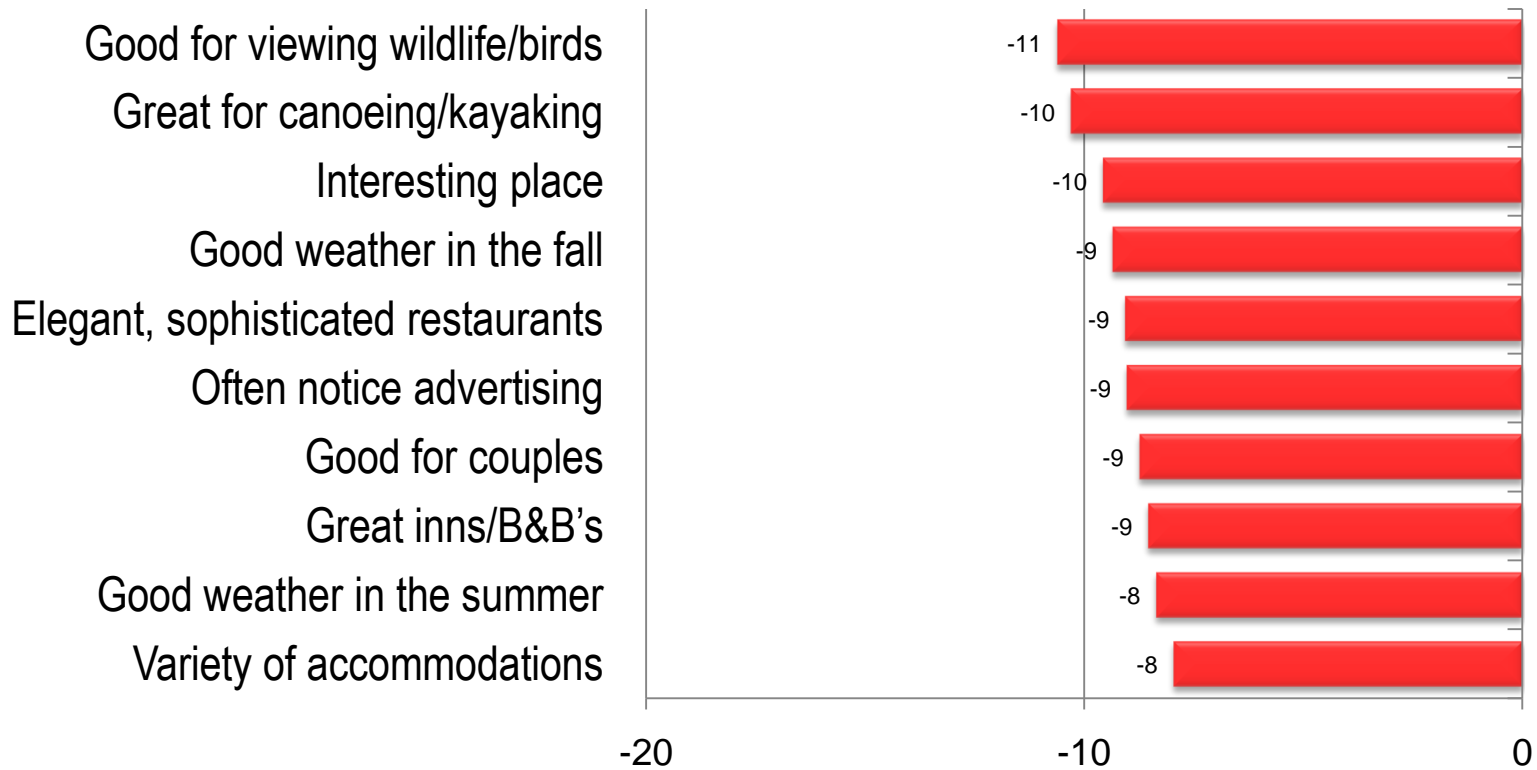


Difference in Percent Who Strongly Agree

RTO7's Image Weaknesses vs. Muskoka (Cont'd)



Base: Ontario Residents

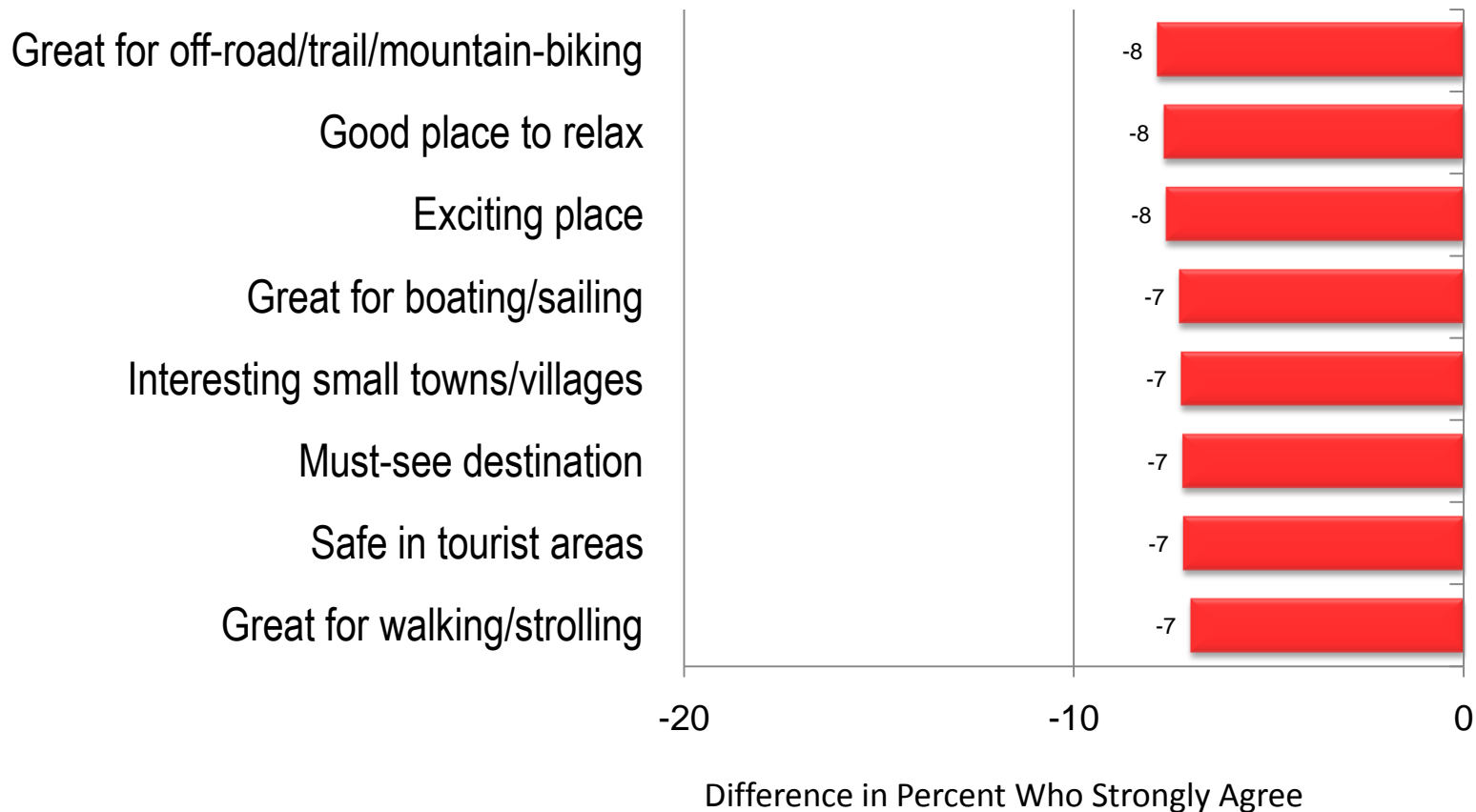


Difference in Percent Who Strongly Agree

RTO7's Image Weaknesses vs. Muskoka (Cont'd)



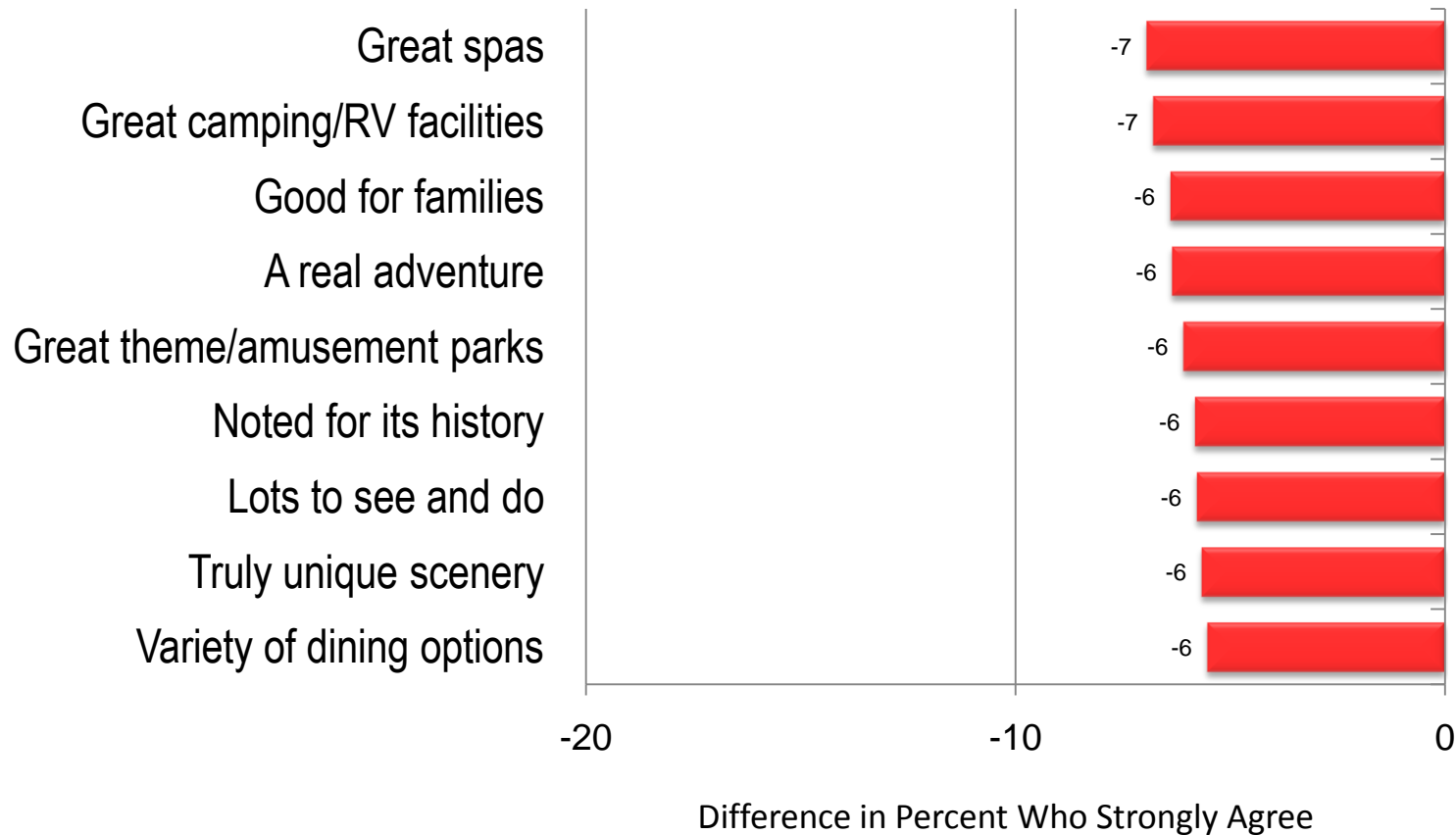
Base: Ontario Residents



RTO7's Image Weaknesses vs. Muskoka (Cont'd)



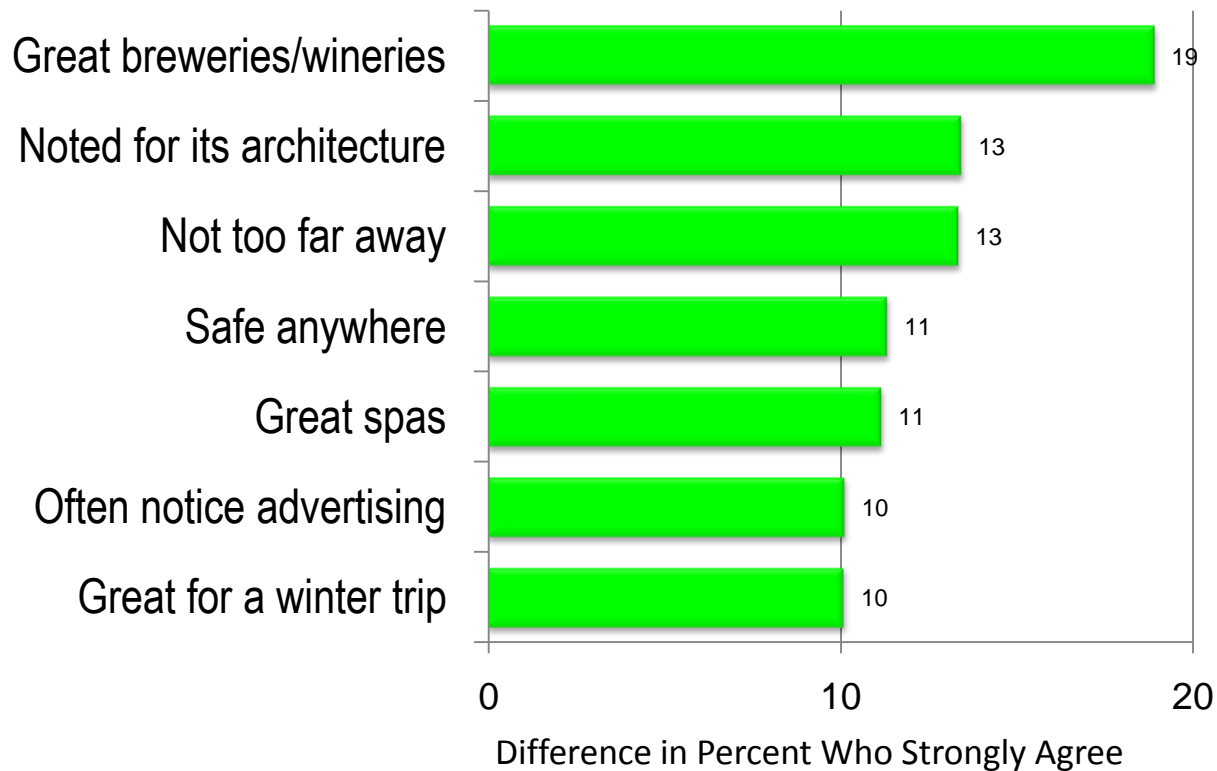
Base: Ontario Residents



RTO7's Image Strengths vs. Northern Michigan



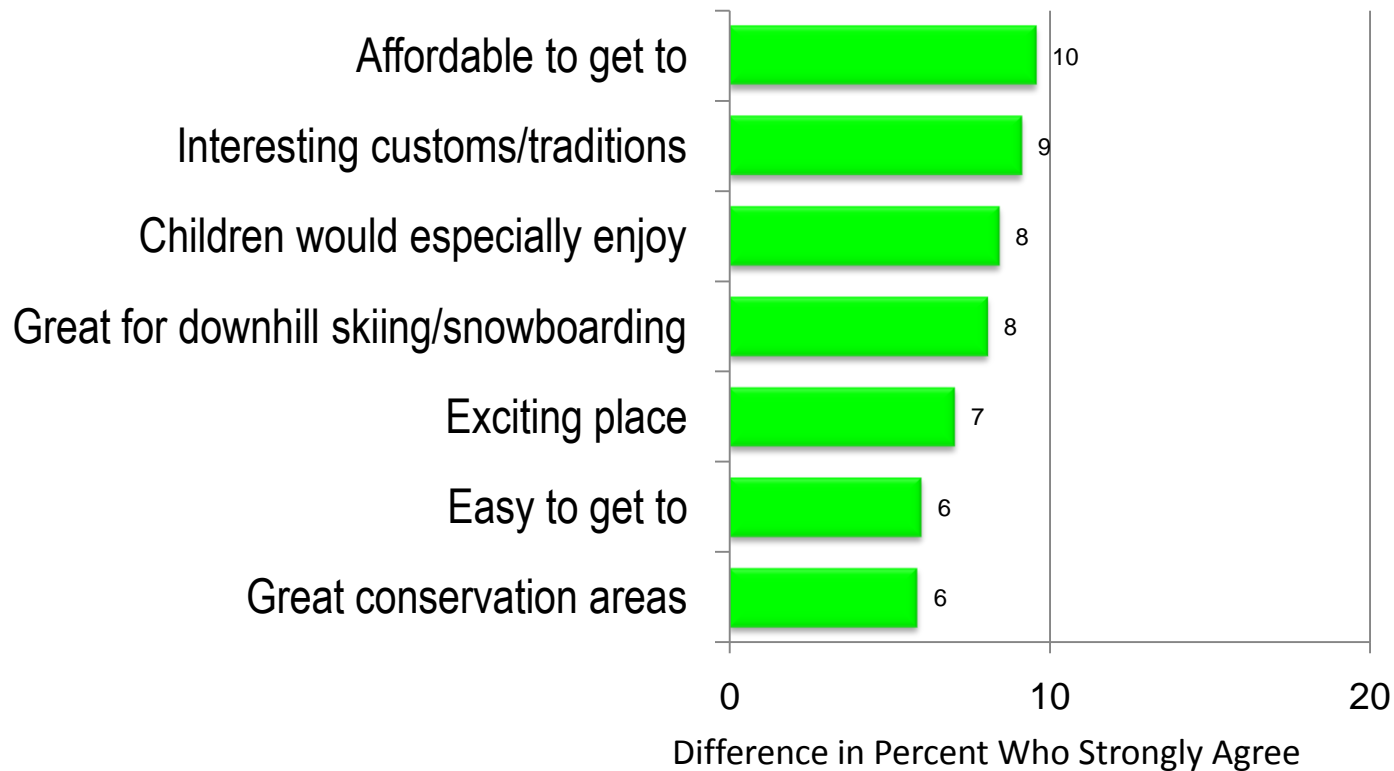
Base: Ontario Residents



RTO7's Image Strengths vs. Northern Michigan (Cont'd)



