



Huntsville Municipal Accommodation Tax Association: Travel Plans of Ontarians to Huntsville

pollara
strategic insights

August 2020

Research Methodology

- An online survey was conducted among a randomly-selected sample of N=900 adult (18+) Ontario residents who are very or somewhat likely to travel within Ontario in the summer, fall or winter.
- The interviews were conducted between July 27 to August 5th, 2020.
- As a guideline, a probability sample of this size carries a margin of error of $\pm 3.3\%$, nineteen times out of twenty. The margin of error is larger for sub-segments. Although demographic and regional quotas were employed to ensure reliable and comparable sub-segment analysis, the dataset was weighted to ensure the sample is representative of the Ontario population by region, age and gender. Discrepancies in total % are due to rounding.

Region	Number of Interviews	Margin of error
Toronto	200	$\pm 6.9\%$
GTA Belt	200	$\pm 6.9\%$
Greater Ottawa Area	100	$\pm 9.8\%$
Southwest	200	$\pm 6.9\%$
Eastern	100	$\pm 9.8\%$
Northern	100	$\pm 9.8\%$
Ontario	900	$\pm 3.3\%$



Key Findings

COVID-19 is making Ontario travellers hesitant to travel outside of Ontario, but most are willing to make plans in province.

- Prior to COVID-19, these Ontarian travellers had booked their summer plans, and a majority were planning travel for both the fall and winter. Travel within the province was most popular in the summer months but in the fall months, Ontarians were booking more international travel, particularly in November and December.
- Because of COVID-19, most Ontarians have cancelled summer travel plans outside of Ontario. Ontarians are far more comfortable travelling within the province and a majority have not cancelled local travel. Those who have cancelled, plan to stay close to home, go on daytrips and replace travel outside the province to destinations within Ontario.
- Ontarians are more optimistic about fall and winter travel plans and are hesitant to cancel destinations to other parts of Canada and abroad. Half believe they will still travel within Canada and more Ontarians will consider travelling outside of Canada than in the summer (although a majority have cancelled plans). Those who have cancelled will wait to see what happens or travel when it's safe, or just stay home and go on daytrips.
- Overall, fewer Ontarian travellers currently have travel plans compared with before the COVID-19 outbreak. However, they are booking travel within the province at the same rate as before the COVID-19 outbreak regardless of season. Ontarians say they are travelling because they need to get away or outside the city.
- Covid-19 is changing the priorities of Ontarians travelers and most are thinking about staying safe and taking precautions when travelling including ensuring that accommodations are following COVID-19 safety protocols and limiting plane travel. And only half of Ontarians feel safe travelling within the province.

Muskoka and Huntsville are popular for their outdoor activities, but less for cultural experiences

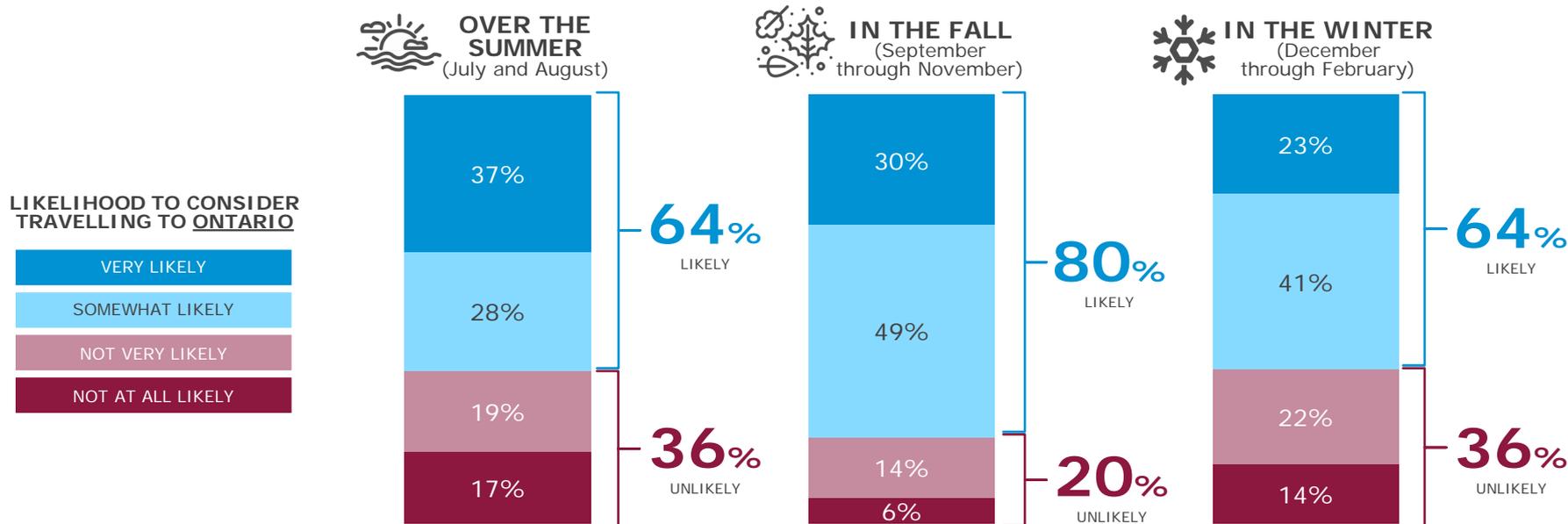
- The Muskoka region is the most popular travel destination in the summer and is also popular in the fall, and Huntsville is the second most popular destination within this region (behind Algonquin Park). As the winter months approach, Ontarians begin gravitating toward cities such as Toronto and Ottawa as travel destinations.
- Huntsville is a competitive destination with many other areas of the province, but is not the preferred destination compared to any of them. In fact, travellers would prefer to visit to Prince Edward County, Ottawa or Niagara than to Huntsville.
- Despite the fact that more than half of the Ontario travellers' population has been to Huntsville, still most have a low familiarity with the area. It is best known for its scenic views, tranquility and outdoor activities. And it performs well in these areas, bringing those who want these types of experiences. However, travellers are less aware of a different side of Huntsville, that offers different experiences for families or adults, culture or even shopping. Outside of Algonquin Park and, to a lesser degree, Arrowhead Park, travellers are unfamiliar with Huntsville attractions.
- Hearing about the Huntsville offerings, even in the confines of the survey, helped to increase interest in visiting the area, particularly in the summer and fall.
- Travellers to this area are likely to stay only a few days and are likely to look to hotels for accommodations.

RECOMMENDATIONS

- Huntsville does not need to fight against any negative impressions among Ontario travellers. It is a popular area of Muskoka and would be a travel consideration compared to most other areas of Ontario.
- However, Ontarians need to know more about what Huntsville has to offer, with even those who have visited saying they are not very familiar with it and have low awareness of almost all attractions (outside of Algonquin Park).
- Huntsville's primary draw is its beautiful scenery and tranquil nature. These are a cost of entry for this area and should not be forgotten. In fact, focusing on Huntsville's lakes and beaches to explore and as a gateway to Algonquin Park are most influential to increase visitation.
- While not forgetting the scenic beauty of the area, increasing awareness in other sides of Huntsville, such as cultural activities dining/patio options or shopping, could increase interest and competitiveness. This could also differentiate it from other areas of Muskoka, increase the lengths of stay to the area and provide more reasons to travel through winter months.

The Fall is the most popular season for travellers within Ontario

- Eight in ten (80%) Ontarian travellers are likely to travel within Ontario in the fall. Fewer, but still a majority are planning to travel over the summer (64%) or during the winter months (64%).
- Ontarians living in Northern Ontario (79%) and Toronto (71%) are more likely to travel within Ontario in the summer.
- Younger Ontarians (18-34 years) are most likely to travel within Ontario in the summer (75%), while two-thirds of 35-54 year olds are likely to travel (68%), and 55+ year olds are least likely to travel in summer (51%).



Base: Total (N=900)

SCR6. How likely are you to travel within Ontario, spending at least one night away from home, staying at a paid accommodation (hotel, motel, Airbnb, cottage rental, campground, etc.) in the following time periods. * Details in the notes

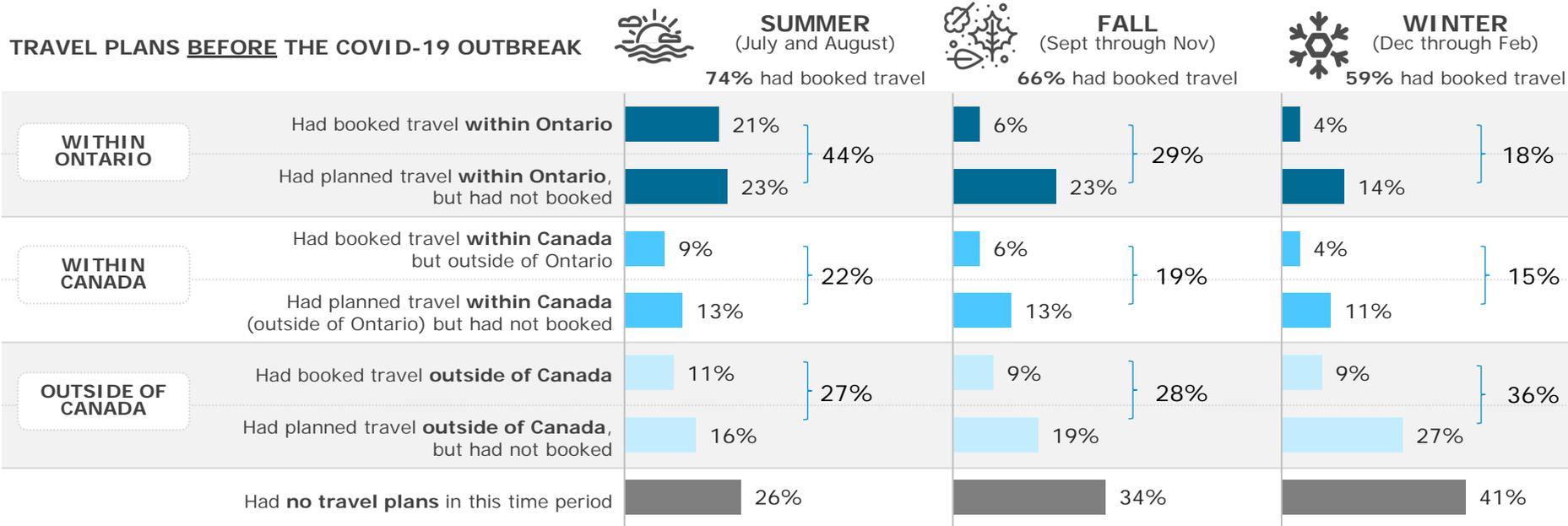


Travel During COVID-19

pollara
strategic insights

Prior to COVID-19, travellers were most likely to be traveling within Ontario in the summer or out of country this winter

- Prior to COVID-19 two-fifths (44%) of Ontarian travellers had booked or planned travel within Ontario over the summer, while only a fifth (22%) had booked or planned travel within Canada and a quarter (27%) outside of Canada.
- Ontarians who booked travel in the fall were equally likely to have booked in the province (29%) as international travel (28%); and winters travelers were more likely to have booked outside of Canada (36%) than within the province (18%).



Base: **Total** (N=900)

A1. Now we would like to understand how the COVID-19 outbreak in Canada has impacted your travel plans over the next few months. Before the COVID-19 outbreak, had you booked or plan any travel in the following time periods? Please include travel where you were staying at paid accommodations for at least one night (hotel/motel, resort, house/cottage rental, campground), not travel where you were staying with friends or family, at a vacation home that you own or daytrips.

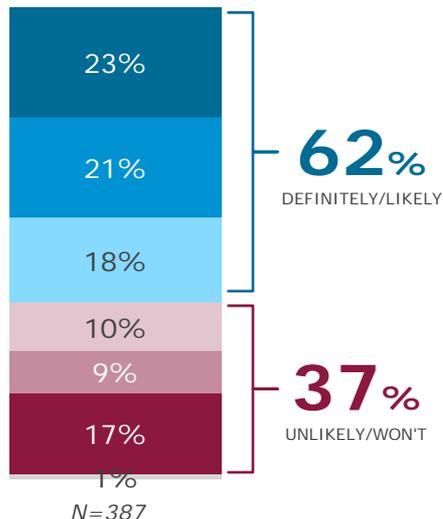
Ontarians who booked summer travel within the province are most likely to travel as planned

- A majority of Ontarians (62%) who booked travel within the province are likely to keep their plans with a quarter saying they have confirmed plans and a fifth (21%) very likely to still travel. Only a third (37%) are cancelling travel plans.
- Ontarians with travel plans outside the province are far more likely to cancel their plans, with a majority (62%) likely to cancel plans within Canada and most (86%) cancelling plans outside of Canada – a majority (61%) have already cancelled summer travel plans outside of Canada.

