



CENTRAL COUNTIES TOURISM

Audience Research

Presentation of Findings

July 28, 2017

PROJECT CONTEXT

Background

Central Counties Tourism (CCT) is a regional tourism organization in Ontario that encompasses the sub-regions of **Durham, York and Headwaters**.

CCT seeks to build a **competitive and sustainable tourism strategy** across these 3 sub-regions that will **drive visitation** and **grow the region as a destination of choice**.

Qualitative and **quantitative market research** was executed to **guide strategy development**, including marketing and communication plans and tourism products.

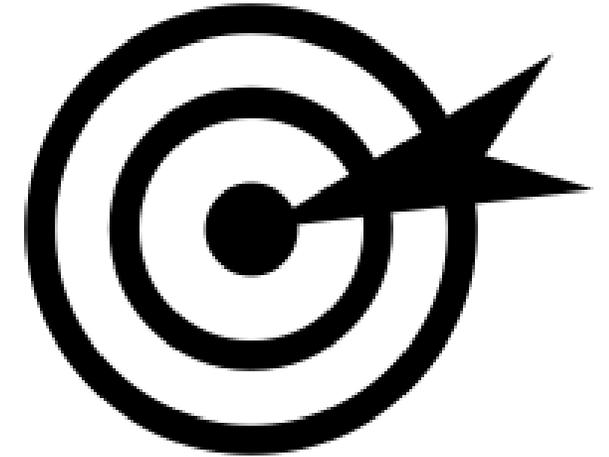


Research Objectives

More specifically, the objectives of this research were to...

- Provide a **deeper understanding** of **current** and **potential** audiences.
 - Who are they?
 - What drives their choice of tourism activities?
 - How do they make spending decisions?
- Understand **key motivations** and **barriers** to visiting the region;
- Identify the key **target audience(s)** for CCT;
- Identify the most **effective methods** and **compelling messages** to reach and engage these audiences.

The research **included both qualitative and quantitative**.



Methodology - Qualitative

The **qualitative phase** involved an **online research forum** among Recent and Prospective Visitors to York Durham Headwaters in order to understand current attitudes and behaviours related to visiting the region.

The online forum was conducted over 3 days among 10 Recent and 10 Prospective visitors to York Durham Headwaters from across Ontario.



Methodology - Quantitative



Data Collection

Online survey conducted using a third party panel



Sample Size

809 completes

- 302 completes with Recent Visitors
 - 507 completes with Prospective Visitors
 - 207 completes with Prospective Visitors from Ontario
 - 150 completes with Prospective Visitors from outside Ontario, but within Canada
 - 150 completes with Prospective Visitors from the Northeast US
-



Qualifying Criteria

Not 'sensitively' employed (respondent or any household member). 'Sensitive' employment included employment by an advertising / PR / market research agency, the media, a tourist attraction, a travel agency, hotel, airline or other profession related to the travel industry.

18+ years of age.

Reside in Canada or the Northeast US (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey or Pennsylvania). All US respondents needed to hold a valid US passport.

Have travelled for leisure purposes in the past year.

Would consider (definitely would, probably would or might or might not) Ontario for a leisure vacation, get-away or excursion (overnight or day excursion) in the next 12 months.

Do not have a primary or secondary residence in York Durham, Headwaters

Reporting Perspective

Throughout this presentation, circles and squares have been used to denote significance.

-  = Results are significantly **higher** than the sub-group(s) to which it is being compared (at a 95% confidence level).
-  = Results are directionally **higher** than the sub-group(s) to which it is being compared (an 80% or 90% confidence level).
-  = Results are significantly **lower** than the sub-group(s) to which it is being compared (at a 95% confidence level).
-  = Results are directionally **lower** than the sub-group(s) to which it is being compared (an 80% or 90% confidence level).

KEY DISCOVERIES

Respondent Definition

Throughout this presentation we will look at the perspective among **Recent Visitors** and **Prospective Visitors**.



Recent Visitors are defined as individuals from Ontario who have visited York Durham Headwaters in the past 12 months.



Prospective Visitors are defined as individuals from Ontario, Canada outside Ontario, or the Northeastern US who have not visited York Durham Headwaters in the past 12 months, but would consider (definitely, probably or might or might not) Ontario for a leisure vacation, get-away or excursion in the next 12 months.



Recent Visitors to the area tend to be affluent families with children who are looking for opportunities to spend quality time together, while enjoying the outdoors and exploring new areas...

Who's Visiting? - Recent Visitor Profile

		Recent Visitors (n=302) %
 AGE	18-34	24
	35-54	41
	55+	35
	Average	47.5
	<hr/>	
 GENDER	Men	47
	Women	53
<hr/>		
 HOUSEHOLD COMPOSITION	Kids	35
	No Kids	65
	<hr/>	
 HOUSEHOLD INCOME	<\$75,000	52
	\$75,000+	48
	Average (\$)	85,200



The **Recent Visitor** tends to be middle aged and represents an even split of men and women.

Over a third have children under 18 in their household.

Recent visitors also tend to be fairly affluent, with an average household income of \$85,000 and almost half (48%) having a household income of \$75,000 or more.

Travel Personas

As part of the qualitative forum, we had respondents to describe the type of tourist they are. From here we created **8 travel personas** to encompass their motivations...



Family Fun Fan
(wants to have a good time with the family)



Outdoor Enthusiast
(enjoys getting outside, enjoying fresh air and connecting with nature)



Backroads Explorer
(wants to discover towns and experiences off the beaten path)



Culture Connoisseur
(enjoys food, music, arts and culture)



Thrill Seeker
(enjoys lots of excitement)



Knowledge Hunter
(Seeks to understand more about the region, its history and its people)



Pampered Traveler
(Loves to relax and get pampered)



Shopping Enthusiast
(Enjoys shopping and finding great deals)

Recent Visitor Profile

Most commonly, Recent Visitors are **Family Fun Fans** wanting to have a good time with their family or **Outdoor Enthusiasts** who enjoying getting outside and exploring nature.

		Recent Visitors (n=302) %
	Family Fun Fan - who wants to have a good time with the family	25
	Outdoor Enthusiast - who enjoys getting outside, enjoying fresh air and connecting with nature	21
	Backroads Explorer - who wants to discover towns and experiences off the beaten path	15
	Culture Connoisseur - who enjoys food, music, arts and culture	13
	Thrill Seeker - who enjoys lots of excitement	10
	Knowledge Hunter - who seeks to understand more about the region, its history and its people	8
	Pampered traveler - who loves to relax and get pampered	5
	Shopping Enthusiast - who enjoys shopping and finding great deals	4



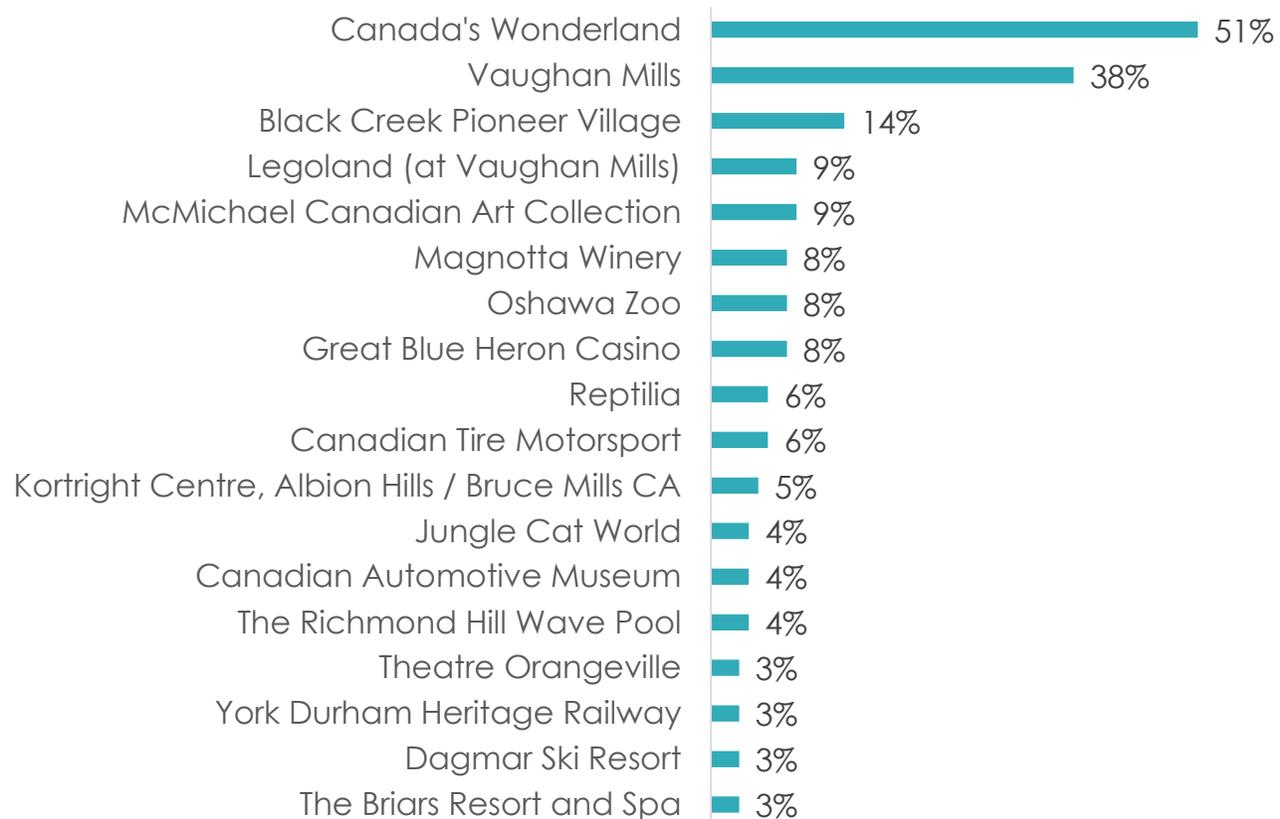
TRAVELER PERSONA

Attractions Visited in Past 12 Months

Among Recent Visitors, **Canada's Wonderland** and **Vaughan Mills** were the most common attractions visited.

% of Recent Visitors Who Visited Attraction in Past 12 Months – Top Mentions*

Base: Recent Visitors (n=302)



*Top mentions – mentioned by at least 3% of Recent Visitors
Q14a. Which of the following attractions, if any, have you visited in the past 12 months?



Prospective Visitors are slightly older, represent a slightly higher proportion of women, are less likely to have children in their household and are less affluent...

