



ECONOMIC IMPACT OF TOURISM REPORT

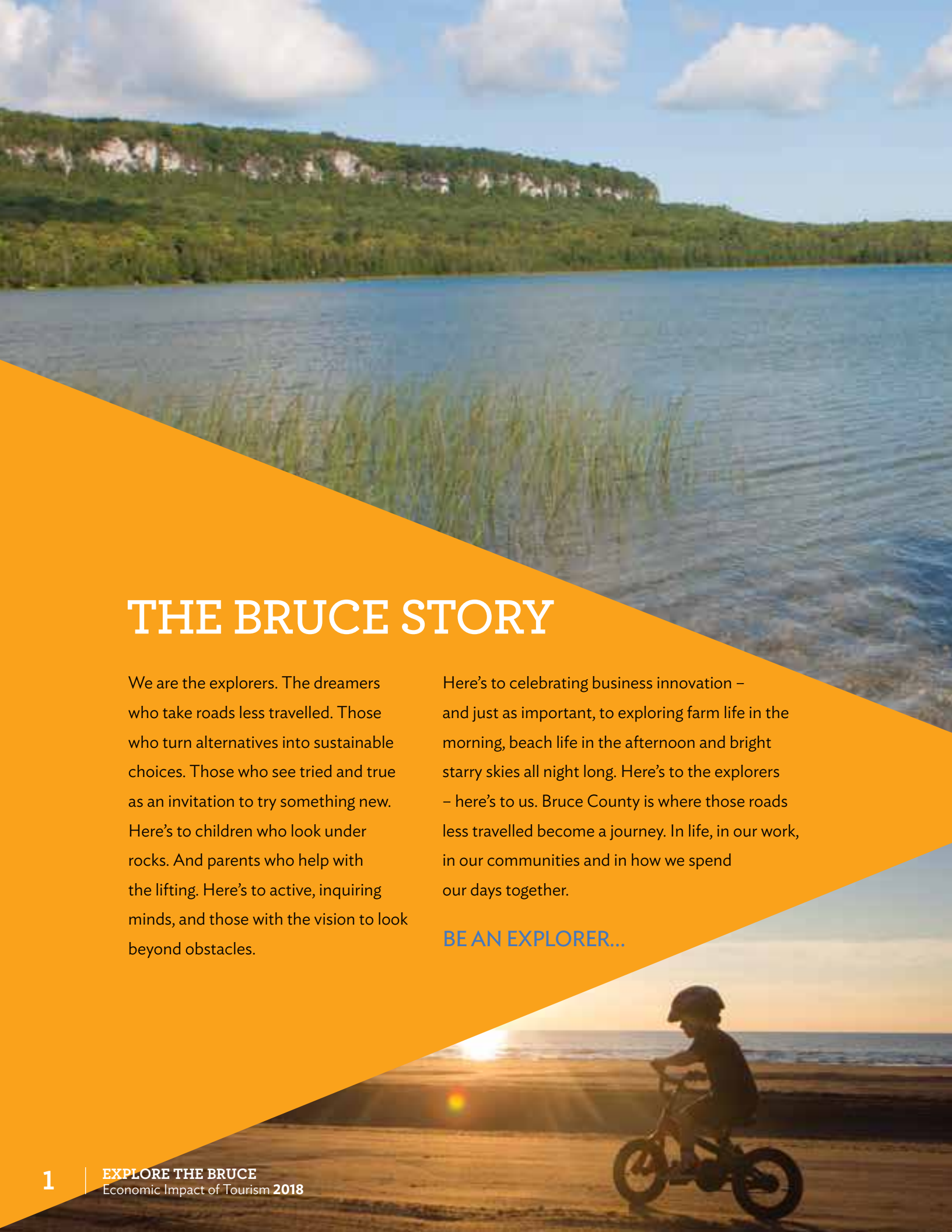
2018

explore
the BRUCE



TABLE OF CONTENTS

- A. The Bruce Story 1
- B. The Methodology / Research 3
- C. 2018 Tourism By The Numbers 5
 - i. Economic Impact Numbers 5
 - ii. Business Survey Results 7
 - iii. Visitor Survey Results: Online Panel 13
 - iv. Visitor Survey Results by Municipality: Online Panel 27
 - v. Visitor Survey Results: Onsite Surveys 34
- D. Comparisons 46
- E. Next Steps 51



VISITOR TARGET AUDIENCE

THE BRUCE STORY

We are the explorers. The dreamers who take roads less travelled. Those who turn alternatives into sustainable choices. Those who see tried and true as an invitation to try something new. Here's to children who look under rocks. And parents who help with the lifting. Here's to active, inquiring minds, and those with the vision to look beyond obstacles.

Here's to celebrating business innovation – and just as important, to exploring farm life in the morning, beach life in the afternoon and bright starry skies all night long. Here's to the explorers – here's to us. Bruce County is where those roads less travelled become a journey. In life, in our work, in our communities and in how we spend our days together.

BE AN EXPLORER...



As highlighted in the 2017-2021 “Find yourself in Bruce County” Economic Development Strategic Plan, below are the types of visitors currently visiting Bruce County:

- Nature Lovers
- Knowledge Seekers
- New Canadians
- Memory Makers
- Mellow Vacationers

WHO IS A VISITOR?

The definition of “visitor” is someone who has visited Bruce County within the past 12 months and has travelled more than 40 kilometres.



THE METHODOLOGY / THE RESEARCH

In 2018, the Economic Development team worked on conducting over 500 surveys of our visitors (defined as anyone who travelled over 40 kilometres), as well as 170 local tourism related businesses to develop the Economic Impact of Tourism Study. The results from this study will be beneficial for potential investors and entrepreneurs as it will support them in their decision to open a business in Bruce County with accurate and meaningful data. This year, the results will be used as a baseline to be measured against on an annual basis.

The goal of this project is to develop a framework for the collection and analysis of tourism data that leverages existing collection sources, addresses current gaps, builds a baseline of information, reduces duplication of efforts and better informs business and industry supports for prospective business growth opportunities.

This framework looks to integrate data from multiple sources to develop a set of Key Performance Indicators (“KPIs”) that can be used to evaluate the impact of tourism on Bruce County and the effectiveness of efforts to promote regional tourism. The data structure is designed to support continual analysis as new data is acquired and to be fully owned and updated by Bruce County. The data was collected from three sources:

- 1 Shared data from partner organizations such as attendance, visitor, and tourism-related survey data from attractions and parks as well as data from government businesses.
- 2 An annual survey of regional businesses that intersect directly with visitors conducted by Bruce County.
- 3 Survey of visitors from across Ontario (re-run every three years by an outside vendor). In the intervening years Bruce County will use the questionnaire from this survey to conduct on-site surveys at different events, as well as online surveys to supplement completes (the onsite / online surveys were conducted this year to allow for comparison with the online panel survey).



i. ECONOMIC IMPACT OF TOURISM



**Economic Impact
for Bruce County**

Gross Domestic Product (\$m)	121.9	21.3	30.8	174.0
Labour Income (\$m)	62.9	13.9	18.6	95.4
Employment (In Jobs)	1,905	208	221	2,333
	DIRECT	INDIRECT	INDUCED	TOTAL

Fiscal Impact in Bruce County

Direct Taxes (\$m)	22.8	32.5	2.1	57.3
Total Taxes (\$m)	32.5	39.6	5.1	77.3
	FEDERAL	PROVINCIAL	MUNICIPAL	TOTAL



ii. BUSINESS SURVEY RESULTS



The first step of the process was to conduct an annual survey of regional businesses that intersect directly with visitors to gather an estimate of tourist activity. Although subject to sample error, it can provide data on a broader set of activity and with sufficient response rates produce estimates on categories of tourist expenditure.

The survey was conducted between June 19 and July 29, 2018, with a sample of 170 Bruce County businesses that intersect directly with visitors.

The businesses were contacted by email or by phone and explained the objectives of the survey. If they agreed to complete the survey, they were given the choice to complete it online or over the telephone.

More than half of businesses surveyed are collecting or tracking data for their business. Of these, the most commonly collected data is retail, point-of-sale data or cash register receipts, food and beverage sales and hotel occupancy rates.



BUSINESS SURVEY RESULTS HIGHLIGHTS:

2/3 of businesses indicate that they can distinguish between visitors who are locals versus tourists. Of these, the most common way of doing this is by collecting information from guests (e.g., reservation forms, guest registry or book, information form, talking with guests or asking them where they are from and recognition of locals or personal knowledge of locals.)

4 in 10 maintain a record of where visitors are from and are willing to share this information with the County of Bruce.

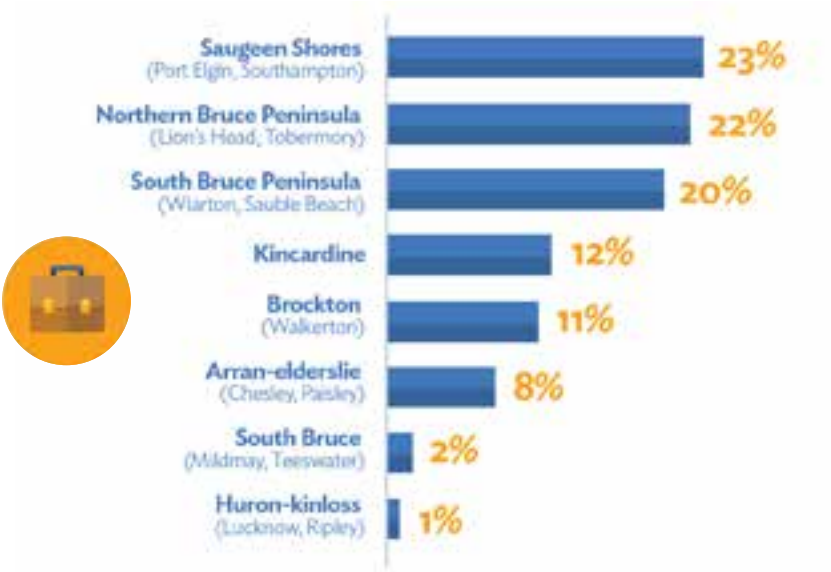
Businesses report that on average visitors spend about **\$130** at their establishment, but this figure varies by type of business.

Businesses surveyed indicate that they have on average **1,206** visitors at their establishment each week during the peak and, on average, **231** visitors each week during the off season. These figures vary by type of business.

The most common types of data that businesses would find useful are: **number of visitors, where they are from, demographics of visitors, and how visitors are finding out about their business.**

ii. BUSINESS SURVEY RESULTS

The largest proportion of businesses surveyed are located in Saugeen Shores, Northern Bruce Peninsula and South Bruce Peninsula.



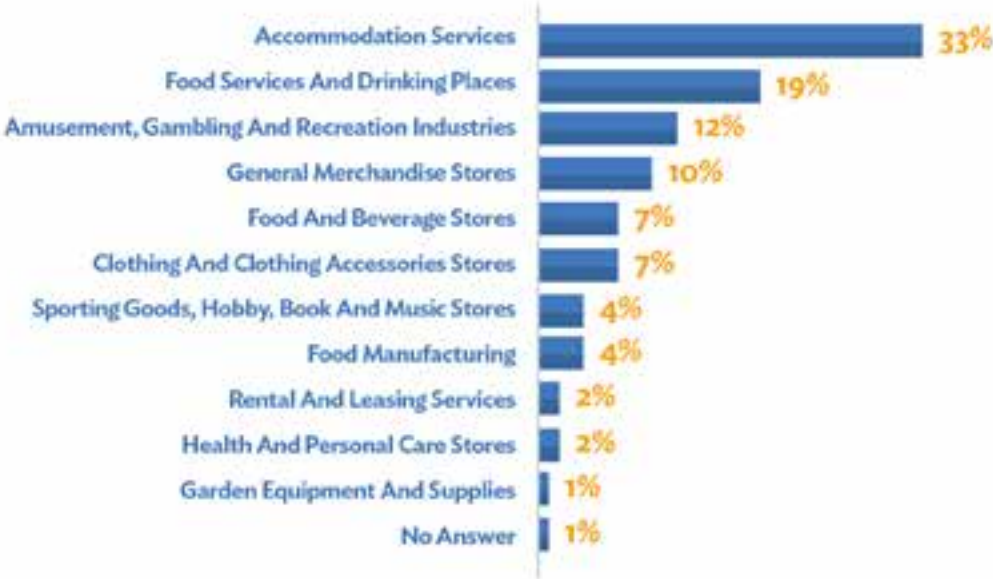
The lowest representation is from South Bruce and Huron-Kinloss.