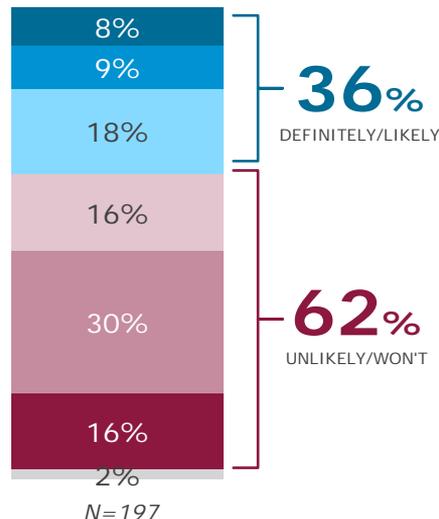

 PLANS FOR THE **SUMMER**
 BEFORE COVID-19 OUTBREAK



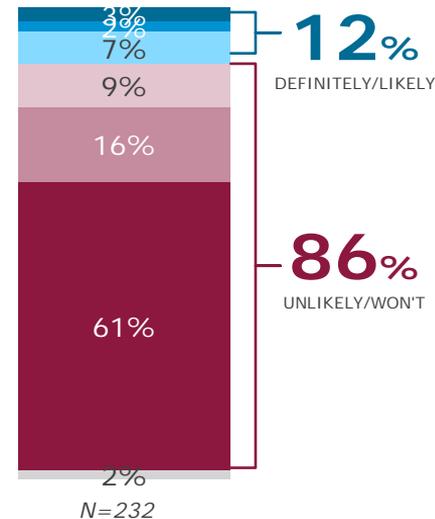
Travel within Ontario



Travel in Canada



Travel outside Canada



Base: Those Who Have Booked Or Planned Over The Summer

A2. Please consider the travel plans you had made for the summer, before the outbreak of COVID-19. Due to the COVID-19 outbreak, how likely do you think it is that you will be traveling as planned?

Because of COVID-19, Ontarians will stay home or travel within the province

- Ontarians who cancelled plans are interested in a number of options to replace travel. Two fifths (39%) plan to stay home while a third say they will make daytrips (34%) or travel to destinations within the province (33%).
- A third also say they will save money to travel when it's safe (33%) and more than a quarter (28%) will wait and see when travel is advisable.



PLANS FOR SUMMER SINCE COVID-19 OUTBREAK: Ontarians staying close to home



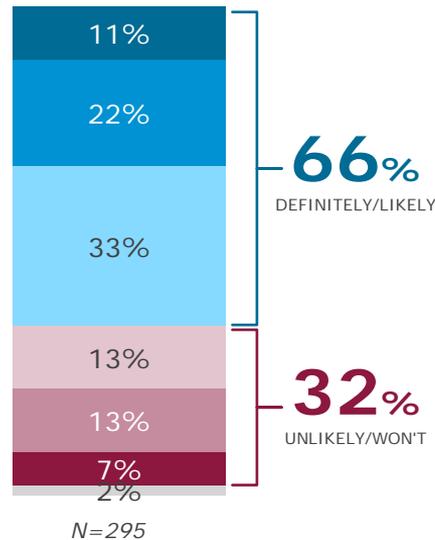
Fall/winter travellers most likely to travel as planned within Ontario; more hesitant to travel outside the province and won't outside of country

- A majority of Ontarians (66%) who booked travel within the province for the fall are likely to keep their plans although fewer have confirmed plans (11%) compared to Ontarians traveling within the province in the summer (23%).
- As the COVID numbers drop and the province opens up, half (54%) of Ontarians are planning to travel to other parts of Canada as planned – significantly more than in the summer months (36%)
- However, although more comfortable with international travel than in the summer, three quarters (73%) are likely to not travel internationally.

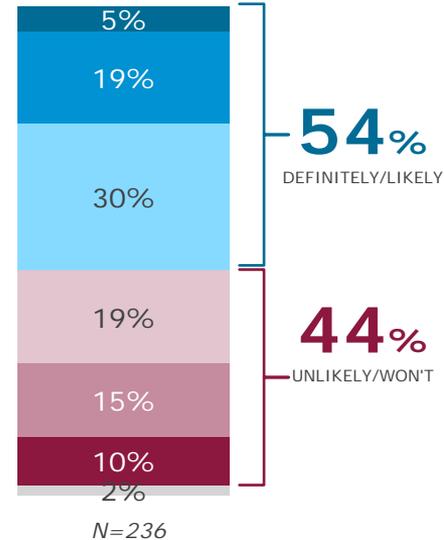
PLANS FOR THE **FALL OR WINTER**
WITH COVID-19 OUTBREAK



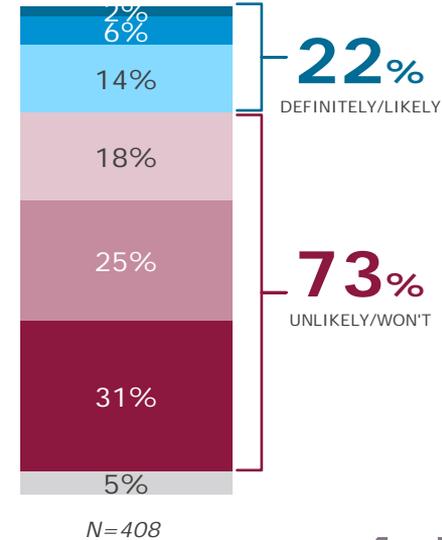
Travel within Ontario



Travel in Canada



Travel outside Canada



Base: Those Who Had Booked Or Planned In Fall Or Winter in A1

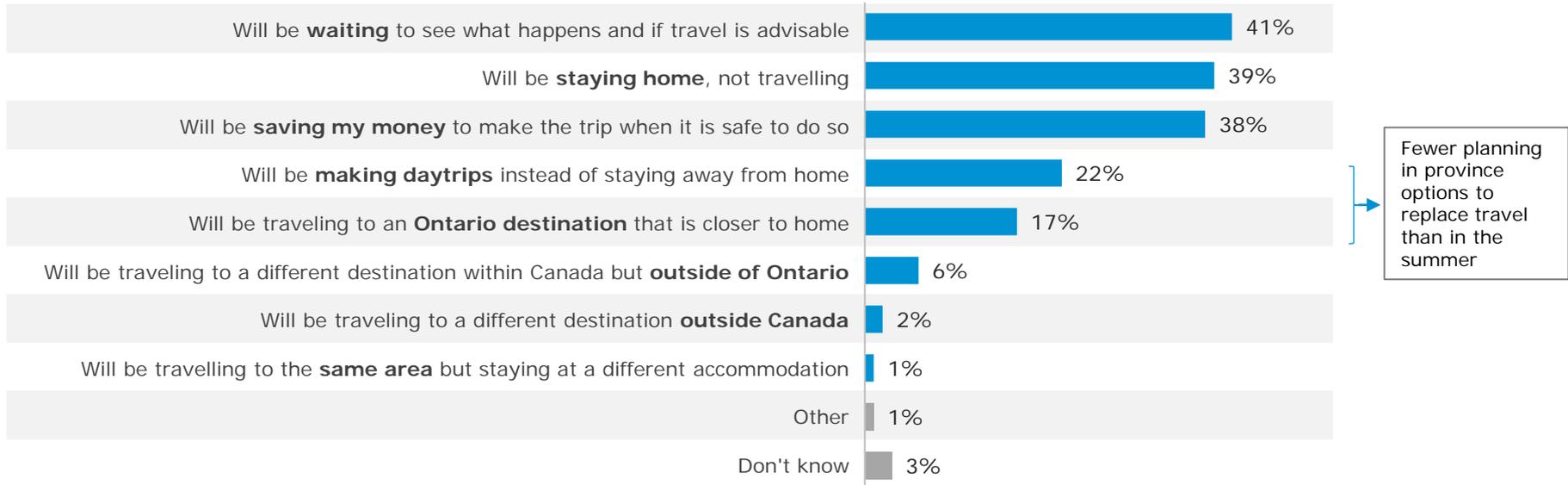
A4. You mentioned that you had made plans to travel in the Fall or Winter. Due to the COVID-19 outbreak, how likely do you think it is that you will be traveling as planned?

Because of COVID-19, Ontarians cancelling plans will wait until travel is advisable or stay home

- Two-fifths of Ontarians will wait to see if travel is advisable at a later date (41%) or will save money and make the trip when it is safe (38%).
- Two-fifths (39%) say they will stay at home and not travel.
- Only a fifth (22%) will make daytrips as a replacement and less than a fifth (17%) will choose travel within the province as an alternative to Fall travel plans.

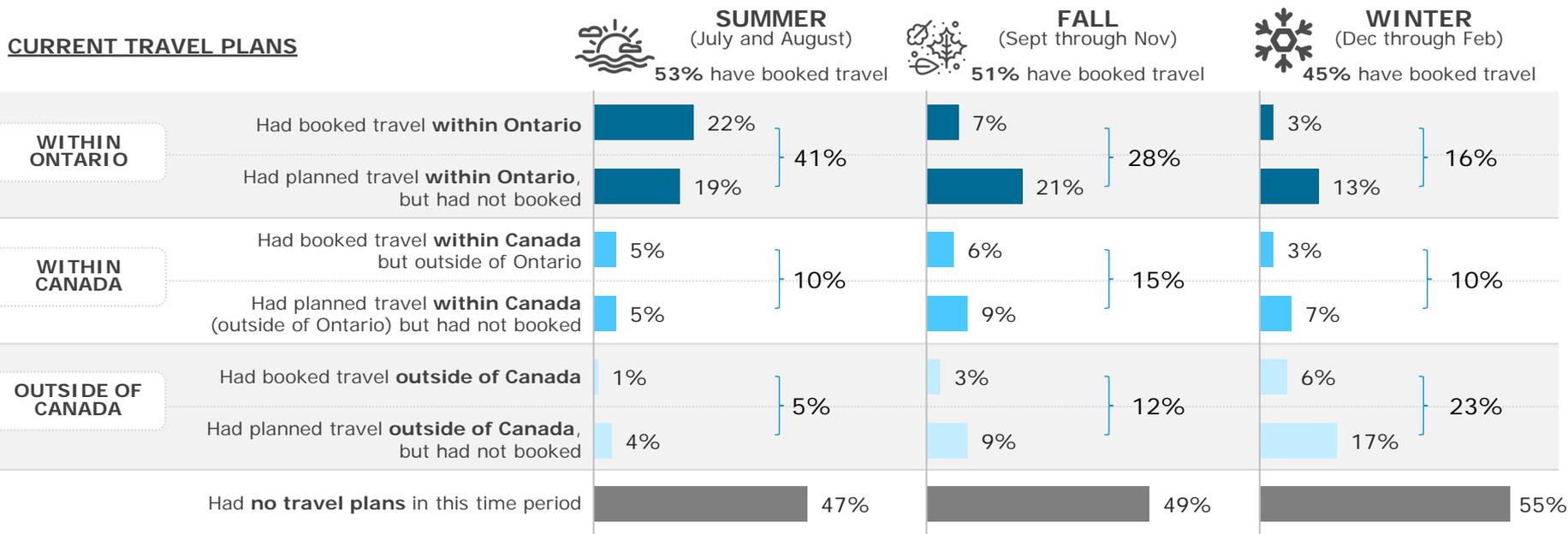


PLANS FOR FALL/ WINTER SINCE COVID-19 OUTBREAK: Ontarians waiting until it's safe or staying home



Currently fewer Ontarian travellers have travel plans than before COVID-19 – In-province travel most popular

- Currently two-fifths (41%) of Ontarians have booked or planned travel within Ontario over the summer, while just over a quarter (28%) have planned in-province travel for the fall.
- Few Ontarians have booked travel for other parts of Canada for any season (only 10-15%).
- International travel is popular in the winter and a quarter (23%) are planning to travel outside of Canada.