Prospective Visitor Profile

		Prospective Visitors (n=507) %	Recent Visitors (n=302) %
 REGION	BC	10	-
	Prairies	13	-
	Ontario	58	100
	Quebec	13	-
	Atlantic Canada	6	-
	Northeast US	30	-
 AGE	18-34	21	24
	35-54	36	41
	55+	43	35
	Average	49.2	47.5
 GENDER	Men	41	47
	Women	59	53
 HOUSEHOLD COMPOSITION	Kids	23	35
	No Kids	77	65
 HOUSEHOLD INCOME	<\$75,000	59	52
	\$75,000+	41	48
	Average (\$)	75,000	85,200



Prospective Visitors are slightly older, represent a higher proportion of women, are less likely to have kids in their household and are less affluent than Recent Visitors.

Prospective Visitor Profile

Prospective Visitors are most likely to be **Family Fun Fans**, **Outdoor Enthusiasts** and **Culture Connoisseurs**.



TRAVELER PERSONA

	Prospective Visitors (n=507) %	Recent Visitors (n=302) %
Family Fun Fan - who wants to have a good time with the family	21	25
Outdoor Enthusiast - who enjoys getting outside, enjoying fresh air and connecting with nature	17	21
Backroads Explorer - who wants to discover towns and experiences off the beaten path	11	15
Culture Connoisseur - who enjoys food, music, arts and culture	16	13
Thrill Seeker - who enjoys lots of excitement	6	10
Knowledge Hunter - who seeks to understand more about the region, its history and its people	11	8
Pampered traveler - who loves to relax and get pampered	10	5
Shopping Enthusiast - who enjoys shopping and finding great deals	7	4

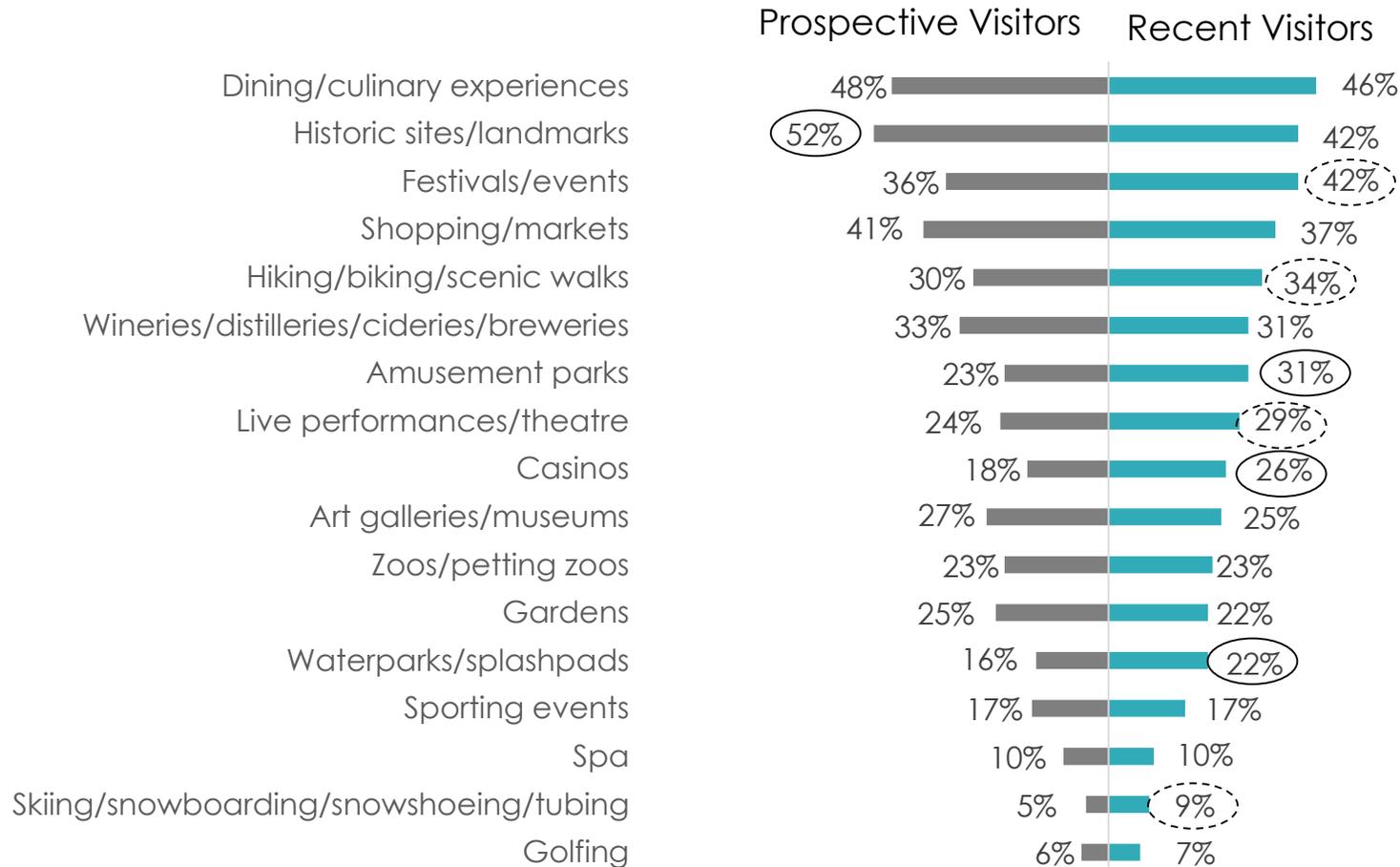


Offering a diverse range of activities and attractions is a key driver of travel choices...

Most Appealing Types of Attractions

% Putting in Top 5

Base: Recent Visitors (n=300); Prospective Visitors (n=507)



When planning a leisure trip / getaway or excursion, the **most appealing activities** among both Prospective and Recent Visitors are...

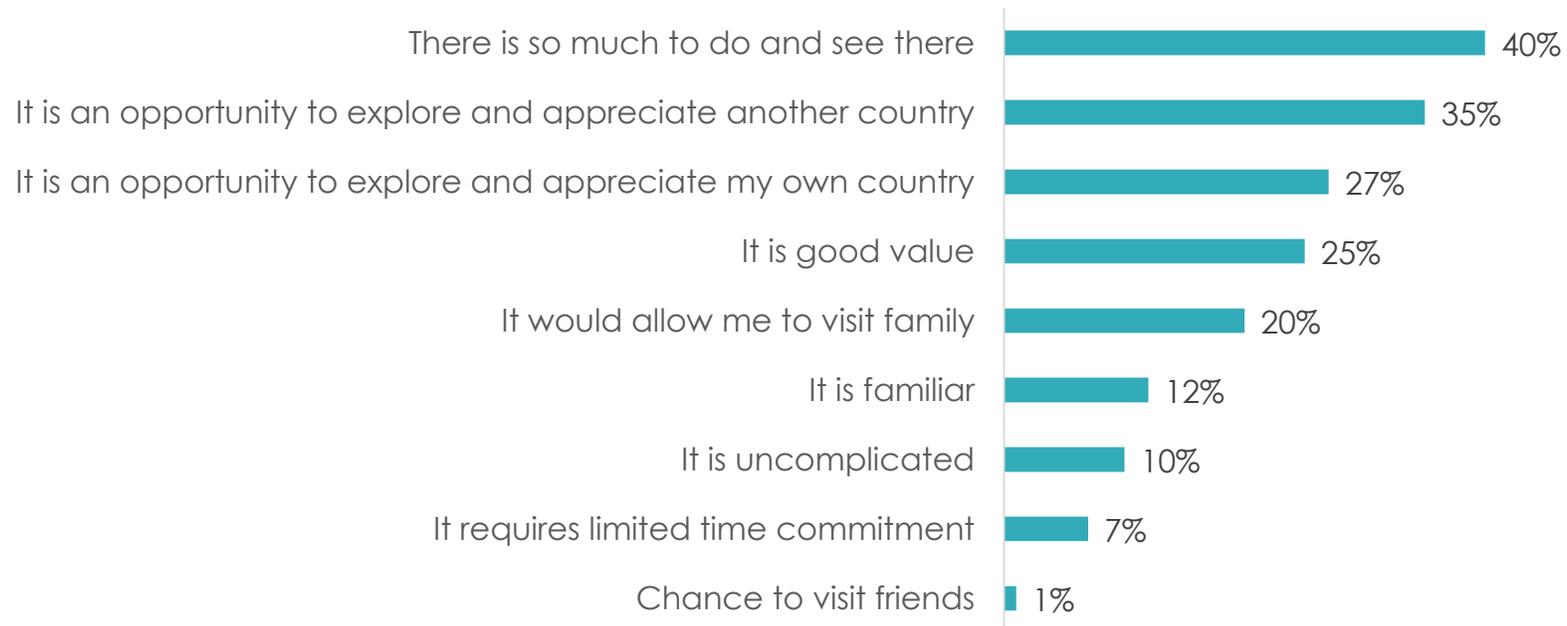
- Dining / culinary experiences
- Historic sites / landmarks
- Festivals / events
- Shopping / markets

Reasons For Considering Ontario as a Leisure Destination

With travelers looking for such a diverse range of activities, one of the **key reasons those outside Ontario would consider Ontario as a leisure destination is because it has a variety of things to see and do.**

Reasons for Considering Ontario As a Leisure Destination - % Putting in Top 2

Base: Prospective Visitors not from Ontario (n=300)



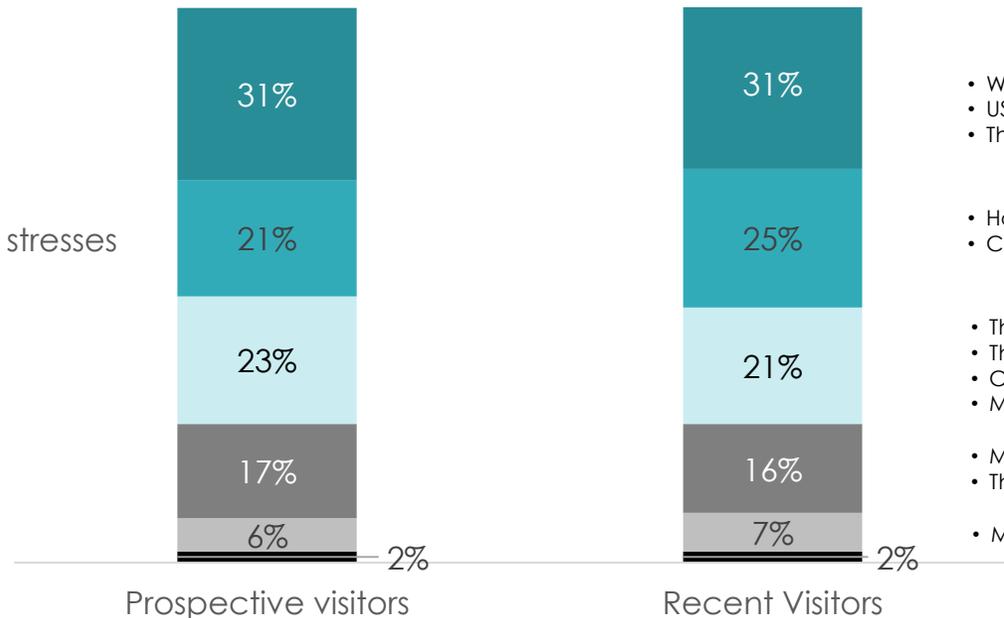
Primary Motivation for Planning a Leisure Trip in Ontario

In fact, **exploring / discovering and seeing something new** is the primary motivation for planning a leisure trip in Ontario.