Base: Ontario Residents

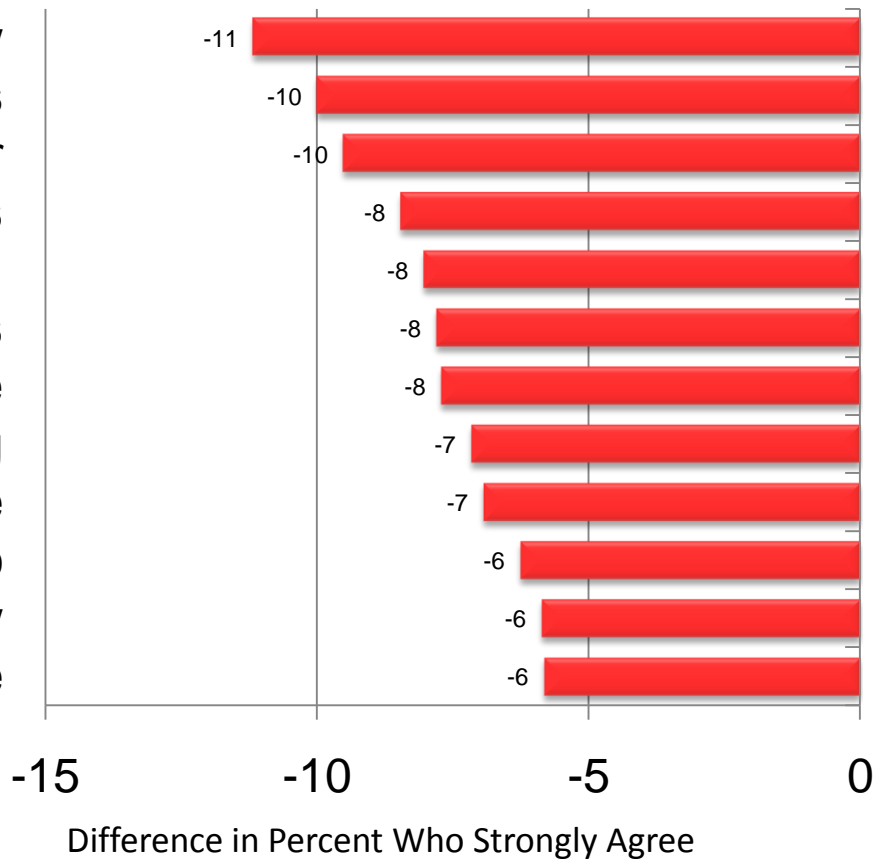


RTO7's Image Weaknesses vs. Northern Michigan



Base: Ontario Residents

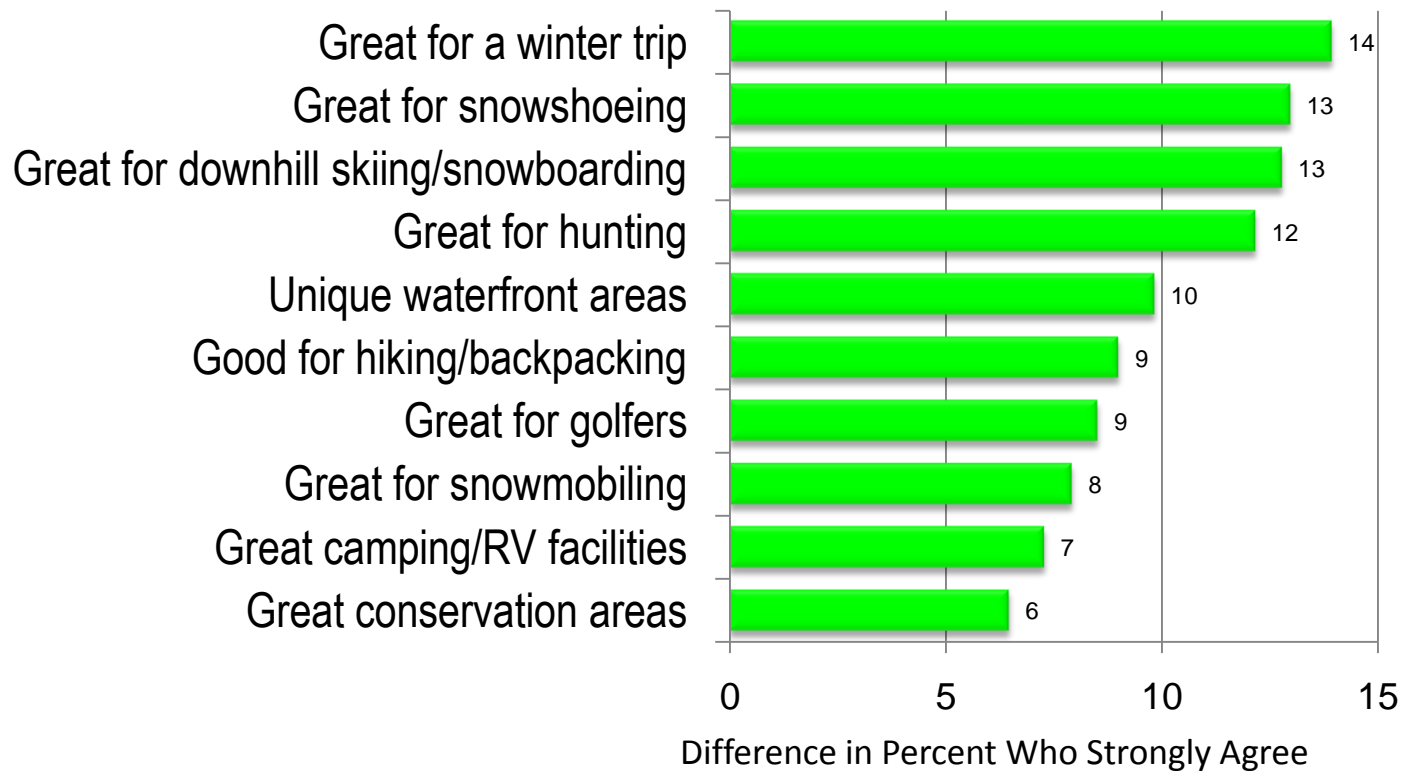
- Truly beautiful scenery
- First-class hotels/resorts
- Good weather in the summer
- Good for viewing wildlife/birds
- Great for off-road/trail/mountain-biking
- Variety of accommodations
- Interesting place
- Great for sightseeing
- Beautiful countryside
- Lots to see and do
- Noted for its history
- A fun place



RTO7's Image Strengths vs. Prince Edward County



Base: Ontario Residents

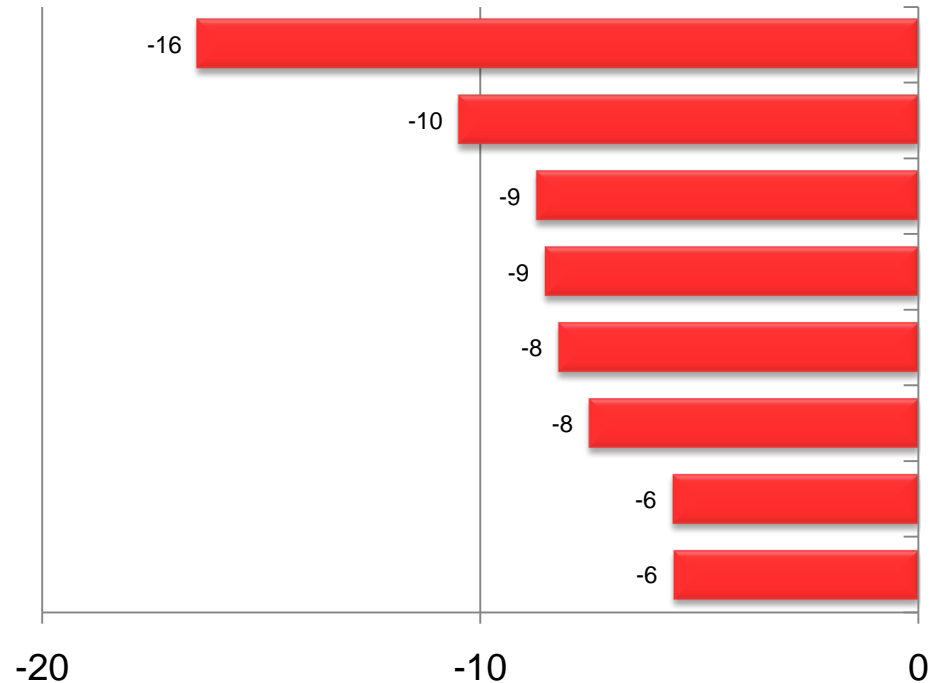


RTO7's Image Weaknesses vs. Prince Edward County



Base: Ontario Residents

- Noted for its history
- Great inns/B&B's
- Great for antiquing
- Unique local cuisine
- Good for an adult vacation
- Elegant, sophisticated restaurants
- Excellent museums/art galleries
- Safe in tourist areas

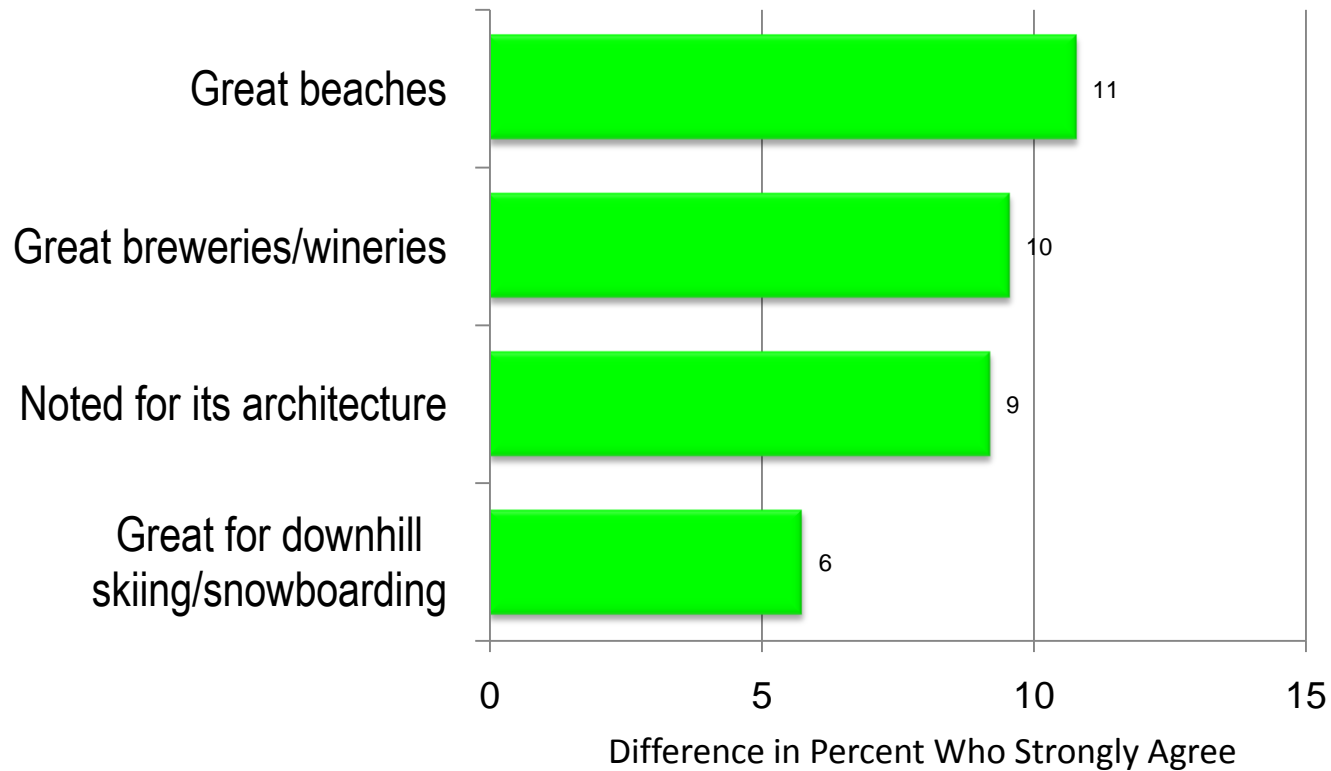


Difference in Percent Who Strongly Agree

RTO7's Image Strengths vs. Haliburton/Kawarthas



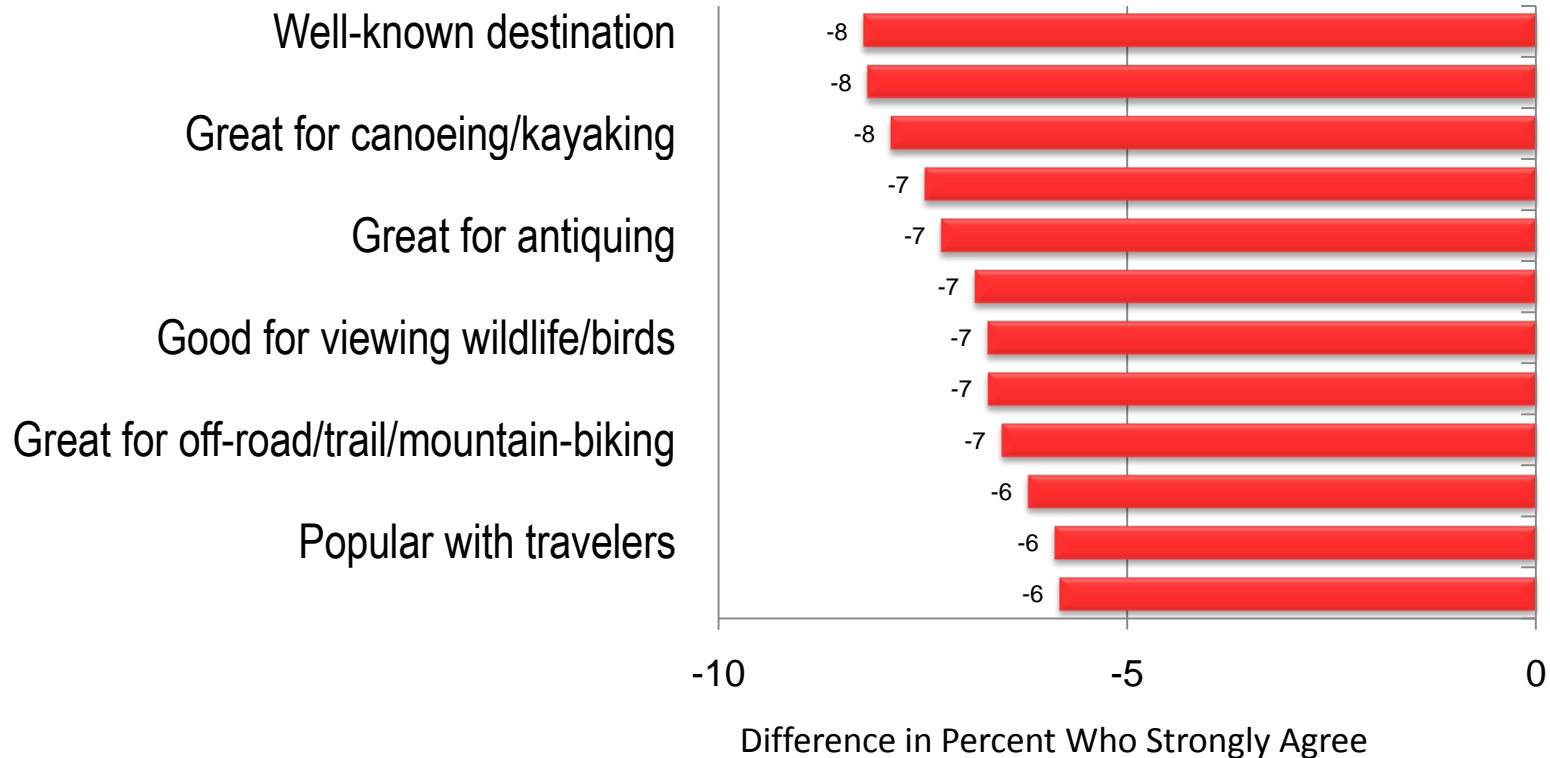
Base: Ontario Residents



RTO7's Image Weaknesses vs. Haliburton/Kawarthas



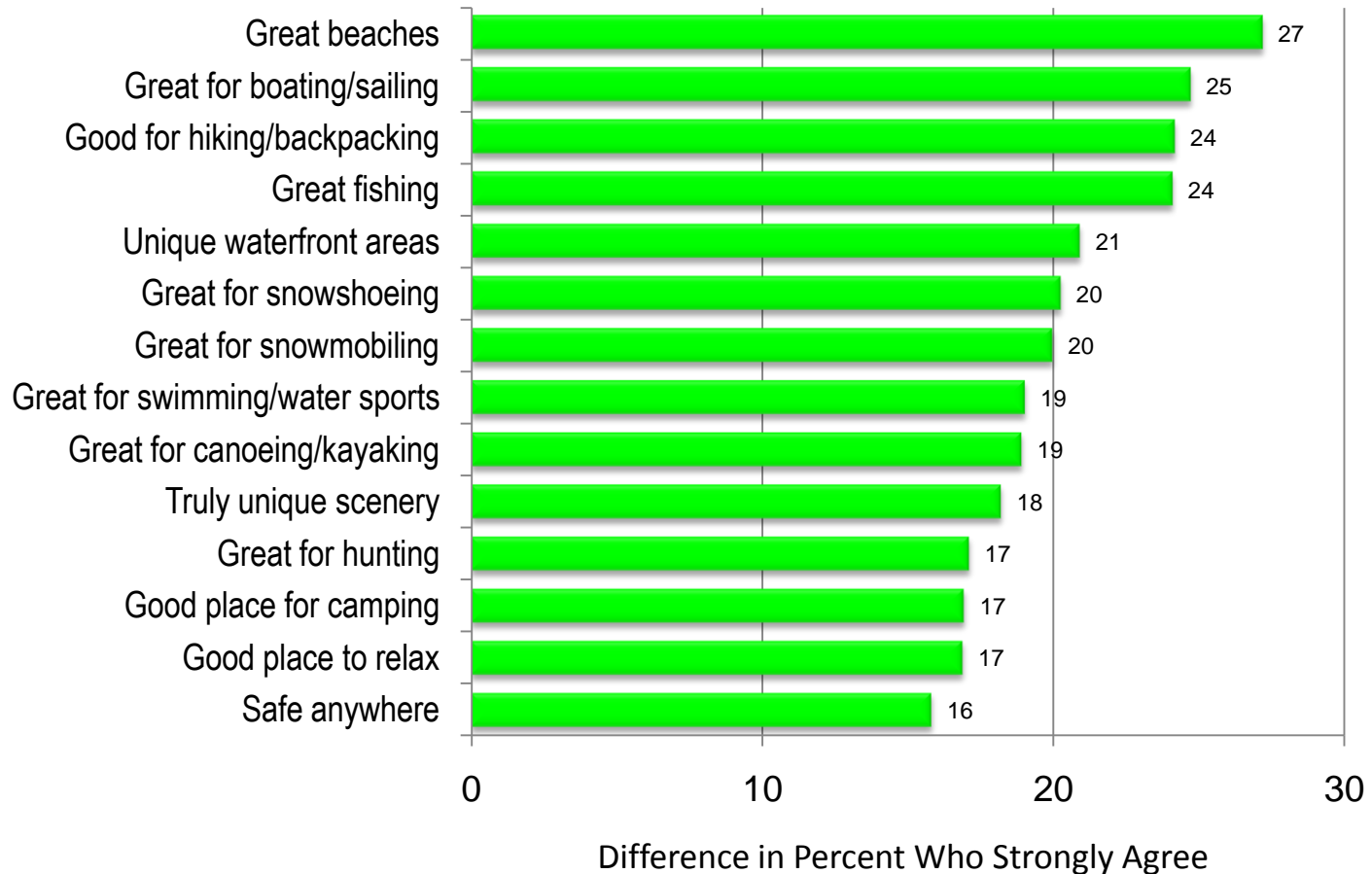
Base: Ontario Residents



RTO7's Image Strengths vs. KW/Stratford/Goderich



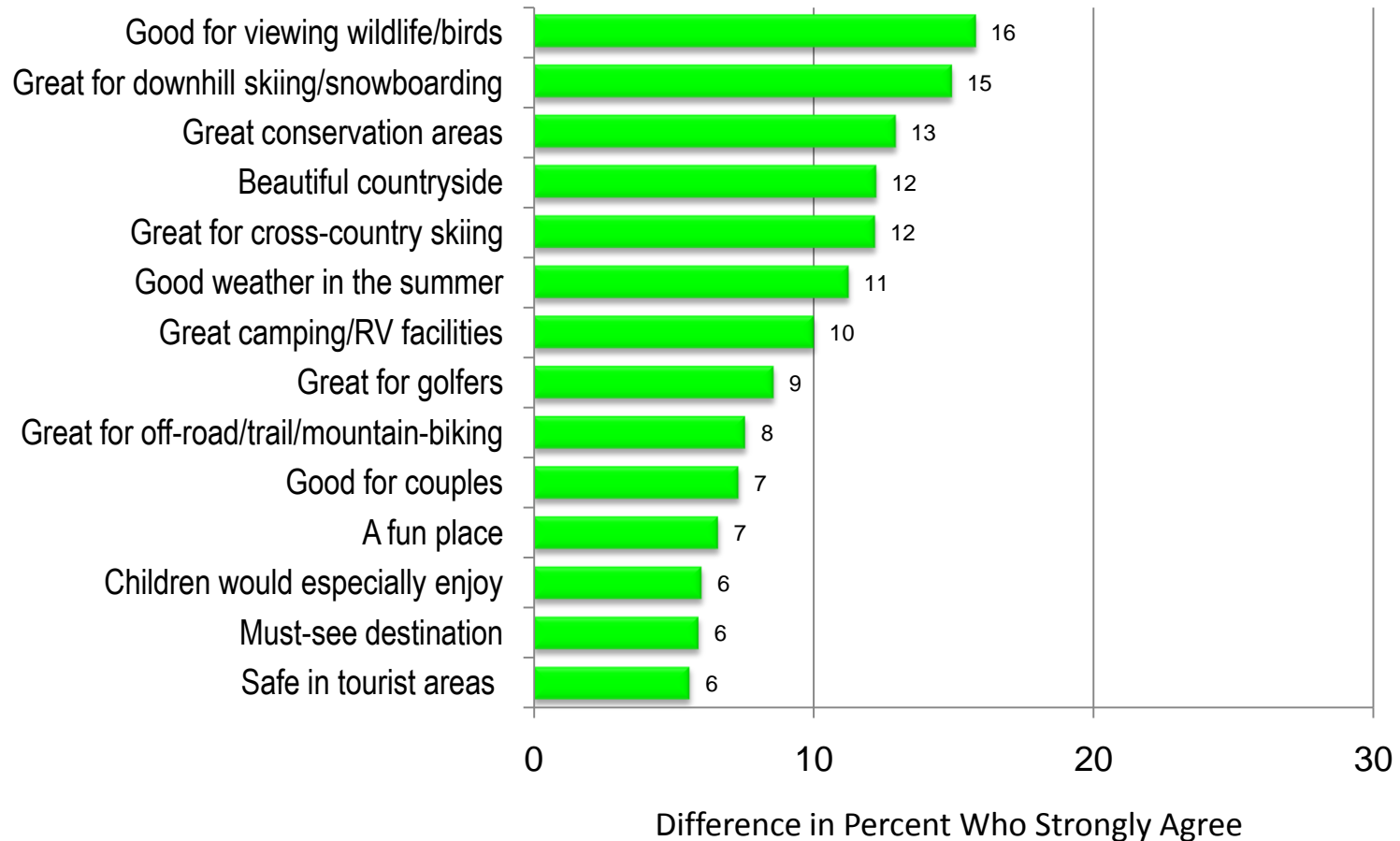
Base: Ontario Residents



RTO7's Image Strengths vs. KW/Stratford/Goderich (Cont'd)