Base: Total (N=900)

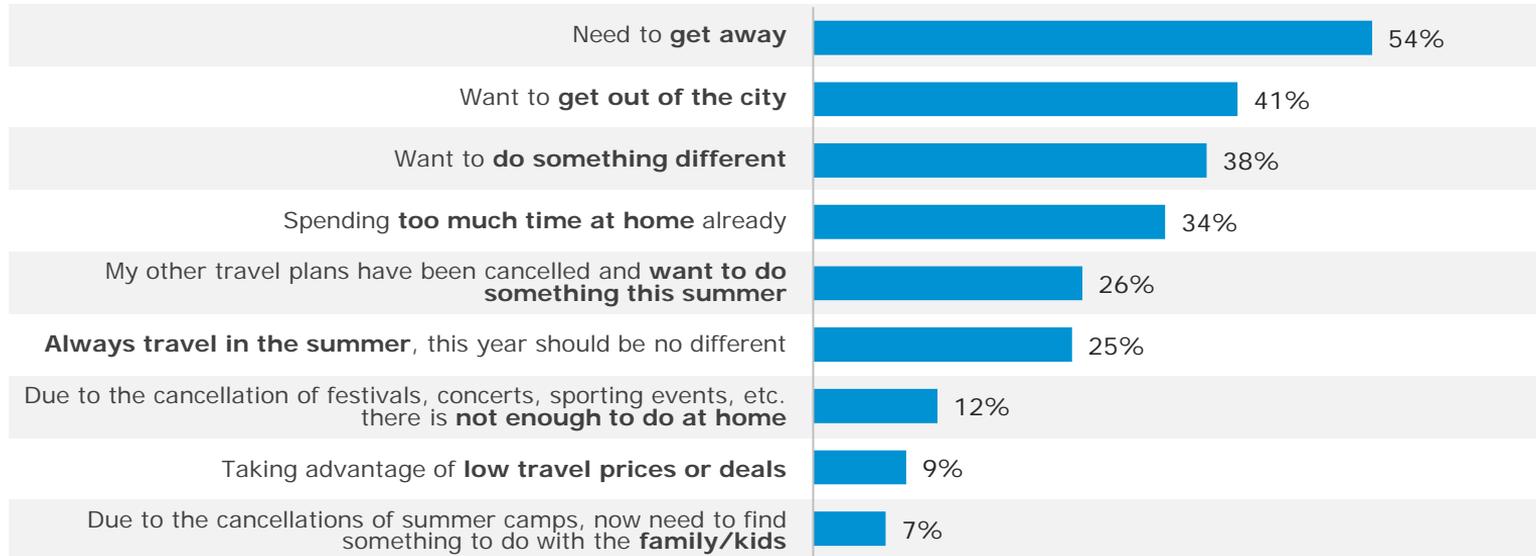
A6. Considering plans you made before or since the outbreak of COVID-19, do you currently have any travel plans in any of the following time periods?

Ontarians booking travel because they need to get away or out of the city

- Just over half (54%) of Ontarians who booked or are planning travel this summer say they need to get away. And two-fifths would like to get out of the city (41%) or want to do something different (38%).
- Only a quarter (26%) are travelling because other plans were cancelled and only a few directly because of cancellations of festivals and events (12%) or summer camps for kids (7%) because of COVID-19.



REASONS FOR TRAVEL PLANS THIS SUMMER

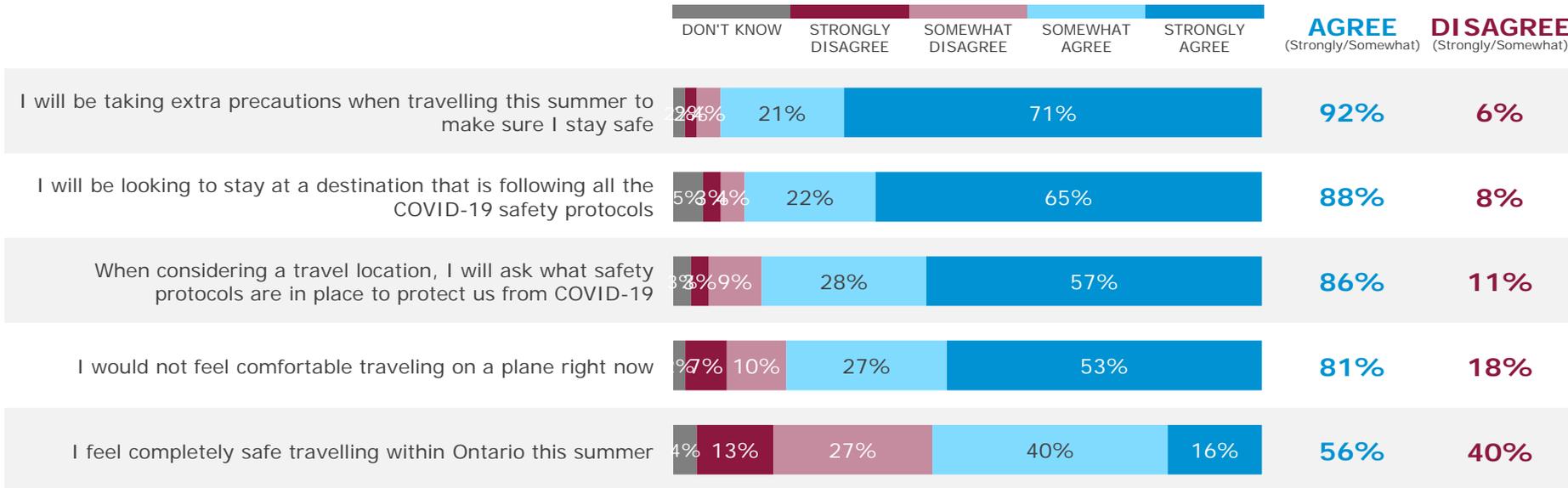


Base: Those who Booked Or Planned Travel This Summer (N=461)

A7. Why have you made these travel plans for this summer?

Because of COVID-19 Ontarians are cautious and take safety precautions when travelling

- Almost all (92%) of Ontarians are taking extra precautions to make sure they are safe when travelling this summer because of COVID-19.
- Most will be staying at destinations that are following COVID-19 protocols (88%) and will ask what safety protocols are in place (86%).
- Eight in ten (81%) Ontarians also say that they would not feel comfortable on a plane right now.
- Reinforcing the importance of safety while travelling, only just over half (54%) of Ontarians say that they feel completely safe travelling, while two-fifths (40%) do not.
- Younger Ontarians (18-54 years) are more likely to feel safe travelling within Ontario in the summer (59-61%) than those who are 55+ (49%).



Base: Total (N=900)

A8. To what extent do you agree or disagree with the following statements.

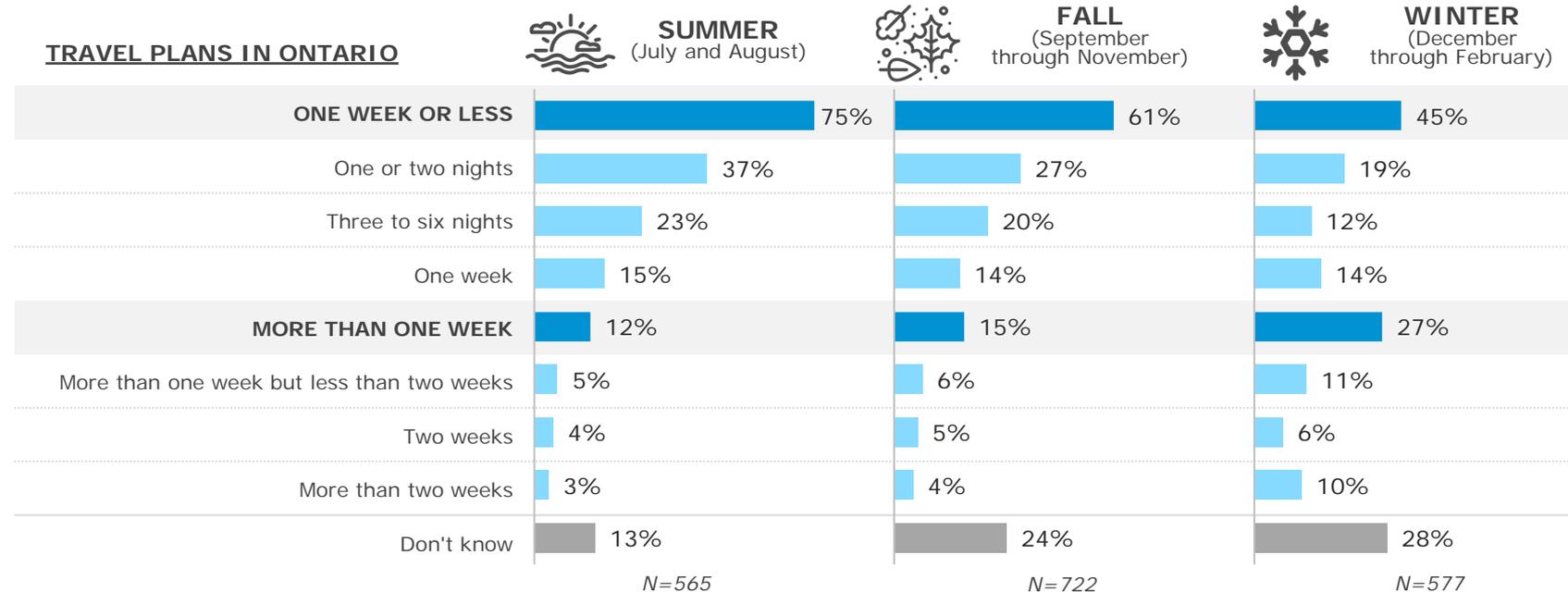


Travelling in Ontario

pollara
strategic insights

Ontarians' travel tends to consist of short stays rather than extended vacations

- In the summer months, three quarters (75%) of Ontarians with travel plans in the province are planning to only stay a week or less away from home, with 37% saying their trip will only be one or two nights. Few plan to stay longer than a week (12%).
- A majority (61%) of fall travelers are also planning to be away for a week or less (with 27% saying this will be one or two nights) and few (15%) for more than a week – a quarter (24%) are undecided.
- In the winter, two fifths (45%) are planning to stay a week or less but a quarter (27%) are considering a longer stay of more than a week – close to a third (28%) have not decided.

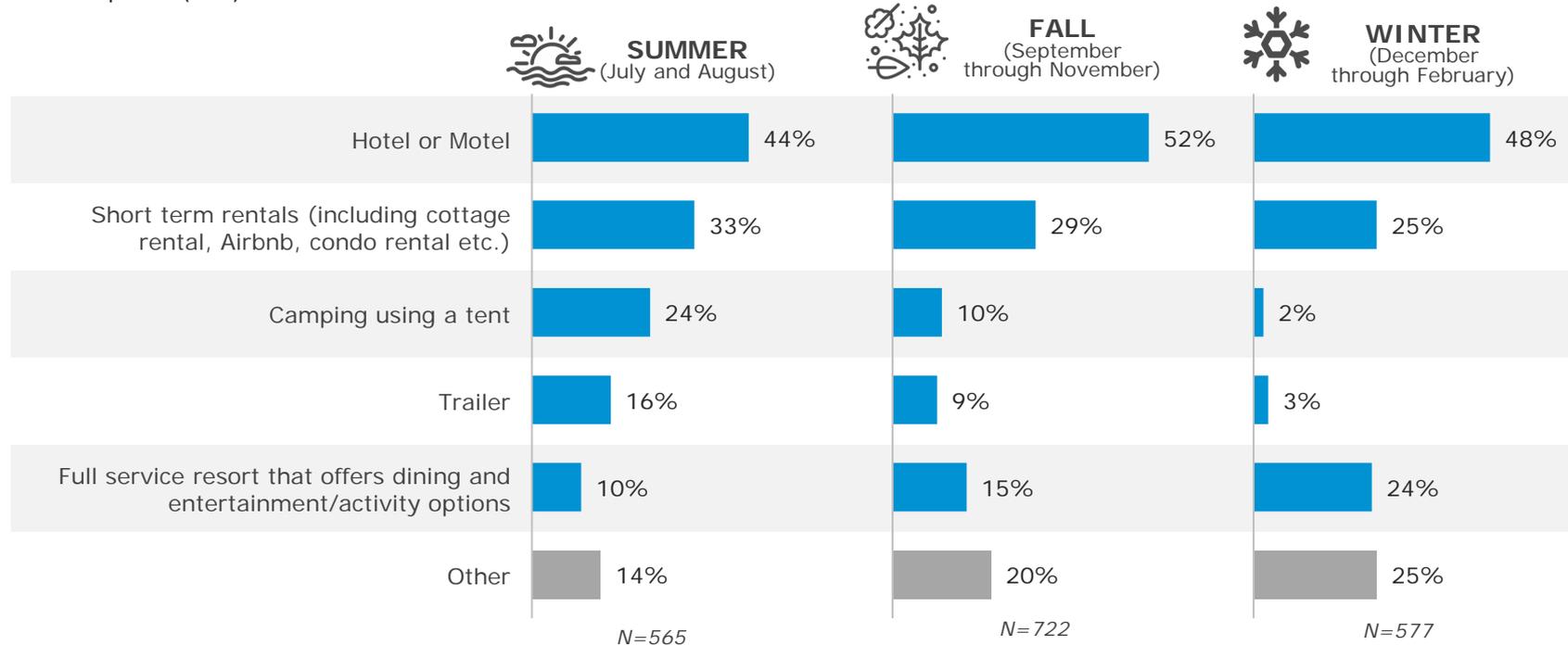


Base: Those Answering Very/Somewhat Likely to travel in Ontario in SCRG

B1. Thinking about your potential travel plans for each of the following timeframes, approximately how long do you intend to stay away from home?