TYPES OF BUSINESS SURVEYED

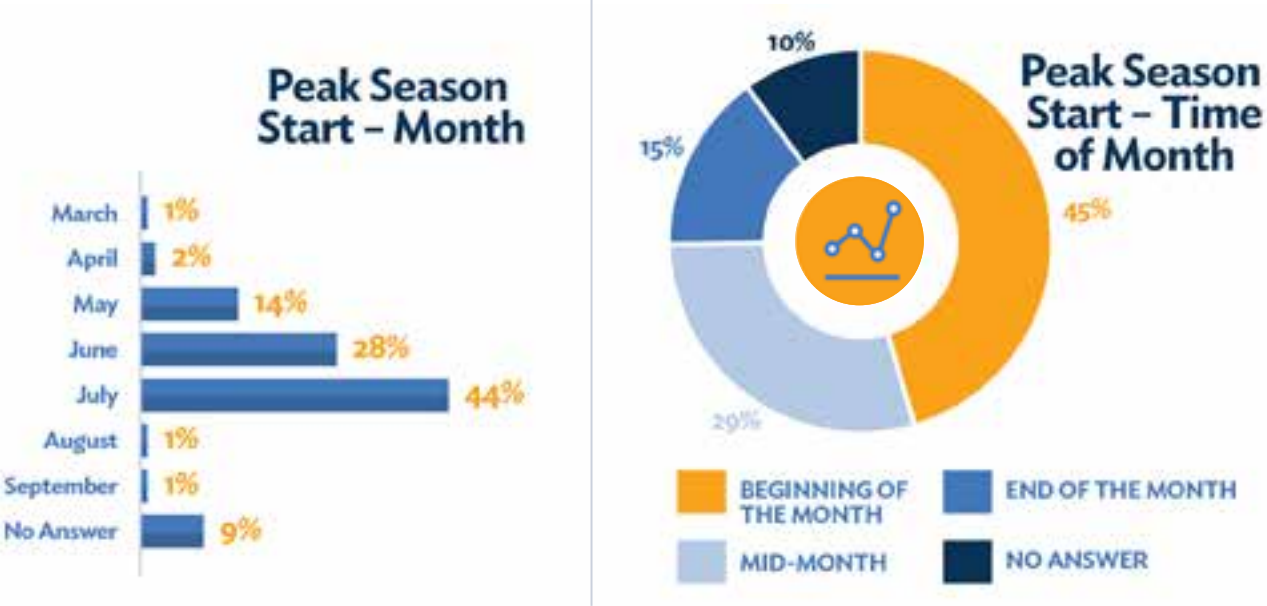
The largest proportion of business respondents to the survey are mostly from accommodation services, followed by food services and drinking places, amusement, gambling and recreation industries, or general merchandise stores.

The lowest representation is from businesses from rental businesses and leasing services, health and personal stores and garden equipment supplies.

TYPES OF BUSINESS SURVEYED



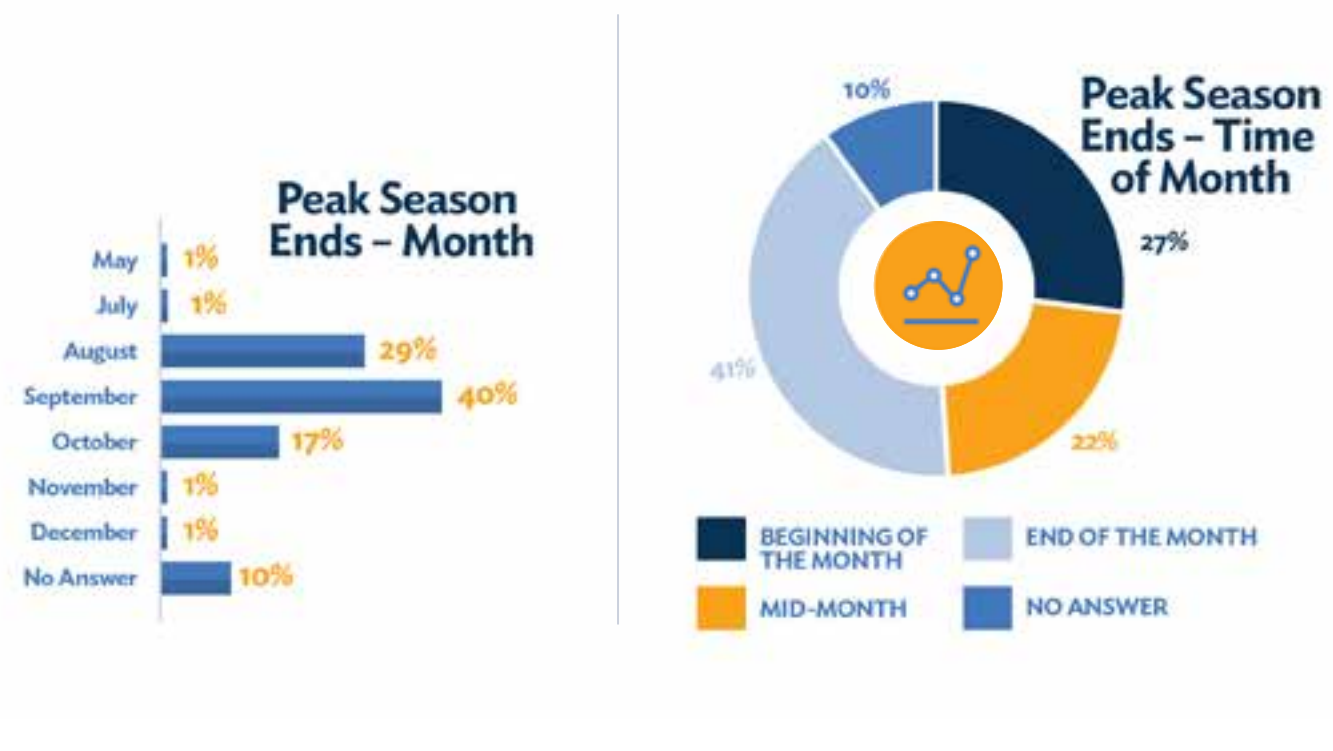
When Does Your Peak Season Start?



More than 4/10 of businesses surveyed indicate that their peak season starts in July, followed by 3/10 who say June and more than 1/10 who mention May.

Almost half indicate that their peak season starts at the beginning of the month, while three in ten say mid-month, and more than one in ten say end of the month.

When Does Your **Peak Season End?**



Number of **Visitors** and **Sales Amount**
– by Types of Business

TYPES OF BUSINESS	NUMBER OF VISITORS – PEAK SEASON	NUMBER OF VISITORS – OFF SEASON	AVERAGE VISITOR DOLLAR AMOUNT SPENT (INCL o)
Accommodation Services	505	83	\$209
Food Services And Drinking Places	1,111	430	\$25
Amusement, Gambling And Recreation Industries	967	211	\$66
General Merchandise Stores	946	464	\$97
Food And Beverage Stores	1147	420	\$39
Clothing And Clothing Accessories Stores	6987	239	\$90
Sporting Goods, Hobby, Book And Music Stores	1175	428	\$99
Food Manufacturing	2372	68	\$34
Rental And Leasing Services	250	40	\$1,210
Health And Personal Care Stores	205	125	\$38
Garden Equipment And Supplies	300	12	\$50

Number of **Visitors** and **Sales Amount**

Number of Visitors – Peak Season	Number of Visitors – Off Season	Average Visitor Dollar Amount Spent
Mean (incl. o) 1,206 (excl. o) 1,224	Mean (incl. o) 231 (excl. o) 253	Mean (incl. o) \$130 (excl. o) \$131

* incl o = those who completed the survey and did not spend any money in Bruce County.



iii. VISITORS SURVEY RESULTS: ONLINE PANEL

The purpose of this baseline visitor survey was to gather data on key indicators, such as reason for visit, primary activities undertaken and estimated spending during visit. For the purposes of this research, the scope of the visitor survey was limited to domestic, in-province visitors, which comprise over 80% of visitors to Bruce County.

The survey was conducted with a sample of 600 Ontario residents 18 years of age and older who have visited Bruce County for a business, pleasure or personal trip within the past 12 months. The sample was balanced by age, gender and region to be representative of Ontario residents according to the most recent Census data.

The precision of online polls is measured using a credibility interval. In this case, the poll of 600 Ontarians has a credibility interval of plus or minus 4.6 percent.

The survey was conducted online and sample was drawn from Ipsos' Canadian online panel. The survey was fielded between August 7 and 13, 2018.

ONLINE VISITOR SURVEY HIGHLIGHTS

More than half of visitors
53% indicated that their most recent trip was between April and July 2018



More than half 54%
of visitors stayed overnight. Among these, they stayed an average of 3 nights, and one-third stayed in a hotel or motel, while three in ten stayed in a private home, while about two in ten camped.



The vast majority
88% of visits are for personal reasons. Visiting friends or family, followed by participating in outdoor sport or recreational activity or shopping are the most frequent reasons for the trip.



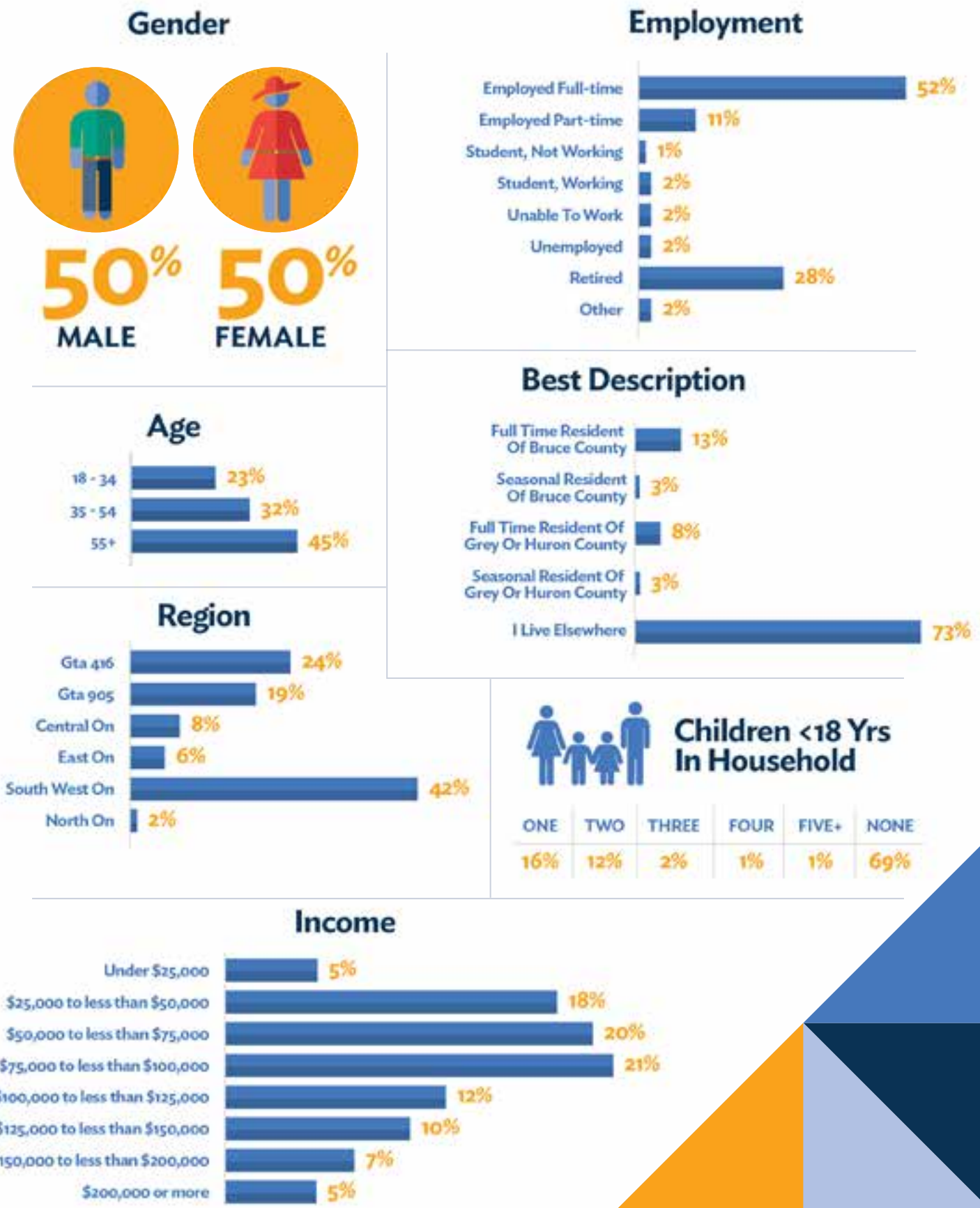
Almost 9 in 10
visitors visited with one other person, while almost one in ten visit on their own. Visitors to Bruce County spent on average **\$592**, and a median of **\$156**.



