



EDAC Marketing Canada Awards

Abstract: Publications - Economic Impact of Tourism

The purpose of this project was to develop a standardized methodology to measure the economic impact of tourism in Bruce County on an annual basis. The project goal was to develop a framework for the collection and analysis of tourism data to leverage existing collection sources, address current gaps, build a baseline of information, reduce duplication of efforts and better inform business and industry support for prospective business growth opportunities. This standardized and consistent approach has the potential to guide the expansion of tourism and will foster incremental growth in a key economic sector in Bruce County, see Appendix A. It is currently the only model of collecting primary data annually to measure the economic impact of tourism within a designated area in Ontario.

The report that was generated has helped entrepreneurs decide on why they should open their business here because they have data to support their decisions. Recently, at the EDCO Investors Dragon pitch session, we shared this data and since then have had two hotel investors have come to the Peninsula, with one confirmed to open a business next year.

In 2019, we have had an influx of new tourism businesses open and expand in Bruce County, including:

- Four new craft breweries and one opening this year
- Two new hotels with the potential of two more
- Bruce Peninsula Eco-Tours and an outdoor escape room based in the forest (not for profit eco tours)
- Two axe throwing (business additions from Ascent Aerial Park in Sauble Beach and Cornerstone Golf in Tobermory)
- The June Motel (successful motel owners from Prince Edward County)
- Downtown retail stores and restaurants, both new and expanding

More tourism related businesses has increased the number of visitors to their area– since more tourism activities/experiences = more visitors, longer stays and more spending. The report provides vital and useful information for attracting new businesses to the area. Prior to the completion of this study, collection efforts didn't provide the appropriate data for business development, address current gaps, or form a baseline of information. Data collection efforts were being duplicated by multiple stakeholders and were often based on subjectivity rather than fact.

The challenge of a project like this is to create meaningful data that will help current and potential businesses, our industry partners and ourselves, while being sustainable on an annual basis. With this change being made, we are now able to support our businesses with factual primary data that they can use in their marketing efforts, in their business expansions as well as when applying for grants and other financial assistance. We are also able to better understand where we should be putting our own marketing efforts in the creation of our next Strategic Plan and see how our efforts are influencing the tourism industry on an annual basis, see Appendix B and C.

The target audience includes (more detailed information in Appendix D):

- Nature Lovers: 35-54-year-old couples, with young children, budget conscious, love the outdoors
- Memory Makers: 35-50-year-old couples, often sandwich generation with elementary aged children
- Mellow Vacationers: 55+ year old, working couples without children, seeking rest and relaxation
- Knowledge Seekers: 55+ year old, females with grown children, employed, higher levels of education
- New Canadians: 25-34-year-old couples with young kids, high levels of education, influenced by trends

See Appendix E for News Articles and Media Attention.



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).



2018
TOURISM BY THE NUMBERS

i. ECONOMIC IMPACT OF TOURISM



Visitors
2.5
MILLION

Over **90%** are likely to visit Bruce County again next year.

Economic Impact Of Tourism
299.1
MILLION

Total Visitor Spending
(in millions of dollars)