Ontarians prefer hotels and motels when traveling in the province

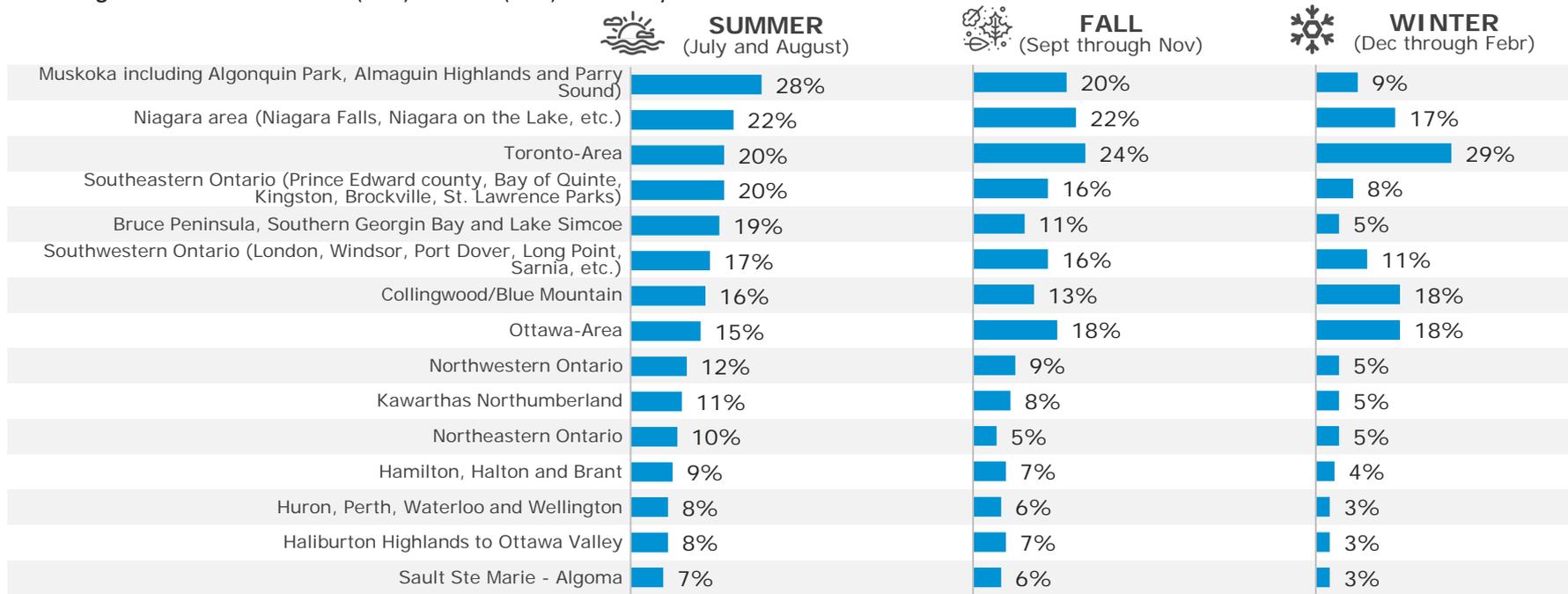
- In the summer two-fifths (44%) of Ontarians plan to stay in a hotel/ motel in the province while a third (33%) opt for short-term rentals and a quarter (24%) plan to camp using a tent.
- Slightly more Ontarians, close to half prefer a hotel/ motel in the fall (52%) and winter (48%), with only a third (29%) choosing short-term rentals in the fall and a quarter (25%) in the winter.



Base: Those Answering Very/Somewhat Likely to travel in Ontario in SCRG B2. And what type of accommodations are you considering for this trip?

Muskoka area is most popular as a destination this summer

- Muskoka is the most popular destination this summer with close to a third (28%) considering travel to the area, more than any other region in Ontario.
- Only a fifth (20%) are considering traveling to Muskoka in the fall, its popularity slipping slightly behind Toronto (24%) and Niagara (22%).
- In winter, few (9%) Ontarians are planning to travel to Muskoka - cities are more popular with a third (29%) planning to visit Toronto and a fifth (18%) Ottawa. A fifth (18%) are also planning to visit Collingwood/ Blue Mountain in the winter.
- **Regional difference:** Toronto (38%) and GTA (38%) more likely to consider Muskoka this summer.



Base: Those Answering Very/Somewhat Likely In SCR6
 B3. Where in Ontario are you considering for your travel?

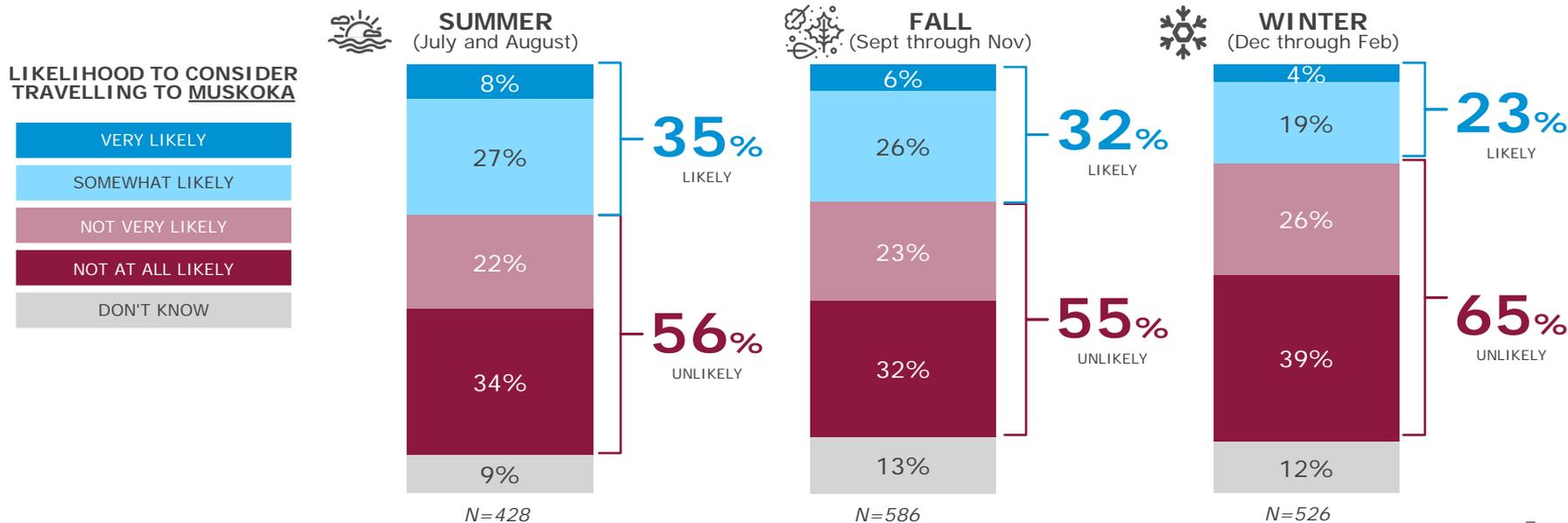
N=565

N=722

N=577

A third of those not currently travelling to Muskoka would consider it in the summer or fall

- A third of those who do not currently have plans to travel to Muskoka would consider the area a vacation destination in the summer (35%) or fall (32%).
- Only a quarter (23%) would consider travelling to the area in the winter.
- Toronto and GTA residents are more likely to consider Muskoka in all three seasons.
- Younger Ontarians (18-54 years) are more likely to consider traveling to Muskoka in the fall and winter.



Base: If Muskoka Not Mentioned In B3

B4. How likely would you be to consider travelling to Muskoka for your vacation? * Details in the notes

Huntsville second most popular Muskoka destination in the summer and fall

- Algonquin Park is the most popular travel destination in Muskoka with a third saying they would consider travel there in the summer (34%) and fall (31%) although the area is less popular in the winter (less than a fifth – 17% - would consider to travel to the area).
- Huntsville is the second most popular destination, slightly edging out Gravenhurst, with a quarter (26%) saying they would consider travel there in the summer and a fifth (21%) in the fall.



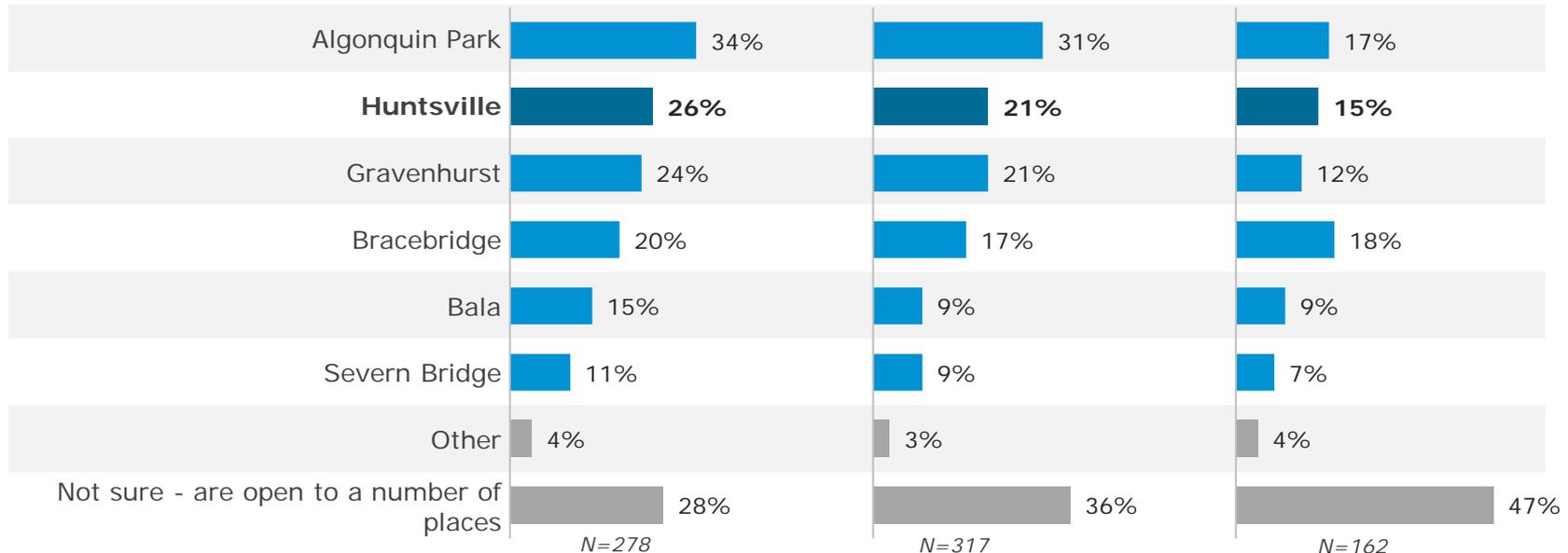
SUMMER
(July and August)



FALL
(September through November)



IN THE WINTER
(December through February)



Base: If Muskoka Mentioned In B3 Or Very/Somewhat Likely In B4
B5. Where in Muskoka would you consider travelling?

Ontarians are open to travelling to anywhere in Muskoka and see the region as diverse

- Three quarters (77%) of Ontarians say that they are open to travelling to any part of Muskoka while only a quarter (23%) have a specific area in mind.
- A majority of Ontarians view Muskoka as having a number of different areas with a variety of activities (60%) while two-fifths view Muskoka as offering the same type of vacation to travelers (40%).
- While more than half see Muskoka as mainly an outdoor area, two-fifths (38%) believe Muskoka offers both culture and outdoor options.