93% of visitors are satisfied with their trip to Bruce County (rating of 6 or more on a 10-point scale), including 60% who are very satisfied with their visit, rating their experience between 8 and 10.



iii. VISITORS SURVEY RESULTS:
ONLINE PANEL



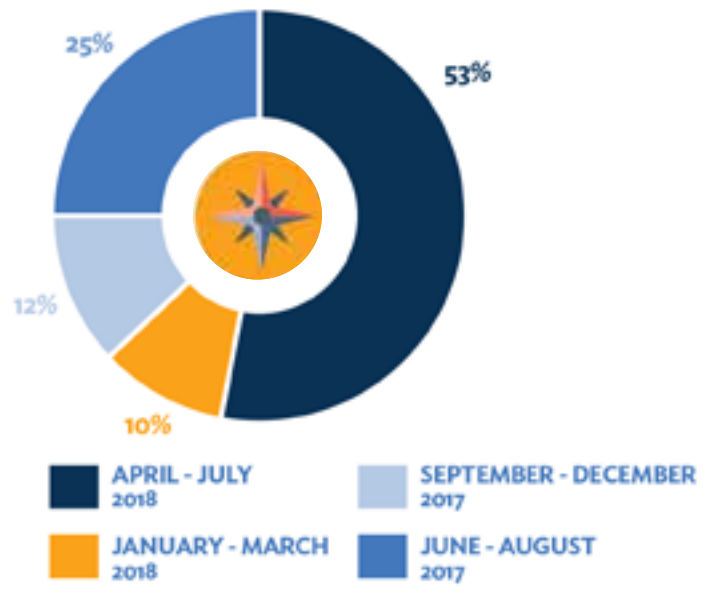
Number of Trips Taken in Past 12 Months – by Reason for Visit

	REASON FOR VISIT	
	BUSINESS	PERSONAL
Base: All Respondents	79	530
Mean # of Trips	7.5	3.1

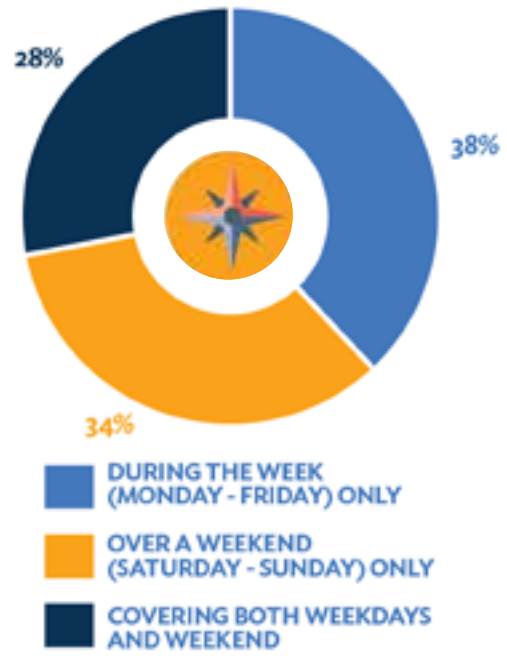
Number of Trips Taken in Past 12 Months – by Where Visitors Are From

	WHERE VISITORS ARE FROM		
	BRUCE	Grey County HURON COUNTY	Ontario
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO
Base: All Respondents	79	48	473
Mean # of Trips	3.7	13	2.7





When Was Your Most Recent Trip to Bruce County?






What Day of the Week Did You Visit Bruce County?





When Was Your Most Recent Trip to Bruce County? – by Age, Region and Kids in Household

	AGE			REGION							HOUSEHOLD	
												
	18 - 34	35 - 54	55+	GTA - TOTAL	GTA 416	GTA 905	CENTRAL	EAST	NORTH	SOUTH WEST	KIDS	NO KIDS
Base: All Respondents	136	194	270	254	141	113	45	35	12	254	188	412
April - July 2018	46%	53%	57%	47%	45%	50%	56%	43%	75%	59%	46%	56%
January - March 2018	18%	13%	4%	15%	21%	7%	7%	14%	8%	5%	19%	6%
September - December 2017	14%	9%	13%	13%	13%	12%	9%	17%	8%	11%	15%	10%
June - August 2017	22%	25%	27%	26%	21%	31%	29%	26%	8%	25%	20%	28%

Number of Trips Taken in Past 12 Months – by Where Visitors Are From

	WHERE VISITORS ARE FROM		
		 Grey County	 HURON COUNTY
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO
Base: All Respondents	79	48	473
April - July 2018	52%	65%	52%
January - March 2018	20%	8%	8%
September - December 2017	16%	8%	11%
June - August 2017	11%	19%	28%

What Day of the Week Did You Visit Bruce County? – by Age and Region

	AGE			REGION						
										
	18 - 34	35 - 54	55+	GTA - TOTAL	GTA 416	GTA 905	CENTRAL	EAST	NORTH	SOUTH WEST
Base: Stayed 5 Or Less Nights	66	92	137	126	69	57	20	23	6	120
During the week (Monday - Friday) only	29%	30%	47%	39%	46%	30%	25%	43%	50%	37%
Over a weekend (Saturday - Sunday) only	39%	40%	28%	37%	26%	49%	60%	30%	17%	29%
Covering both weekdays and a weekend	32%	29%	26%	25%	28%	21%	15%	26%	33%	34%

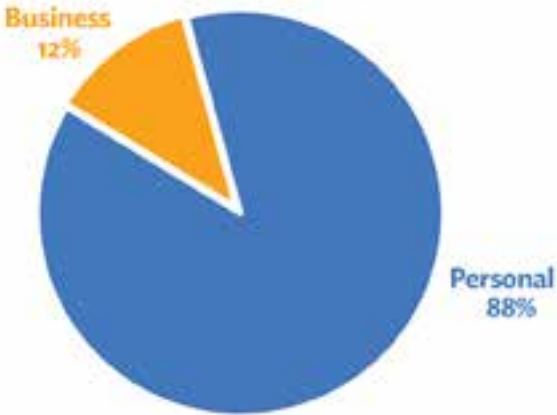
What Was the Reason for Your Most Recent Trip to Bruce County?

Personal trips to Bruce County outnumber business trips more than seven to one. Visiting people, friends or family is the most common reason to visit Bruce County, followed by participating in outdoor sport or recreational activity, shopping, or sightseeing, touring, traveling, day trip or getaway.





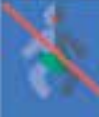
What was the Primary Reason for Your Personal Trip?





What was the Reason for Your Trip?



What was the Reason for Your Trip to Bruce County? – by Gender, Age and Kids in Household

	GENDER		AGE			HOUSEHOLD	
							
	MALE	FEMALE	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: All Respondents	300	300	136	194	270	188	412
Business	15%	9%	18%	12%	8%	23%	6%
Personal	85%	91%	82%	88%	92%	77%	94%





What Was the Primary Reason For Your Personal Trip? – by Age and Kids in Household

	AGE			HOUSEHOLD	
					
	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: Personal Trip	111	171	248	144	386
Visit people/ spend time with friends/ family/ family event	19%	28%	31%	18%	31%
Participate in outdoor sport or recreational activity	15%	24%	23%	17%	23%
Shopping	28%	18%	11%	32%	11%
Sightseeing/ touring/ traveling/ day trip/ get away	6%	12%	14%	8%	13%
Go to a cottage	6%	5%	6%	6%	5%
Go for a drive/ a road trip	2%	4%	3%	1%	3%
Attend an event/ concert/ show	1%	2%	3%	2%	2%
Vacation (unspecified)	1%	3%	2%	1%	2%
Other	21%	5%	7%	12%	8%
Don't know / no answer	1%	1%	-	1%	1%

What was the Reason for Your Trip to Bruce County? – by Where Visitors Are From

	WHERE VISITORS ARE FROM			
	 BRUCE	 Grey County	 HURON COUNTY	 Ontario
	FULL - TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
Base: Took Overnight Trip	79	48	473	
Business	27%	19%	8%	
Personal	11%	19%	28%	

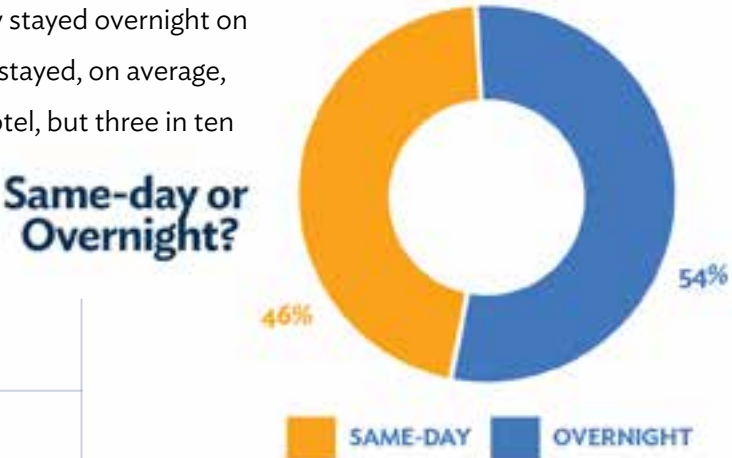
What Was the Primary Reason For Your Personal Trip? – by Where Visitors Are From

	WHERE VISITORS ARE FROM			
		 Grey County	 HURON COUNTY	 Ontario
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
Base: Took Overnight Trip	58	39	433	
Visit people/spend time with friends/ family/ family event	21%	10%	30%	
Participate in outdoor sport or recreational activity	5%	21%	24%	
Shopping	55%	18%	11%	
Sightseeing/ touring/ traveling/ day trip/ get away	2%	18%	12%	
Go to a cottage	2%	3%	6%	
Go for a drive/ a road trip	-	8%	3%	
Attend an event/ concert/ show	2%	8%	2%	
Vacation (unspecified)	-	-	3%	
Other	10%	15%	9%	
Don't know / no answer	3%	-	-	



Visitors Staying Overnight





More than half of visitors to Bruce County stayed overnight on their most recent trip. Among these, they stayed, on average, 3 nights and a third stayed in a hotel or motel, but three in ten stayed at a private home. About two in ten camped and about one in ten rented a cabin or cottage or stayed at a bed and breakfast.