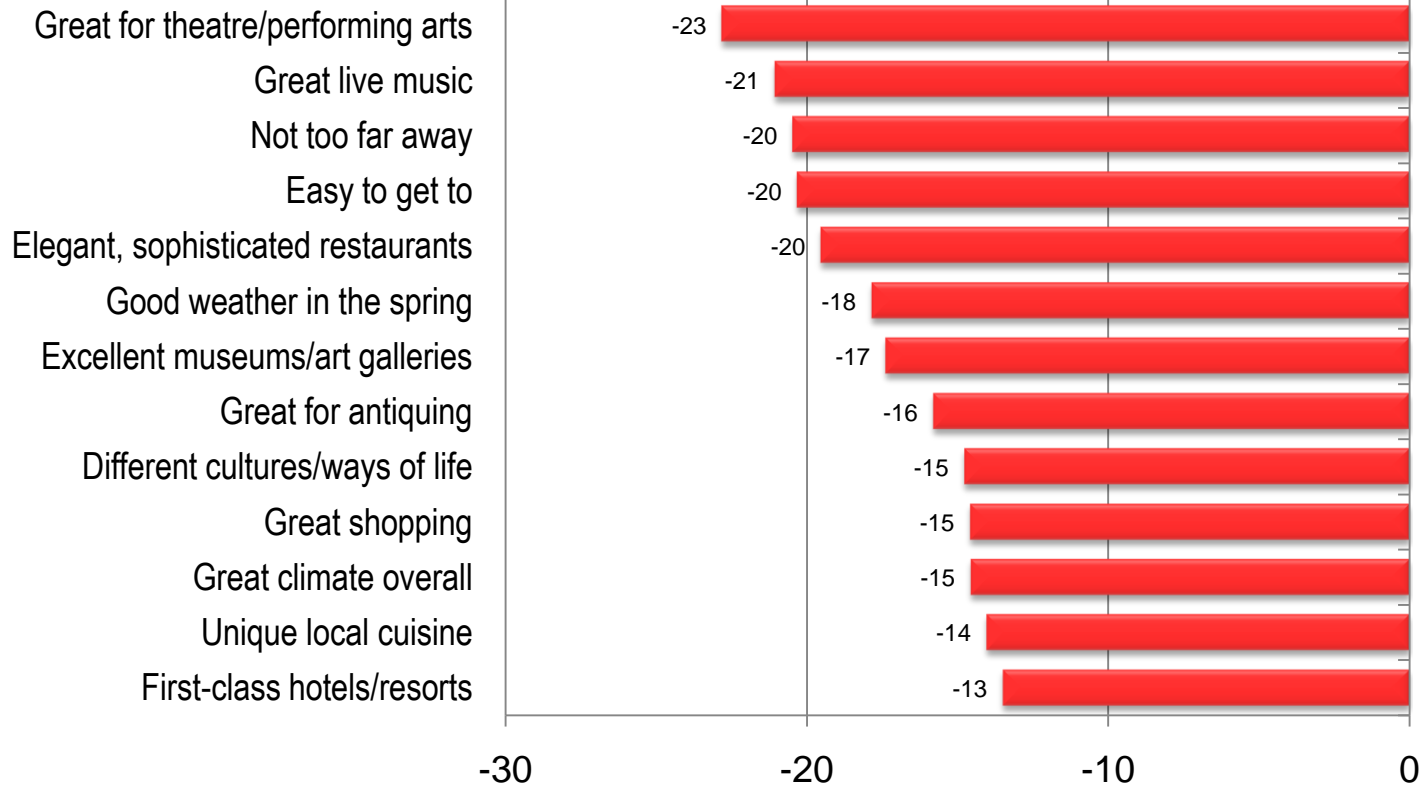
Base: Ontario Residents



RTO7's Image Weaknesses vs. KW/Stratford/Goderich



Base: Ontario Residents

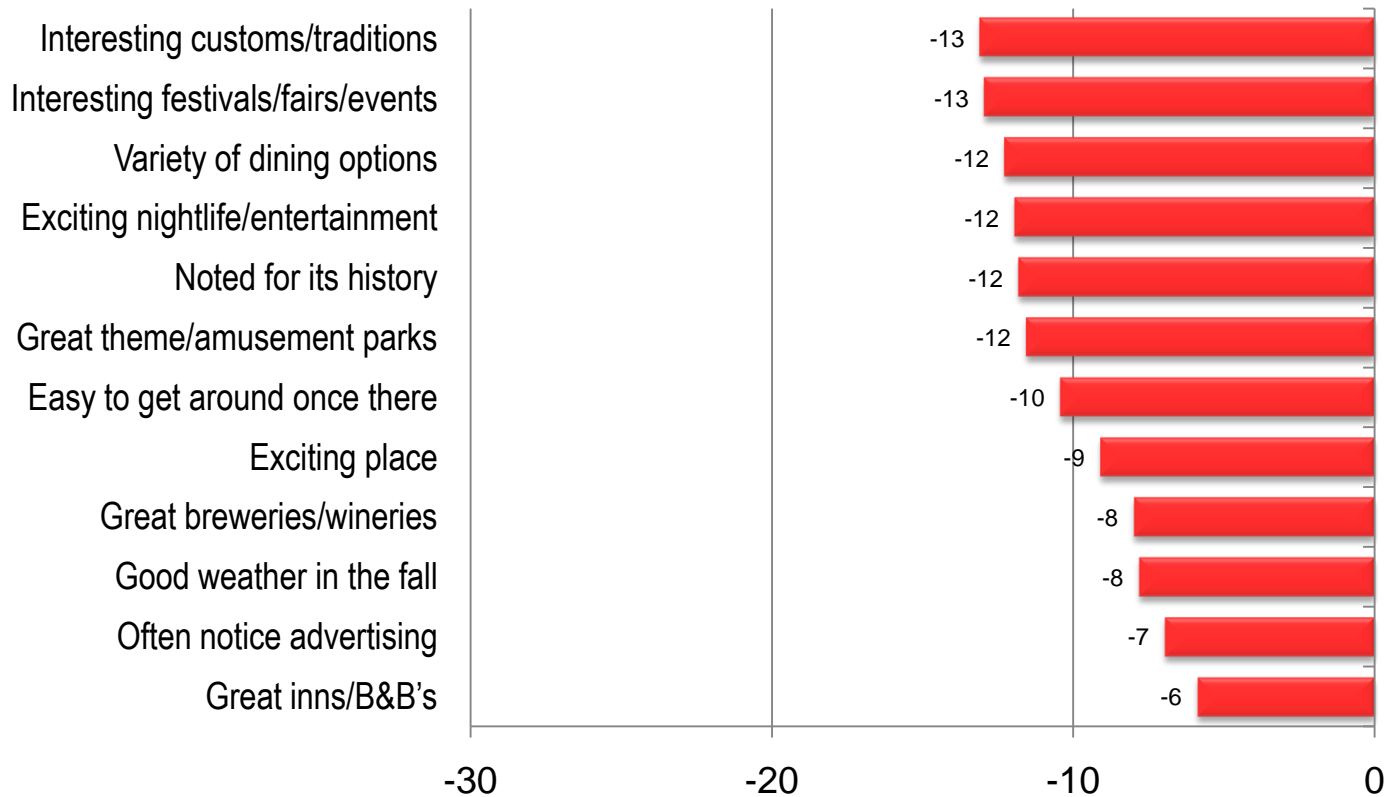


Difference in Percent Who Strongly Agree

RTO7's Image Weaknesses vs. KW/Stratford/Goderich (Cont'd)



Base: Ontario Residents



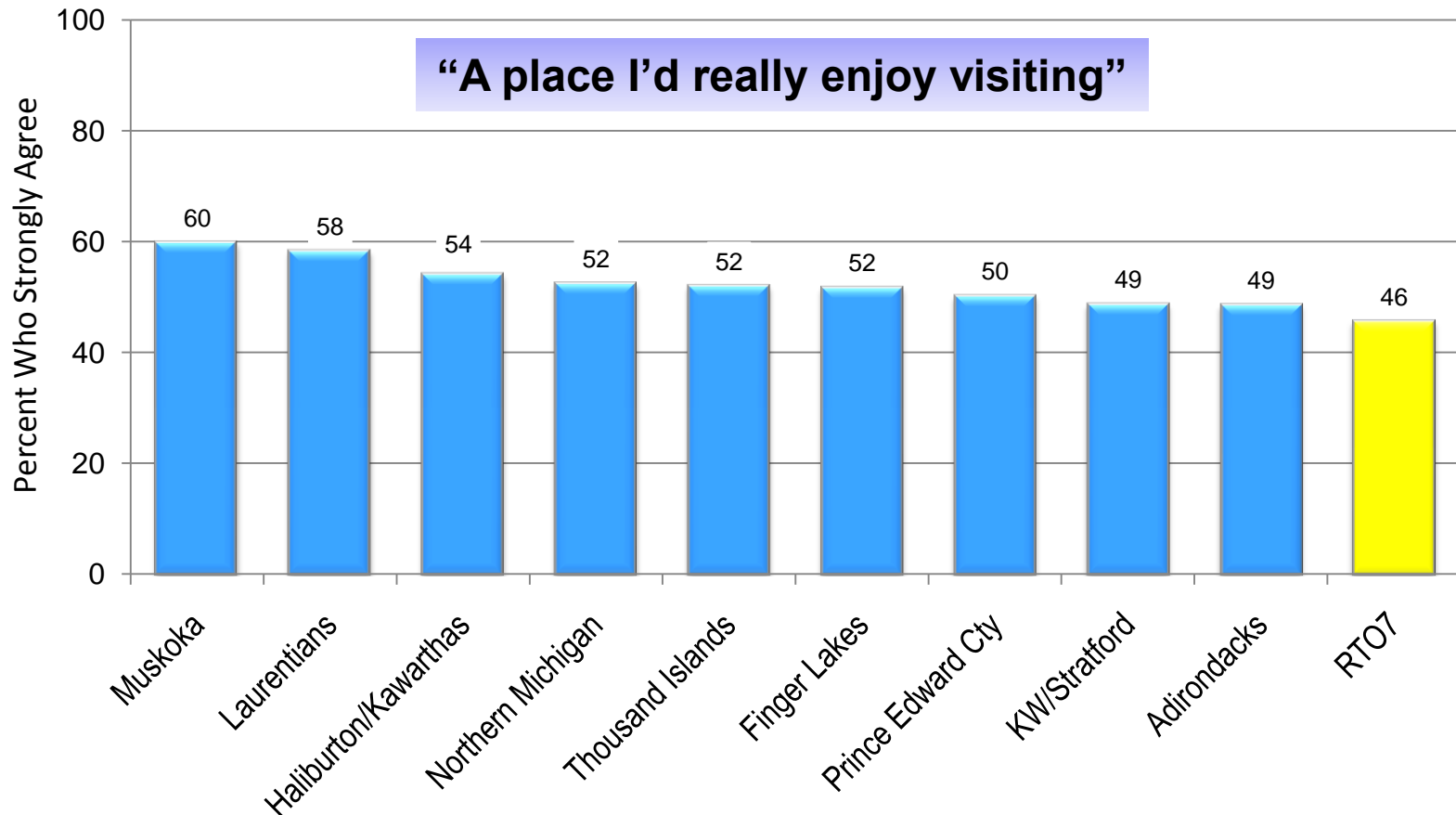
Difference in Percent Who Strongly Agree

RTO7's Competitive Image in Each Region

RTO7's Overall Image vs. Competitors



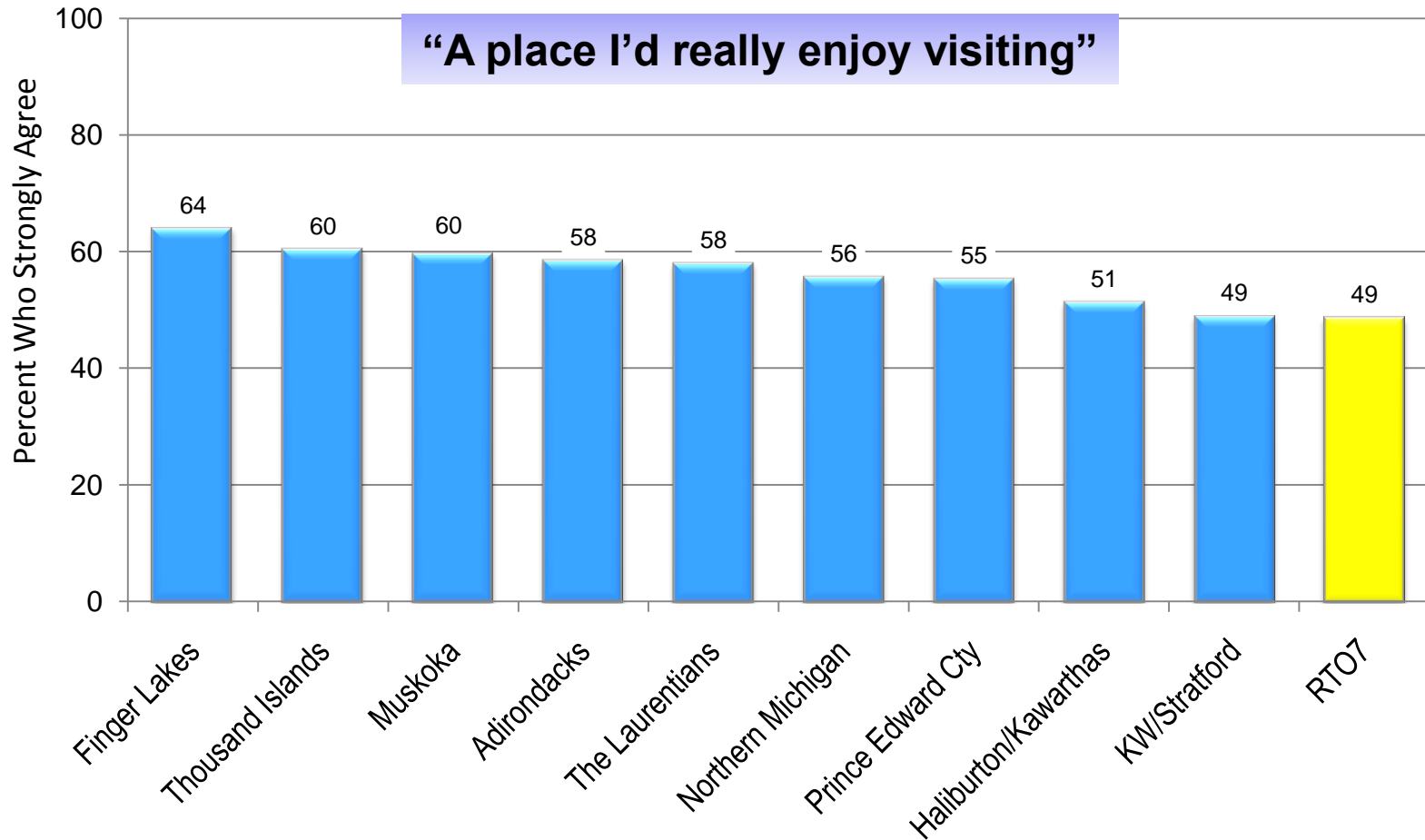
Base: GTA Residents



RTO7's Overall Image vs. Competitors



Base: Residents of SW Ontario



RTO7's Overall Image vs. Competitors



Base: Residents of Eastern Ontario



RTO7's Overall Image vs. Competitors



Base: Residents of Quebec

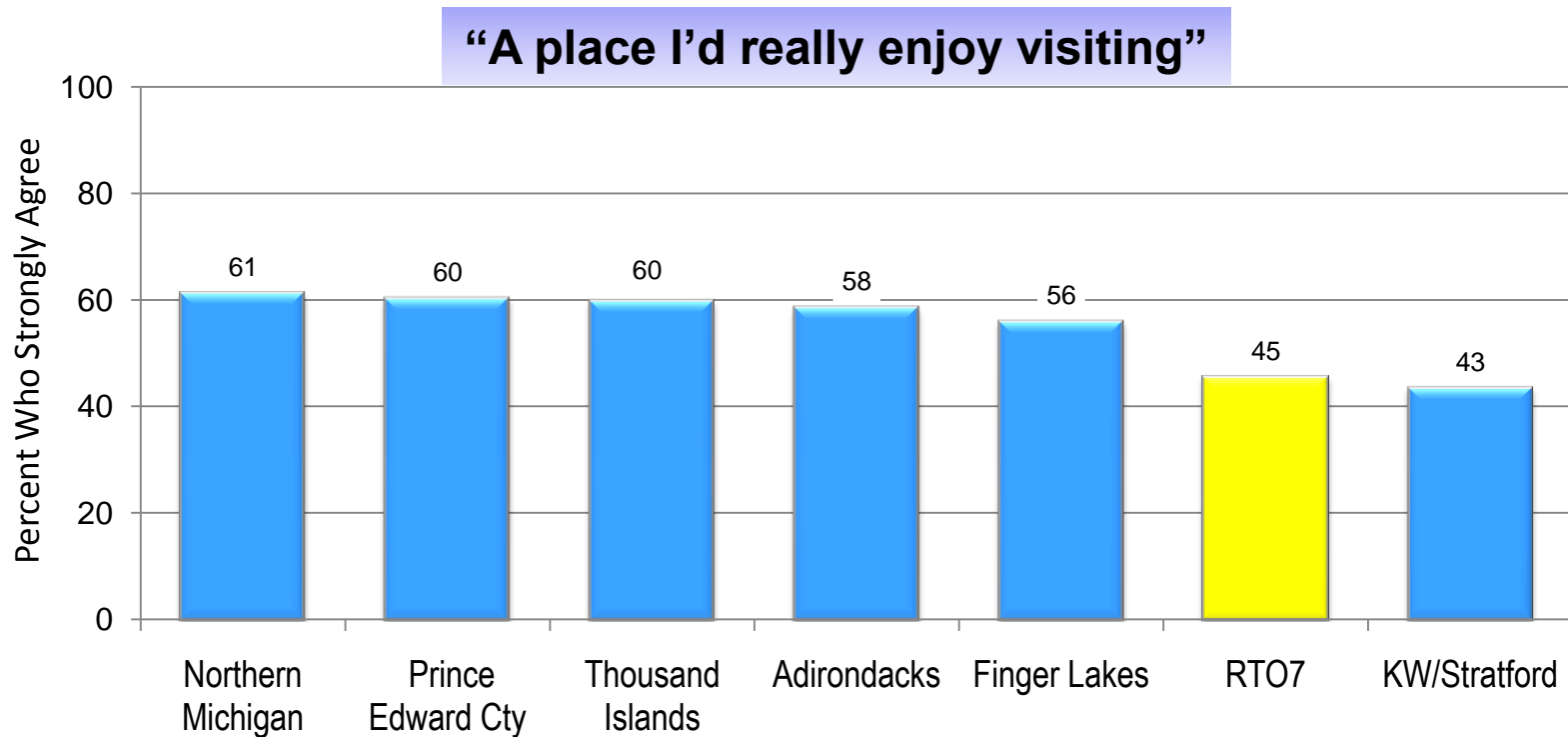


Note: Ratings of Finger Lakes, KW/Stratford/Goderich, and Northern Michigan are not shown, as the base of those aware of/rating each region was too small