GROUP 1: Ontarians are open to travel to anywhere in Muskoka rather than specific areas

There are **specific areas** within Muskoka that I would like to travel to 23%

I would be open to travelling to **any part** of Muskoka 77%

GROUP 2: Majority of Ontarians see Muskoka as a diverse region

There are a number of very different areas within Muskoka that all offer different things 60%

The whole Muskoka area is similar and offers the same type of vacation to travellers 40%

GROUP 3: Muskoka viewed mainly as an area for outdoor activities

Muskoka offers great vacation options to those who are looking for **outdoor** adventures 55%

Muskoka offers great vacation options for those who are looking for a **cultural** vacation 7%

Muskoka offers options for **both** culture or the outdoors 38%

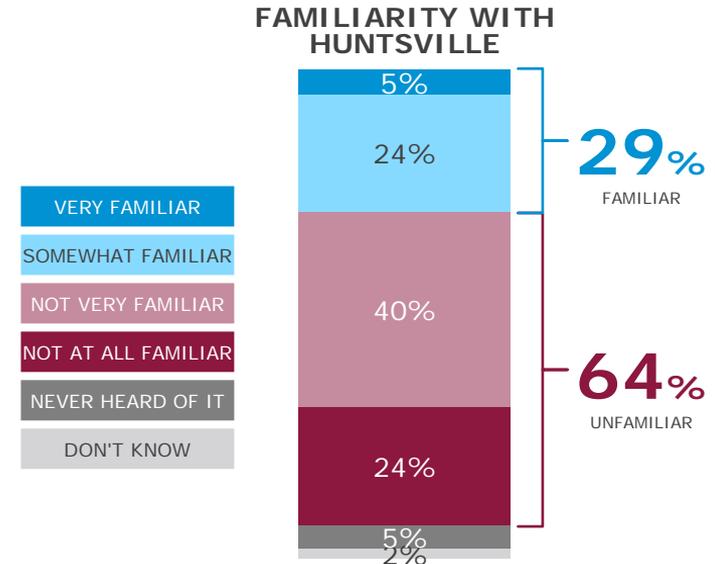
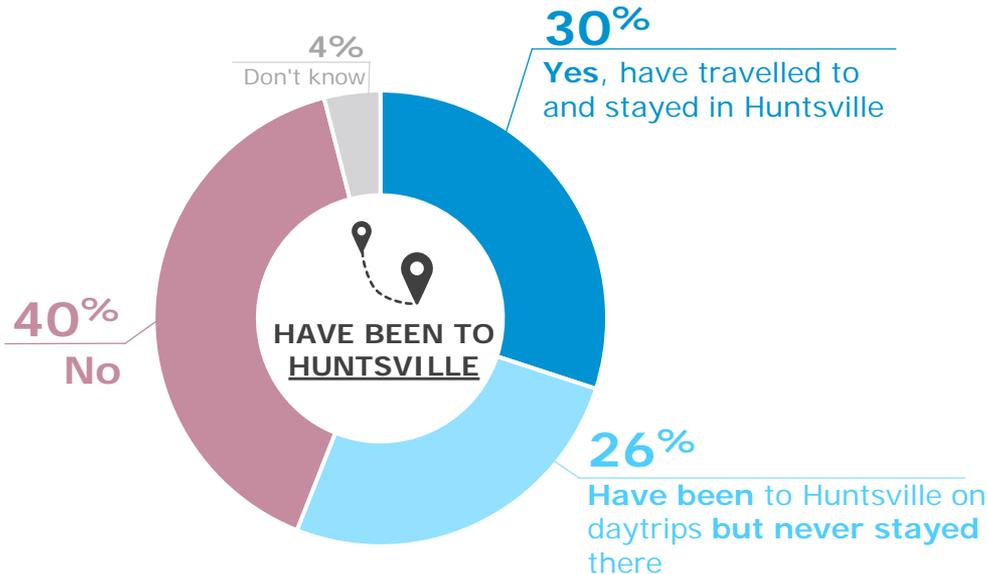


Impression of Huntsville



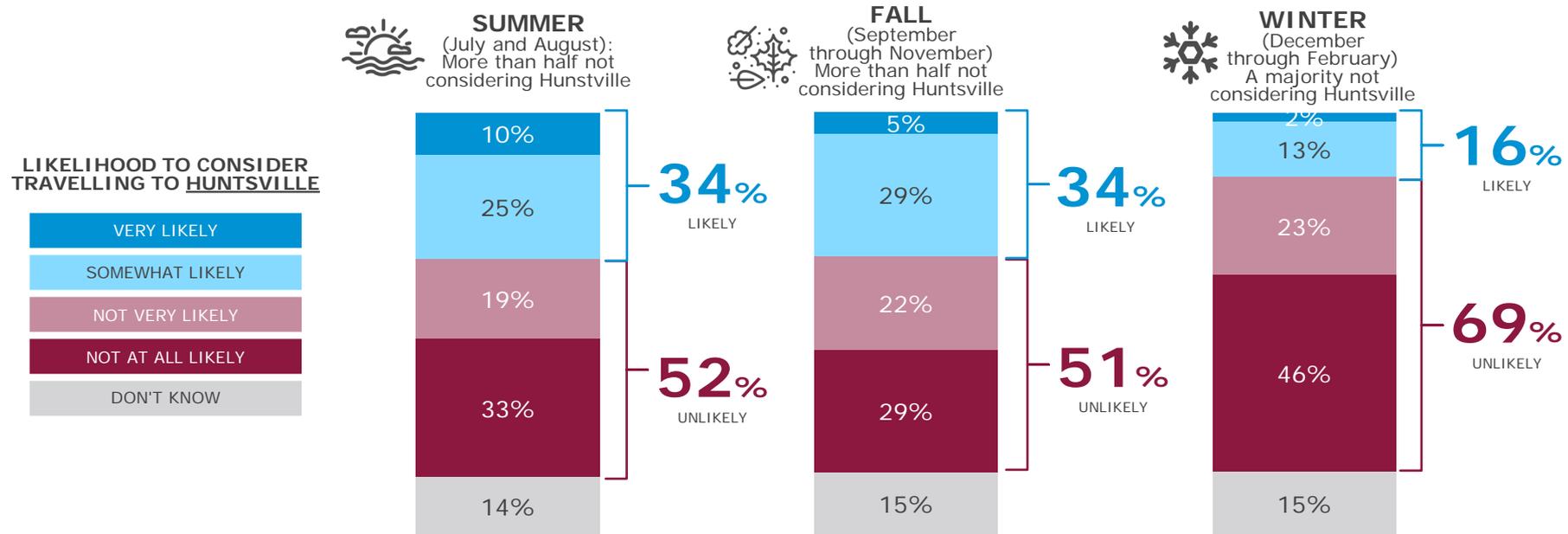
Ontarians have travelled to Huntsville but are not that familiar with the town

- More than half (56%) of Ontarians have been to Huntsville with a third (30%) saying they have stayed in Huntsville and a quarter (26%) saying they have been there as a daytrip.
- However, only a third (39%) are familiar with Huntsville and few (5%) are very familiar.
- **Regional Differences:** Ontarians in the GTA region are more likely to have travelled and stayed in Huntsville (38%).



A third of Ontarians would consider travel to Huntsville in the summer or fall

- A third of Ontarians are likely to consider travelling to Huntsville in the summer (34%) and fall (34%) while less than a fifth would consider travel there in the winter (16%).
- Regional Differences:** Toronto and GTA residents are more likely to consider Huntsville than other regions regardless of season; Ontarians in southwestern Ontario are also more likely to consider Huntsville in the Fall.

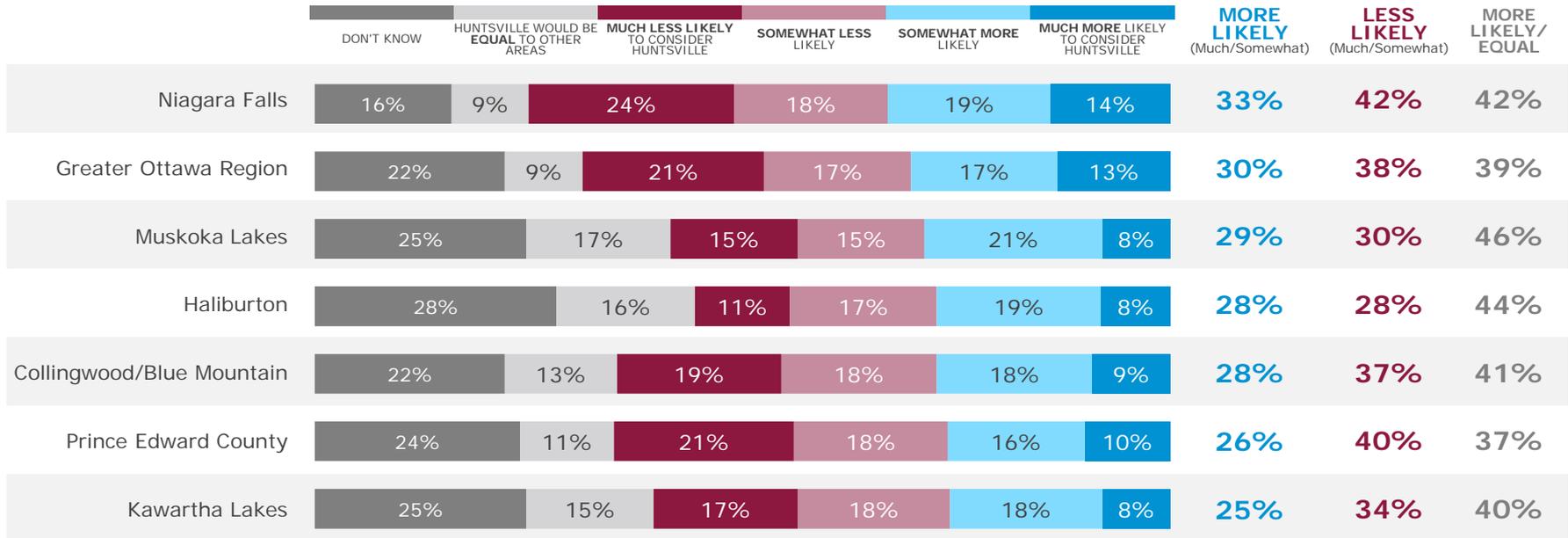


Base: Total (N=900)

C3. How likely would you be to consider a trip to Huntsville Ontario in each of the following time periods?

Huntsville is competing with other areas in Ontario and while not always preferred, the town is competitive

- When given a choice between Huntsville and other areas in Ontario, Ontarians are slightly less likely to choose Huntsville. Huntsville is most competitive with Haliburton (preference for both is 28%) and Muskoka Lakes (29% choose Huntsville while 30% choose Muskoka Lakes).
- Larger difference emerge in other areas: Two-fifths would consider Niagara Falls (42%) and Greater Ottawa region (38%) over a third choosing Huntsville (33% and 30% respectively).
- However, when the number of Ontarians who believe Huntsville is equal to other areas is accounted for, the town is more competitive.



Base: Total (N=900)

C4. How likely would you be to consider a trip to Huntsville over each of the following travel destinations if you were planning a trip within Ontario?

Ontarians who prefer Huntsville have multiple reasons including nature and familiarity

- Close to a fifth (17%) of Ontarians who prefer Huntsville say their preference is because of nature and scenic beauty.
- Familiarity plays a role in determining preference with 12% having visited before and 9% who say they know people close by.
- Activities are not a driver of preference in this case (only 11% say activities).

REASONS FOR VISITING HUNTSVILLE

17%	Nature (Net)
8%	<i>Scenic/northern landscape/Canadian Shield/it is pretty/beautiful</i>
4%	<i>Nature/nature setting/green</i>
4%	<i>Close to parks/provincial parks/Arrowhead/Algonquin</i>
2%	<i>Fall colours/foliage/colour change/fall destination</i>
15%	Have never been/like to discover new areas/something new
12%	Have been before/visited in the past/familiar with area/good experience
12%	Close/proximity/not to far/easy drive
11%	Activities (Net)
6%	<i>Outdoor activities/great outdoors/camping/adventure/hiking/trails/cycling/golf/skiing</i>
6%	<i>Water activities/fishing/boating/kayaking/the lakes/close to water</i>



9%	Family/friends near/know people there/family cottage/own property
7%	Less crowded/less busy/safer/can social distance/less Covid
6%	Good/great/interesting/nice/like it
4%	Small town/quaint/quiet/laid back
4%	Variety/many options/choices/activities
3%	Accommodation/resorts/hotels/cottage rentals
3%	Have heard good/great things/decent reputation/recommended
2%	Good shopping/variety of shops
1%	Good restaurants/bars/breweries