Same-Day or Overnight? – by Gender, Region and Kids in Household

	GENDER		REGION							HOUSEHOLD	
	MALE	FEMALE	GTA TOTAL	GTA 416	GTA 905	CENTRAL	EAST	NORTH	SOUTH WEST	KIDS	NO KIDS
Base: All Respondents	300	300	254	141	113	45	35	12	254	188	412
Same-day	50%	42%	48%	50%	46%	49%	29%	50%	46%	57%	42%
Overnight	50%	58%	52%	50%	54%	51%	71%	50%	54%	43%	58%

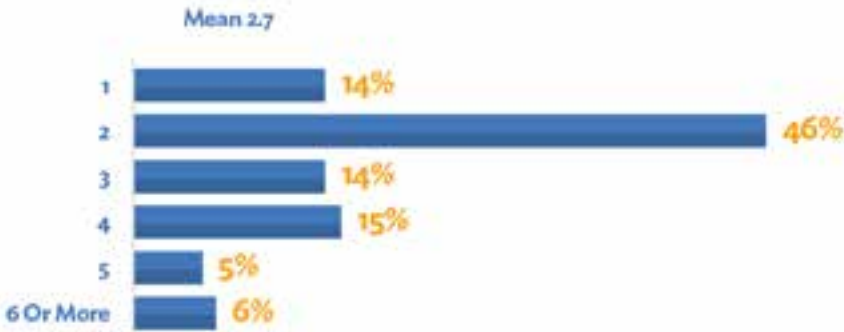
Same-Day or Overnight? – by Where Visitors Are From

	WHERE VISITORS ARE FROM		
			 
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO
Base: Took Overnight Trip	79	48	473
Same-day	71%	71%	40%
Overnight	29%	29%	60%

Types of Accommodation – by Age

	AGE		
Base: Took Overnight Trip	70	99	153
Hotel or motel	36%	33%	31%
Private home (with friends or family)	27%	32%	29%
Camping/campground or RV/trailer Park	16%	17%	15%
Rental cabin/cottage	14%	9%	13%
Bed and breakfast	13%	8%	8%
Airbnb	10%	3%	1%
Other cabin/ cottage	1%	2%	5%
Other	-	-	1%

Just over one in ten visitors travelled on their own, almost one-half visited with one other person and four in ten with at least 3 people in their party.



How Many People Went on This Trip?
- by Gender, Age and Kids in Household

	GENDER		AGE			HOUSEHOLD	
							
	MALE	FEMALE	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: All Respondents	300	300	136	194	270	188	412
Mean # of People	2.5	2.8	3	2.8	2.4	3.2	2.4

Average Amount Spent During Entire Stay
- by Where Visitors Are From

	WHERE VISITORS ARE FROM			
Mean (Including those that stated zero spending)	 BRUCE	 Grey County	 HURON COUNTY	 Ontario
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
<i>Base: All Respondents</i>	79	48	473	
Accommodation	\$268.2	\$155.4	\$156.2	
Recreation and Entertainment	\$208.2	\$47.9	\$55.3	
Transportation	\$149.7	\$86.4	\$70.1	
Food and Beverage	\$217.8	\$96.4	\$140.6	
Shopping	\$320.9	\$80.7	\$87.7	

Total Amount Spent During Entire Stay in Bruce County

MEAN/MEDIAN Total Spending

	TOTAL	
	INCL. \$0	EXCL. \$0
Accommodation (including overnight park fees)	\$171	\$364
Recreation and Entertainment (including entrance/user fees)	\$75	\$149
Transportation	\$82	\$106
Food and Beverage	\$147	\$161
Shopping	\$117	\$204
TOTAL (MEAN)	\$592	\$984
TOTAL (MEDIAN)	\$156	\$520

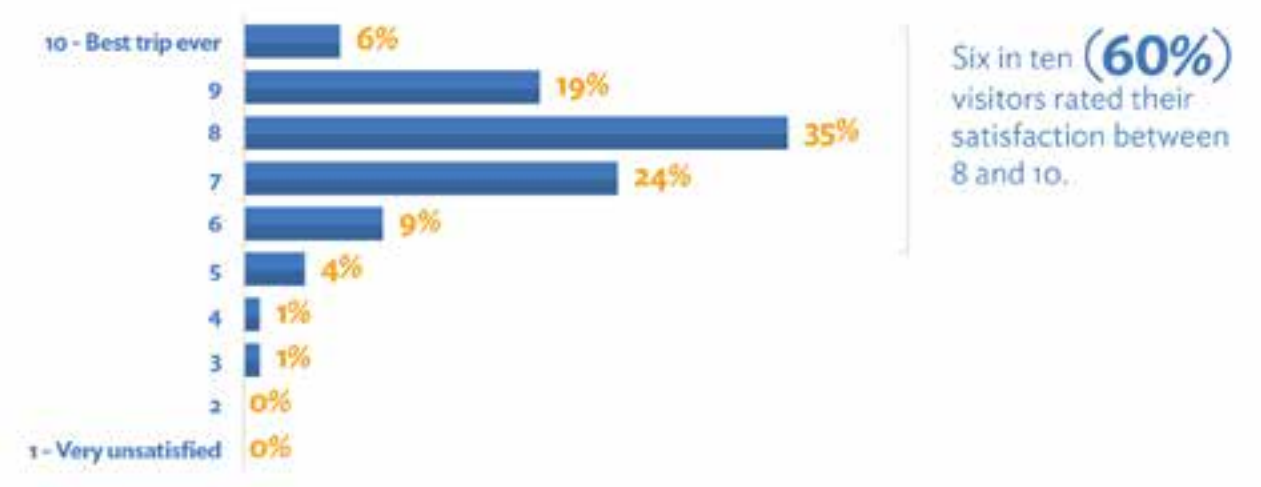
*Including and excluding those that spent zero dollars.

Total Amount Spent - by Type of Business

	AGE			INCOME					HOUSEHOLD	
										
	18 - 34	35 - 54	55+	UNDER \$25,000	\$25,000 TO LESS THAN \$50,000	\$50,000 TO LESS THAN \$75,000	\$75,000 TO LESS THAN \$100,000	MORE THAN \$100,000	KIDS	NO KIDS
All Respondents	136	194	270	32	111	122	128	207	188	412
Accommodation	\$241.1	\$161.7	\$142	\$29.4	\$114	\$149.2	\$219.7	\$205.5	\$222.5	\$147.2
Recreation and Entertainment	\$163.3	\$58.1	\$42.2	\$44.7	\$48.7	\$45.1	\$89.6	\$101.5	\$151.3	\$39.9
Transportation	\$127	\$83.6	\$58	\$44.9	\$73.6	\$68.7	\$87.4	\$96.4	\$118.1	\$65.4
Food and Beverage	\$195.6	\$154.9	\$117.2	\$58.3	\$99.3	\$120.4	\$167.7	\$189.6	\$193	\$126.2
Shopping	\$223.8	\$116	\$66.2	\$44.6	\$55.9	\$110	\$144.2	\$148.7	\$230	\$66.8

How Satisfied With Most Recent Trip to Bruce County?

More than nine in ten (93%) are satisfied with their trip to Bruce County, rating 6 or more on a 10-point scale. Six in ten (60%) visitors provide a very high satisfaction with their visit to Bruce County, rating their experience between 8 and 10.



How Satisfied With Most Recent Trip to Bruce County? – by Age and Kids in Household

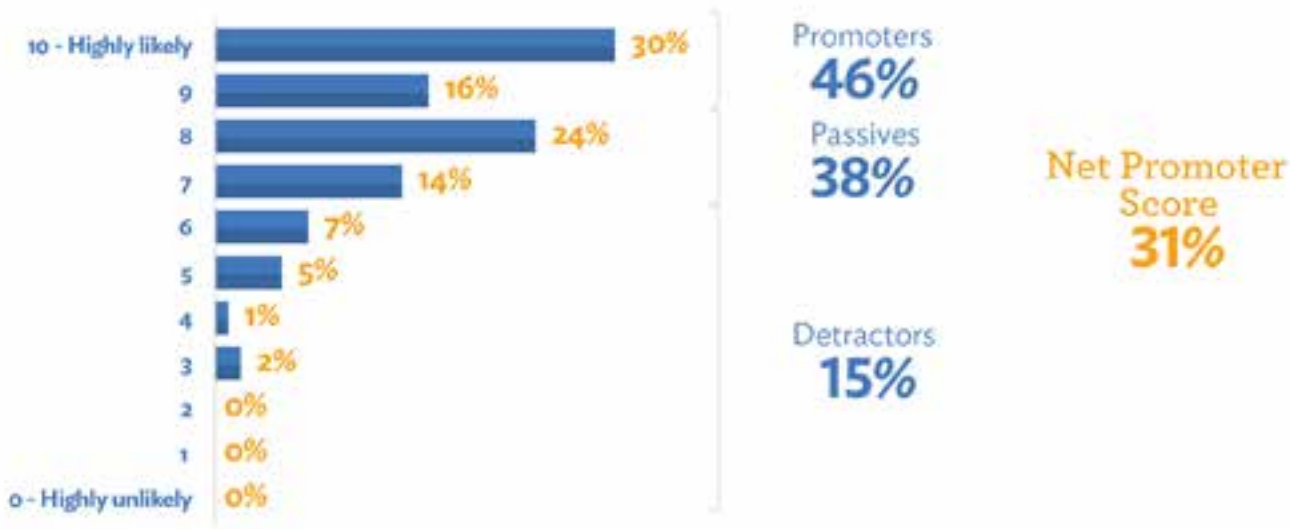
	AGE			HOUSEHOLD	
	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: All Respondents	136	194	270	188	412
Top Box - 10 - Best trip ever	13%	5%	3%	13%	3%

How Satisfied With Most Recent Trip to Bruce County? – by Where Visitors Are From

	WHERE VISITORS ARE FROM			
		 Grey County	 HURON COUNTY	 Ontario
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
Base: All Respondents	79	48	473	
Top Box - 10 - Best trip ever	15%	8%	4%	

How Likely to Recommend Bruce County to Others?

Almost half of visitors are promoters of Bruce County (rating of 9 or 10 on likelihood to recommend the County to family, friends or colleagues), while only 15 percent are detractors (rating of 0 to 6 on likelihood to recommend). The NET Promoter score is 31%.

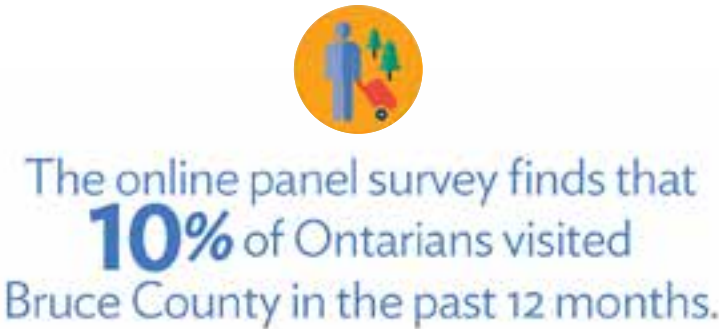


How Likely to Recommend Bruce County to Others? – by Gender and Age

	GENDER		AGE		
	MALE	FEMALE	18 - 34	35 - 54	55+
Base: All Respondents	300	300	136	194	270
Net Promoter Score	25%	38%	25%	29%	36%



iv. VISITOR SURVEY RESULTS BY MUNICIPALITY: ONLINE PANEL



Visitors are more likely to have visited Northern Bruce Peninsula, Saugeen Shores, Kincardine and South Bruce Peninsula, and visitors who are more likely to have visited these four municipalities are more likely to live outside of Bruce, Grey and Huron Counties.