RTO7's Overall Image vs. Competitors



Base: US Residents



Caution: small base

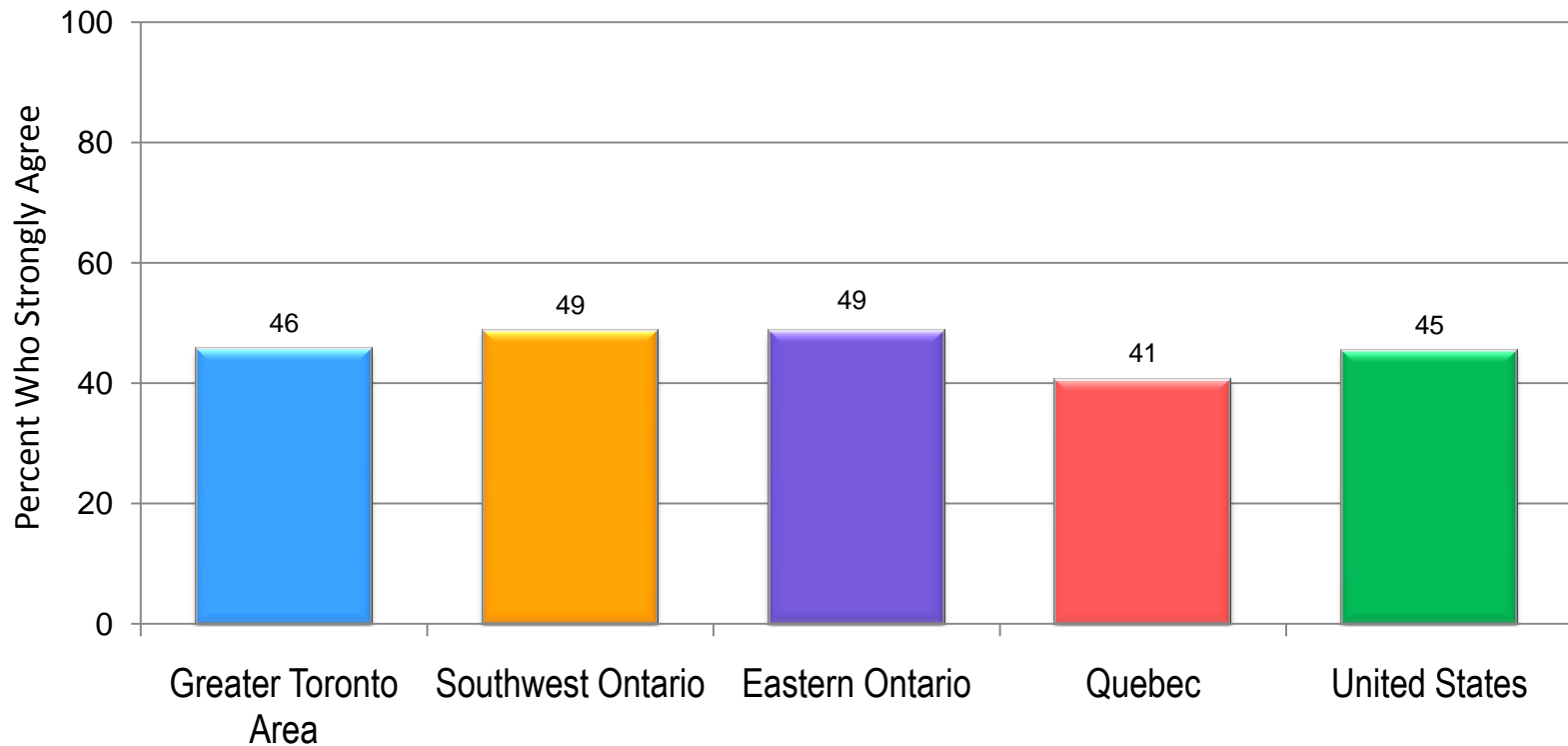
Note: Ratings of Muskoka, Laurentians and Haliburton/Kawarthas are not shown, as the base of those aware of/rating the region was too small

RTO7's Image
by Region of Residence
and Demographics

RTO7's Overall Image by Region



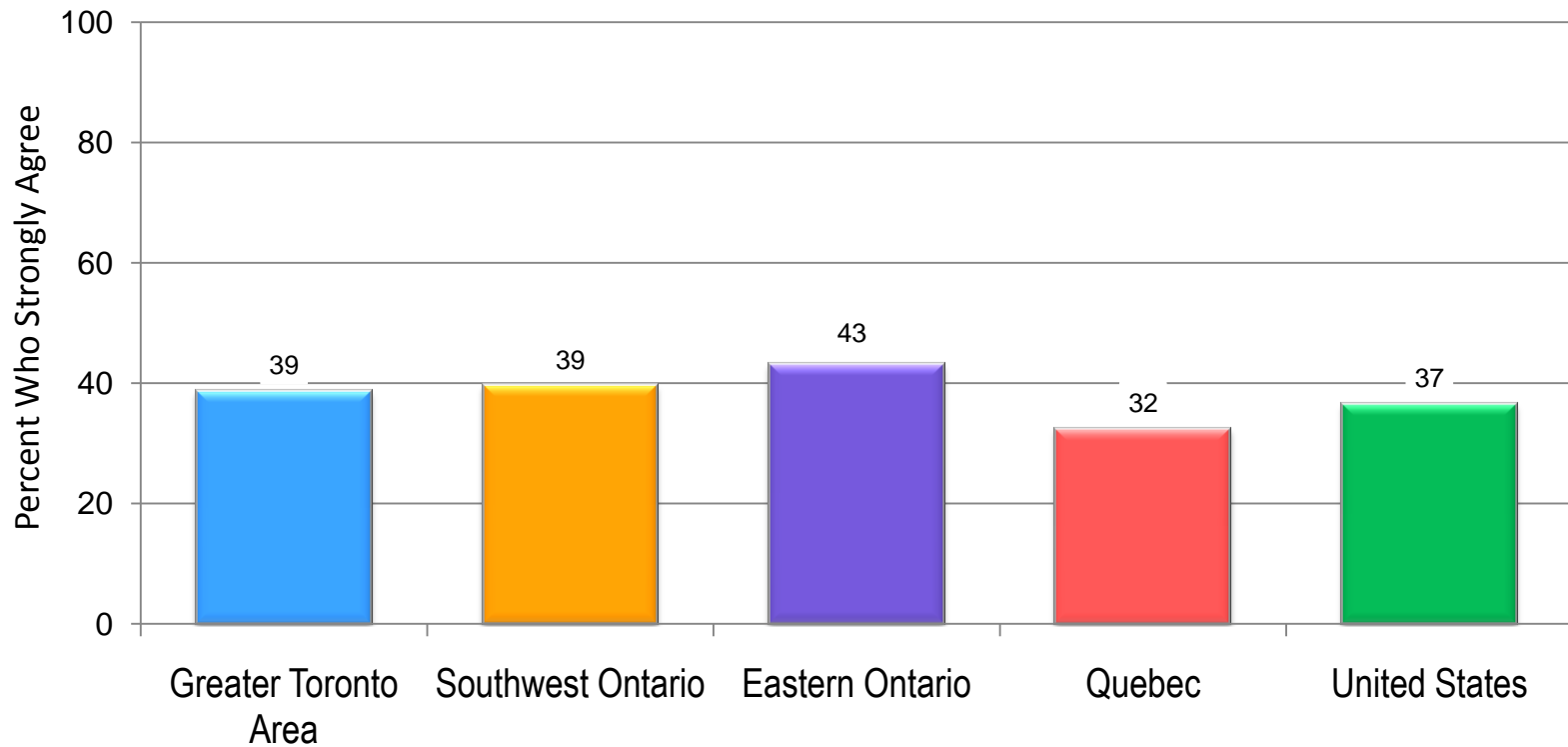
“A place I'd really enjoy visiting”



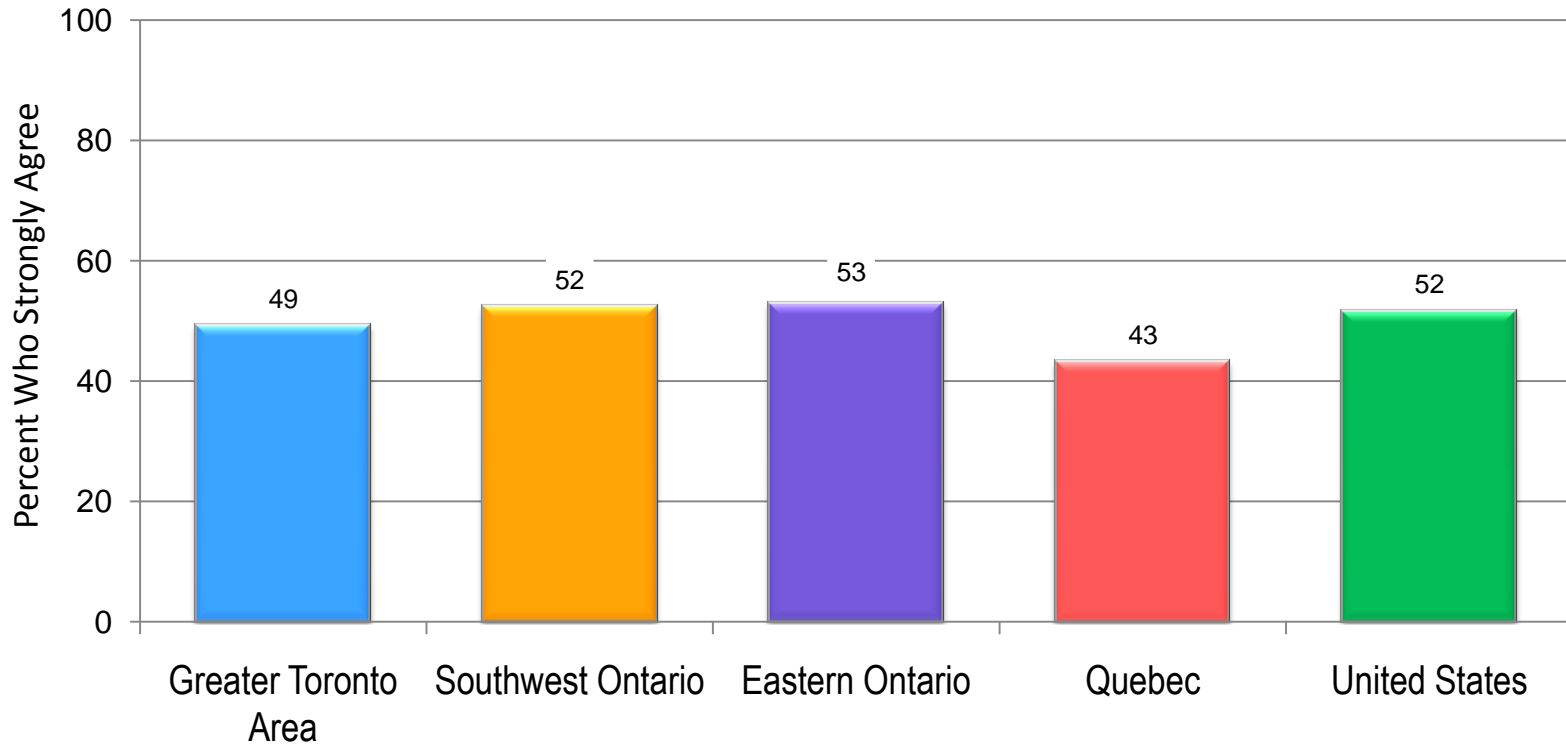
RTO7's Overall Image by Region



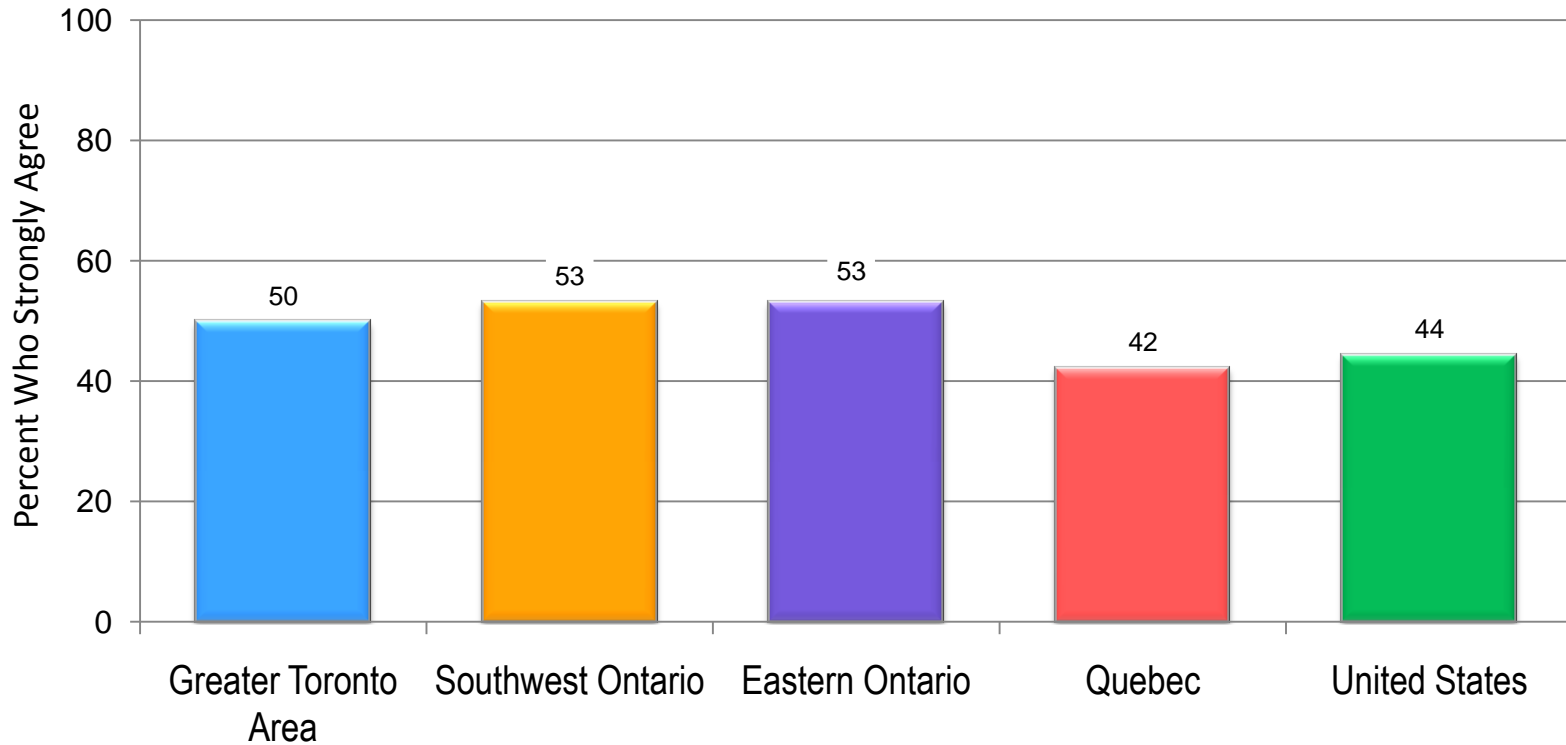
“Excellent Value For The Money”



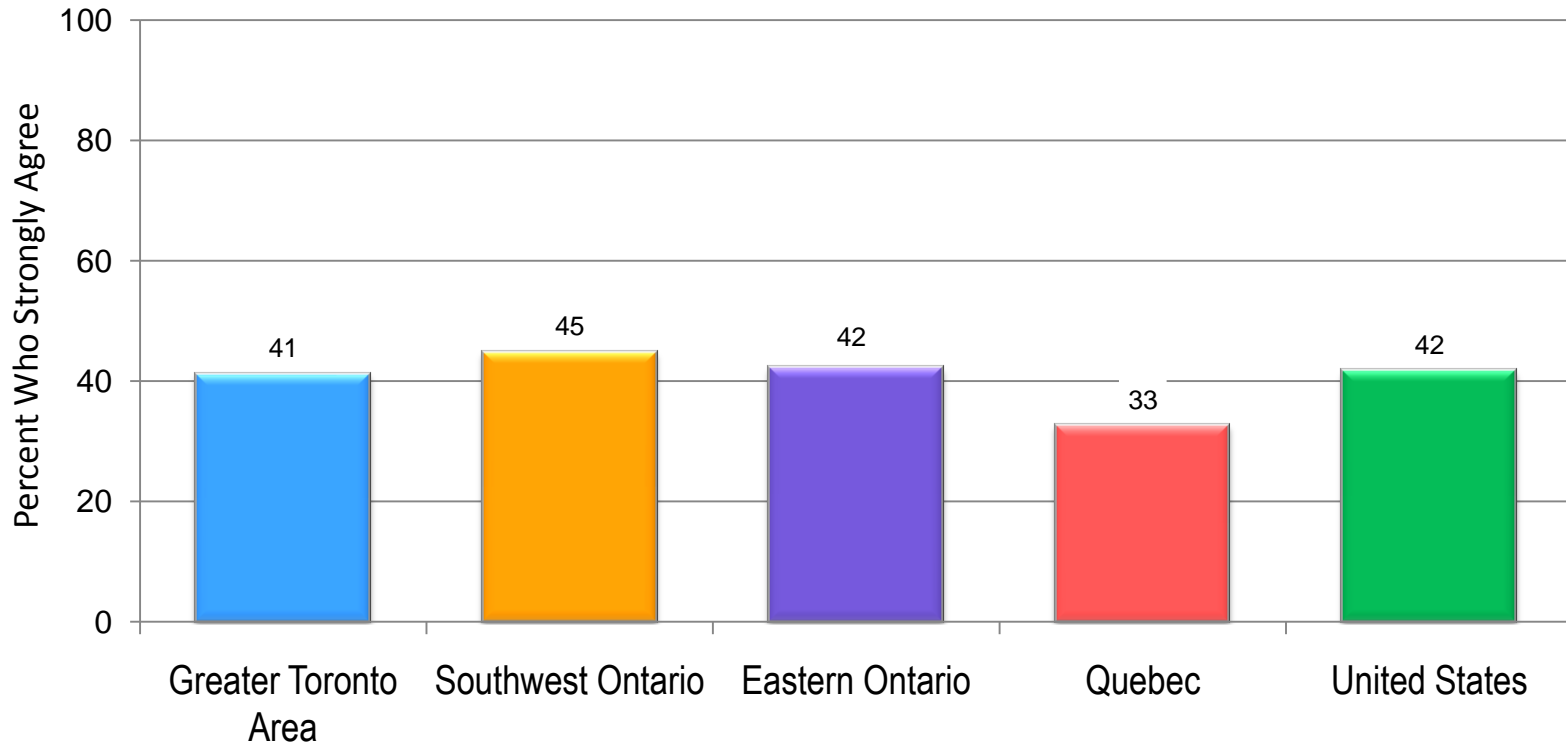
RTO7's Image by Region – Adult Destination