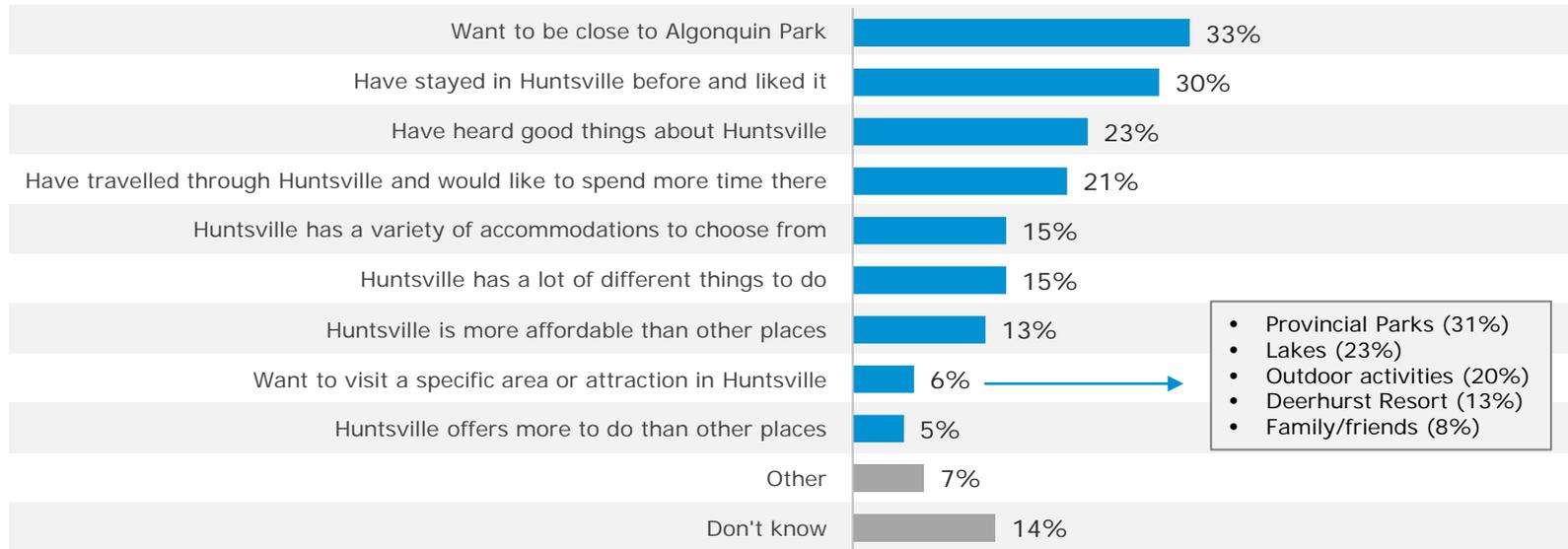
Base: *If Much/Somewhat More Likely To Consider Huntsville In C4 (N=508)*

C5. *Why are you more likely to visit Huntsville compared to other areas of the province? Please be as specific as possible.*

Proximity to Algonquin Park encourages Ontarians to consider Huntsville as a travel destination

- A third (33%) of Ontarians choose Huntsville over other regions because it is close to Algonquin Park.
- A third (30%) also say that they have visited Huntsville before and like the area, and a quarter (23%) say they have heard good things about Huntsville.
- Ontarians are less likely to consider Huntsville because of activities: Only 15% say Huntsville has a lot to do, few (6%) are interested in a particular attraction (6%) or believe that Huntsville has more to do than other places (5%).

REASONS FOR CONSIDERING HUNTSVILLE: Close to Algonquin and good reputation



Base: If Much/Somewhat More Likely To Consider Huntsville In C4 (N=508)

C6. Which, if any, are reasons that you are more likely to consider Huntsville compared to other areas of the province? C7. You mentioned that you are likely to visit Huntsville to see a specific area or attraction. What specifically would you like to see? (N=34) * Small base size – full chart in the Appendix

Ontarians are not choosing Huntsville because of the lack of knowledge and competition with other places

- When asked, a fifth (21%) of Ontarians say they are not considering Huntsville as a travel destination because they know little about the area and what it has to offer.
- A fifth (20%) believe that other destinations are more interesting or have more to offer in terms of activities.



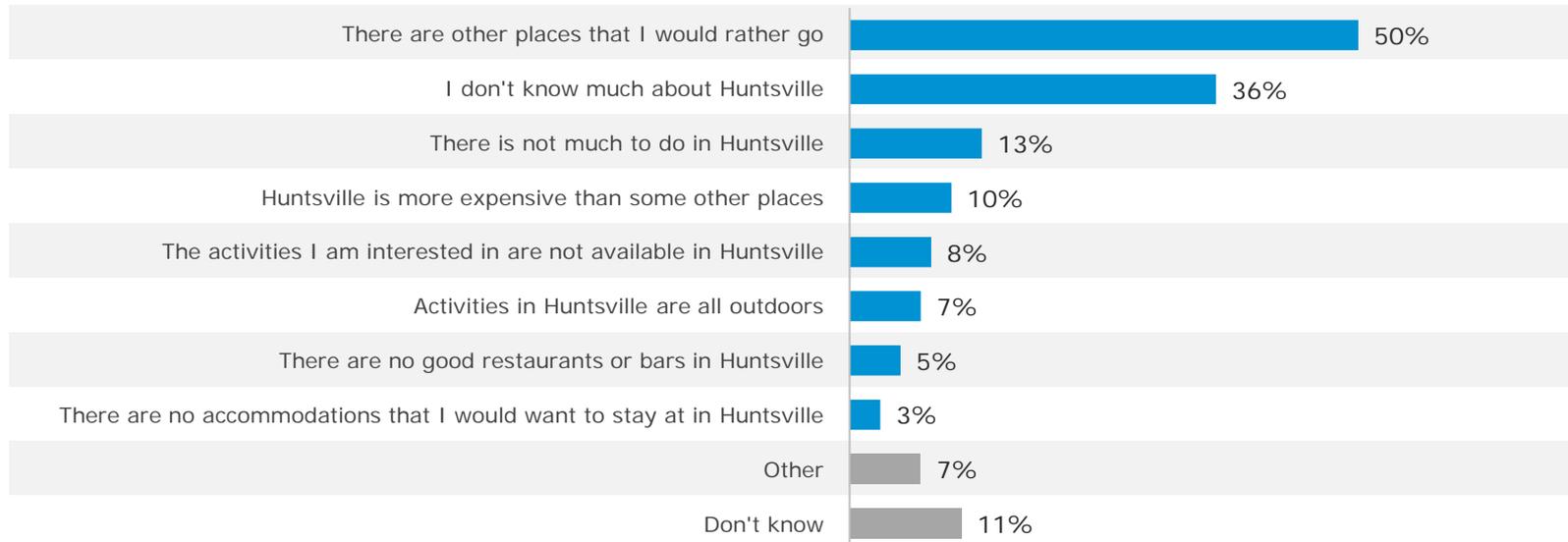
Base: *If Somewhat/Much Less Likely To Consider Huntsville In C4 (N=595)*

C8. Why are you less likely to visit Huntsville compared to other areas of the province? Please be as specific as possible.

When presented reasons, Ontarians do not choose Huntsville because other areas are more appealing and to a lesser degree knowledge of the area

- When presented with reasons for not choosing Huntsville, half (50%) of Ontarians say there are other places in the province they would rather go.
- A third (36%) also say they do not know much about Huntsville.
- The lack of activities of interest to Ontarians (8%) or the prominence of outdoor activities (7%) are not reasons for not traveling to Huntsville for many Ontarians.

REASONS FOR NOT CONSIDERING HUNTSVILLE: Half of Ontarians prefer other destinations



Base: If Somewhat/Much Less Likely To Consider Huntsville In C4 (N=595)

C9. Which, if any, are reasons that you are less likely to consider Huntsville compared to other areas of the province?

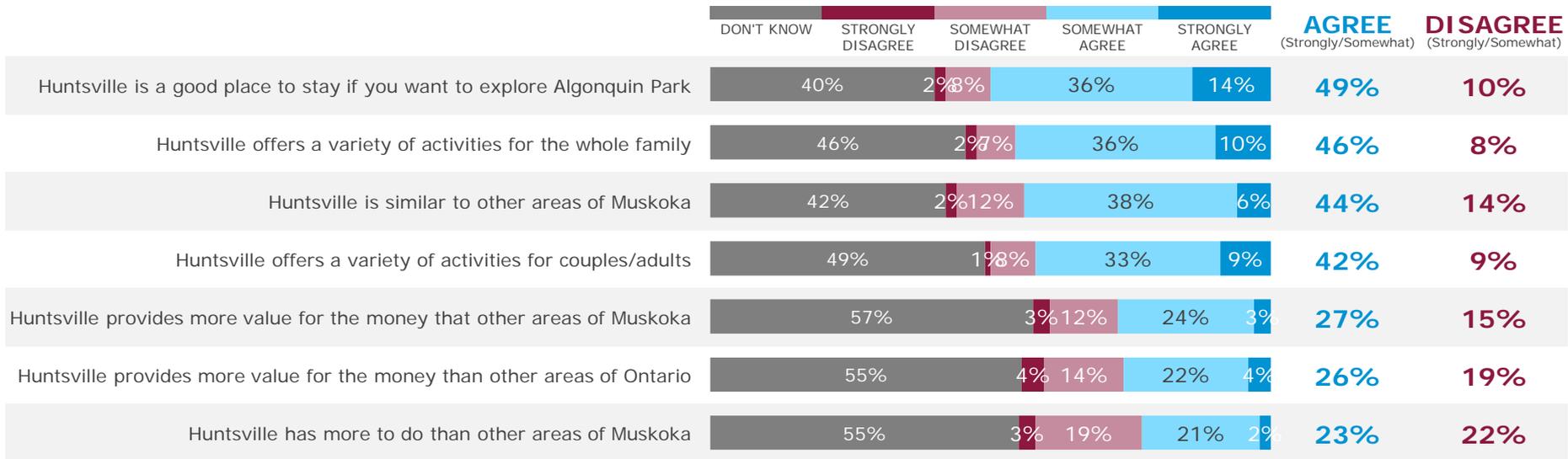
Ontarians not interested in Huntsville activities are looking for specific outdoor or cultural activities

- A third (35%) of Ontarians who are unlikely to travel to Huntsville because the area does not offer activities that interest them, are interested in specific outdoor activities. Another fifth (20%) are interested in more urban, cultural activities such as museums and theatre.



Huntsville is known for its proximity to Algonquin and a variety of activities but knowledge relatively low

- **Proximity to Algonquin/ Muskoka:** Close to half of Ontarians see Huntsville as a good place to stay while they explore Algonquin Park (49%) and two-fifths (44%) because it is similar to Muskoka.
- **Activities:** Close to half of Ontarians believe that Huntsville offers a variety of activities for the entire family (46%) or just couples/ adults (42%). However, Ontarians do not believe (only a quarter – 23%) that Huntsville has more to offer than other areas of Muskoka.
- And only a quarter agree that Huntsville provides value for money compared to other areas of Muskoka (27%) or Ontario (26%).
- Note: Ontarians do not disagree with these attributes of Huntsville – two fifths to a half do not have enough knowledge of the area to agree or disagree.

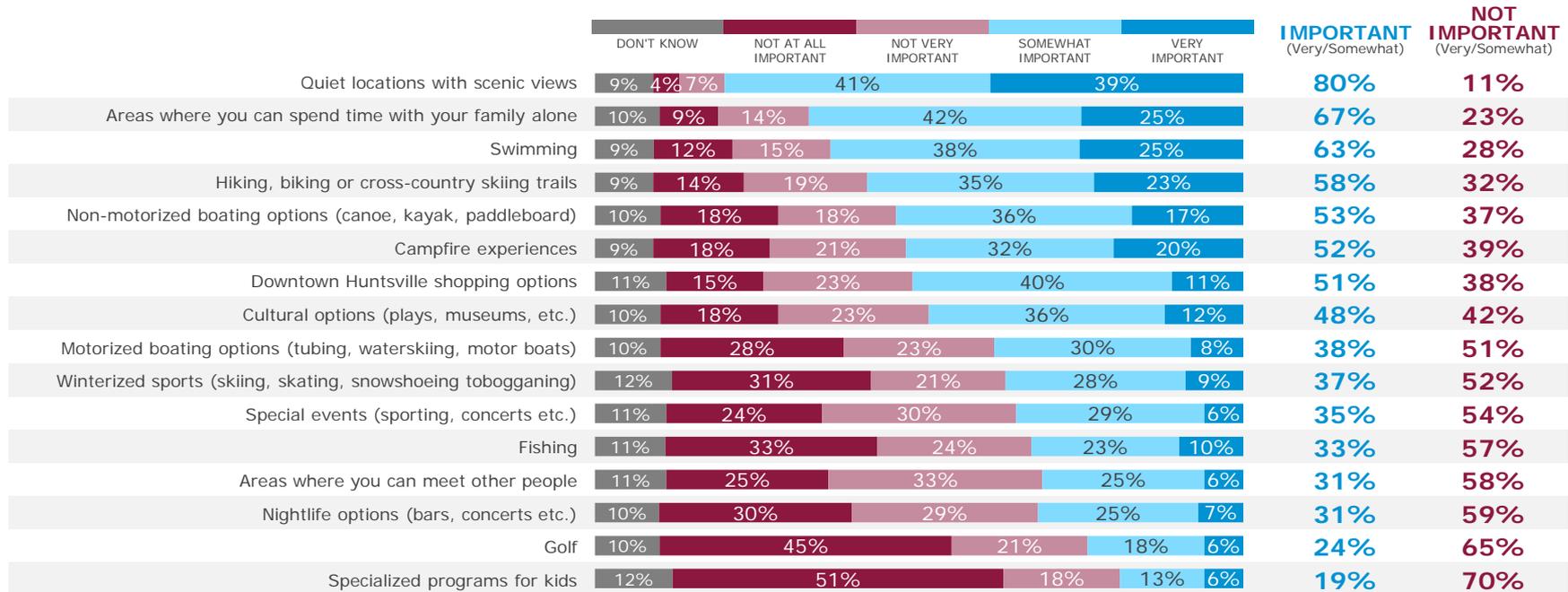


Base: Total (N=900)

C12. Based on what you may have seen, read or heard about Huntsville, to what extent do you agree or disagree with each of the following statements?