Primary Motivation For Planning a Leisure Trip, Get-away, Excursion in Ontario

Base: Recent Visitors (n=300); Prospective Visitors (n=507)

- To explore, discover, see something new, have an adventure
- To spend quality time with family and/or friends
- To relax, rejuvenate, forget your worries, escape from day to day stresses
- To have fun
- To experience nature
- To learn



Motivation Tends to Be Higher Among...

- Women
- US travellers
- Those with a household income of \$75k+

- Households with kids
- Canadian travellers

- Those 55+;
- Those without kids in their household
- Canadian travellers
- Men

- Men
- Those with a household income <\$75K

- Men



Key Drivers of Decision-Making

Likewise, **offers lots to see and do / offers a variety of activities** is among the most important factors when choosing a destination or activity, along with being **fun** and **good value**.

% Rating Importance an 8-10

On a 1 to 10 Scale From Not At All Important to Very Important

Base: Recent Visitors (n=300); Prospective Visitors (n=507)





The York Durham Headwaters area is not well known as
a travel destination...

Unaided Awareness of Tourism Regions in Ontario

When asked to name tourism regions in Ontario, **no one**, including Recent Visitors and Prospective Visitors, **mentioned York Durham Headwaters** unaided.

% Mentioning Region / Area Unaided

Base: Recent Visitors (n=302); Prospective Visitors (n=507)

Recent Visitors

TOP MENTIONS*	%
Niagara Falls	53
Toronto	33
Ottawa	28
Muskoka	22
Algonquin Park	14
1000 Islands	7
Kingston	7
Wasaga Beach	5
Tobermory	5
Kawarthas	4
Prince Edward country	4
Niagara on the lake	4
Georgian Bay	4
Thunder Bay	4

Prospective Visitors

TOP MENTIONS*	%
Niagara Falls	41
Toronto	34
Ottawa	25
Muskoka	11
Algonquin Park	6
1000 Islands	5

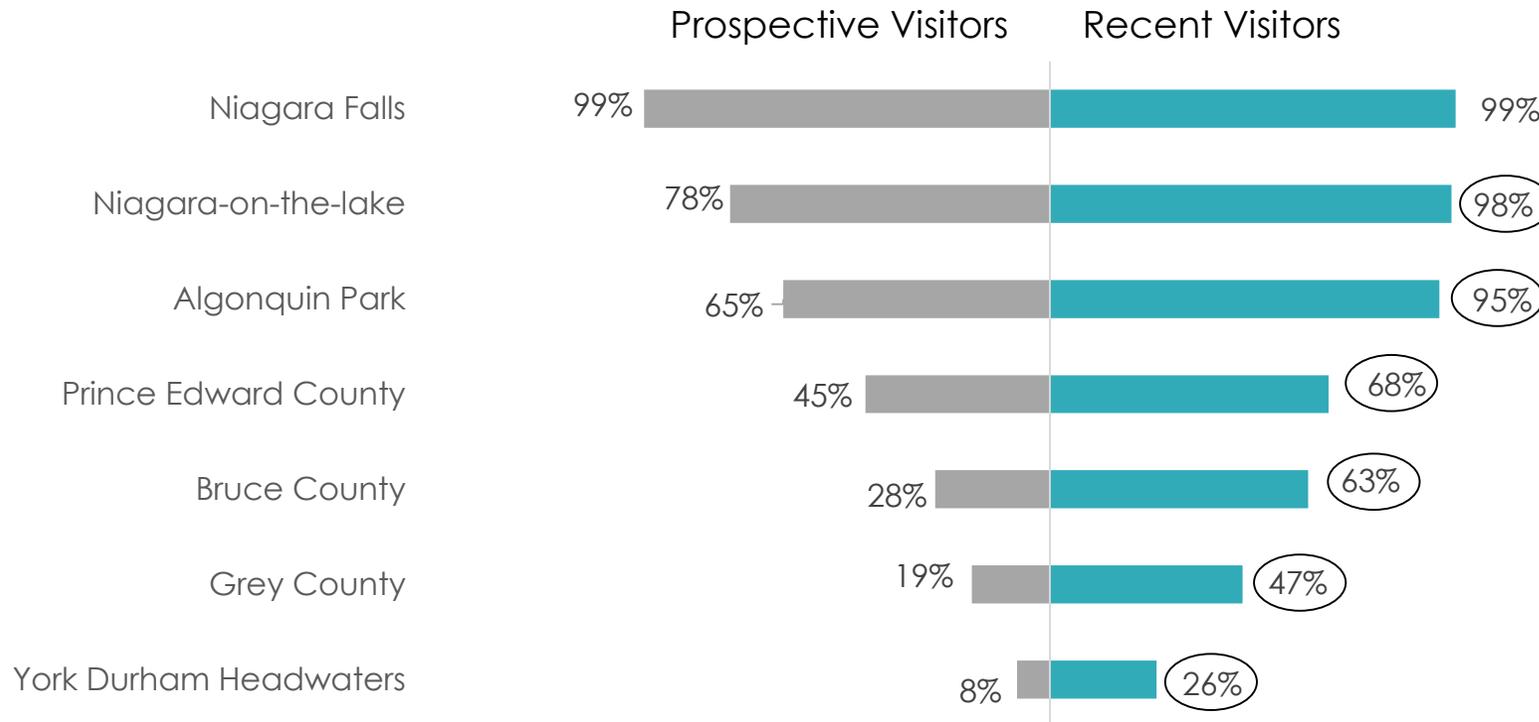
*Top mentions – cited by at least 4% of respondents
Q10a. When you think of tourism regions or areas in Ontario, what comes to mind?

Aided Awareness of Tourism Areas in Ontario

Even when aided, less than **10% of Prospective Visitors** and only **26% of Recent Visitors** said they had heard of **York Durham Headwaters**, with awareness levels far below those of other tourism regions in Ontario.

% Saying Have Heard of Area (Aided)

Base: Recent Visitors (n=302); Prospective Visitors (n=507)

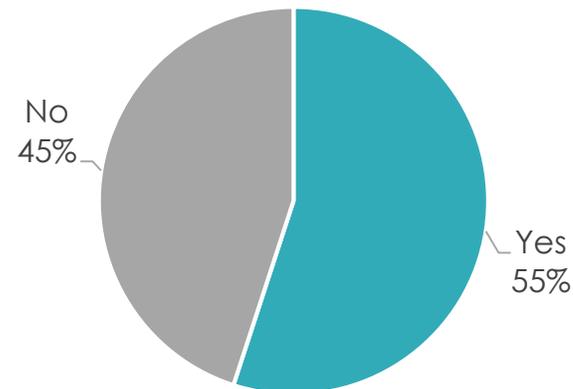


Incidence of Recent Visitors Knowing They Had Visited York Durham Headwaters

In fact, when shown a map and given the geographic boundaries as well as a few examples of the attractions in the area, **only 55% of Recent Visitors said they had visited York Durham Headwaters in the past 12 months.** It was not until they were given a longer list of attractions that they identified themselves as a Recent Visitor to the area.

Incidence of Recent Visitors Knowing They Had Visited York Durham Headwaters in Past 12 Months

Base: Recent Visitors (n=302)



Incidence of Recent Visitors Knowing They Had Visited York Durham Headwaters

In respondents own words...



“I had no idea I was visiting the area in the past. I never heard the name before!”

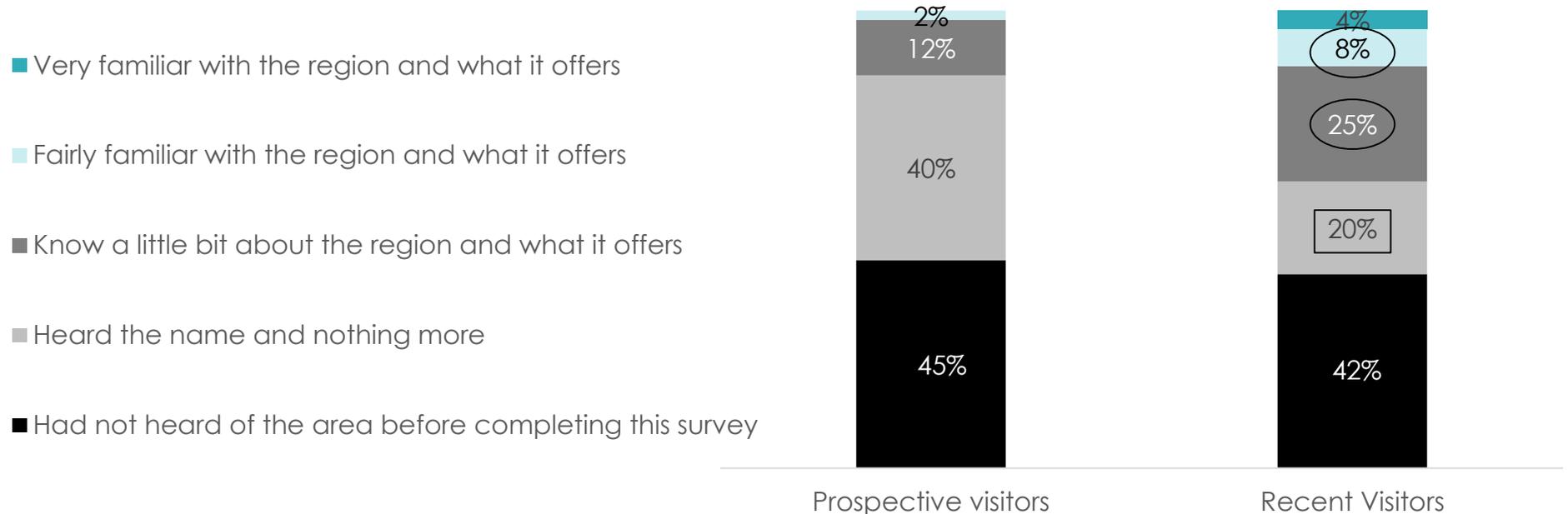
“I did not know the name of this region before today, although I have indeed traveled to this region many times.”