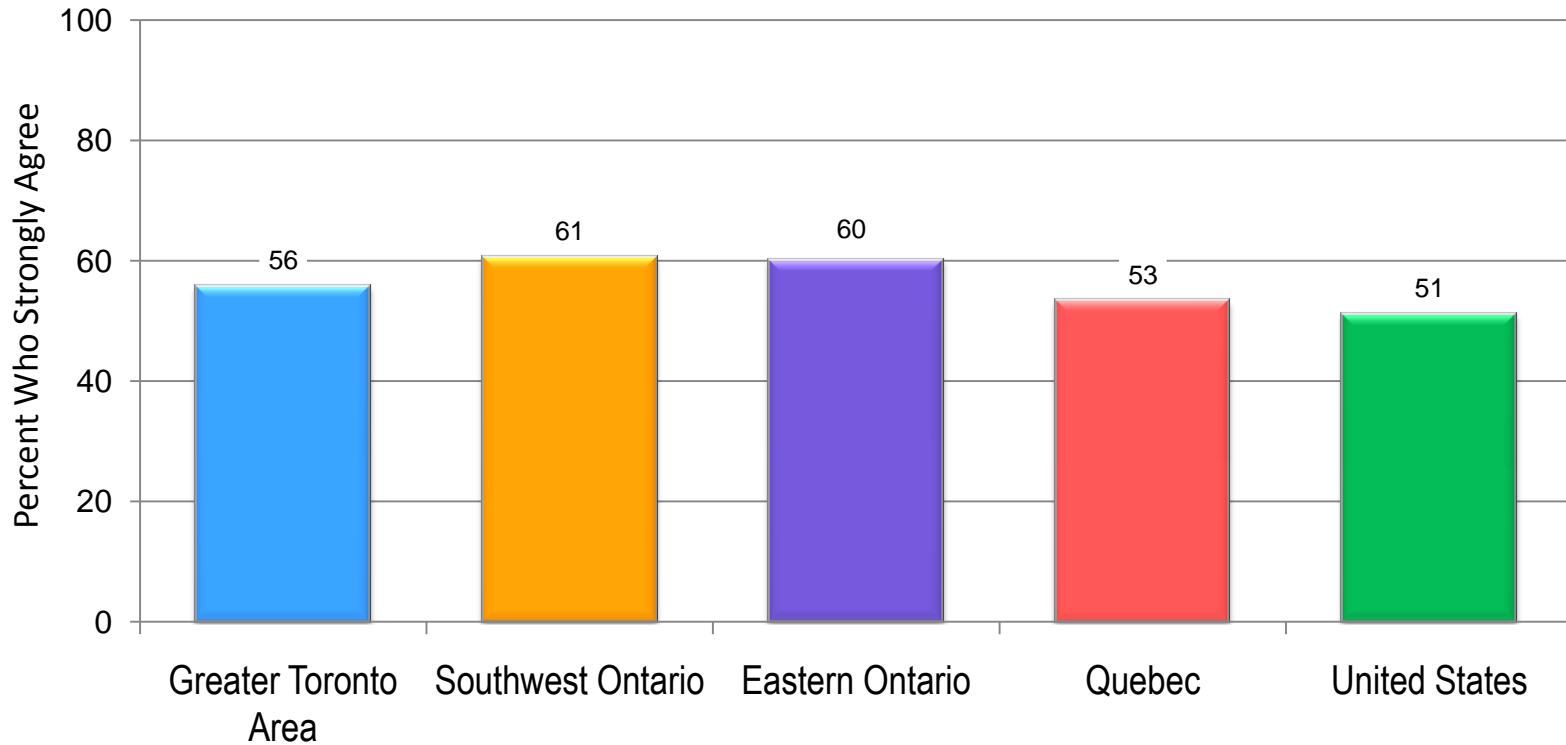
RTO7's Image by Region – Family Atmosphere