Scenery and tranquillity are most important for potential travellers to Huntsville

- Eight in ten Ontarians (80%) say that a quiet location with scenic views is important if they are to consider a trip to Huntsville. And a majority also believe that it is important to have an area where you can spend time alone with the family (67%).
- While not as important as a quiet and scenic area, activities such as swimming (63%) are important to a majority of Ontarians. And more than half value trails (58%), paddling (53%), campfires (52%) and even shopping (51%).

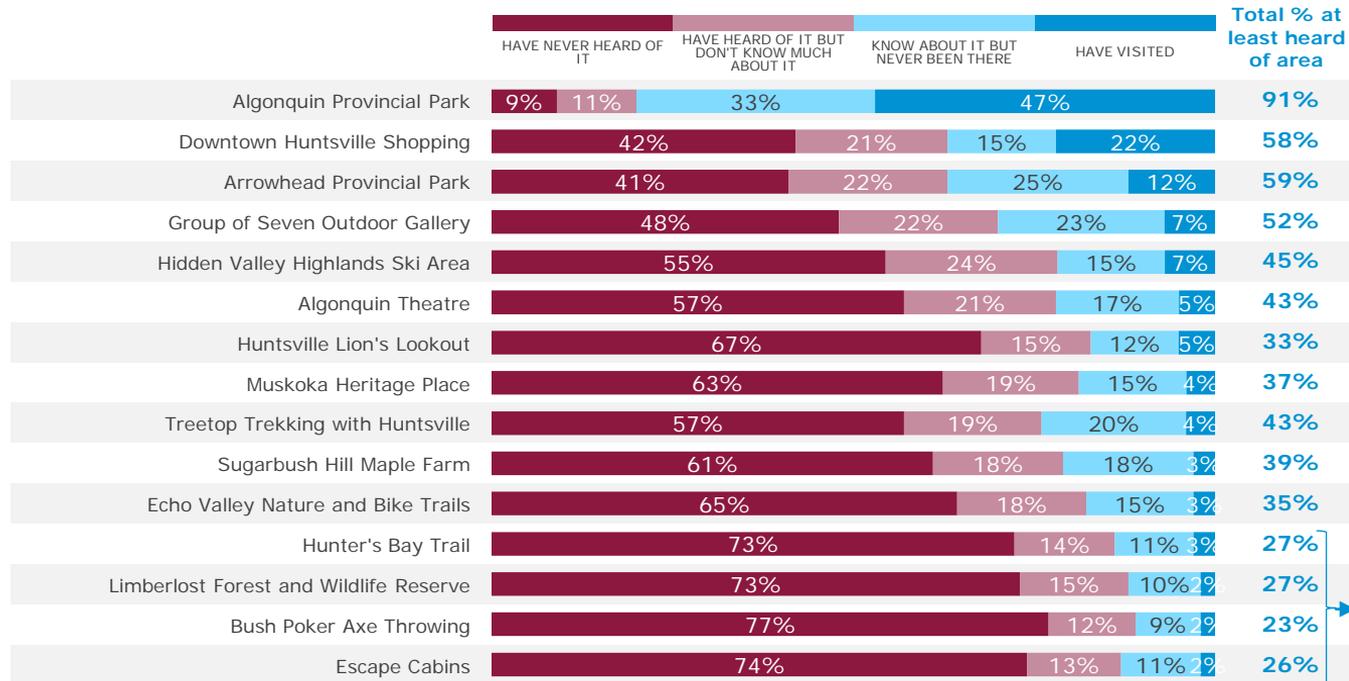


Base: Total (N=900)

C13. If you were considering a trip to Huntsville, how important would it be that it offer you each of the following types of activities.

Algonquin Park most well known and visited area near Huntsville

- Almost all (91%) Ontarians have at least heard of Algonquin Park and close to half (47%) have visited. A majority have also heard of Arrowhead provincial park (59%) although far fewer have visited (12%).
- Although other areas are less known to Ontarians, a fifth (22%) have visited the downtown shopping area and a majority (58%) have at least heard of it. And half (52%) are aware of the Group of Seven Gallery.



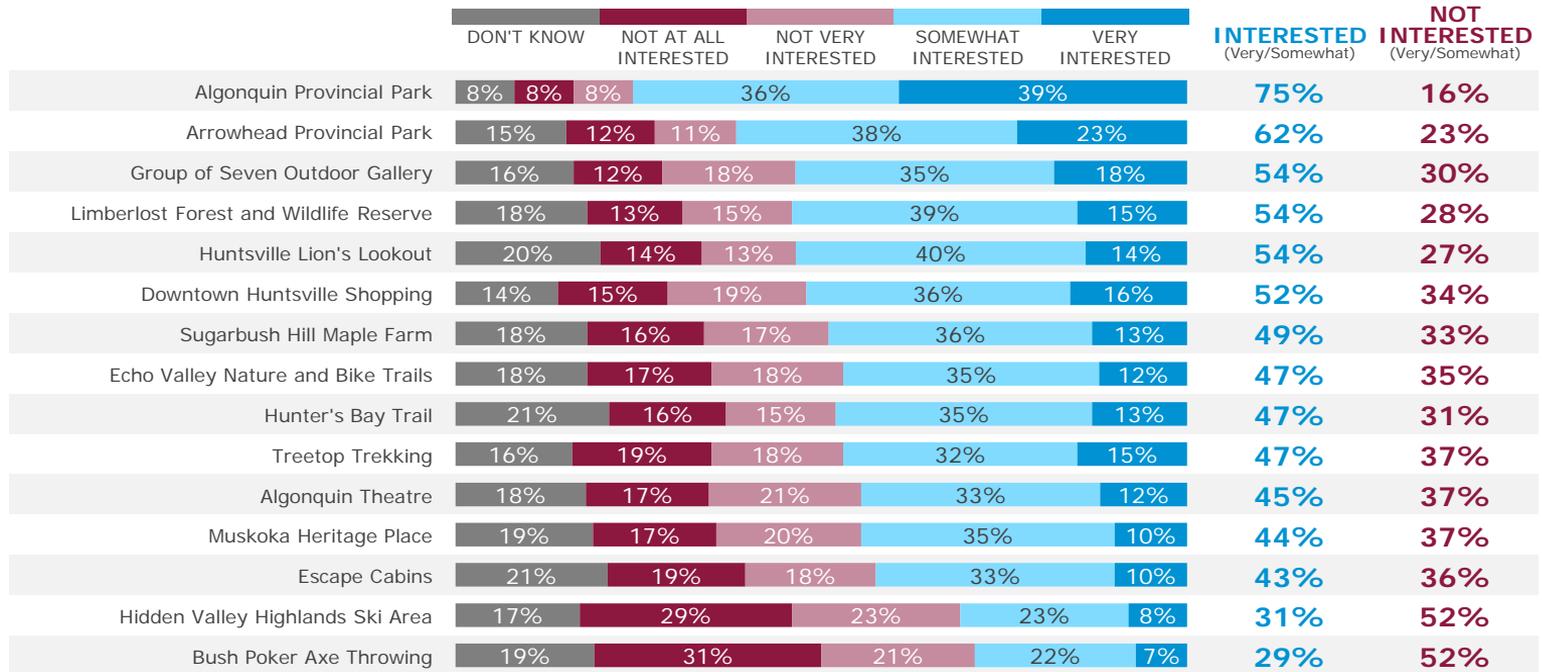
Only a quarter of Ontarians have heard of these places

Base: Total (N=900)

C14. How familiar are you with each of the following...

Provincial parks near Huntsville are appealing to Ontarians as a place to visit

- Three quarters (75%) of Ontarians are interested in visiting Algonquin Park and a majority (62%) are interested in visiting Arrowhead Provincial Park.
- Just over half would be interested in the Group of Seven Outdoor Gallery (54%), Limerlost (54%) and the Lion's Lookout (54%).
- Ontarians are the least interested in Hidden valley Ski Area (31%) and axe throwing (29%).



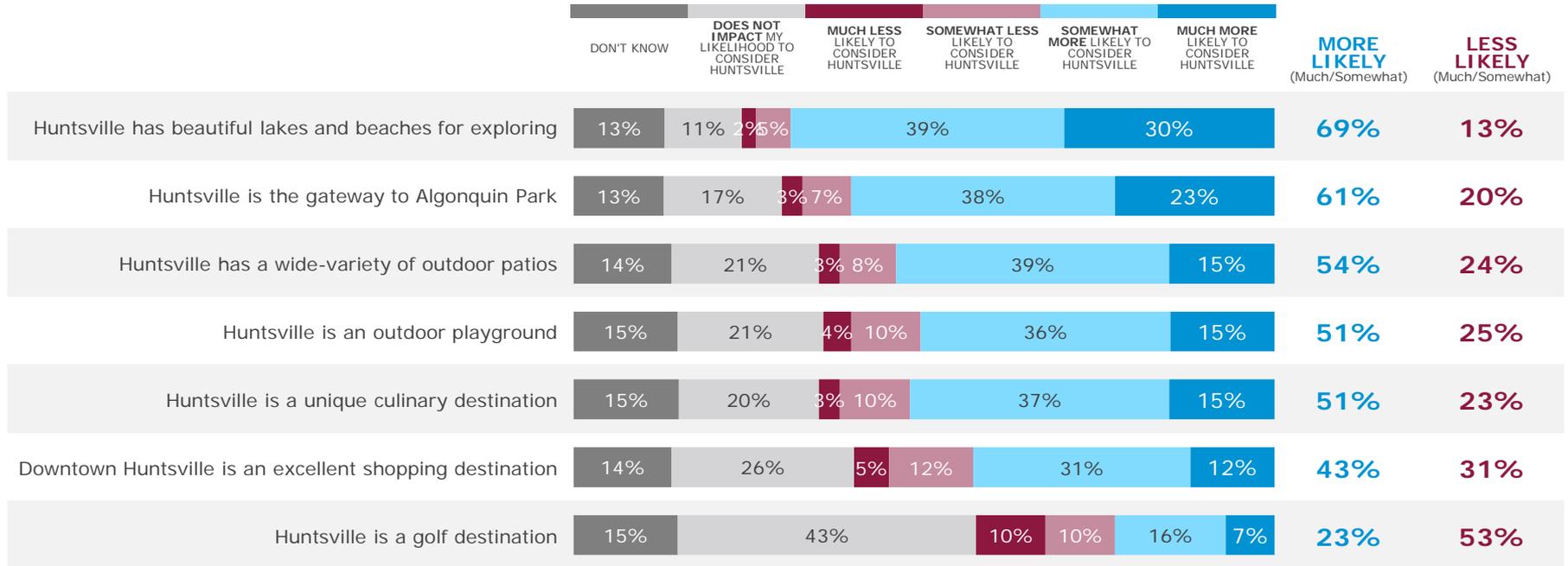
A fifth neither agree or disagree suggesting low knowledge of these areas

Base: Total (N=900)

C15. And how interested would you be in visiting each of the following? If you have visited it in the past, please indicate your interest in visiting it again.

Huntsville as a 'beaches and lake' destination and 'gateway to Algonquin' resonate with Ontarians

- A majority (69%) of Ontarians responded to 'Huntsville has beautiful lakes and beaches for exploring' saying they are more likely to consider Huntsville as a vacation destination after reading the description.
- 'Gateway to Algonquin Park' also resonated with a majority (61%) of Ontarians.