Familiarity With York Durham Headwaters As a Travel Destination

Familiarity with the area is low, with the majority of visitors not having heard the name York Durham Headwaters before coming this survey or knowing the name and nothing more.

Familiarity With York Durham Headwaters As a Travel Destination

Base: Those aware of York Durham Headwaters or those classified as recent visitors Recent Visitors (n=302); Prospective Visitors (n=42)





Awareness of the specific attractions within the region is also limited...

Unaided Awareness of Specific Attractions in Ontario

When asked to name specific tourist attractions in Ontario, **Canada's Wonderland is the only attraction** within the York Durham Headwaters area to be **among the top ten mentions**.

% Mentioning Tourist Attraction Unaided – Top 10 Mentions Shown

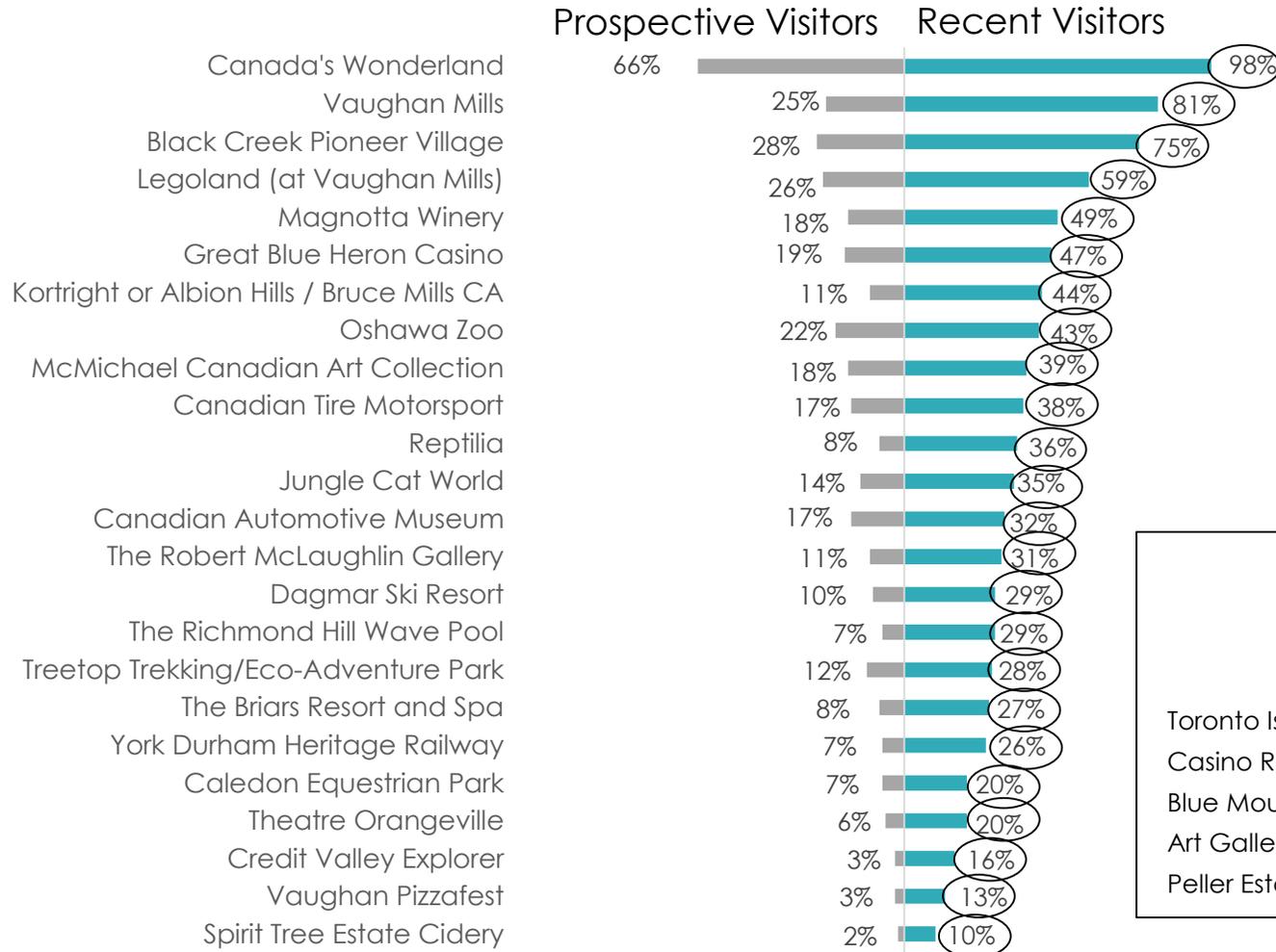
Base: Recent Visitors (n=302); Prospective Visitors (n=507)

Prospective Visitors		Recent Visitors	
TOP MENTIONS*	%	TOP MENTIONS*	%
Niagara Falls	42	Niagara Falls	50
CN Tower	20	CN Tower	40
Canada Wonderland	11	Canada Wonderland	26
Parliament Hill/Building	7	Parliament Hill/Building	16
Toronto Zoo	4	Ripley Aquarium	9
Ripley Aquarium	3	ROM/Royal Ontario Museum	6
ROM/Royal Ontario Museum	3	Toronto Zoo	5
Canadian National Exhibition/CNE	3	Algonquin Park	5
Toronto/Ontario Science Centre	3	Canadian National Exhibition/CNE	4
Rogers Centre/SkyDome	3	Provincial park	4

Aided Awareness of Specific Attractions in Area

% Saying Have Heard of Attraction (Aided)

Base: Recent Visitors (n=302); Prospective Visitors (n=507)



Similarly, aside from Canada's Wonderland, aided awareness of the attractions within the area is generally lower than seen for other attractions in Ontario.

FOR COMPARISON

	Prospective %	Recent %
Toronto Islands	55	91
Casino Rama	45	89
Blue Mountain	40	85
Art Gallery of Ontario	48	84
Peller Estates Winery	32	57

Primary Associations With York Durham Headwaters

To this end, “**Don’t know**” was the most common mention when those with at least some level of familiarity were asked for their **primary associations** with York Durham Headwaters as a travel destination.

Primary Associations With York Durham Headwaters As a Travel Destination

Base: Those with at least some level of familiarity with area (n=185)



The larger the font, the more often the association was mentioned





Given the area is not on travelers' radar screens, the biggest barrier to visiting the area is simply never thinking of it and / or lack of familiarity with the points of interest within the region...

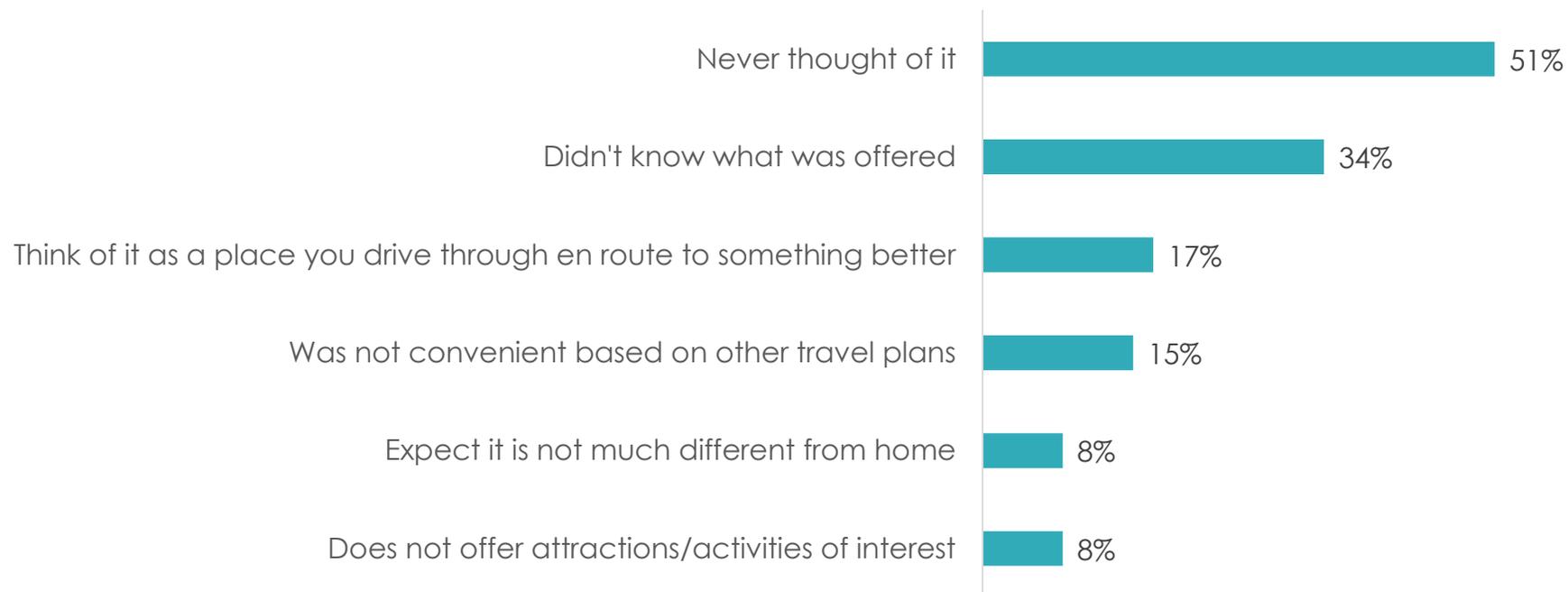
Reasons For Not Having Visited in Past 12 Months

Among Prospective Visitors (n=507)

Consistent with what we heard in the qualitative phase, **“never think of it”** and **“don’t know what is offered”** are the primary barriers to not visiting the region among Prospective Visitors.