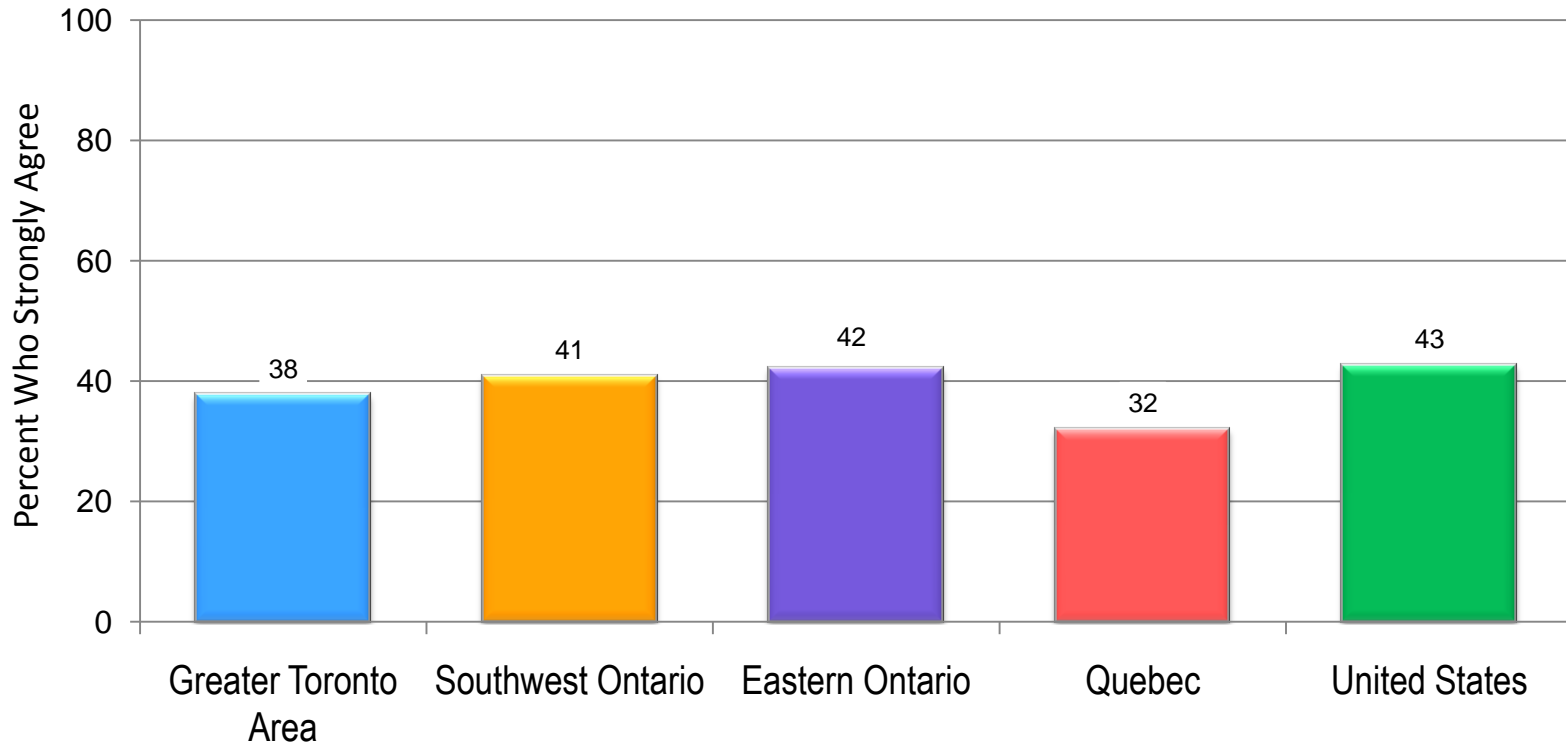
RTO7's Image by Region – Exciting



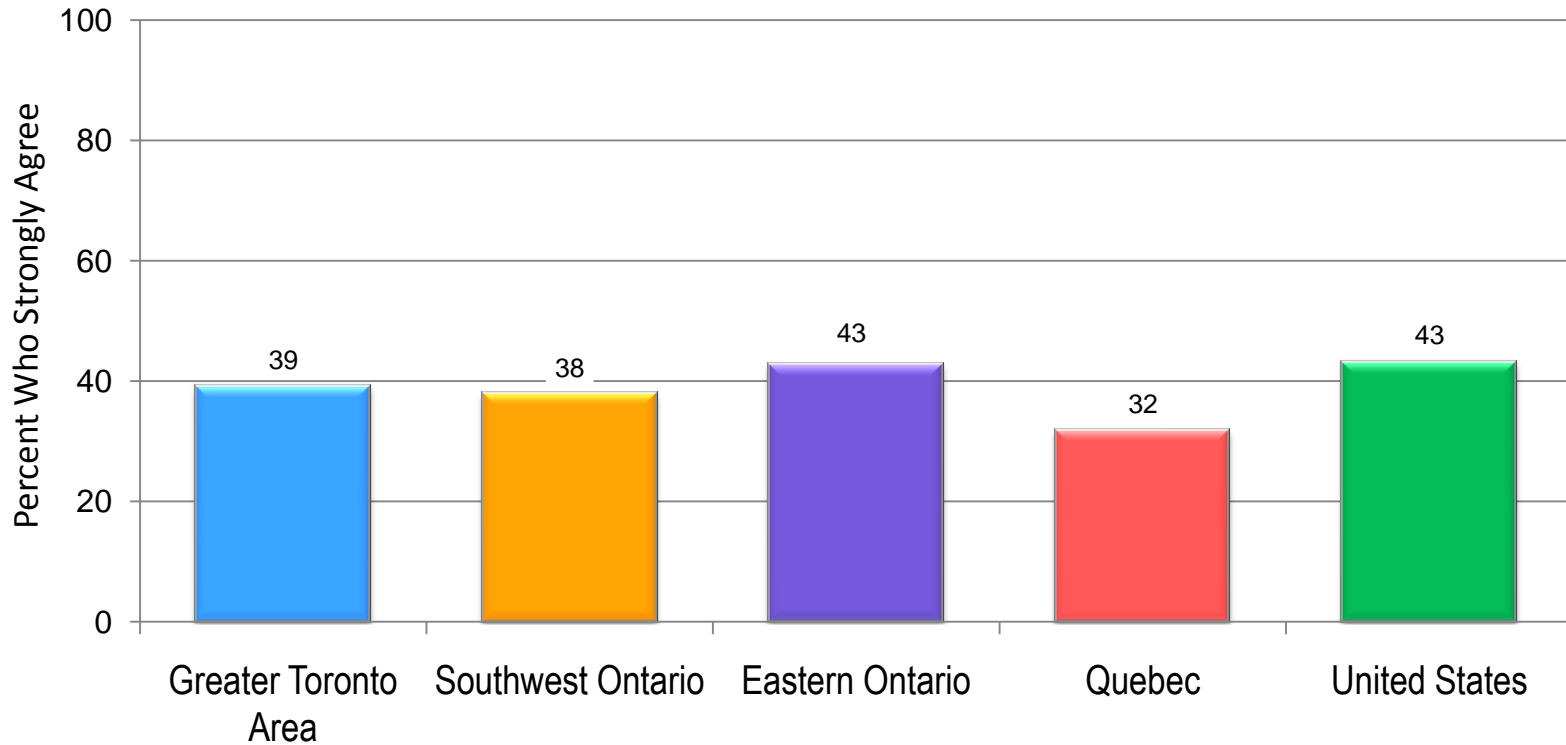
RTO7's Image by Region – Worry Free



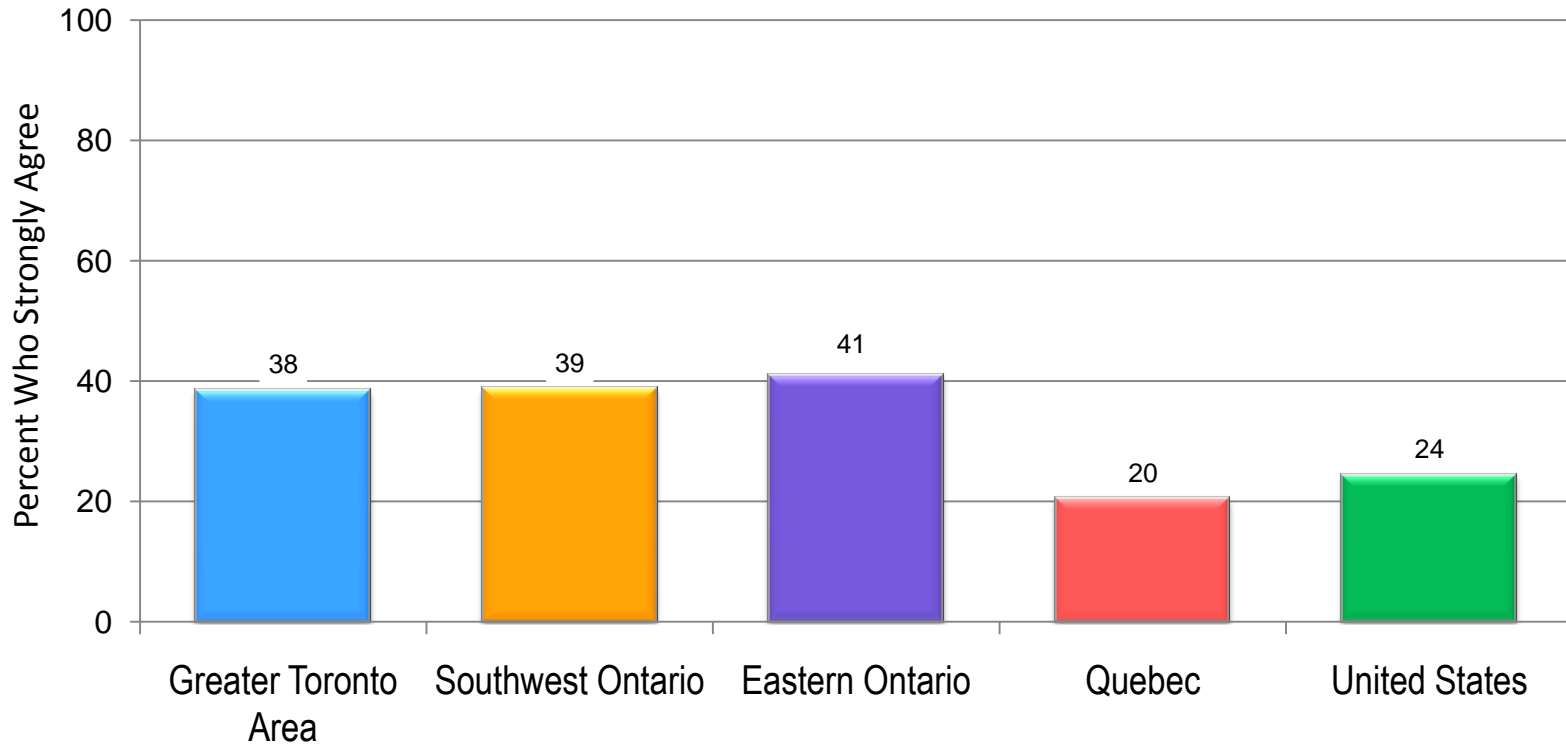
RTO7's Image by Region – Sightseeing



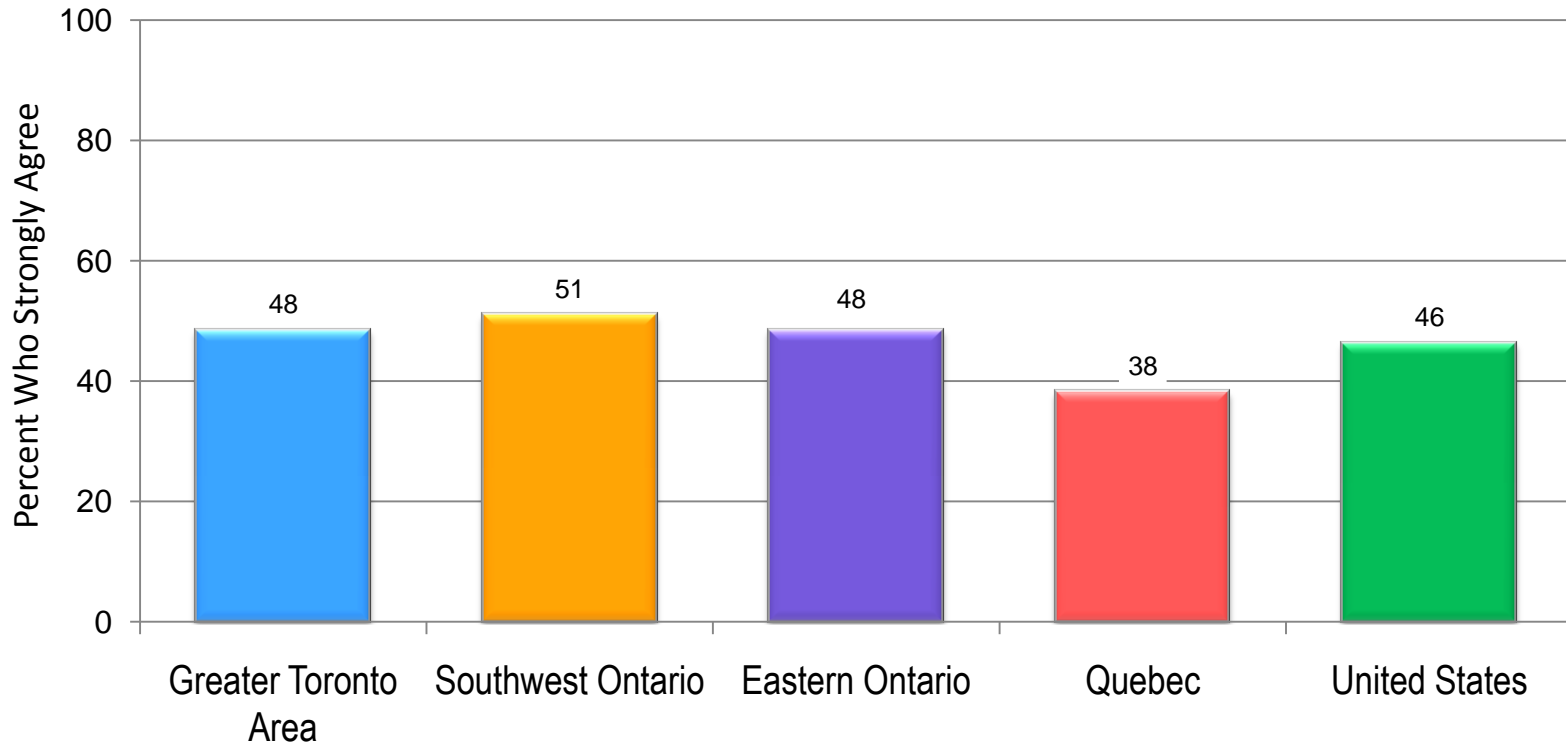
RTO7's Image by Region – Unique



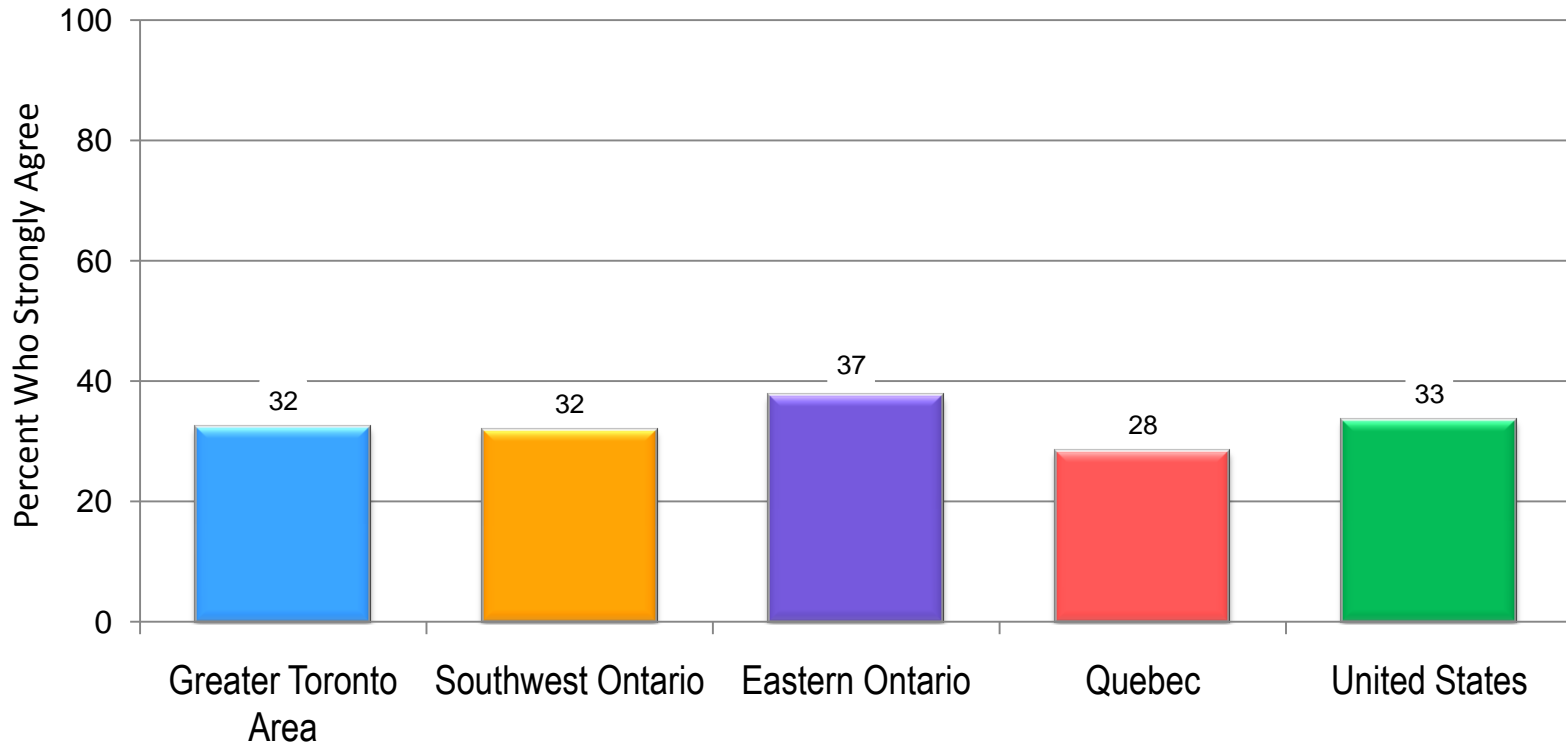
RTO7's Image by Region – Popular



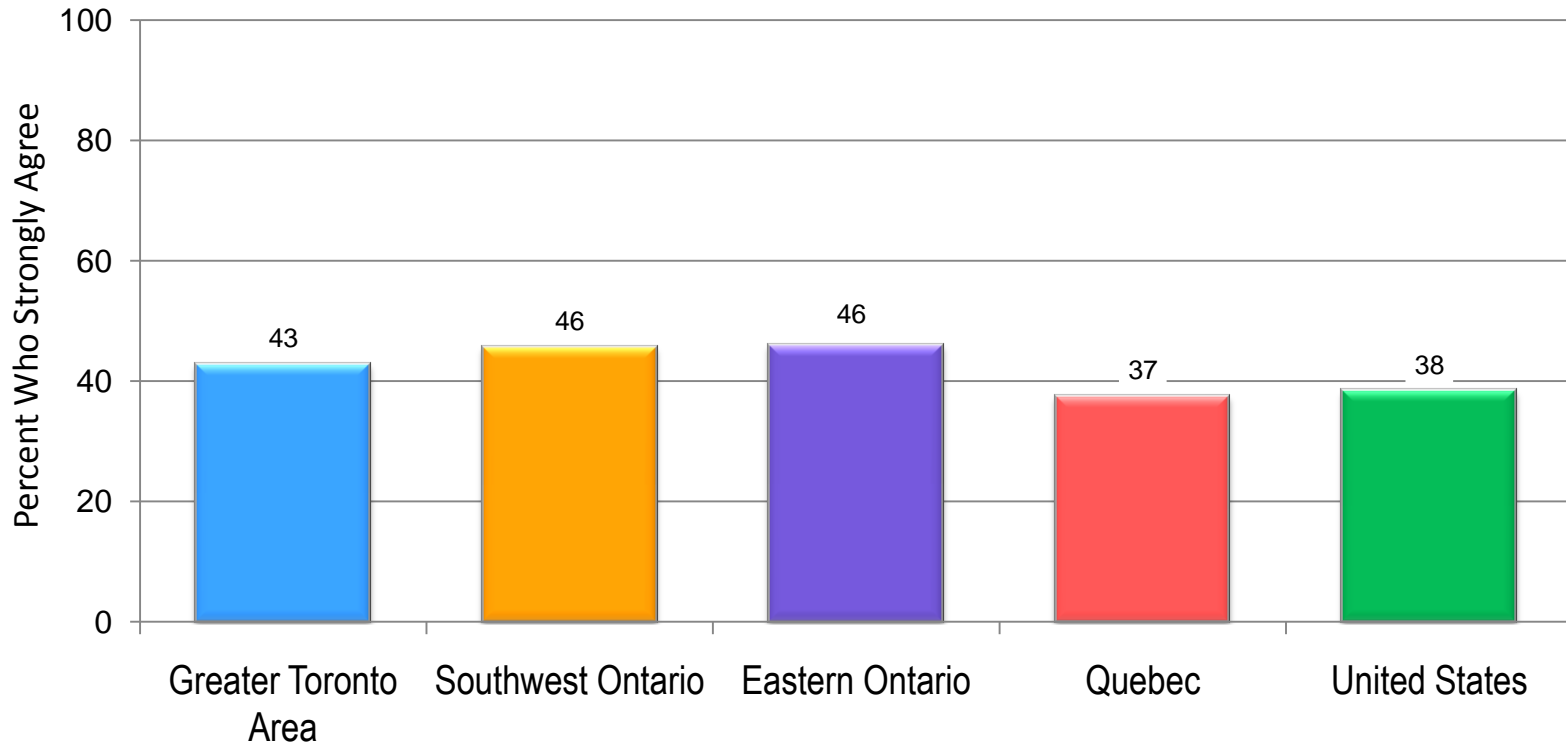
RTO7's Image by Region – Sports and Recreation



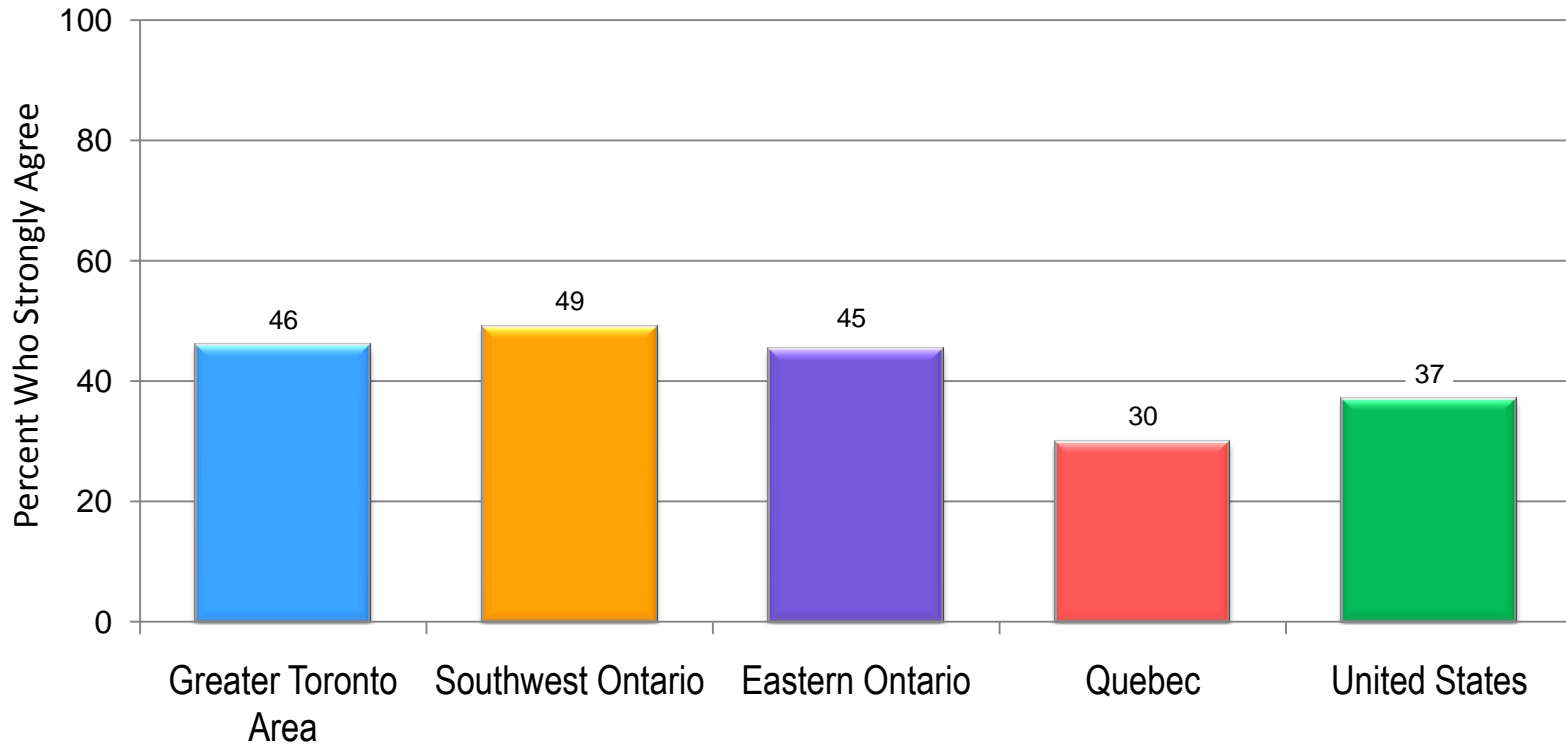
RTO7's Image by Region – Luxurious



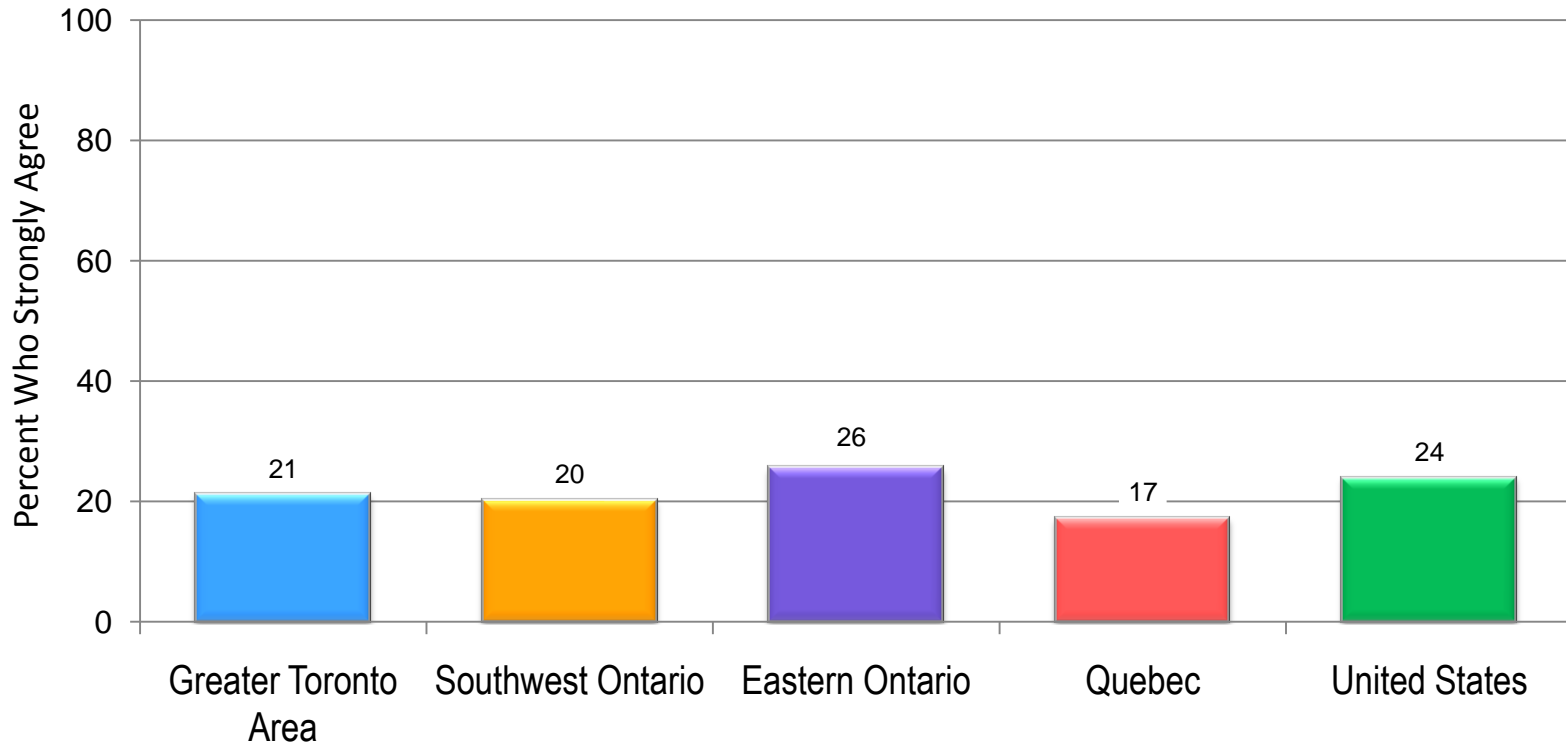
RTO7's Image by Region – Climate



RTO7's Image by Region – Affordable



RTO7's Image by Region – Entertainment



RTO7's Image by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
A Place I'd Really Enjoy Visiting	46	43	49	43	47	47
Excellent Value For The Money	38	37	40	38	37	40

RTO7's Image by Demographics



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Adult Destination	50	47	54	49	49	53
Family Atmosphere	49	45	54	48	49	50
Exciting	41	39	44	42	41	41
Worry-Free	56	55	58	52	56	62
Sightseeing	39	36	43	40	39	39
Unique	39	37	42	38	39	39

RTO7's Image by Demographics (Cont'd)



	Total	Gender		Age		
		Male	Female	18-34	35-54	55+
	%	%	%	%	%	%
Popular	34	30	38	32	33	37
Sports & Recreation	47	44	51	44	48	50
Luxurious	32	31	35	33	32	33
Climate	42	41	43	42	41	44
Affordable	43	42	44	39	43	47
Entertainment	21	20	23	23	21	19

RTO7's Image by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/ S.Asian	Other
	%	%	%	%	%	%
A Place I'd Really Enjoy Visiting	46	43	48	47	38	37
Excellent Value For The Money	38	32	42	39	35	31

RTO7's Image by Demographics



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/ S.Asian	Other
	%	%	%	%	%	%
Adult Destination	50	49	52	51	43	45
Family Atmosphere	49	46	52	50	45	41
Exciting	41	43	42	42	36	37
Worry-Free	56	52	59	58	48	45
Sightseeing	39	40	40	40	37	35
Unique	39	40	40	39	39	35

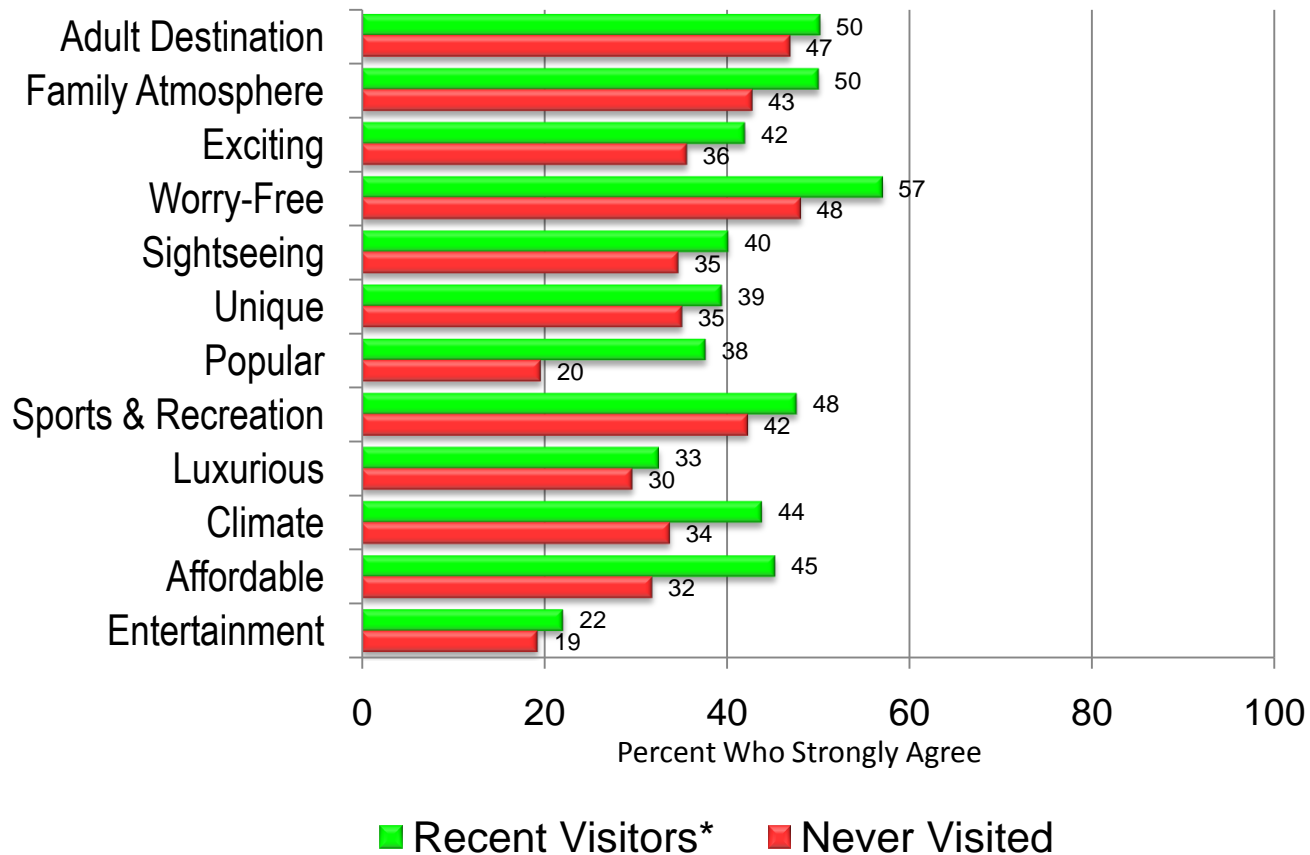
RTO7's Image by Demographics (Cont'd)



	Total	Household Income		Ethnicity		
		<\$50K	\$50K+	Caucasian	Asian/S.Asian	Other
	%	%	%	%	%	%
Popular	34	32	35	35	32	24
Sports & Recreation	47	46	49	49	39	40
Luxurious	32	31	34	33	32	29
Climate	42	38	44	43	40	38
Affordable	43	38	46	44	37	36
Entertainment	21	23	21	21	25	21