In contrast, visitors to Bruce County are less likely to have visited Brockton, Arran-Elderslie, Huron-Kinloss and South Bruce, and visitors who are more likely to have visited these four municipalities are more likely to be full-time residents of Bruce County.

Visitors to Bruce County tend to skew older (45% age 55 and older), and these visitors are more likely than those age 18 to 34 to have visited Saugeen Shores and Kincardine. Visitors also tend to be more likely to have kids (57%), and these visitors are more inclined than those with no kids to have visited Arran-Elderslie and South Bruce

Municipality Visited Within Bruce County



Municipality Visited within Bruce County – by Gender, Age, Region and Kids in Household

	GENDER		AGE			REGION							HOUSEHOLD	
	MALE	FEMALE	18 - 34	35 - 54	55+	GTA - TOTAL	GTA 436	GTA 905	CENTRAL	EAST	NORTH	SOUTH WEST	KIDS	NO KIDS
Base: All Respondents	300	300	136	194	270	254	141	113	45	35	12	254	188	412
Northern Bruce Peninsula	34%	42%	41%	40%	35%	47%	48%	47%	38%	26%	42%	30%	39%	38%
Saugeen Shores	33%	31%	18%	32%	39%	19%	17%	20%	29%	34%	33%	45%	25%	35%
Kincardine	31%	26%	18%	26%	34%	20%	20%	21%	31%	31%	8%	36%	25%	30%
South Bruce Peninsula	18%	25%	18%	22%	23%	20%	21%	19%	22%	20%	8%	24%	16%	24%
Brockton	19%	11%	15%	16%	14%	12%	14%	10%	16%	37%	25%	14%	19%	13%
Arran-Elderslie	15%	11%	21%	11%	10%	15%	21%	8%	4%	14%	8%	12%	22%	8%
Huron-Kinloss	14%	10%	14%	12%	11%	12%	13%	10%	9%	17%	8%	13%	16%	10%
South Bruce	13%	7%	12%	11%	9%	11%	11%	12%	4%	9%	17%	10%	15%	8%

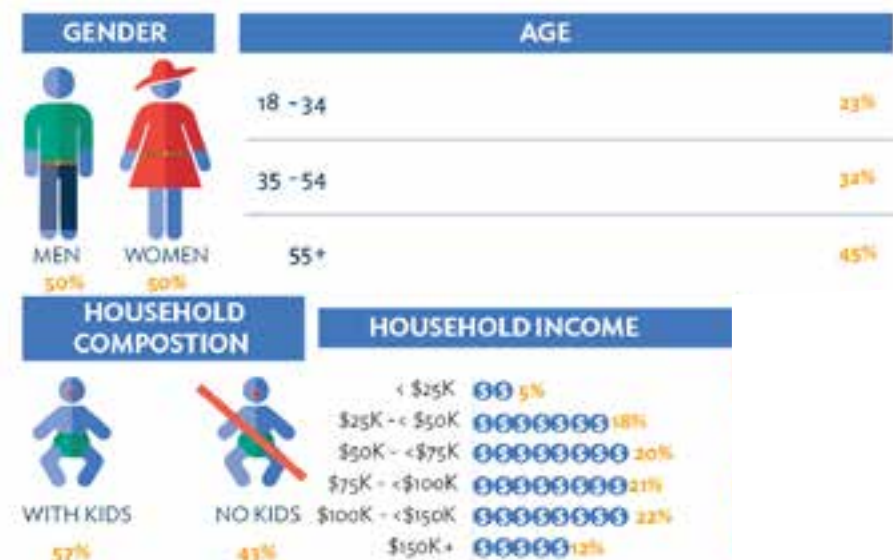
Municipality Visited within Bruce County – by Reason for Visit and Same-Day/Overnight Trip

	REASON FOR VISIT		SAME - DAY/OVERNIGHT TRIP	
	BUSINESS	PERSONAL	SAME - DAY	OVERNIGHT
Base: All Respondents	70	530	278	322
	1	2	3	4
Northern Bruce Peninsula	21%	40%	33%	43%
Saugeen Shores	36%	31%	30%	34%
Kincardine	34%	27%	26%	30%
South Bruce Peninsula	17%	22%	18%	24%
Brockton	31%	13%	19%	11%
Arran-Elderslie	39%	9%	21%	6%
Huron-Kinloss	17%	12%	15%	10%
South Bruce	13%	10%	14%	7%

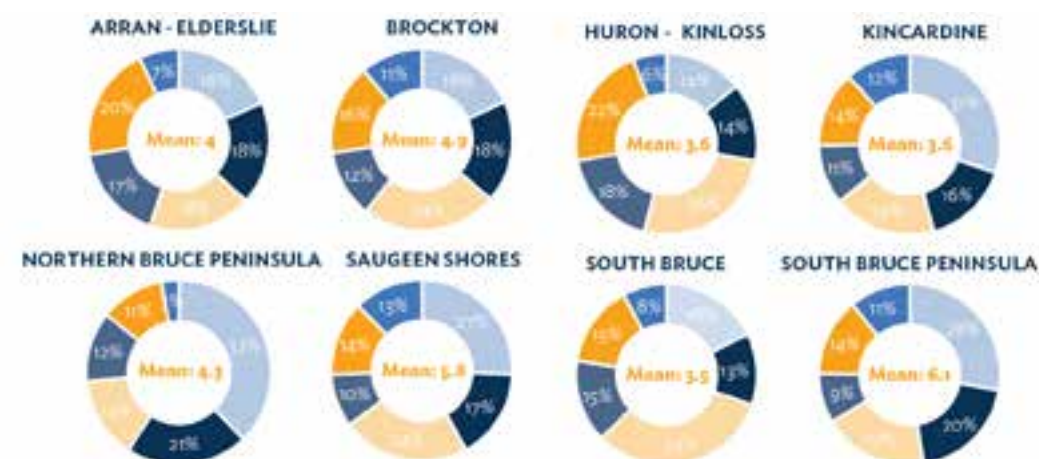
Where Visitors are From

	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
Base: All Respondents	79	48	473	
Northern Bruce Peninsula	32%	40%	39%	
Saugeen Shores	27%	40%	32%	
Kincardine	24%	42%	27%	
South Bruce Peninsula	22%	35%	20%	
Brockton	34%	21%	11%	
ArranElderslie	39%	29%	7%	
Huron - Kinloss	27%	25%	8%	
South Bruce	19%	15%	8%	

Visitor Survey Online Panel



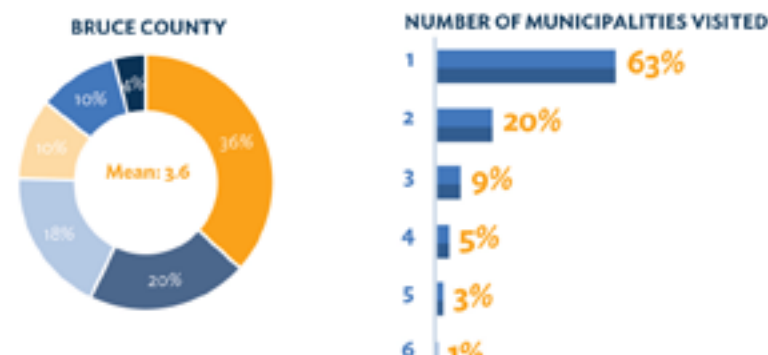
Number of Trips Taken in Past 12 Months



On average, visitors have made 3.6 visits to Bruce County within the past 12 months. About two thirds of visitors have visited only one municipality within Bruce County, while two in ten have visited two, one in ten have visited three, and one in ten four or more.

Number of Trips Taken in Past 12 Months

On average, visitors have made the most trips to South Bruce Peninsula (mean 6.1) and Saugeen Shores (mean 5.8) over the past 12 months, and made the fewest trips to Huron Kinloss (mean 3.6), Kincardine (mean 3.6), and South Bruce (mean 3.5).



When Was Your Most Recent Trip to Bruce County? – by Municipality Visited

	MUNICIPALITY VISITED							
	ARRAN-ELDERSLIE	BROCKTON	HURON-KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA
Base: All Respondents	76	90	73	169	228	191	61	129
	1	2	3	4	5	6	7	8
April - July 2018	55%	60%	55%	59%	50%	60%	51%	54%
January - March 2018	22%	20%	16%	7%	7%	7%	18%	9%
September - December 2017	13%	9%	21%	14%	14%	10%	18%	13%
June - August 2017	9%	11%	8%	21%	30%	23%	13%	24%

What was the Reason for Your Trip to Bruce County? – by Municipality Visited and Same-Day/Overnight Trip

	MUNICIPALITY VISITED								SAME - DAY/OVERNIGHT TRIP	
	ARRAN - ELDERSLIE	BROCKTON	HURON - KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA	<div> <div>Month</div> <div>24</div> </div> <div>SAME - DAY</div>	<div> <div>OVERNIGHT</div> </div>
Base: All Respondents	76	90	73	169	228	191	61	129	278	322
Business	36%	24%	16%	14%	7%	13%	15%	9%	17%	7%
Personal	64%	76%	84%	86%	93%	87%	85%	91%	83%	93%

MUNICIPALITY VISITED IN BRUCE COUNTY



Same-Day or Overnight?
– by Reason for Visit and Municipality Visited

	REASON FOR VISIT		MUNICIPALITY VISITED							
			ARRAN - ELDERSLIE	BROCKTON	HURON - KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA
Base: All Respondents	70	530	76	90	73	169	228	191	61	129
Same-day	67%	44%	76%	60%	56%	43%	40%	43%	62%	40%
Overnight	33%	56%	24%	40%	44%	57%	60%	57%	38%	60%



How Many People Went on This Trip?
– by Reason for Visit and Municipality Visited

	REASON FOR VISIT		MUNICIPALITY VISITED							
			Arran-Elderslie	Brockton	Huron-Kinloss	Kincardine	Northern Bruce Peninsula	Saugeen Shores	South Bruce	South Bruce Peninsula
Base: All Respondents	70	530	76	90	73	169	228	191	61	129
Mean # of People	2.3	2.7	2.5	2.5	2.3	2.5	2.8	2.7	2.5	2.7

Average Amount Spent During Entire Stay
– by Municipality Visited

	MUNICIPALITY VISITED							
	ARRAN - ELDERSLIE	BROCKTON	HURON - KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA
Base: All Respondents	76	90	73	169	228	191	61	129
Accommodation	197.2	244.5	141.1	168.5	197.8	166.7	114	196.2
Recreation and Entertainment	170.9	98.7	88.3	55.1	69	41.8	89.5	57.9
Transportation	122.4	105.2	118.6	58.4	76.5	64.9	56.8	91.2
Food and Beverage	196.3	177.8	94.9	155.3	155.2	149.6	107.7	162.2
Shopping	277.3	151	164.8	125.3	101.1	92.8	137.4	105.4



What Was the Primary Reason For Your Personal Trip?
– by Municipality Visited and Same-Day/Overnight Trip

	MUNICIPALITY VISITED								SAME-DAY/OVERNIGHT TRIP	
	ARRAN - ELDERSLIE	BROCKTON	HURON - KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA	 SAME - DAY	 OVERNIGHT
Base: Personal Trip	49	68	61	145	213	166	52	117	231	299
Visit people/ spend time with friends/ family/ family event	35%	28%	25%	35%	16%	32%	31%	26%	22%	32%
Participate in outdoor sport or recreational activity	8%	15%	16%	14%	28%	21%	10%	26%	17%	25%
Shopping	31%	29%	28%	14%	11%	10%	37%	8%	27%	8%
Sightseeing/ touring/ travelling/ day trip/ get away	4%	15%	11%	13%	15%	10%	6%	12%	10%	12%
Go to a cottage	-	-	2%	5%	8%	7%	2%	9%	-	10%
Go for a drive/ a road trip	4%	1%	3%	3%	4%	4%	2%	4%	5%	1%
Attend an event/ concert/ show	2%	1%	2%	6%	1%	1%	-	1%	3%	2%
Vacation (unspecified)	-	-	2%	3%	2%	3%	-	3%	1%	3%
Other	14%	7%	10%	8%	14%	11%	12%	10%	13%	6%
Don't know / no answer	2%	3%	2%	-	-	1%	2%	1%	1%	-