Reasons For Not Visiting York Durham Headwaters Area in Past 12 Months

Base: Those aware of York Durham Headwaters area, but have not visited in past 12 months (n=59)





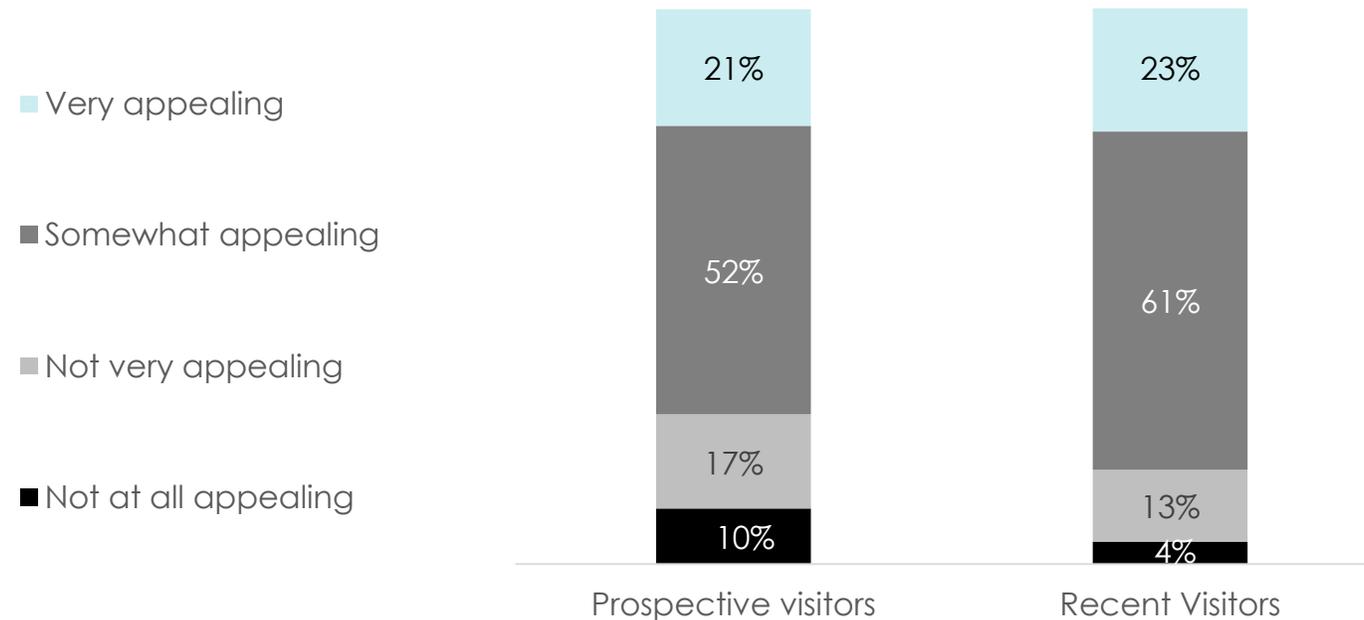
This lack of familiarity with the area means the region lacks appeal as a travel destination...

Appeal of York Durham Headwaters As a Travel Destination

Among those who have heard of York Durham Headwaters, **less than one-quarter rate the region as being highly appealing** as a travel destination.

Appeal of York Durham Headwaters As a Travel Destination

Base: Recent Visitors or those aware of York Durham Headwaters. Recent Visitors (n=302); Prospective Visitors (n=42)



Reasons For Believing YDH is Not an Appealing Travel Destination

Lack of familiarity with the area is the primary reason some feel York Durham Headwaters is not an appealing travel destination.

Reasons for Believing York Durham Headwaters is NOT an Appealing Travel Destination

Base: Those who say York Durham Headwaters is not very / not at all appealing as a travel destination (n=60)



“We **know nothing about this area.**”

“I **don't know anything about it**, so it is not appealing at this stage.”

“I'm not sure what is **there** as a travel destination.”

“Have **no idea what it is and the value of seeing.**”

“I just **don't know much about it** which is a sign, at least to me, that it is not popular.”

“I have **no idea what this place is about.**”

“I **know nothing about the area nor what is offered there** or even where it is.”

“**Never heard about it before**, and I live in the province!”

“I suppose there are a few places there that are attractive, such as the McMichael Gallery, but it a very diffuse range of suburbia and exurbia around the GTA. **It is hard to grasp just what it is.**”

“Although I've heard of York Durham Headwaters I'm **not sure where the region is or what it has to offer** therefore it's not very appealing.”

“I **don't know anything about the area and what it has to offer.** We tend to go to Western or Northern Ontario in the summer.”



Reasons For Believing YDH is Not an Appealing Travel Destination

Others fear it might be “boring”.



Reasons for Believing York Durham Headwaters is NOT an Appealing Travel Destination

Base: Those who say York Durham Headwaters is not very / not at all appealing as a travel destination (n=60)

“Durham is quite boring.”

“Boring.”

“Doesn't sound that fun.”

“Nothing too exciting.”



Reasons For Believing YDH is a Very Appealing Travel Destination

By contrast, those who view the area as being highly appealing as a travel destination are **aware and appreciate the variety** the region offers...

Reasons for Believing York Durham Headwaters is a Very Appealing Travel Destination

Base: Those who say York Durham Headwaters is a very appealing travel destination (n=78)



“It has a **variety of experiences** to offer.”

“It **offers a variety of outdoor activities and shopping as well.** Most places that are far out in the country side don't have many shops to choose from.”

“Close to home and has a **wide variety of activities I enjoy.**”

“I love nature and **exploring new areas** of nature such as trails and forests.”

“**Many things to do** inside and outside.”

“There are **many opportunities to do different things.** Whether it is in the natural environment, shopping/dinning or amusement parks.”

“**Good activities for a whole family.**”

“The **trails, the culture, the shopping** and the **food.**”

“**Many different things to explore and experience** without travelling a great distance.”

“**Lots of places to visit** including outdoor and indoor which is fun and exciting.”



Reasons For Believing YDH is a Very Appealing Travel Destination

Other advantages of the area include its **locational convenience** (easy to get to, easy to plan a trip to) and the **nature / scenery**.

Reasons for Believing York Durham Headwaters is a Very Appealing Travel Destination

Base: Those who say York Durham Headwaters is a very appealing travel destination (n=78)



“I **love nature and exploring new areas** of nature such as trails and forests.”

“I love going somewhere that is an escape and **enjoy the beauty of nature and meet new people.**”

“Many different things to explore and experience **without travelling a great distance.**”

“I have been there before and it is **very beautiful.** The way I picture Canada.”

“Much to do in **Green Space. Back to roots, outdoors.** I remember when we used to care about that. Hiking, exploring nature, doesn't cost a thing too.”

“The **trails and culture look enticing.** Always enjoy a trek through the forest. Seeing wildlife.”

“It's appealing because it **isn't extremely far away from where I live,** and I think it would be really fun.”

“Lots of different things to do & experience **in a short distance**”





The lack of familiarity with the area may stem from the fact that many visitors come to the area to see a specific attraction and do not have full appreciation for all that the area offers...

Primary Reason For Visiting York Durham Headwaters

While there are a number of reasons Recent Visitors visited York Durham Headwaters, almost a third said they **came to see a specific attraction.**

Primary Reasons For Visiting York Durham Headwaters

Base: Recent Visitors (n=302)

“The purpose of my visit was to spend the long weekend with my husband away to unwind and relax, and not travel too far.”

“I visited Vaughan Mills to go shopping with my mom.”

“Took friends to the McMichael Gallery.”

“Something to do for fun with the whole family which offered both entertaining and educational experiences and was not far from my home.”

“We went to Vaughan Mill and to Legoland with our grandsons.”

“Canada’s Wonderland with kids.”

TOP MENTIONS*	%	
To see a specific attraction in the area	28	Canada's Wonderland: 15% Vaughan Mills: 10% Blue Heron Casino: 3% McMichael Gallery: 2% Black Creek Pioneer Village: 2% Legoland: 2% Canadian Tire Motorsports: 2% Reptilia: 1%
To visit friends / family	25	
To relax / for pleasure / to have fun	22	
Sightseeing / adventure / exploration / see something new	11	

*Top mentions – cited by at least 5% of respondents.

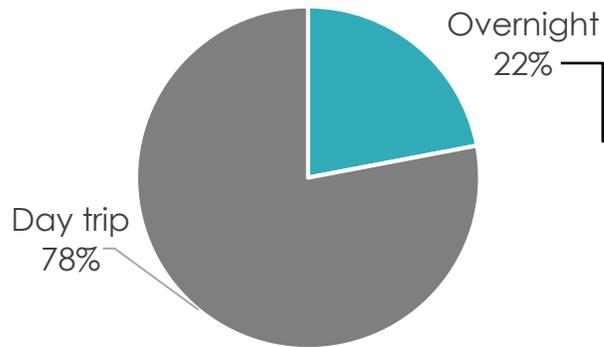
Q23. [FOR RECENT VISITORS] What was your purpose for visiting the York Durham Headwaters area? Please be as specific and detailed as possible.

York Durham Headwaters Visit Profile

Among Recent Visitors (n=302)

Further, most Recent Visitors **only came to the area as a day trip** and most **had been to the area or attraction they visited before**.

Duration of Stay



Type of Accommodation

Stayed in Paid Accommodation: 57%

Stayed with friends / family: 43%

of Night In Paid Accommodation

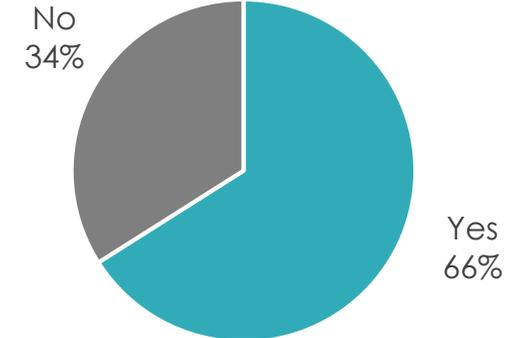
1 night: 18%

2 nights 44%

3+ nights 38%

Average: 2.5

Incidence of Visiting Area Before



Satisfaction With Visit to Area

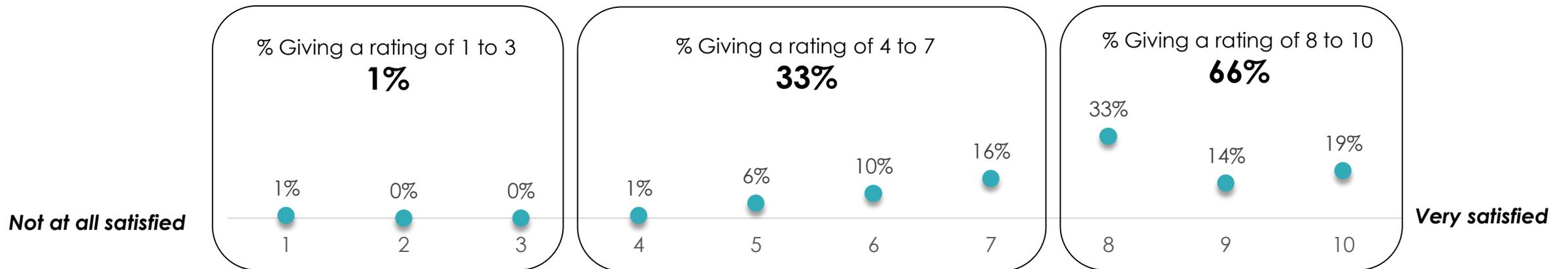
Among Recent Visitors (n=302)

Generally speaking, Recent Visitors were **very satisfied with their visit**, with two-thirds rating their overall satisfaction an 8-10, and 19% rating it a 10 out of 10. Importantly, the **more attractions / venues an individual has visited in the area and the longer their stay**, the **more satisfied they are** with their visit.