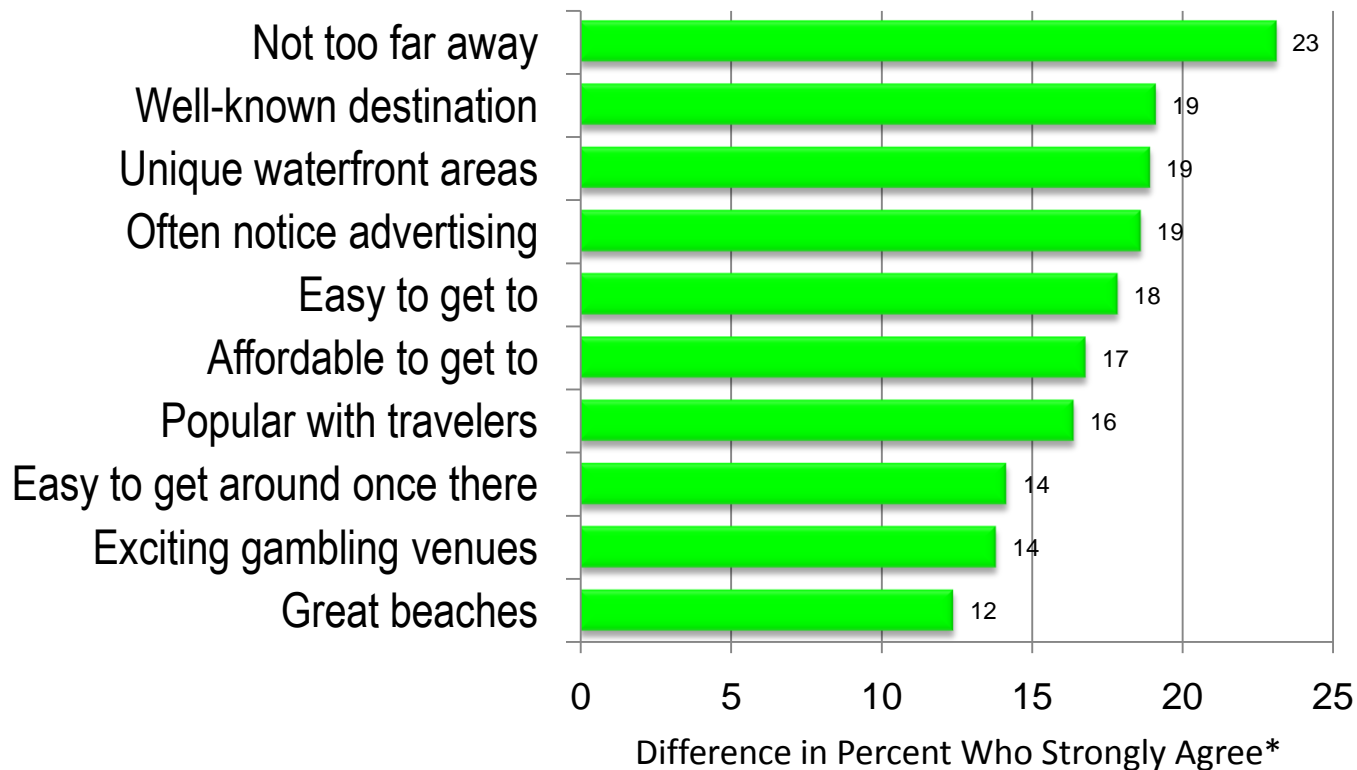
RTO7's Product Delivery

RTO7's Product Vs. Image



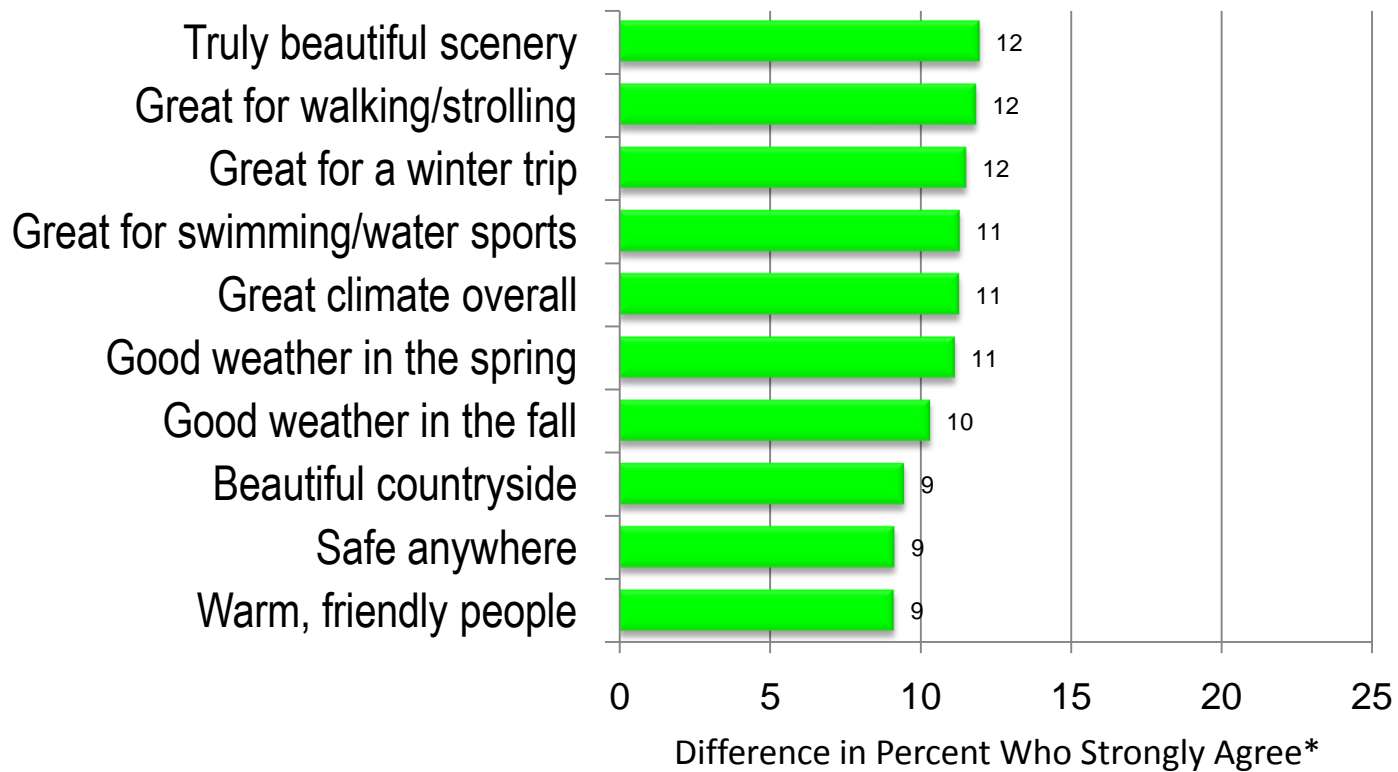
*Visited RTO7 within the past 2 years

RTO7's Product Strengths



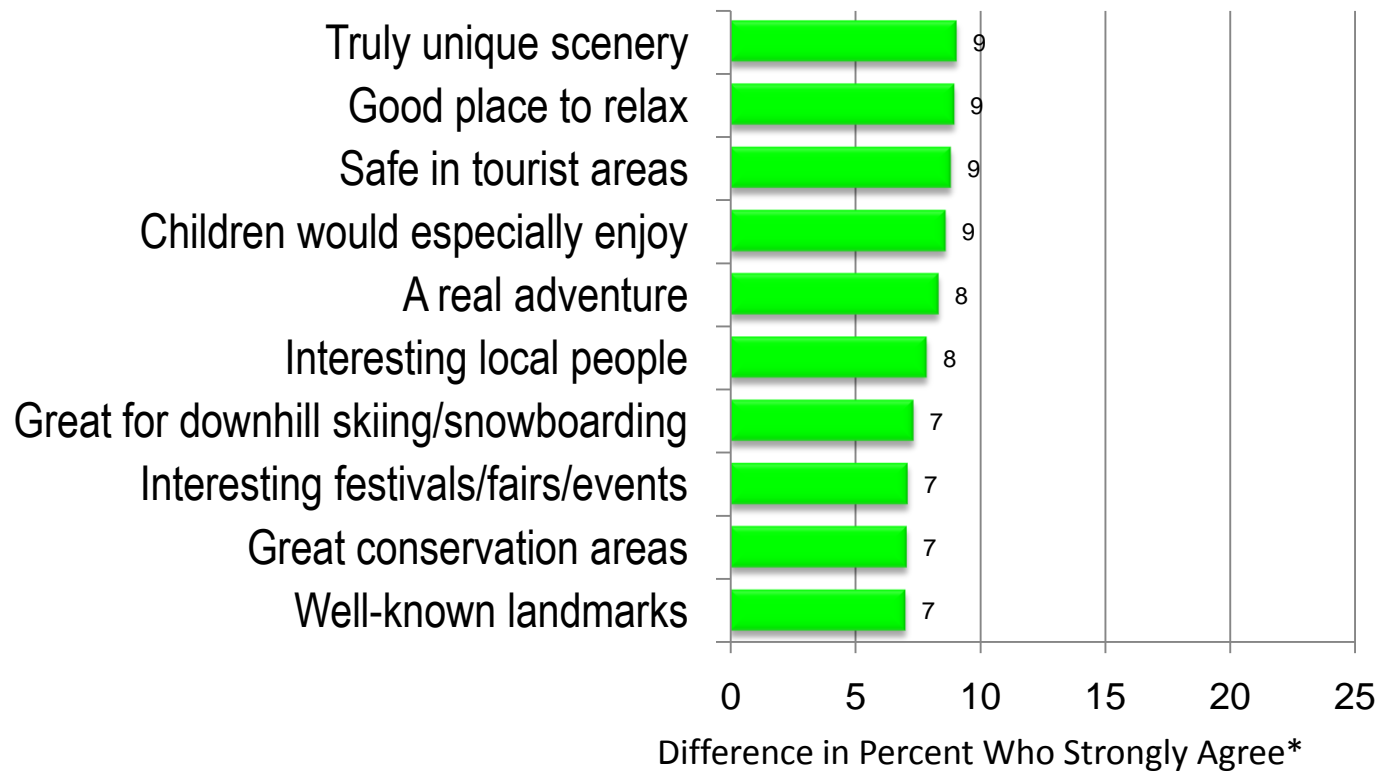
*Difference in percent between recent visitors and those who never visited RTO7.

RTO7's Product Strengths (Cont'd)



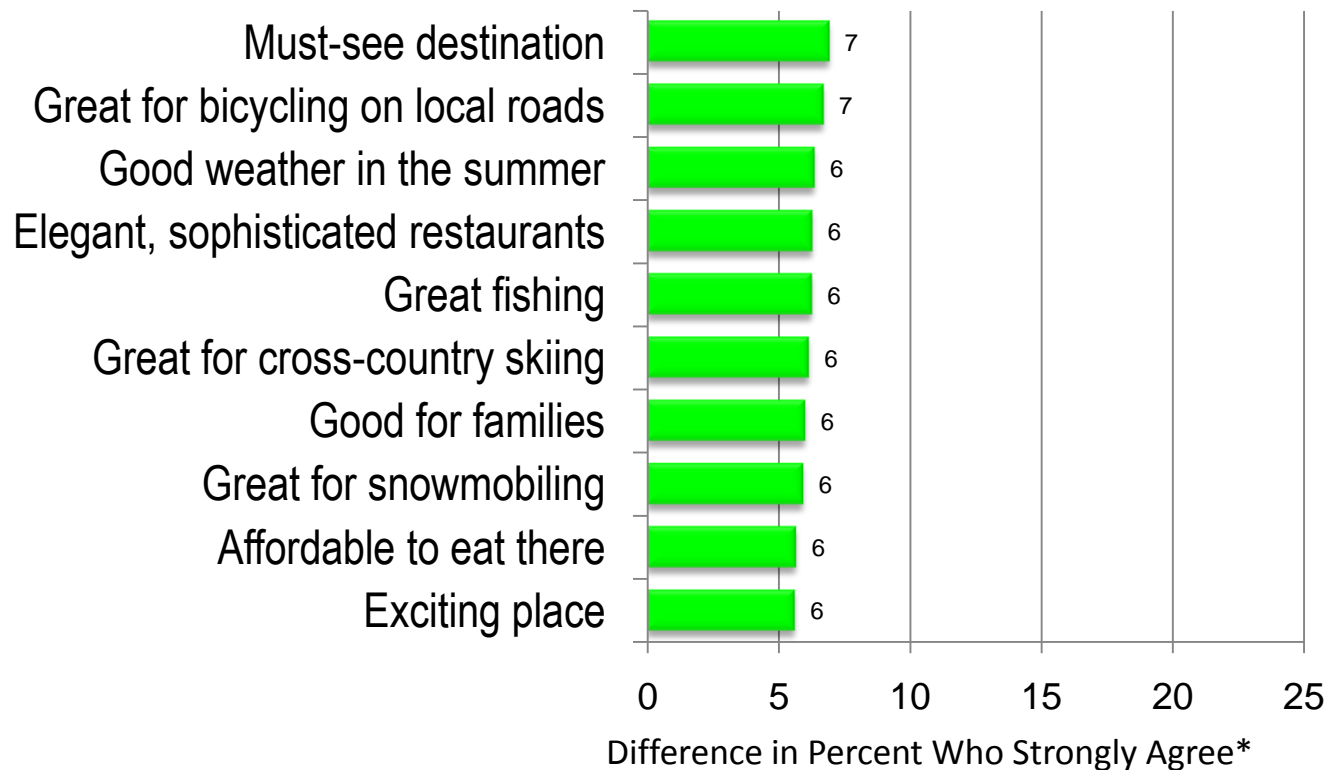
*Difference in percent between recent visitors and those who never visited RTO7.

RTO7's Product Strengths (Cont'd)



*Difference in percent between recent visitors and those who never visited RTO7.

RTO7's Product Strengths (Cont'd)



*Difference in percent between recent visitors and those who never visited RTO7.

RTO7's Product Weaknesses



THERE ARE NO PERCEIVED PRODUCT WEAKNESSES VS. IMAGE

Appendix: Questionnaire

Questionnaire



This survey is about leisure time activities, including recreation and travel. Your answers to this survey are completely confidential and will only be used in combination with other responses. Please click "Continue" to proceed

1. A trip is a journey taken outside your own community that is not a part of your normal routine. An overnight trip includes at least one night away from home. **In the past 3 years**, have you personally taken any overnight leisure trips to any destination in North America?

Yes

No **[Screen Out]**

2. In the **next 2 years**, do you personally intend to take any overnight leisure trips to any destination in North America?

Yes

No **[Screen Out]**

3. Thinking of all the places that you could visit on a leisure trip, what three specific destinations in Ontario, Canada would you really enjoy visiting if you had the chance? (Please be as specific as possible, identifying the city, town, or region. And remember to include places you might consider in other seasons of the year.)

1. _____
2. _____
3. _____

Questionnaire (Cont'd)



4. Which of these places or regions have you ever **heard of**? Select all that apply.

- Grey County, Ontario
- Bruce County, Ontario
- Simcoe, County, Ontario
- Georgian Bay, Ontario
- Owen Sound, Ontario
- Collingwood, Ontario
- Wasaga Beach, Ontario
- The Blue Mountains, Ontario
- The Bruce Peninsula (including Wiarton and Tobermory, Ontario)
- Lake Huron beaches and area towns including Kincardine, Sauble Beach, and Hanover, Ontario
- Midland-Penetanguishene, Ontario
- Barrie, Ontario
- Orillia, Ontario
- Muskoka (Gravenhurst, Bracebridge, Huntsville area), Ontario
- Prince Edward County, Ontario
- Kingston and the Thousand Islands, Ontario/New York
- Finger Lakes, New York
- The Adirondacks, New York
- Michigan's Upper Peninsula
- The Laurentians, Quebec
- Peterborough/Haliburton/Kawartha Lakes region, Ontario

Questionnaire (Cont'd)



5a. Which of these places or regions displayed on this map (**SHOW MAP AND KEEP AS ICON THAT PEOPLE CAN CONSULT FOR Q5b/c**) have you **ever** visited on a day or overnight trip for pleasure? Select all that apply.

	<u>Day Trip Taken</u>	<u>Overnight Trip Taken</u>
Grey County	<input type="checkbox"/>	<input type="checkbox"/>
Bruce County	<input type="checkbox"/>	<input type="checkbox"/>
Simcoe County	<input type="checkbox"/>	<input type="checkbox"/>
Southern Georgian Bay from Midland to Tobermory, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Owen Sound, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Collingwood, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Wasaga Beach, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
The Blue Mountains, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
The Bruce Peninsula (including Wiarton and Tobermory, Ontario)	<input type="checkbox"/>	<input type="checkbox"/>
Lake Huron beaches and area towns from Kincardine to Sauble Beach, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Midland-Penetanguishene, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Barrie, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Orillia, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Muskoka (Gravenhurst, Bracebridge, Huntsville area), Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Prince Edward County, Ontario	<input type="checkbox"/>	<input type="checkbox"/>
Kingston and the Thousand Islands, Ontario/New York	<input type="checkbox"/>	<input type="checkbox"/>
Finger Lakes, New York	<input type="checkbox"/>	<input type="checkbox"/>
The Adirondacks, New York	<input type="checkbox"/>	<input type="checkbox"/>
Michigan's Upper Peninsula	<input type="checkbox"/>	<input type="checkbox"/>
The Laurentians, Quebec	<input type="checkbox"/>	<input type="checkbox"/>
Peterborough/Haliburton/Kawartha Lakes region, Ontario	<input type="checkbox"/>	<input type="checkbox"/>

Questionnaire (Cont'd)



5b. And which of these places have you visited on a day or overnight trip for pleasure in the **past 2 years**? Select all that apply

	<u>Day Trip Taken</u>	<u>Overnight Trip Taken</u>
Grey County	[]	[]
Bruce County	[]	[]
Simcoe County	[]	[]
Southern Georgian Bay from Midland to Tobermory, Ontario	[]	[]
Owen Sound, Ontario	[]	[]
Collingwood, Ontario	[]	[]
Wasaga Beach, Ontario	[]	[]
The Blue Mountains, Ontario	[]	[]
The Bruce Peninsula (including Wiarton and Tobermory, Ontario)	[]	[]
Lake Huron beaches and area towns from Kincardine to Sauble Beach, Ontario	[]	[]
Midland-Penetanguishene, Ontario	[]	[]
Barrie, Ontario	[]	[]
Orillia, Ontario	[]	[]
Muskoka (Gravenhurst, Bracebridge, Huntsville area), Ontario	[]	[]
Prince Edward County, Ontario	[]	[]
Kingston and the Thousand Islands, Ontario/New York	[]	[]
Finger Lakes, New York	[]	[]
The Adirondacks, New York	[]	[]
Michigan's Upper Peninsula	[]	[]
The Laurentians, Quebec	[]	[]
Peterborough/Haliburton/Kawartha Lakes region, Ontario	[]	[]

Questionnaire (Cont'd)



6. In this question, please provide your personal impressions of the places shown below on the map as travel destinations. To do this, please indicate how much you agree or disagree that each of the following statements applies to each destination. Use a 10-point scale, where "1" means you do not agree at all that the place has that characteristic and "10" means you agree completely; just enter a number into each of the boxes shown below. **A note to make this exercise easier for you: after entering a number in one of the spaces, you can use your tab key on your keyboard to quickly move across the page and to move to the next line.**

Even though you may not have visited these places, it is your impression that really matters. So please use what you have seen and read in advertising, the internet, books, or magazines, or heard from friends or relatives as well as your own experience to answer the following questions.

Type in a zero "0" only when you have no impression at all of a destination for a particular statement.

(Note to programmer: Rotate order of rating Grey/Bruce/Simcoe region by respondent (not by statement))

Respondent to rate only those destinations heard of in Q.4, always including Grey/Bruce/Simcoe (any "Yes" to items 1 through 13, i.e., Grey County, etc. thru Orillia), plus a random selection of two others

The goal is 500 per "other" destination, assuming enough "heard of".)