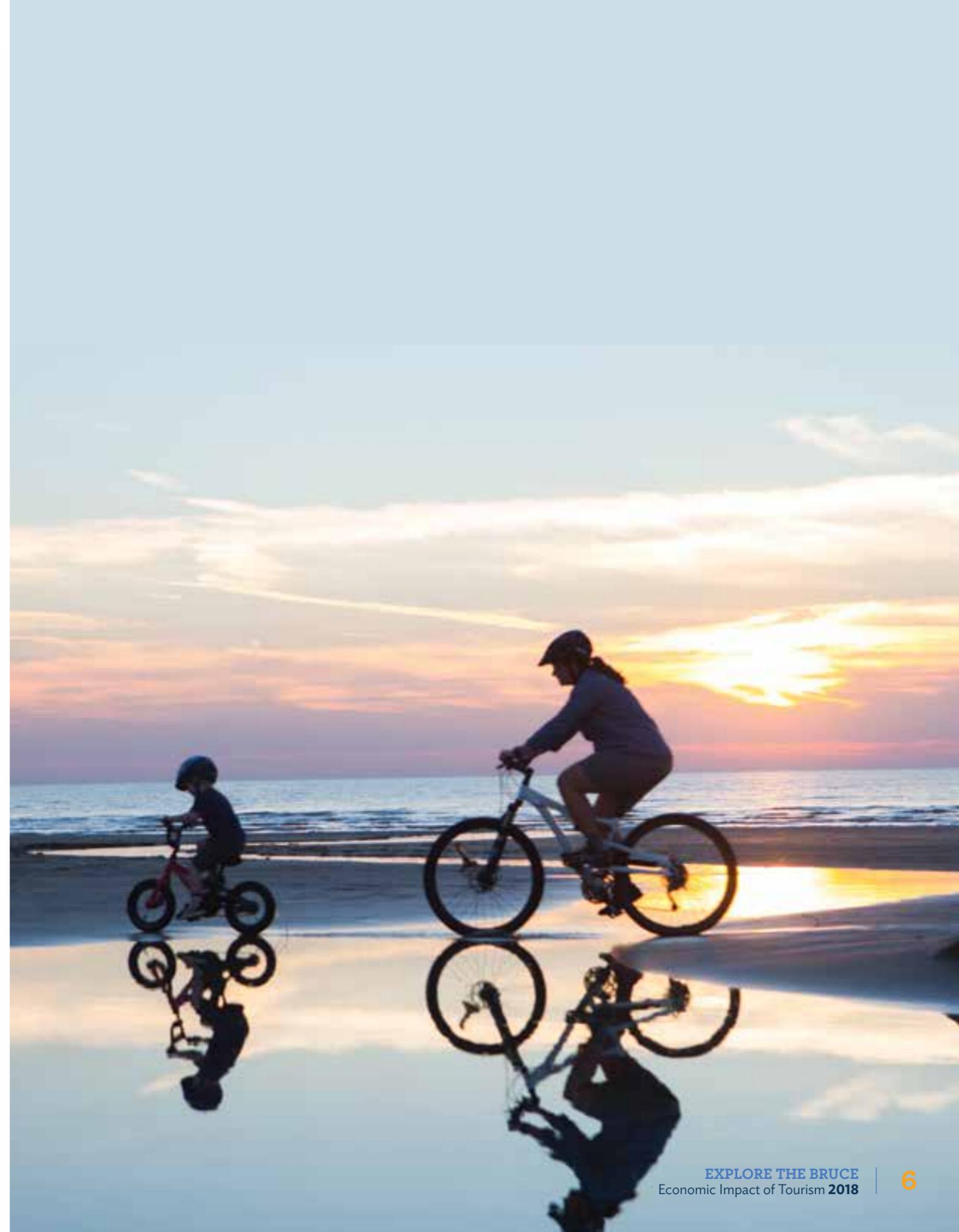


Economic Impact for Bruce County

	DIRECT	INDIRECT	INDUCED	TOTAL
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

Fiscal Impact in Bruce County

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



2018
TOURISM BY THE NUMBERS

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.

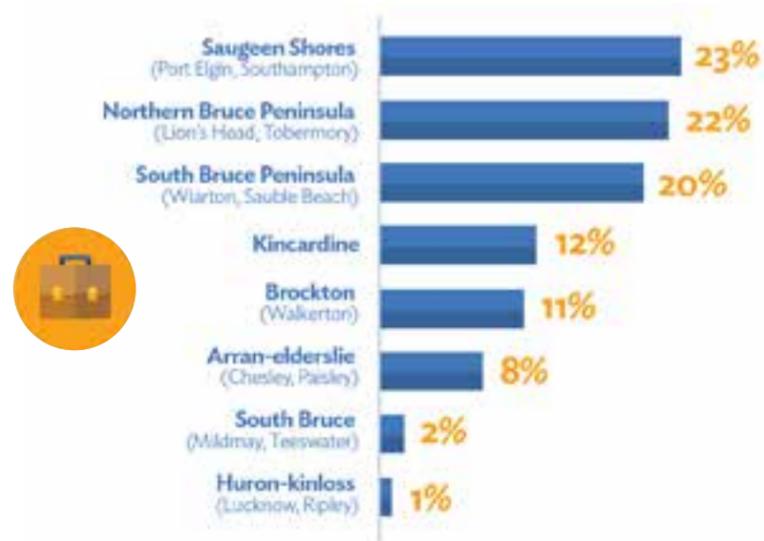
Businesses surveyed indicate that they have on average **1,206** visitors at their establishment each week during the peak and, on average, **231** visitors each week during the off season. These figures vary by type of business.