Overall Satisfaction With Visit to the York Durham Headwaters Area

On a 1 to 10 Scale From Not At All Satisfied to Very Satisfied

Base: Recent Visitors (n=302)



% Giving a rating of 8-10	AGE			GENDER		HHLD COMPOSITION		HHLD INCOME		NUMBER OF ATTRACTIONS VISITED			TYPE OF VISIT	
	18-34	35-54	55+	Men	Women	Kids	No Kids	<\$75K	\$75K+	1	2-3	4+	Day	Overnight
Recent Visitors	64	66	67	62	70	65	66	62	70	66	58	76	62	79

Likelihood of Visiting Again

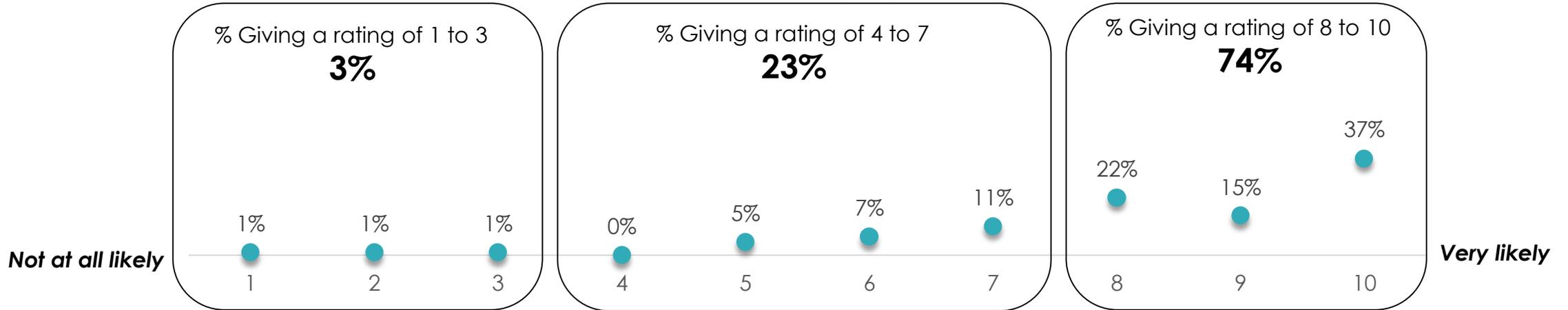
Among Recent Visitors (n=302)

Most Recent Visitors are also **very likely to visit the area again**. Not surprisingly, the **more satisfied an individual is with their visit, the more likely they are to visit again**.

Likelihood of Visiting York Durham Headwaters Area Again

On a 1 to 10 Scale From Not At All Likely to Very Likely

Base: Recent Visitors (n=302)



% Giving a rating of 8 to 10	AGE			GENDER		HHLD COMPOSITION		HHLD INCOME		SATISFACTION WITH VISIT	
	18-34	35-54	55+	Men	Women	Kids	No Kids	<\$75K	\$75K+	8 to 10	1 to 7
Recent Visitors	74	76	72	73	75	77	72	74	74	93	37



Likelihood of Recommending

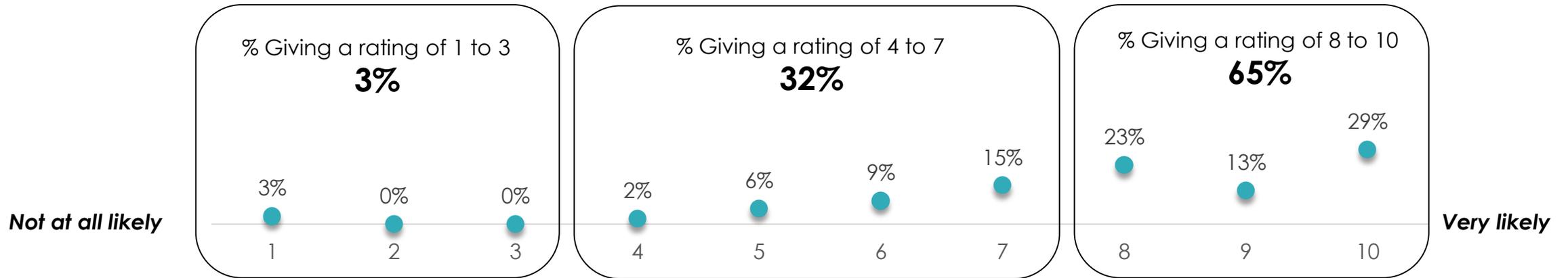
Among Recent Visitors (n=302)

And two-thirds **would recommend the region** to others. Again, the **more satisfied an individual is with their visit, the more likely they are to recommend** the area.

Likelihood of Recommending York Durham Headwaters Area As a Travel Destination

On a 1 to 10 Scale From Not At All Likely to Very Likely

Base: Recent Visitors (n=302)



% Giving a Rating of 8 to 10	AGE			GENDER		HHLD COMPOSITION		HHLD INCOME		SATISFACTION WITH VISIT	
	18-34	35-54	55+	Men	Women	Kids	No Kids	<\$75K	\$75K+	8 to 10	1 to 7
Recent Visitors	57	68	66	62	66	69	62	62	68	86	22

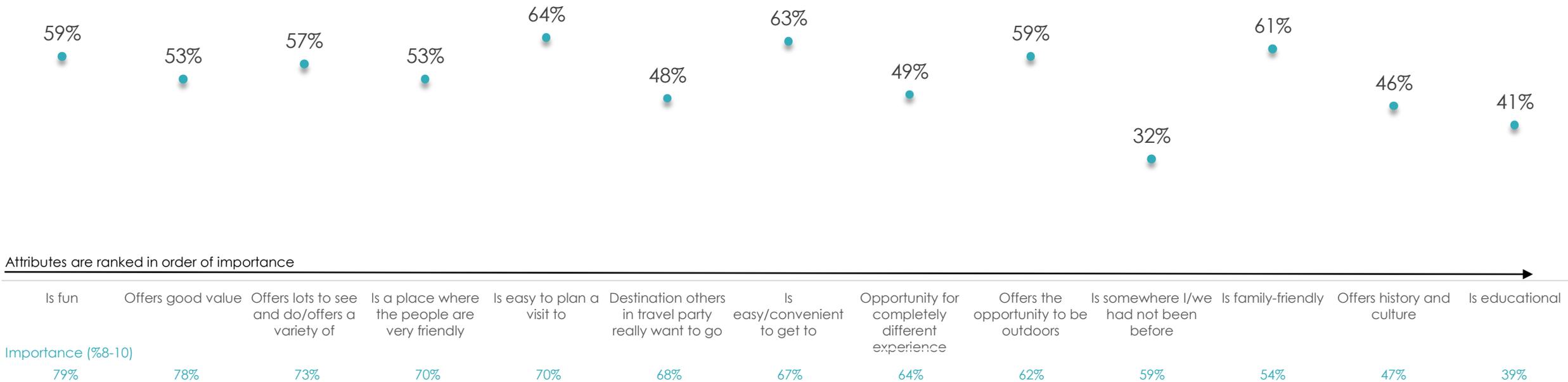


Detailed Evaluation of Visit

Among Recent Visitors (n=302)

Further, most felt their **recent visit delivered against what they look for in a travel destination**, including being easy to plan, easy to get to, fun, variety of activities and good value. Interestingly, **scores were lower on some of the dimension tied to excitement and unique experiences**, suggesting an opportunity to dial this up in marketing communication and product offerings.

% Giving a Rating of 8 to 10
 On a 1 to 10 Scale From Does Not Describe At All to Describes Perfectly
 Base: Recent Visitors (n=302)



Reasons For Being Very Satisfied With Visit

Those who were highly satisfied with their visit **felt the area offered lots to see and do**, indoors and out.

Reasons For Being Very Satisfied With Visit

Base: Those who rated satisfaction level an 8 to 10 (n=199)

“I **like the area and what it has to offer** and am really close.”

“The entire trip was really **one of a kind**, and was the **perfect mix of variety** that took my mind off of my life back in Toronto.”

“Very satisfied with my visit. the **area offered lots to see and do**, a nice atmosphere. very lively and enjoyable. It is the perfect place to visit, to wind down, get away, relax, or try something new.”

“It offers a **wide variety** of outdoor and indoor activities.”

“It has **plenty to keep me interested** and I will continue to visit the area as it is very relaxing.”

“**Lots of things** to do.”

“Very Satisfied, we went to the **art gallery**, had **dinner** in a very nice restaurant.”

“Good **fun day of activities.**”



Reasons For Moderate Satisfaction Levels

Those who expressed lower levels of satisfaction **seemed more likely to have only visited one specific attraction** and didn't seem to have a chance to explore the area.

Reasons For Being Moderately Satisfied With Visit

Base: Those who rated satisfaction level a 1 to 7 (n=199)

“Don't have much to say, I **didn't participate in anything else other than Legoland.**”

“I **just visited Vaughan Mills Mall.**”

“**Did not really take the time to see** anything.”

“Just a day trip, **nothing special!!**”

“Just **another casino.**”

“It was average, although I've **only been in a small section of that area.**”

“I was at Wonderland. It was a day trip; fun but not a place I am eager to go to again soon. I **still do not know what else the region holds.**”



Reasons For Being Very Satisfied With Visit

In the qualitative research we heard that the **way one is treated is a primary differentiator between a positive and negative experience**, suggesting this defines the experience and will encourage repeat visits and positive word of mouth.

- Treated well; with respect
- Not judged
- Inviting atmosphere
- Happy, enthusiastic people (staff plus other visitors)
- Good service
- Well organized

In addition:

- All the amenities needed are on hand and clean
- No crowds
- No hidden costs

Reasons For Being Very Satisfied With Visit

This was corroborated in the quantitative research phase. **Those very satisfied with their visit were more likely to describe a connection with others** – either with the “locals” at the place they visited or because of something that the place they visited did to make them feel more connected to those they were with.