How Satisfied With Most Recent Trip to Bruce County? – by Reason for Visit and Municipality Visited

	REASON FOR VISIT		MUNICIPALITY VISITED							
			ARRAN - ELDERSLIE	BROCKTON	HURON - KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA
Base: All Respondents	70	530	76	90	73	169	228	191	61	129
Top Box - 10 - Best trip ever	13%	5%	16%	7%	7%	4%	7%	5%	13%	10%

How Likely to Recommend Bruce County to Others – by Municipality Visited and Same-Day/Overnight Trip

	MUNICIPALITY VISITED										
	ARRAN - ELDERSLIE	BROCKTON	HURON - KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA	SAME - DAY	OVERNIGHT	
Base: All Respondents	76	90	73	169	228	191	61	129	278	322	
Net Promoter Score	50%	38%	34%	52%	51%	51%	43%	57%	22%	40%	

How Likely Are You to Visit Bruce County Next Year? – by Municipality Visited and Kids in Household

	MUNICIPALITY VISITED								HOUSEHOLD	
	ARRAN - ELDERSLIE	BROCKTON	HURON - KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA		
Base: All Respondents	76	90	73	169	228	191	61	129	188	412
Definitely will	64%	62%	60%	55%	46%	55%	62%	54%	56%	44%

v. VISITOR SURVEY RESULTS: ONSITE SURVEYS

Bruce County conducted the onsite/online survey this year to get a better understanding of how the results would compare to the online panel survey.

The onsite survey was conducted at various events/festivals, national/provincial parks, tourism centres and various communities, as well as online link was placed on the County’s website. The survey was conducted among a total of 504 visitors, including 363 onsite and 141 online.

ONSITE VISITOR SURVEY RESULTS HIGHLIGHTS:

Visitors made an **6.6** average of trips to Bruce County over a 12 month period.



Three-quarters were staying overnight. Among these, they stayed an average of 6.3 nights, and one-third were staying in a private home, while two in ten each were camping or renting a cabin or cottage. Only 15 percent were staying in a hotel or motel.

Almost all 98% visits are for personal reasons (2% for business).

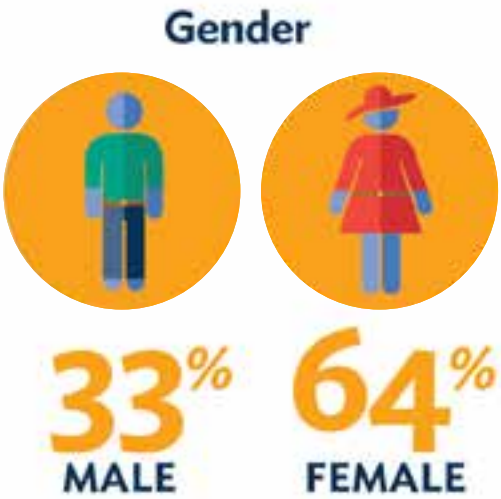


Almost 9 in 10 visitors visited Bruce County with one other person, while 1 in 10 visited on their own. On average, visitors to Bruce County spent \$1,324 (including those who spent nothing).

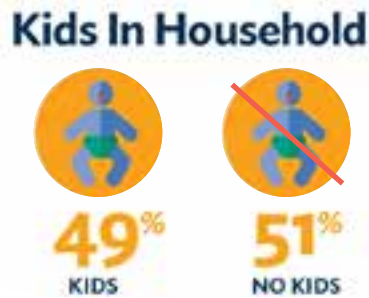
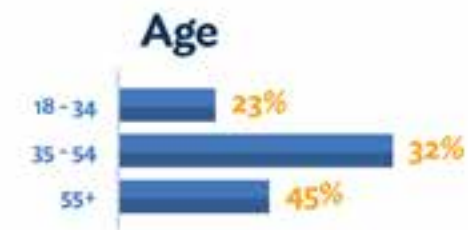
More than nine in ten 95% visitors are satisfied with their trip to Bruce County (rating of 6 or more on a 10-point scale), with the vast majority of these (86%) who are very satisfied with their visit, rating their experience between 8 and 10.



Demographics

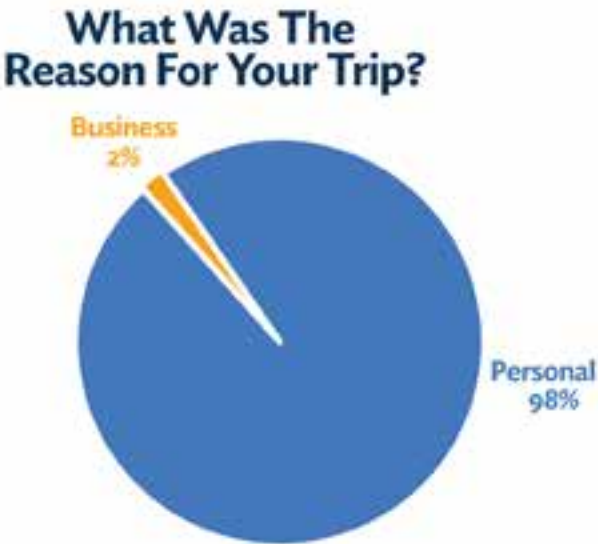


*3% left answers blank.



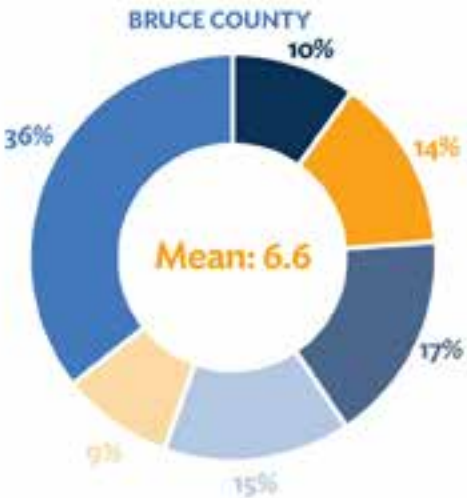
What Was the Reason for Your Most Recent Trip to Bruce County?

Nearly all visitors say their current trip was primarily personal; only 2% say it was for business. Participating in outdoor sport or recreational activity is the most common reason to visit Bruce County, followed by attending a specific event or festival and visiting family or friends.



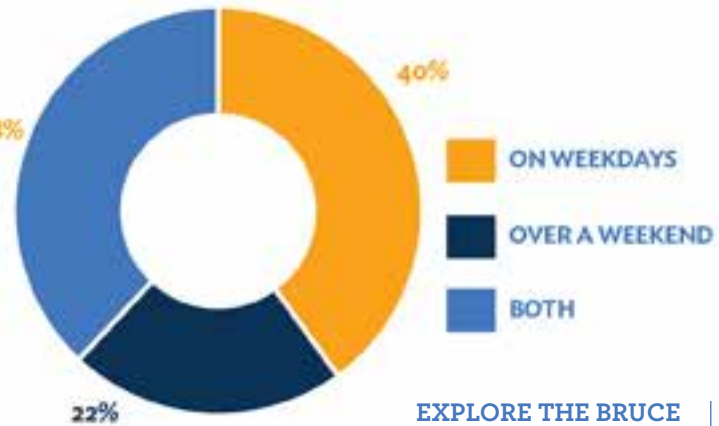
Number of Trips Taken in Past 12 Months

On average, visitors have made 6.6 visits to Bruce County within the past 12 months.



What Time of Week Did You Visit Bruce County?

When it comes to the time of week of the visit, four in ten visited during the week, two in ten over the weekend and four in ten during the week and a weekend.





How Did You Arrive in Bruce County?



How Did You Arrive in Bruce County – by Same-Day/Overnight Trip

	SAME-DAY/OVERNIGHT TRIP	
	<div>March 24</div> SAME-DAY	OVERNIGHT
Base: All Respondents	117	387
Personal Car	86%	96%
Plane	1%	1%
Rental Car	2%	3%
Boat	10%	12%
Walk	8%	-
Other	1%	1%

Same-day or Overnight – by Age and Kids in Household

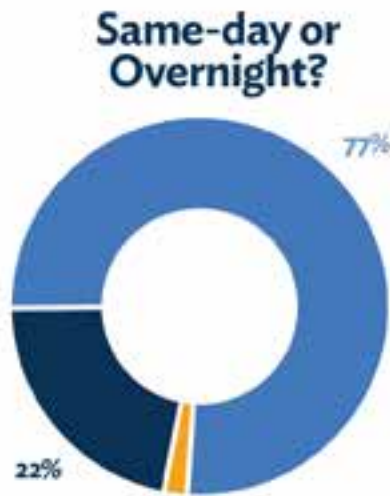
	AGE			HOUSEHOLD	
	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: All Respondents	93	260	146	246	258
Same-day	73%	79%	85%	16%	28%
Overnight	79%	82%	68%	83%	71%

Types of Accommodation – by Age and Kids in Household

	AGE			HOUSEHOLD	
	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: Took Overnight Trip	73	212	99	204	183
Hotel or motel	8%	18%	13%	19%	11%
Private home (with friends or family)	44%	28%	36%	27%	40%
Camping/campground or RV/trailer Park	22%	27%	17%	26%	21%
Rental cabin/cottage	18%	21%	22%	22%	19%
Bed and breakfast	-	1%	3%	1%	3%
Airbnb	6%	1%	1%	3%	2%
Other	3%	4%	5%	4%	4%

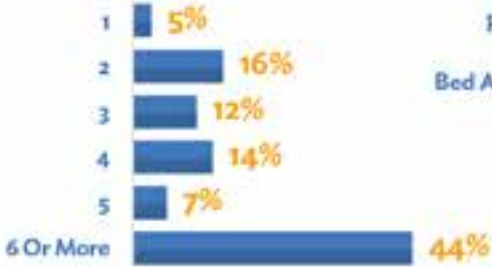
Visitors Staying Overnight

Three-quarters (77%) of visitors to Bruce County were staying overnight on their trip. Among these, they were staying, on average, 6.3 nights and a third were staying in a private home, while about two in ten were camping or renting a cabin or cottage and more than one in ten were staying in a hotel or motel.

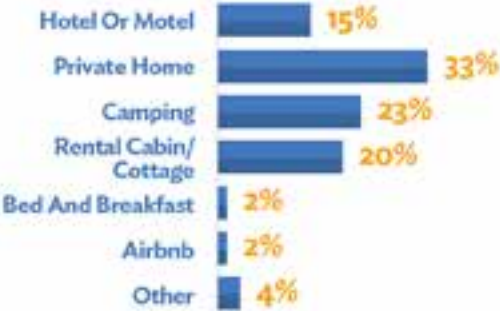


SAME-DAY NO ANSWER OVERNIGHT

Number of Nights Stayed

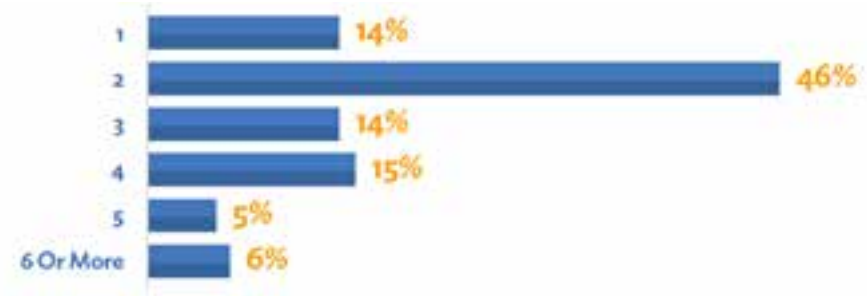


Types of Accommodation




How Many People Went on This Trip?