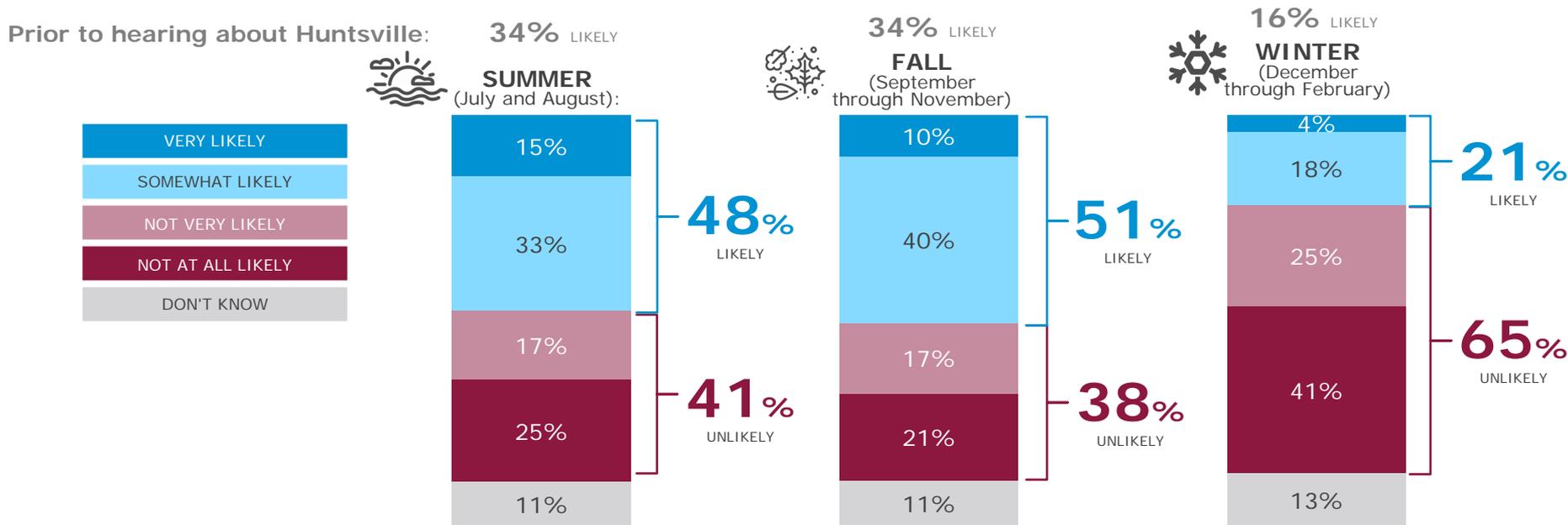


Base: Total (N=900)

C16. The following are statements that are about Huntsville. For each of the following, how does this statement impact your likelihood to consider Huntsville as vacation destination?

After hearing about Huntsville more Ontarians would consider travel to the town

- After hearing about Huntsville, half of Ontarians would consider visiting in the summer (48%) an increase of 14% (Slide 23), or the fall (51%), an increase of 16%.
- And a fifth (21%) would consider a trip in the winter, a smaller increase of 5%.
- **Regional Differences:** After hearing about Huntsville all regions are now more likely to consider travel to Huntsville than Eastern and Northern Ontario.
- Younger Ontarians (18-54 years) are more likely to consider travel to Huntsville in the summer and winter after hearing about it



Base: Total (N=900)

C17. Thinking about all you have heard about Huntsville today, how likely would you be to consider a trip to Huntsville in each of the following time periods? *Details in the notes



Key Drivers For Travel

pollara
strategic insights

Summer: More regular travellers drawn to cultural and local activities while occasional visitors seek out the outdoors and parks

Drawn To:

Motivated By:

- Shopping in Downtown Huntsville
- Sugarbush Hill Maple Farm

- Importance of shopping options



- Treetop Trekking
- Shopping in Downtown Huntsville

- Importance of cultural options
- Importance of shopping options
- Campfire experience
- Non-motorized boating options



- Arrowhead Provincial Park
- Algonquin Provincial Park
- Bush Poker Axe Throwing

- Campfire experiences
- Hiking or biking trails
- Non-motorized boating options
- Quiet locations with scenic views



SUMMER SEASON: Occasional visitors drawn to the outdoor experience

- Among those respondents that are **most likely to travel within Ontario during the Summer**, months (July-August) both the shopping options in downtown Huntsville and the Sugarbush Hill Maple Farm are the attractions with the highest marginal value in potentially bringing visitors to the Huntsville area.
- Among those respondents that are **regular travellers within Ontario** throughout the year, what would draw them to the Huntsville area during the summer is an interest in visiting or revisiting **Treetop Trekking** or the **shopping in downtown Huntsville**. Regardless of the season, respondents that are more prone to travelling regularly throughout the province are also more drawn to more **cultural activities** including the theatre and local museums/cultural centres. This group is important because it represents individuals that are most likely to return multiple times to the Huntsville area during the year and are the demographic that can make the most regular positive impact on the local economy.
- Occasional travellers within the province would largely be drawn to the Huntsville area in the summertime for the camping experience at the **Arrowhead or Algonquin Provincial Parks**, or in trying out the **Bush Poker Axe Throwing**. The crowd drawn towards visiting the provincial parks is primarily motivated by a desire for the “campfire experience” which includes **quiet scenic views** and **non-motorized boating options**. Those drawn towards experiencing the **axe throwing** are also motivated towards having an **outdoor camping experience** but are more likely to also want the **availability of activities aimed at kids** and are attracted to more **motorized boating (tubing, water skiing etc.)** options.

Fall: Travellers gravitate towards the outdoors while regulars also appreciate cultural activities

Drawn To:

Motivated By:

- Hunter's Bay Trail

- Hiking, biking trails
- Quiet scenic views



- Among respondents **most likely to travel within Ontario during the Fall** (September-November) the **Hunter's Bay Trail** is the attraction with the highest marginal value in bringing potential visitors to the Huntsville area.

- Muskoka Heritage Place
- Treetop Trekking

- Importance of cultural options
- Importance of shopping options
- Campfire experiences
- Non-motorized boating options
- Special events



- Among respondents that are **regular travellers** within Ontario throughout the year, what would bring them to Huntsville during the Fall is an interest in visiting the **Muskoka Heritage Place** (primary) as well as **Treetop Trekking** (secondary). Motivating this group is the **importance of cultural activities and availability of shopping**. This group is important because it represents individuals that are most likely to return multiple times a year to the Huntsville area and could make a regular positive impact on the local economy.

- Arrowhead Provincial Park
- Echo Valley Nature and Bike Trails

- Campfire experiences
- Non-motorized boating options
- Quiet scenic views
- Hiking, biking trails



- **Occasional travelers** in Ontario are most likely to be drawn to the Huntsville area in the Fall to experience either **Arrowhead Provincial Park** or the **Echo Valley Nature and Bike Trails**, both of which are motivated primarily by **a love of hiking** and the desire for quiet scenic walks and the campfire experience.

Winter: Travellers are drawn to Huntsville for winterized sports

Drawn To:

Motivated By:

- Hidden Valley Highlands Ski Area

- Winterized sports



- Hidden Valley Highlands Ski Area
- Sugarbush Hill Maple Farm

- Winterized sports
- Cross-country skiing
- Specialized programming for kids
- Importance of cultural options
- Importance of shopping
- Quiet scenic views



- Hidden Valley Highlands Ski Area
- Echo Valley Nature and Bike Trails

- Winterized sports
- Cross-country skiing
- Specialized programming for kids



WINTER: The alpine ski areas appealing to all travellers

- Among respondents most likely to travel within Ontario during the winter months (December-February), the **Hidden Valley Highlands Ski Area** is the attraction that has the largest marginal value in potentially bringing visitors to the Huntsville area.
- Among those that regularly travel within the province throughout the year, what would attract them to the Huntsville area in the winter is largely the **Hidden Valley Highlands Ski Area** but this also overlaps with an interest in the Sugarbush Hill Maple Farm. Once again, those interested in the maple farm tend to be more drawn to enjoying cultural experiences as well as shopping while those drawn to the ski area are primarily interested in winter sports and the specialized programming available for their kids. This group is important because it represents individuals that are most likely to return multiple times a year to the Huntsville area and can make the most regular positive impact on the local economy.
- Occasional travelers within the province would be drawn to the Huntsville area in the wintertime largely for the skiing at **the Hidden Valley Highlands Ski Area**, but also the Echo Valley Nature and Bike Trails, for a scenic cross-country skiing experience. Again those drawn to the Highlands Ski Area are largely motivated by a desire for Alpine (downhill) skiing but may also be drawn to Nordic (cross- country) skiing options and also appreciate the availability of specialized programming for their kids.

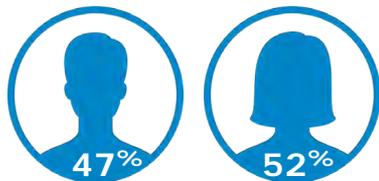


Demographics

pollara
strategic insights

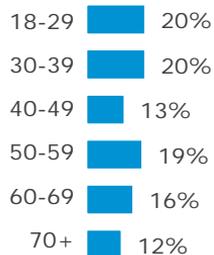
Demographics

GENDER



Another gender identity - 1%

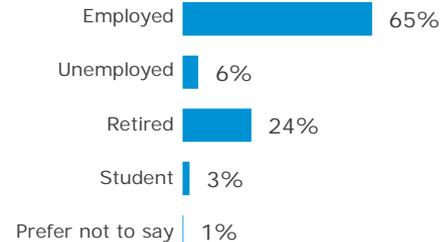
AGE



REGION



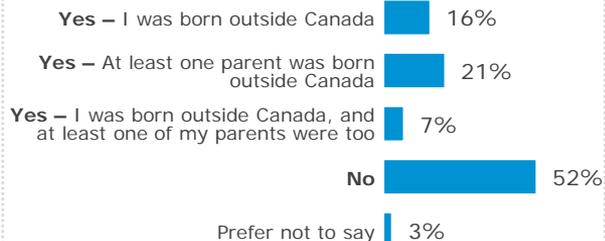
EMPLOYMENT STATUS



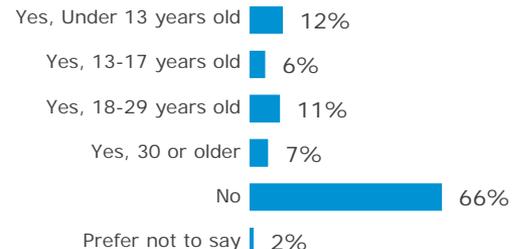
INCOME



BORN IN/OUTSIDE CANADA



CHILDREN IN HOUSEHOLD



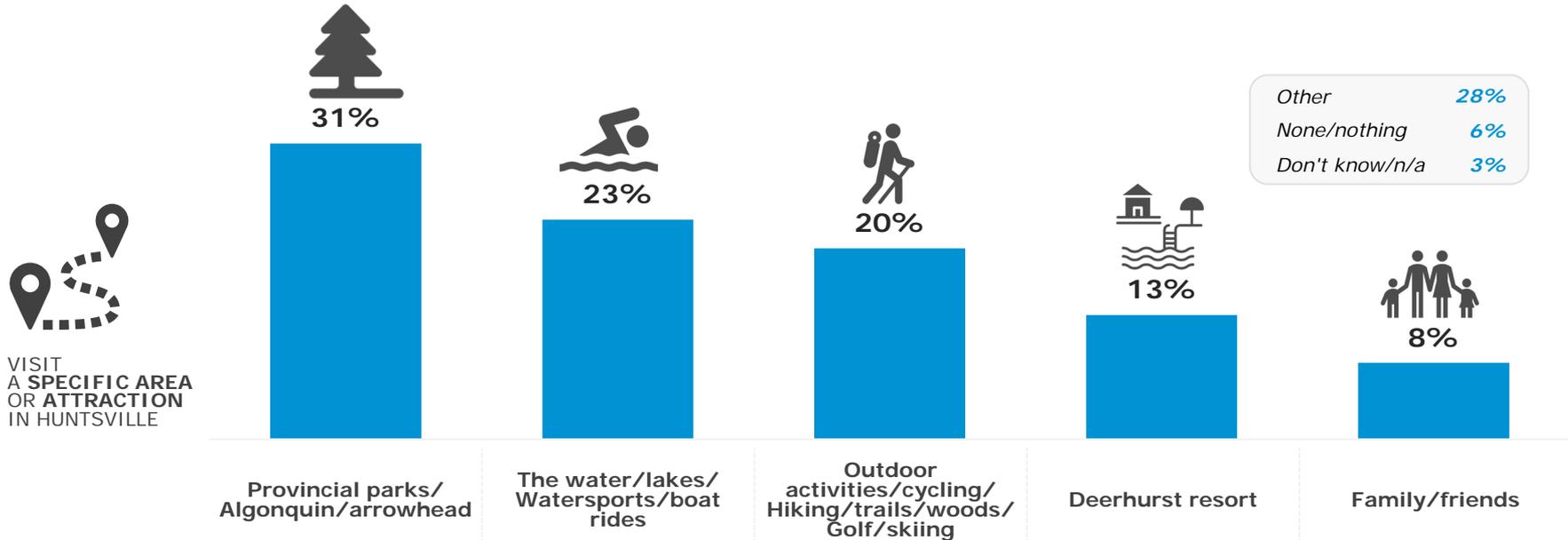


Appendix

pollara
strategic insights

Provincial parks popular with Ontarians interested in visiting specific attractions

- A third (31%) of Ontarians interested in visiting a specific area or attraction are interested in nearby provincial parks.
- A quarter (23%) are interested in access to lakes for water activities and fifth (20%) in outdoor activities.



Base: *If You Want To Visit A Specific Area Or Attraction In Huntsville (N=34)*

C7. *You mentioned that you are likely to visit Huntsville to see a specific area or attraction. What specifically would you like to see?*



Lesli Martin, Vice President

pollara
strategic insights
www.pollara.com