Reasons For Being Very Satisfied With Visit

Base: Those who rated satisfaction level an 8 to 10 (n=199)

Our visit had a purpose due to out of country visitors. **They had a day they will always remember** and I revisited a gallery I had enjoyed on a couple of previous visits.”

“The few times we have been there the **people were very nice**. The food was exceptional and the few sights we saw were great.”

“People are **very friendly**.”

“Really had a **fun and memorable time**.”

“The area allowed for a **different experience** when compared to my daily life. For **my family and friends the area offered a bit of an escape**. We enjoyed nature, dined at a great restaurant and visited a gallery. My rating is not higher as, for me, the area doesn't exactly feel like a holiday spot. The areas offers a great deal to visitors and if you take advantage of their calendar of events, during certain times of the year, the area offers extras such as festivals, farmer's markets, child-focused events, etc. as well as the local restaurants and independent retailers. I just don't really think of it as a destination spot.”

“Had an **enjoyable trip with the family**.”

“It's a **lovely area with friendly people**.”

“We had a great time...**kids and adults all loved Jungle Cat World**.”

“I was very satisfied with the trip as was my mother. **Everybody we met were very friendly and that sure goes along way when you are visiting a new place** for the first time and you don't know where anything is, and very nice place at that.”

“I had a great time and **saw many friends and made new ones**.”





When informed of what the area offers, enthusiasm
abounds....

Thoughts After Visiting the Website

As part of the qualitative forum we had respondents visit the York Durham Headwaters website. **After visiting the website, respondents were excited by the region**, as evidenced by the following respondent quote:

“

The region has a lot to offer. The area is full of quaint towns and villages such as Kleinberg and Uxbridge. There are many natural hiking trails and parks offering plenty of outdoor activities. There are several cultural centres which are rich in history. The area is a short drive from Toronto and you can plan day trips to shop, eat at great restaurants or visit several farmers markets.

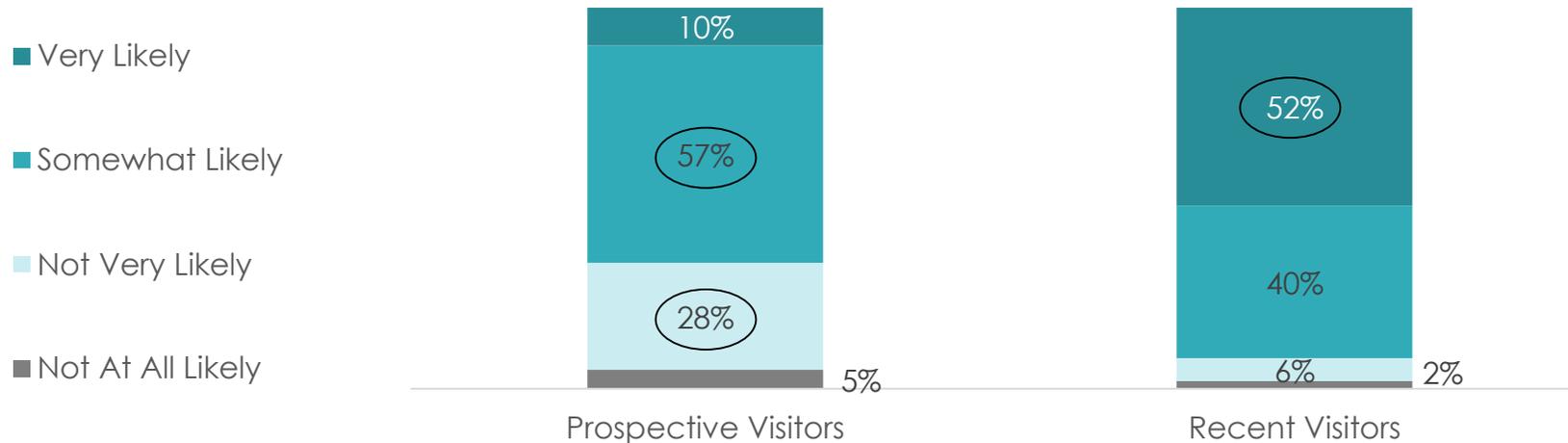
”

Likelihood of Visiting After Becoming More Informed

Similarly, after being told more about the area and the specific attractions in the region in the quantitative research, **52% of Recent Visitors said they would be very likely to visit the region** in the next 12 months and **67% of Prospective Visitors said they are at least somewhat likely to visit.**

Likelihood of Visiting York, Durham, Headwater Region After Becoming Informed of the Area's Highlights and Attractions

Base: Recent Visitors (n=302); Prospective Visitors (n=507)



% Very Likely	AGE			GENDER		HHLD COMPOSITION		HHLD INCOME		REGION	
	18-34	35-54	55+	Men	Women	Kids	No Kids	<\$75K	\$75K+	Ontario	US
Recent Visitors	46	59	47	49	54	53	51	53	51	52	n/a
Prospective Visitors	13	14	6	12	9	20	7	10	11	9	15

Most Compelling Aspects of Region

In the qualitative research participants told us the **most special or unique aspects** of the York Durham Headwater region are the...

- Variety of activities/venues/destinations
- Slower pace / quaintness
- Nature /countryside / scenery
- History and culture

Reasons For Being Very Likely to Visit Area

We heard a similar perspective in the quantitative research among those very likely to visit the area, with several **surprised to learn that the region offers so much to do.**

Reasons For Being VERY LIKELY to Visit Area

Base: Those who said they would be very likely to visit the area (n=209)

“It looks like there's **lots to do for both adults and kids.**”

“There are **so many attractions to visit** such as going for a walk, visiting the rail and tasting the fresh baked goods.”

“Because **now that I know about all the cool stuff there, I'd love to visit.**”

“Learning of the other opportunities to explore and experience, I **realize that my familiarity with the area was not quite as knowledgeable as I had thought.** I am excited to discover these other areas now.”

“There are **more attractions there than I realized.**”

“I now know that there is **a lot more to see and experience in this destination than I had previously thought** on my first trip. Because my first trip was so enjoyable, I am very inclined to go back.”

“I was already likely to make a return visit to the region, but **a number of attractions mentioned earlier had escaped my mind and now are serving to entice me back sooner.**”

“Well my family lives here and I had **no idea the wonderful places I have wanted to check out before are actually here.**”

“I now know that **there are a lot of neat experiences I can have here.**”

“**Conveniently** located.”

Most Compelling Highlights of Area

Of the area's highlights, both Prospective and Recent Visitors would be most compelled to visit the area by the **promise of seasonal flavors and one-of-a kind eateries**, the **outdoor experiences** (rolling hills, abandoned railways, bike trails) and the **Rural Routes and Dirty Boots Discovery Route**. Not surprisingly given they have some familiarity with the area already, the area highlights are more influential for Recent Visitors.

% Rating Influence on Likelihood of Visiting an 8-10

On a 1 to 10 Scale From Not At All Influential to Very Influential

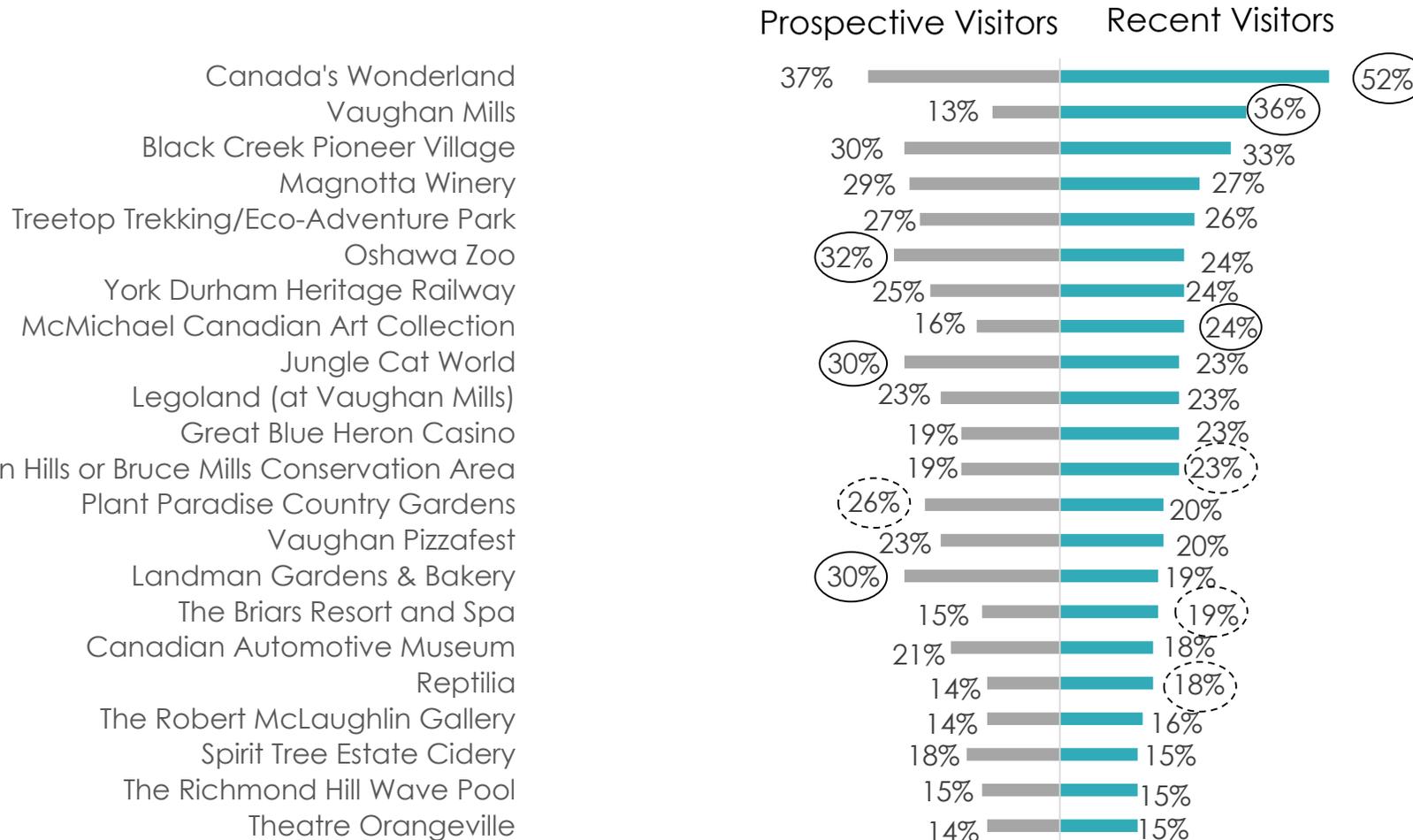
Base: Recent Visitors (n=302); Prospective Visitors (n=507)