Just over one in ten visitors travelled on their own, almost one-half visited with one other person and four in ten with at least 3 people in their party.



How Many People Went on This Trip – by Kids in Household

	HOUSEHOLD	
		
	KIDS	NO KIDS
Base: All Respondents	246	258
Mean # of People	4.7	3.4

Total Amount Spent During Entire Stay in Bruce County


MEAN TOTAL SPENDING

	TOTAL	
	INC. \$0	EXCL. \$0
Accommodation (including overnight park fees)	\$621.1	\$752
Recreation and Entertainment (including entrance/user fees)	\$220	\$241
Transportation	\$127	\$136
Food and Beverage	\$206	\$211
Shopping	\$150	\$169
TOTAL (MEAN)	\$1,324.1	\$1,509

Average Amount Spent During Entire Stay – by Where Visitors Are From

	WHERE VISITORS ARE FROM			
Mean (Including '0')				
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
Base: All Respondents	52	8	444	
Accommodation	\$250	\$700	\$626.2	
Recreation and Entertainment	\$166	\$58.4	\$227.1	
Transportation	\$71.4	\$30	\$131	
Food and Beverage	\$44.3	\$73.3	\$224.2	
Shopping	\$45	\$88	\$162	

Average Amount Spent During Entire Stay – by Age and Income

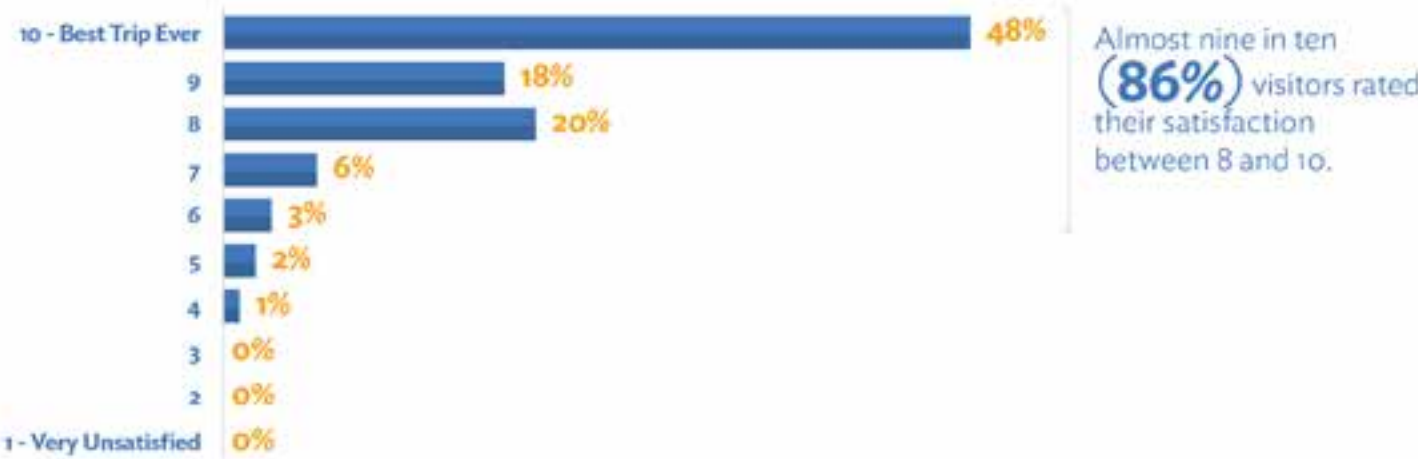
	AGE			INCOME				
								
Mean (Including '0')	18 – 34	35 – 54	55+	UNDER \$25,000	\$25,000 TO LESS THAN \$50,000	\$50,000 TO LESS THAN \$75,000	\$75,000 TO LESS THAN \$100,000	MORE THAN \$100,000
All Respondents	93	260	146	17	42	71	81	234
Accommodation	\$466.1	\$602	\$793.4	\$259.1	\$428.1	\$655	\$572	\$710
Recreation and Entertainment	\$152	\$213.4	\$290.3	\$95	\$89.4	\$166	\$201	\$263
Transportation	\$99.3	\$125.2	\$159	\$154	\$89.3	\$89	\$117	\$151.2
Food and Beverage	\$164	\$227.1	\$194.5	\$137.2	\$84	\$144	\$177	\$270
Shopping	\$104.2	\$145	\$186	\$109	\$74	\$101	\$130	\$191.4



How Satisfied With Most Recent Trip to Bruce County – by Where Visitors Are From

	WHERE VISITORS ARE FROM			
	 BRUCE county	 Grey County	 HURON COUNTY	 Ontario
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
Base: All Respondents	52	8	444	
Top Box - 10 - Best trip ever	73%	75%	45%	

How Satisfied With Most Recent Trip to Bruce County



How Likely to Recommend Bruce County to Others



How Satisfied with Most Recent Trip to Bruce County - by age

	AGE		
			
	18 - 34	35 - 54	55+
Base: All Respondents	93	260	146
Top Box – 10 – Best trip ever	38%	45%	59%

How Likely to Recommend Bruce County to Others
– by Age and Kids in Household

	AGE			HOUSEHOLD	
					
	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: All Respondents	93	260	146	246	258
Net Promoter Score	73%	79%	85%	84%	75%

How Likely Are You to Visit
Bruce County Next Year?


Three-quarters (74%) of visitors say they “definitely will” visit Bruce County next year.





How Likely to Recommend Bruce County to Others
– by Where Visitors Are From

	WHERE VISITORS ARE FROM			
				
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
Base: All Respondents	52	8	444	
Net Promoter Score	94%	100%	83%	

How Likely Are You to Visit Bruce County
Next Year? – by Age and Kids in Household

	AGE			HOUSEHOLD	
					
	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: All Respondents	93	260	146	246	258
Definitely Will	65%	72%	84%	70%	78%

How Likely Are You to Visit Bruce County Next Year?
– by Same-Day/Overnight Trip

	SAME-DAY/OVERNIGHT TRIP	
	 Same - Day	 Overnight
Base: All Respondents	109	387
Definitely Will	82%	72%

How Likely Are You to Visit Bruce County Next Year?
– by Where Visitors Are From

	WHERE VISITORS ARE FROM			
		 Grey County	 HURON COUNTY	
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
Base: All Respondents	52	8	444	
Definitely will	98%	100%	71%	

COMPARISON

ONLINE SURVEY RESULTS VERSUS ONSITE SURVEY RESULTS

In general, respondents to the onsite/online survey are more likely to have visited Bruce County more times in the past 12 months, to have stayed more nights overnight, report higher amounts of spending and to have more positive views of their visit to Bruce County. This is not surprising given that respondents to an onsite survey because they are face-to-face with the interviewer would be more likely to provide more positive responses.

Visited Bruce County for personal reasons:

online panel survey vs. onsite/online survey

88% vs. 98%



Net promoter score recommend to family or friends:

online panel survey vs. onsite/online survey

31% vs. 80%



Stayed in hotel or motel:

online panel survey vs. onsite/online survey

33% vs. 15%

Mean number of nights stayed:

online panel survey vs. onsite/online survey

3 vs. 6.3



Number who stayed overnight:

online panel survey vs. onsite/online survey

54% vs. 77%

Definitely will visit Bruce County next year:

online panel survey vs. onsite/online survey

48% vs. 74%



Very satisfied with trip (rating of between 8 and 10):

online panel survey vs. onsite/online survey

60% vs. 86%

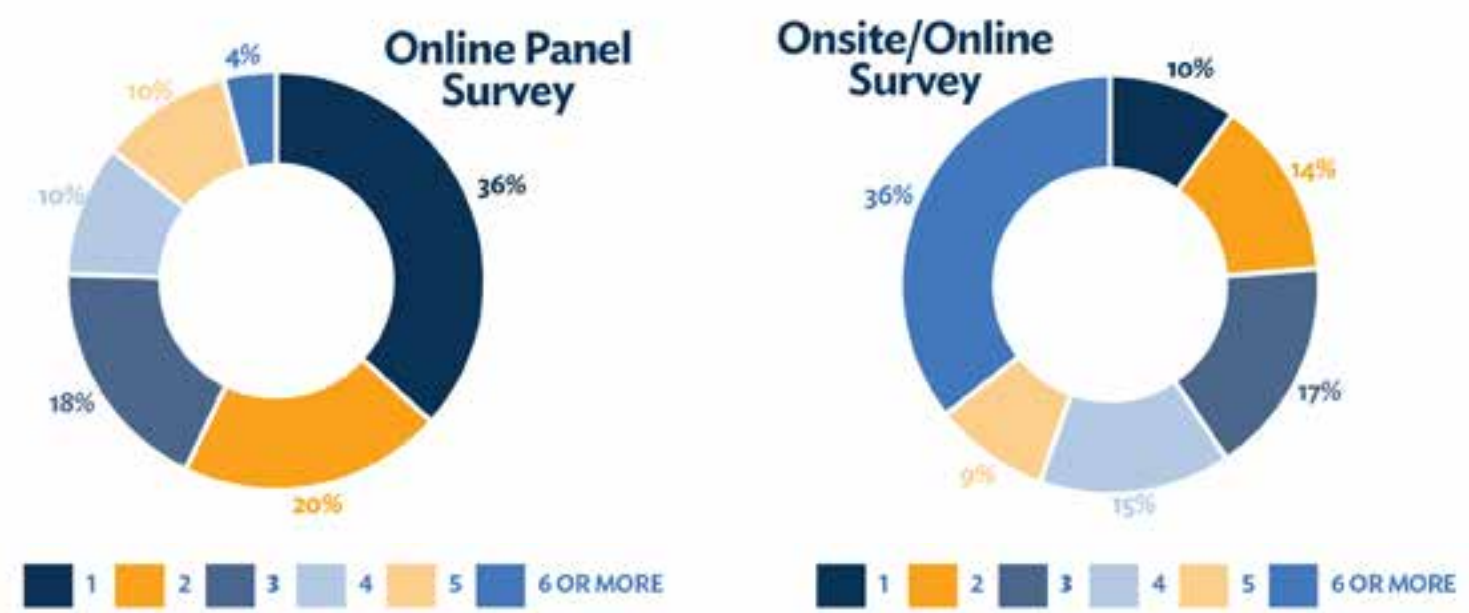
Mean number of trips to Bruce County in past 12 months:

online panel survey vs. onsite/online survey

3.6 vs. 6.6

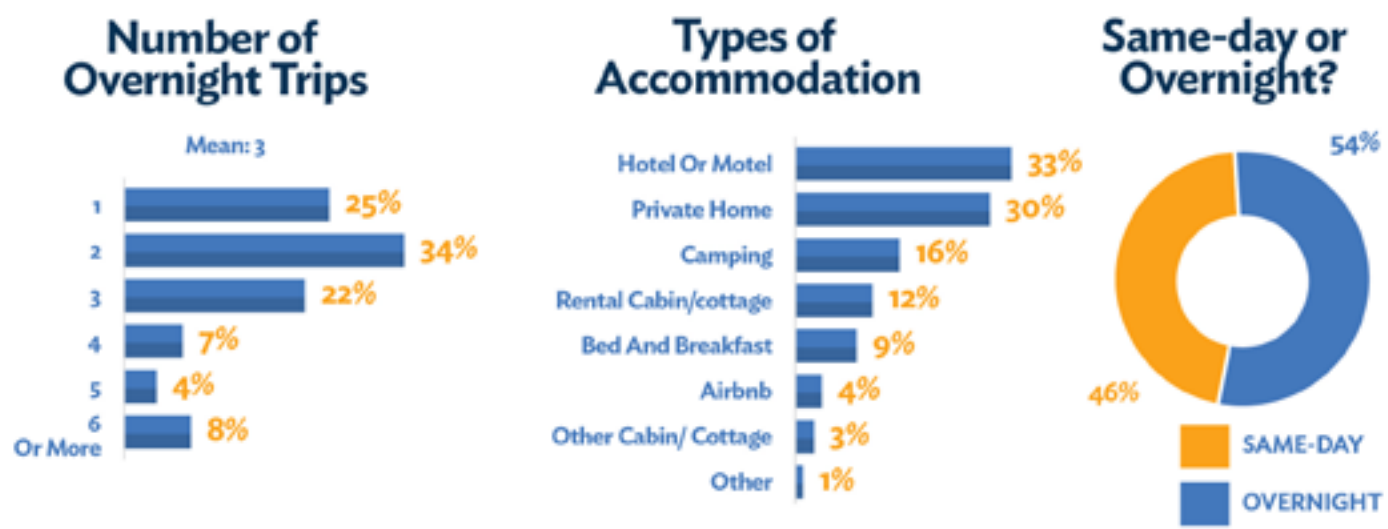
Number of Trips Taken in Past 12 Months
– Online Panel vs. Onsite/Online Survey

Respondents to the online panel survey report taking an average of 3.6 trips to Bruce County in the past 12 months compared to 6.6 among respondents to the onsite/online survey.