Competitors to be rated are:

The Grey/Bruce/Simcoe Counties region

Muskoka, Ontario

Prince Edward County, Ontario

Kitchener-Waterloo/Stratford/Goderich region, Ontario

Kingston and the Thousand Islands

Finger Lakes/Corning, New York

Adirondacks/Lake Placid, New York

Michigan's Upper Peninsula

The Laurentians, Quebec

Peterborough/Haliburton/Kawartha Lakes region, Ontario

Questionnaire (Cont'd)



Distance/Accessibility:

Not too far away to consider for a trip
Easy to get to
Easy to get around once you're there

Weather:

Great climate overall
Good weather in the fall
Great for a winter trip
Good weather in the spring
Good weather in the summer

Scenery:

Unique waterfront areas
Truly beautiful scenery
Truly unique scenery
Beautiful countryside
Great conservation areas

Price/Value:

Affordable to get to
Excellent value for the money

Food and Accommodations:

Elegant and sophisticated restaurants
A wide variety of dining options
Affordable to eat there
Noted for its unique local cuisine
First-class hotels/resorts
A wide variety of different types of accommodations
Affordable accommodations
Great inns/B&B's
Great camping/RV facilities
Great spas

Atmosphere:

Safe to travel in tourist areas
Safe to travel anywhere in this place
A vacation there is a real adventure
An exciting place
A fun place to visit
A good place to relax
A place everyone should visit at least once

Provides a unique travel experience
Good for an adult vacation
Good for couples
Good place for families to visit
Children would especially enjoy this place
A place I'd really enjoy visiting

Questionnaire (Cont'd)



Variety/Cultural Activities/Heritage:

Interesting place
Interesting cities
Interesting small towns/villages
Lots to see and do
Well-known landmarks
Great for walking/strolling
Noted for its architecture
Noted for its history
Beautiful gardens and parks
Great shopping
Great for antiquing
Exciting gambling venues
Excellent museums/art galleries
Great for theatre and the performing arts
Exciting nightlife/entertainment
Great live music
Interesting festivals/fairs/events
Warm, friendly people
Interesting local people
Interesting customs/traditions
Different cultures/ways of life
Great for sightseeing
Great breweries/wineries
Great theme/amusement parks

Sports & Recreation

Great for swimming/ water sports
Great beaches
Good place for camping
Good for hiking/backpacking
Great for boating/sailing
Great for canoeing/kayaking
Great fishing
Great for hunting
Good for viewing wildlife/birds
Great for golfers
Great for off-road/trail/mountain-biking

Great for bicycling on local roads
Great for downhill skiing/snowboarding
Great for cross-country skiing
Great for snowshoeing
Great for snowmobiling

Familiarity:

Well-known destination
Popular with travelers
I often notice advertising for this place

Questionnaire (Cont'd)



7a. How likely are you to visit these places in the next 12 months on a **day pleasure** trip? (Select one answer for EACH place, considering your likelihood of taking a day pleasure trip only.)

Grey/Bruce/Simcoe Counties region Competitor 1 Competitor 2

Definitely Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probably Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Might/Might Not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probably Will Not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely Will Not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7b. How likely are you to visit these places in the next 12 months on an **overnight pleasure** trip? (Select one answer for EACH place, considering your likelihood of taking an overnight pleasure trip only.)

Grey/Bruce/Simcoe Counties region Competitor 1 Competitor 2

Definitely Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probably Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Might/Might Not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probably Will Not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely Will Not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Questionnaire (Cont'd)



8a. (IF “Probably/Definitely Will Not” at Q7a, SKIP RESPONDENT TO INSTRUCTION AT Q8b). Thinking specifically about pleasure trips you may be planning to the **Grey/Bruce/Simcoe Counties region**, how likely are you take any type of **day pleasure trip** including this region in each of the time periods listed below?

	Between now and Apr. 30 th , 2011	Between May 1 st and Labour Day, <u>2011</u>	After Labor Day, <u>2011</u>
Definitely Will	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Probably Will	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Might/Might Not	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Probably Will Not	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>
Definitely Will Not	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>

8b. IF “Probably/Definitely Will Not” at Q7a, SKIP RESPONDENT TO Q9). Thinking specifically about pleasure trips you may be planning to the **Grey/Bruce/Simcoe Counties region**, how likely are you take any type of **overnight pleasure trip** including this region, in each of the time periods listed below?

	Between now and Apr. 30 th , 2011	Between May 1 st and Labour Day, <u>2011</u>	After Labor Day, <u>2011</u>
Definitely Will	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Probably Will	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Might/Might Not	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Probably Will Not	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>
Definitely Will Not	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>

Questionnaire (Cont'd)



9. If you were to take an overnight or day leisure trip to the Grey/Bruce/Simcoe County region, which of the following types or purposes of trip would you be most likely to take? **(SELECT AS MANY AS APPLY)**

- | | |
|---|----------|
| A trip to visit Friends or Relatives living/with a residence there | 1 |
| A Special Event Trip, i.e., a trip taken primarily for the purpose of attending an event such as a fair, festival, pageant, race, sports meet/game | 2 |
| A Touring Trip by car, bus, boat, train, snowmobile or other mode of transportation through the area to enjoy Scenic beauty, local sightseeing, or for cultural or general interest | 3 |
| An Outdoors Trip to experience the natural environment where you may engage in outdoor activities such as camping, hunting, fishing, hiking, or rafting | 4 |
| A Gaming Trip to visit a casino, casino resort, or horseracing/slots | 5 |
| A Shopping Trip, i.e., the main purpose is to shop at a local mall/outlet mall or specialty/boutique shops at your destination | 6 |
| A City Trip to enjoy city amenities such as shopping, museums, nightlife, restaurants, entertainment such as plays or concerts, or just strolling around | 6 |
| A Resort Trip to a beach, inland or mountain resort or resort town to relax, enjoy sports, recreation, etc. | 7 |
| A Ski/snowboarding Trip for the purpose of downhill or cross-country skiing and/or snowboarding | 399
8 |

Questionnaire (Cont'd)



10a. The following list includes specific places, areas and attractions just within part of the Grey/Bruce/Simcoe Counties area, specifically the Grey Country portion. Some of these may have already been mentioned earlier in this survey. Which of these have you ever heard of?

Cities/Towns

Clarksburg
 Craigeleith
 Durham
 Flesherton
 Hanover
 Kimberley
 Meaford
 Owen Sound

 The Blue Mountains
 Thornbury

Local Attractions

Beaver Valley
 Billy Bishop Heritage Museum
 Bruce Trail
 The Blue Mountains' Trail Systems
 Centurion Cycling Festival
 Coffin Ridge Winery
 Craigeleith Heritage Depot
 Craigeleith Provincial Park

 Duncan Crevice Caves Provincial Park
 Elvis Festival at Blue Mountain/Collingwood

 Eugenia Falls
 Feversham Gorge/Waterfall
 Fish Ladder in Thornbury
 Georgian Hills Winery
 Grey Roots
 Museum/Moreston Heritage Village

Hanover Raceway/OLG Slots
 Neustadt Springs Brewery
 Niagara Escarpment
 Osprey Wetlands Conservation Area
 Owen Sound Festival of Northern Lights
 Owen Sound Marine & Rail Museum
 Owen Sound Salmon Spectacular
 Pretty River Valley Provincial Park
 Salsa Festival at Blue Mountain/Collingwood
 Scandinave Spa
 Scenic Caves Nature Adventures
 Skiing at Blue Mountain
 Skiing at Talisman

Summerfolk Music & Crafts Festival
 The Blue Mountains Apple
 Apple Pie Trail
 The Georgian Trail
 The Peak to Shore Music and Arts Festival at Blue Mountain/Collingwood
 The Village at Blue
 Tom Thomson Art Gallery

 None of these (**skip to 10C**)

Questionnaire (Cont'd)



10b. Which of these have you ever visited? **(ASK ONLY IF 'HEARD OF' AT Q.10a)**

Cities/Towns

- Clarksburg
- Craigeleith
- Durham
- Flesherton
- Hanover
- Kimberley
- Meaford
- Owen Sound
- The Blue Mountains
- Thornbury

Local Attractions

- | | | |
|--|--|---|
| <input type="checkbox"/> Beaver Valley | <input type="checkbox"/> Hanover Raceway/OLG Slots | <input type="checkbox"/> Summerfolk Music & Crafts Festival |
| <input type="checkbox"/> Billy Bishop Heritage Museum | <input type="checkbox"/> Neustadt Springs Brewery | <input type="checkbox"/> The Blue Mountains Apple |
| <input type="checkbox"/> Bruce Trail | <input type="checkbox"/> Niagara Escarpment | <input type="checkbox"/> Apple Pie Trail |
| <input type="checkbox"/> The Blue Mountains' Trail Systems | <input type="checkbox"/> Osprey Wetlands Conservation Area | <input type="checkbox"/> The Georgian Trail |
| <input type="checkbox"/> Centurion Cycling Festival | <input type="checkbox"/> Owen Sound Festival of Northern Lights | <input type="checkbox"/> The Peak to Shore Music and Arts Festival at Blue Mountain/Collingwood |
| <input type="checkbox"/> Coffin Ridge Winery | <input type="checkbox"/> Owen Sound Marine & Rail Museum | <input type="checkbox"/> The Village at Blue |
| <input type="checkbox"/> Craigeleith Heritage Depot | <input type="checkbox"/> Owen Sound Salmon Spectacular | <input type="checkbox"/> Tom Thomson Art Gallery |
| <input type="checkbox"/> Craigeleith Provincial Park | <input type="checkbox"/> Pretty River Valley Provincial Park | <input type="checkbox"/> None of these (skip to 10C) |
| <input type="checkbox"/> Duncan Crevice Caves Provincial Park | <input type="checkbox"/> Salsa Festival at Blue Mountain/Collingwood | |
| <input type="checkbox"/> Elvis Festival at Blue Mountain/Collingwood | <input type="checkbox"/> Scandinave Spa | |
| <input type="checkbox"/> Eugenia Falls | <input type="checkbox"/> Scenic Caves Nature Adventures | |
| <input type="checkbox"/> Feversham Gorge/Waterfall | <input type="checkbox"/> Skiing at Blue Mountain | |
| <input type="checkbox"/> Fish Ladder in Thornbury | <input type="checkbox"/> Skiing at Talisman | |
| <input type="checkbox"/> Georgian Hills Winery | | |
| <input type="checkbox"/> Grey Roots | | |
| <input type="checkbox"/> Museum/Moreston Heritage Village | | |

Questionnaire (Cont'd)



Bruce County Version of Q.10a/b

Cities/Towns

- Cape Croker
- Chesley
- Ferndale
- Kincardine
- Lucknow
- Mildmay
- Port Elgin
- Sauble Beach
- Southampton
- Tobermory
- Walkerton
- Warton

Local Attractions

- The Beach at Port Elgin
- The Beach at Southampton
- The Beach at Sauble Beach
- The Beach at Kincardine
- Biener's Bush cross-country ski trails
- Black Creek Provincial Park/Stokes Bay
- Bruce County Museum & Cultural Centre
- Bruce Peninsula Mountain Bike Adventure Park
- Bruce Peninsula National Park, including The Grotto
- Cabot Head Lighthouse & Museum
- Canadian Big Band Celebration in September (Port Elgin)
- Carrick Wines & Ciders
- Chantry Island Lighthouse and Museum
- Chi-Cheemaun Ferry (to Manitoulin Island/dinner cruise)

Questionnaire (Cont'd)



Bruce County Version of Q.10a/b

Cinderella's Carriage Antique and Classic Car Show in Port Elgin
Bruce County Rail Trail
CP Rail Trail
Fathom Five National Marine Park
Flowerpot Island
Formosa Springs Brewery
International Motorcross Park
International Plowing Match at Teesdale in September
Inverhuron Provincial Park
Keppel Croft Farm & Gardens
Kincardine Lighthouse Museum
Kincardine Scottish Festival
Kincardine Scottish Pipe Band concert
Larkwhistle Garden
Lion's Head Provincial Park

- MacGregor Point Provincial Park
- Point Clark Lighthouse and Museum
- Port Elgin Beach Carnival
- Port Elgin Pumpkinfest
- Sauble Beach Sandfest in August
- Sauble Falls Provincial Park
- Saugeen Amphitheater (Saugeen First Nation Reserve)
- Saugeen Bluffs Conservation Area
- Saugeen Rail Trail
- Saugeen River
- Saugeen Valley Conservation Areas
- The Bruce Trail on the Niagara Escarpment
- Walkerton Fish Ladder
- Wiarton Willie Statue/Festival
- Wilmer Trout Ponds
- None of these

Questionnaire (Cont'd)



Simcoe County Version of Q.10a/b

- Alliston
- Barrie
- Base Borden/CFB Borden
- Brechin
- Collingwood
- Innisfil
- Meaford
- Midland-Penetanguishene
- New Tecumseh
- Orillia
- The Blue Mountains
- Thornbury
- Wasaga Beach

Local Attractions

- Alliston Potato Festival
- Awenda Provincial Park
- Balm Beach (Midland)
- Barrie's waterfront trails and Lake Simcoe beaches
- Base Borden Military Museum & Air Show
- Casino Rama
- Collingwood Elvis Festival
- Collingwood Museum
- Collingwood/Blue Mountain/Georgian Trails
- Collingwood's Downtown Heritage District
- Collingwood's Harbour, including Lighthouse Island, Shipbuilder's Park and Millenium Overlook Park
- Collingwood's Wakestock Action Sports & Music Festival
- Craigeith Provincial Park
- Creemore Springs Brewery
- Discovery Harbour/HMS Tecumseh/HMS Bee replicas
- Earl Rowe Provincial Park
- Elmvale Jungle Zoo
- Georgian Bay Queen Penetanguishene 30,000 Island Cruise
- Georgian Downs Racetrack & Slots
- Splash Canyon Water Park
- Hardwood Ski and Bike
- Huronian Museum and Huron Ouendat Village
- Images Thanksgiving Studio Tour (Barrie-Orillia area artists)
- Innisfil Beach
- Kempfenfest Arts and Crafts Festival
- Mariposa Folk Festival
- Martyr's Shrine

Questionnaire (Cont'd)



Simcoe County Version of Q.10a/b

- Nancy Island Historic Site
- Niagara Escarpment/Bruce Trail
- Orillia's waterfront trails and Lake Couchiching beaches
 - Sainte-Marie among the Hurons
- Scandinave Spa
- Scenic Caves Nature Adventures
- Serendipity Princess Barrie Boat Cruise
- Simcoe County Museum
- Skiing at Horseshoe Valley
 - Skiing at Mount St. Louis Moonstone
- Skiing at Snow Valley Barrie
- Springwater Provincial Park
- MacLaren Art Centre, Barrie
- A theatre in the region (, i.e., Theatre Collingwood, Kings Wharf Theatre, Gryphon Theatre, Orillia Opera House)
- Thornbury Fish Ladder/Harbour
- Trent-Severn Waterway
- Wasaga Beach Provincial Park (main beach in Wasaga Beach)
- Wye Marsh Wildlife Centre

Questionnaire (Cont'd)



10c. To what extent would you really enjoy taking part in each of the following types of activities and attractions while on a leisure trip/vacation to this area? Use a scale of 1-10 where “1” means that you would “Would not enjoy this at all” and “10” means you “would really enjoy this”. Please enter ONE number for each activity/attraction in the column below.

(Programmer: rotate this list)

Rating Scale:	Would Not Enjoy At All	1	2	3	4	5	6	7	8	9	Would Really Enjoy 10
Attend a concert/live music performance				_____		Go fishing/hunting		_____			
				_____		Go ice-fishing		_____			
Attend a music/rock/folk festival				_____		Go camping		_____			
Attend a food/culinary festival				_____		Go sailing/boating		_____			
Attend another type of festival or fair				_____		Go canoeing/kayaking		_____			
Attend a live theatre performance				_____		Go cross-country skiing		_____			
Attend a sports event				_____		Go downhill skiing		_____			
Dine while overlooking the bay/harbour				_____		Go snowboarding		_____			
Fine dining				_____		Go snowshoeing		_____			
Go antiquing				_____		Go cycling through the countryside on local roads/trails		_____			
Go brand-name shopping/boutique shopping				_____		Go mountain/off-road biking		_____			
Go caving/rock climbing				_____				_____			

Questionnaire (Cont'd)



Rating Scale:	Would Not Enjoy At All	2	3	4	5	6	7	8	9	Would Really Enjoy
	1									10
Go snowmobiling				_____		Visit an historic lighthouse				_____
Go para-sailing				_____		Visit a local history museum				_____
Go horseback riding				_____		Visit a public/local garden				_____
Go to an amusement/water park				_____		Visit a spa				_____
Go to the beach/swimming				_____		Visit a brewery or winery				_____
Go scuba diving				_____		Visit an historic site connected with shipbuilding/marine industry				_____
Play a round of golf on one of the area's golf courses				_____		Visit an historic site, such as a monument, fort or historic home				_____
Play miniature golf/putt-putt				_____		Visit an historic town with restored homes and interesting shops				_____
Stay at a resort				_____		Visit an art gallery/art show				_____
Take a boat ride/short cruise				_____		Visit a racetrack				_____
Take an open air gondola ride to the top of a local mountain				_____		Visit a casino				_____
Take a scenic driving tour by <u>car</u> to see the area's rugged terrain, (in season)				_____		Visit a zoo				_____
Take a scenic driving tour by <u>motorcycle</u> to see the area's terrain,				_____		Visit a local farmers' market/shop for locally- produced food				_____
Take an historic walking tour of a local town				_____		Walk/hike along the Bruce Trail, atop the Niagara Escarpment,				_____
Tree-top walking/ziplining				_____		a UNESCO World Biosphere Reserve				_____
Visit a conservation area/provincial park to picnic,				_____						_____

Questionnaire (Cont'd)



11. (ASK ONLY THOSE WHO WERE UNAWARE OF THE GREY/BRUCE/SIMCOE REGION AT Q.4; ALL OTHERS SKIP TO Q.12)
Actually, all of the activities and attractions you just read about in the last three questions are available in the Grey County area. This area is a 4-season destination featuring excellent downhill and cross-country skiing, snowmobiling and other winter sports during winter; hiking, biking and scenic drives from spring to fall, historic towns and villages, and beautiful sand beaches for summer enjoyment. Now that you've heard about what's in the region, please indicate how likely you would be to consider visiting the Grey County region in the next 12 months, on a day or overnight trip?

- Definitely Will
- Probably Will
- Might/Might Not
- Probably Will Not
- Definitely Will Not

Questionnaire (Cont'd)



You're almost done! The next few questions are for classification purposes only. They will only be used to group your answers with others like yourself. All answers will be strictly confidential.

Which one of the following best describes the community in which you live?

- Urban
- Suburban
- Rural

Are you.....

- Male
- Female

Please click on the category that includes your age.

- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75 or older

Questionnaire (Cont'd)



Including yourself, how many people currently living in your household are in each of the following age groups? ENTER A NUMBER FOR EACH AGE RANGE; IF THERE ARE NONE, ENTER '0'.

↕ 5 years of age or younger	0 - 10
↕ 6-8 years of age	0 - 10
↕ 9-12 years of age	0 - 10
↕ 13-17 years of age	0 - 10
↕ 18 years of age or older	0 - 10

Which one of the following best describes your marital status?

- Single, never married
- Married
- Living with partner
- Separated
- Divorced
- Widowed
- Prefer not to answer

Questionnaire (Cont'd)



Which one of the following best describes your employment status?

- Employed full time
- Employed part time
- Self-employed
- Not employed, but looking for work
- Not employed and not looking for work
- Retired
- Student
- Homemaker
- Prefer not to answer

What is the highest level of education you have completed?

- Less than 9th grade
- 9th to 12th grade, no diploma
- High school graduate or equivalent
- Some university/college, no degree
- Associate degree/college diploma
- Bachelor's degree
- Graduate or professional degree
- Other, please specify
- Prefer not to answer

Questionnaire (Cont'd)



Which one of the following ranges includes your total yearly household income before taxes?

- Less than \$25,000
- \$25,000-\$49,999
- \$50,000-\$59,999
- \$60,000-\$74,999
- \$75,000-\$99,999
- \$100,000-\$124,999
- \$125,000-\$149,999
- \$150,000-\$199,999
- \$200,000 and over
- Prefer not to answer

We are speaking with people from different ethnic backgrounds to ensure we reflect Canada's diverse population, please can you tell me how you would describe your ethnicity? (Which ethnic or cultural group do you most closely associate yourself with?)

- Caucasian/ White1
- African Canadian/ Caribbean/ African/ Black.....2
- Spanish/ Hispanic/ Latin3
- Asian (Chinese, Korean, Filipino, Japanese).....4
- South Asian / East Indian.....5
- Middle Eastern 6
- Other (Specify _____) 7

Questionnaire (Cont'd)



Thank You Page

Thank you for participating in our survey. Your responses have been successfully recorded. (Field company to add other specifics/incentive info, etc.)

Screen Out Page

Thank you for your interest. However, at this time, we are looking for survey respondents who fit a different profile. Please do not be discouraged, as there may be future studies to which you will be invited to participate.

Survey Closed Page

Thank you for your willingness to participate, however this study has been completed and is closed. We hope you will visit us in the future for other surveys.

Questionnaire (Cont'd)