	Prospective Visitors	Recent Visitors
Visitors to the region can enjoy seasonal flavours at one-of-a-kind eateries ranging from fine dining affairs to cozy nooks serving up home-style favourites. Coffee connoisseurs and those with a sweet tooth aching to be satiated will also be sure to find what they're looking for.	50	57
Rolling hills, abandoned railway lines and treed-in pathways make the area common ground for hikers and mountain bikers. Make your way to the summit of a bluff for a view unlike any other, or challenge yourself to explore new terrain among some of the most picturesque natural settings you'll find in Ontario.	41	53
The Rural Routes and Dirty Boots discovery route stretches from the waterfront shores of Lake Ontario to the rural sites of the Oak Ridges Moraine. These locations are open for visitors to fully experience their fresh artisanal beers, ciders and local flavours of the Greenbelt. Take a tour, meet the brewer or grower and discover their partners' offerings like beer butter tarts, crunchy beer brittle, wholesome spent grain bread, apple cider doughnuts, cheesy ale soup and even brew school.	40	53
Home to Canada's Wonderland, Legoland, The ROC and the Richmond Hill Wave Pool, there is no shortage of thrilling activities for kids.	30	51
Whether you're an avid arts and culture aficionado or simply seeking a better appreciation of the local talent, there's no shortage of theatrical performances, galleries, and museums at your disposal.	35	47
From high fashion to hand-made gifts, from quant main streets and farmers markets to one of the largest shopping malls in Canada, the area boasts great places to find the perfect something for that special someone.	36	46
The York Durham Headwaters region is home to world-class and picturesque golf courses, including Osprey Valley, Wooden Sticks and Angus Glen.	18	37

Most Compelling Attractions

Attractions Most Interested in Visiting – Top Mentions*

Base: Recent Visitors (n=302); Prospective Visitors (n=507)



Of the specific attractions in the area, Recent Visitors express the most interest in visiting **Canada's Wonderland, Vaughan Mills and Black Creek Pioneer Village**, while Prospective Visitors express the most interest in **Canada's Wonderland, Oshawa Zoo, Black Creek Pioneer Village, Jungle Cat World and Landman Gardens & Bakery**, speaking to the importance of highlighting the regions diverse range of activities.

*Top mentions – mentioned by at least 15% of Recent Visitors or Prospective Visitors

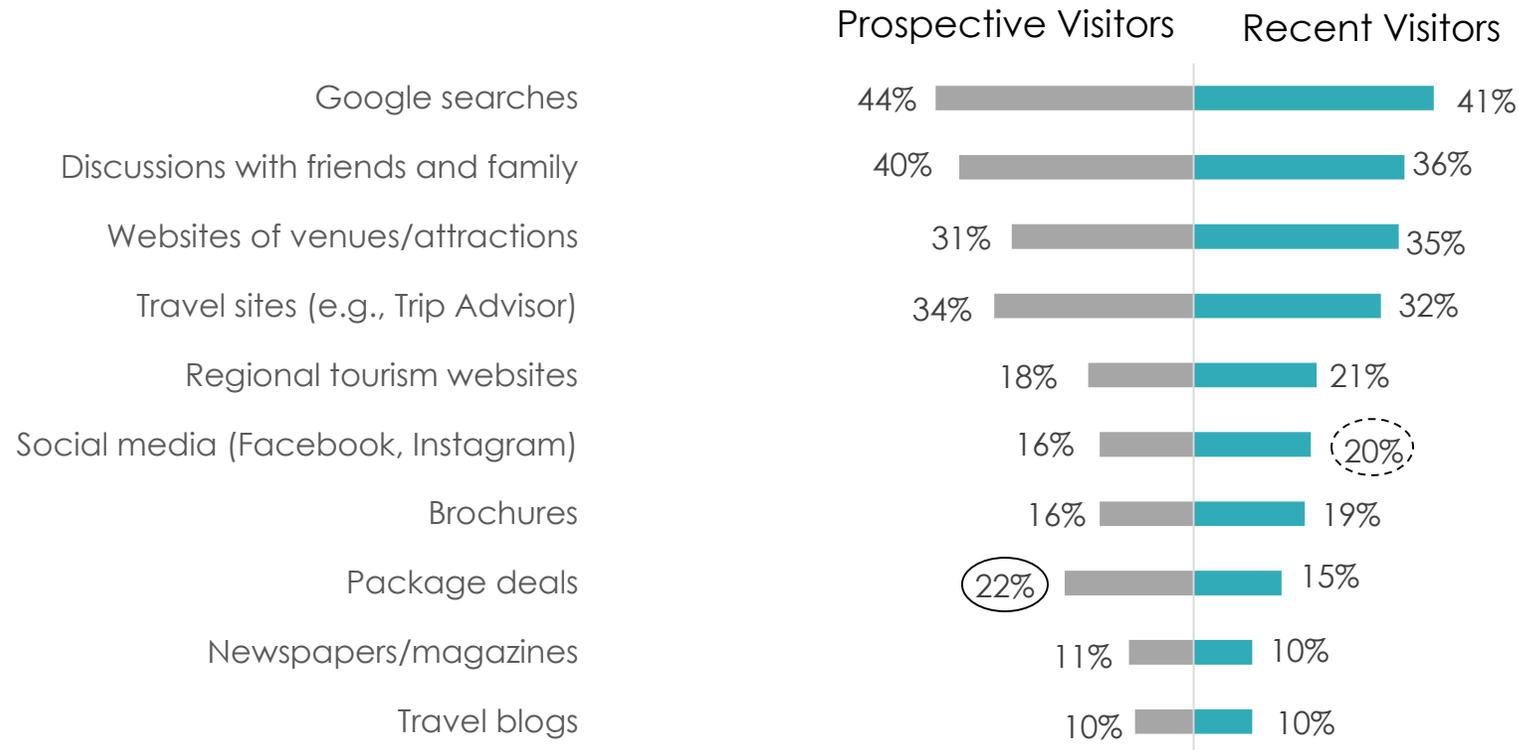
Q34b. Below are some of the attractions / activities available in the York Durham Headwaters area. If you were to take a trip to this area, which would you be most interested in visiting?

Main Sources of Travel Information & Inspiration

Among both Recent and Prospective Visitors, in addition to word of mouth from friends / family, **google searches, websites of venues and attractions, and travel sites** are the primary sources of travel information and inspiration suggesting communication efforts should be focused on these channels.

Main Sources of Travel Information and Inspiration

Base: Recent Visitors (n=302); Prospective Visitors (n=507)



PATH FORWARD

Path Forward

The York Durham Headwaters area is **not well known** as a travel destination.

This **lack of familiarity** with the area means the region **lacks appeal** as a travel destination.

Similarly, this lack of familiarity with the area means many **visitors come to the area to see a specific attraction** and **do not have full appreciation for all that the area offers**.

Generally speaking, most visitors are **satisfied with their visit, likely to return again**, and **likely to recommend** the area or attraction they visited.

When travellers are told more about the area and the diverse range of attractions and activities, they **are surprised**, but **enthusiasm abounds**.

The culmination of a **wide range of activities** (indoor and outdoor and for all age ranges), **slower pace / quaintness, nature / scenery** and **history and culture** are seen to make this area special / unique.

Clearly, there is a need to **boost awareness of the region** as a travel destination.



Path Forward

Awareness building efforts should focus on the key sources for travel information and inspiration which include **Internet searches, destination / venue websites** and **travel websites**, as well as more **mass advertising channels** such as **TV, radio and print**. Qualitative participants even suggested inviting TV hosts to broadcast from locations. The key is to **give prospective visitors a glimpse into all the area offers and create excitement**.

Communication messages should focus on the **diverse & unique range of activities, locational convenience** and **serenity / beauty of the area...**

“Undiscovered local attractions”

“Be a tourist in your own backyard” “Tourist for a day”

“Try something you have never done before”

“Feel like you are a thousand miles away”

“All this only two hours from home!”



Path Forward

Many visitors are currently coming to the area to **visit a single attraction or venue**. However, **when they visit the area** rather than one specific attraction, they are **more likely to stay longer** and **tend to be more satisfied with their visit**. Accordingly, there may be **value in some sort of “passport” program** to encourage visitors to explore the area rather than visit a specific venue or attraction.

A **primary differentiator between a good experience and a great experience is a connection with others** – either with the “locals” at the place they visited or because of something that the place they visited did to make them feel more connected to those they were with.

Going forward it will be **important to work with the various venues and attractions within the area to look for opportunities to create these connections** as it is often what defines the experience and **will encourage repeat visits and positive word of mouth**.



THANK YOU!

APPENDIX

Primary Associations With York Durham Headwaters

Primary Associations With York Durham Headwaters As a Travel Destination

Base: Those with at least some level of familiarity with area (n=185)

	%
Canada's Wonderland	14
Good sites / scenery	7
Water / Water Falls	5
Fun / exciting	4
Shopping	2
Vaughan Mills	2
Variety of attractions	2
McMichael Gallery	2
Easy Access	2
Good outdoors	2
Winery	2
Caledon	2
Casino	1
Canadian Tire Motorsport	1
Newmarket	1
Orangeville	1
Fishing	1
Interesting	1
Parks	1
Trails	1
Oshawa Zoo	1
Calm / relaxing	1
Don't know	43

The larger the font, the more often the association was mentioned



See appendix for frequency of mentions

Q20. [IF Know a little; Fairly familiar OR Very familiar AT Q19 ASK] When you think of York Durham Headwaters as a travel destination, what comes to mind first?

Reasons For Being Unlikely to Visit Area

Those unlikely to visit the region in the next 12 months tend to have travel priorities outside of Ontario or even Canada.

Reasons For Being UNLIKELY to Visit Area

Base: Those who said they would be not very likely or not at all likely to visit the area (n=192)

“I am interested in more exotic tropical international destinations.”

“Ontario isn't at the front of our list.”

“Would like to go to visit but its not a high priority.”

“I prefer to go out of the country for vacation.”

“I still don't know too much about it and have other places I might prefer to travel to first.”

“Overall, it's presented as being more quaint than what would appeal to me. I like visiting big cities. I've been to Toronto several times, and have enjoyed visiting Canada's Wonderland, and would likely visit it again if I were in the area.”

“We tend to book international vacations. However, if Canada was our priority, the York Durham and Headwater region certainly sounds interesting.”

“We have other trips planned.”

Continue the Conversation

For questions or further discussion, please contact...

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