Visitors Staying Overnight

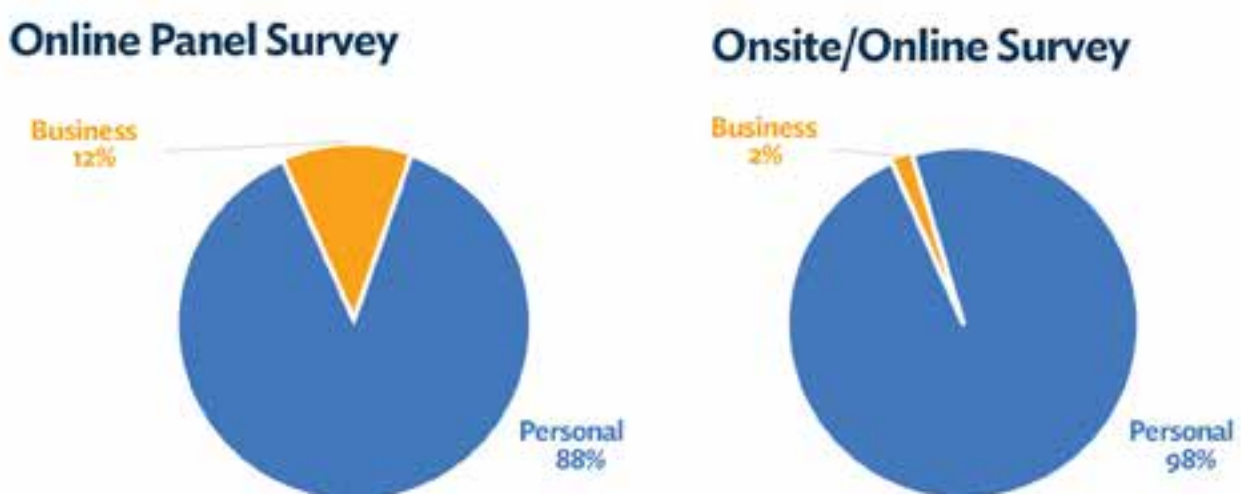
Online Panel Survey



Onsite/Online Survey

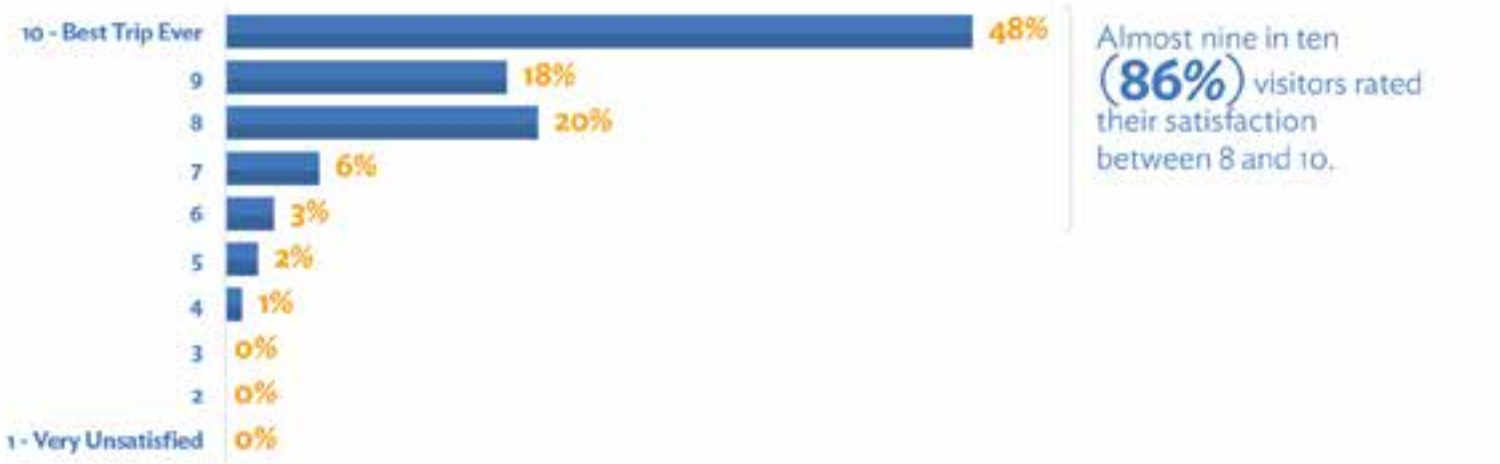


What Was the Reason for Your Most Recent Trip to Bruce County? – Online Panel Versus Onsite/Online Survey



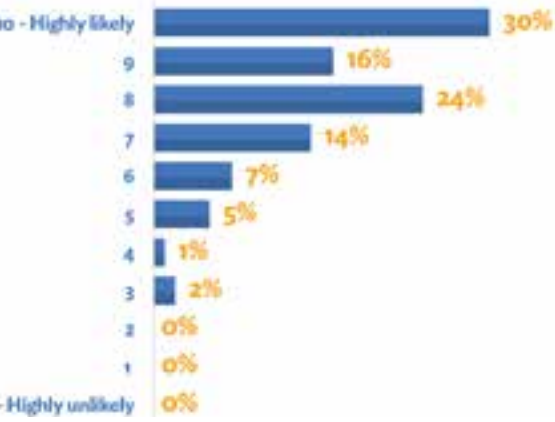
How Satisfied With Most Recent Trip to Bruce County?

Onsite/Online Survey



How Likely to Recommend Bruce County to Others?

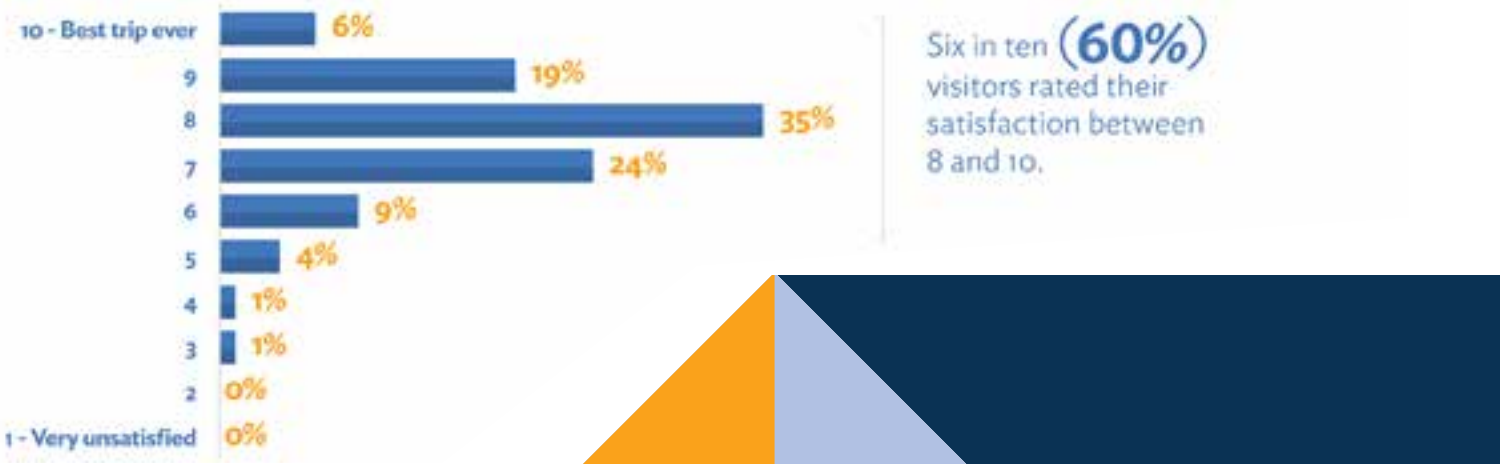
Online Panel Survey



Onsite/Online Survey



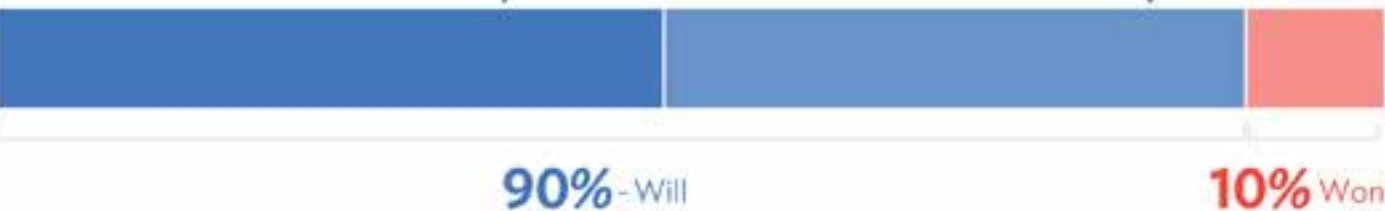
Online Panel Survey



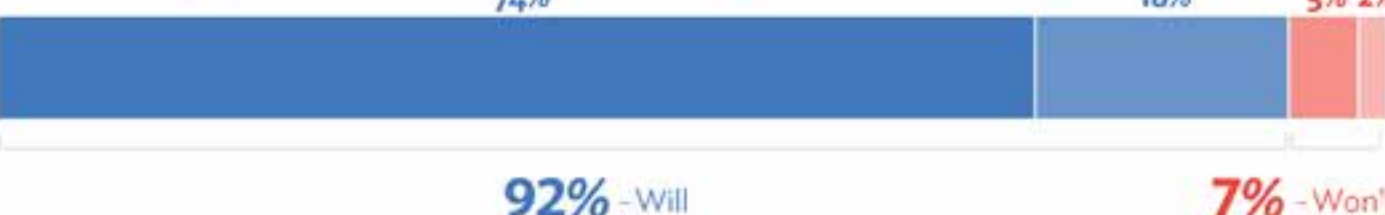
How Likely Are You to Visit Bruce County Next Year?

DEFINITELY WILL PROBABLY WILL PROBABLY WON'T DEFINITELY WON'T

Online Panel Survey



Onsite/Online Survey



NEXT STEPS

- 1 Conduct annual survey to measure the impact of tourism.
- 2 Results from the annual surveys will be made available to local stakeholders so that they have a better understanding of who our visitors are.
- 3 The infographic will be beneficial for existing business owners and prospective entrepreneurs as they decide where they open their businesses.