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



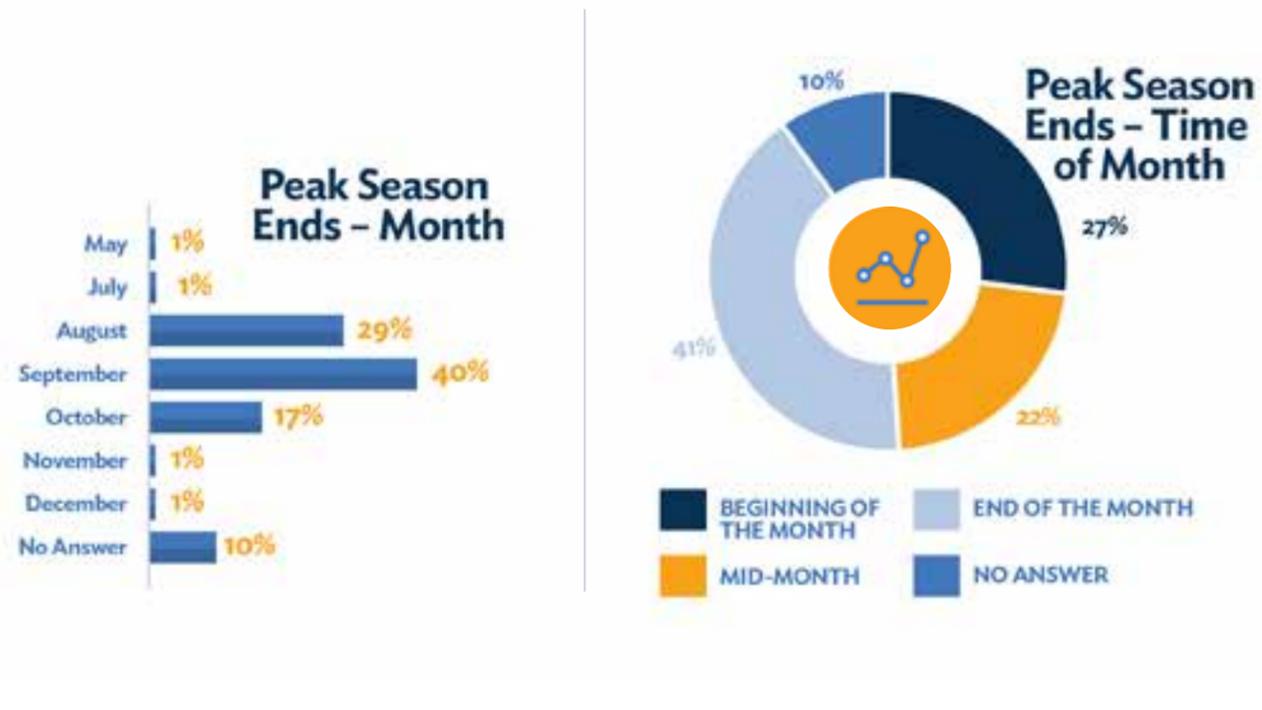
When Does Your Peak Season Start?



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	1,147	420	\$39
Clothing And Clothing Accessories Stores	6987	239	\$90
Sporting Goods, Hobby, Book And Music Stores	1,175	428	\$99
Food Manufacturing	2,372	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

Mean
(incl. o) 1,206
(excl. o) 1,224

Number of Visitors - Off Season

Mean
(incl. o) 231
(excl. o) 253

Average Visitor Dollar Amount Spent

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.

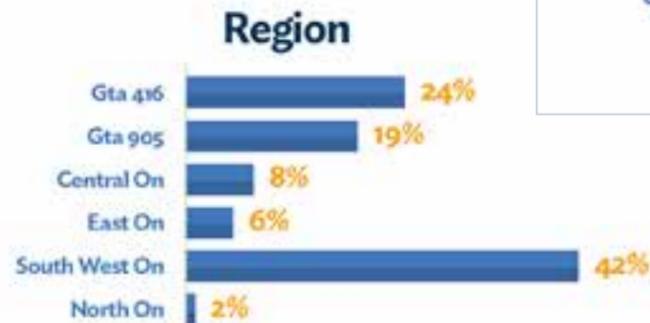
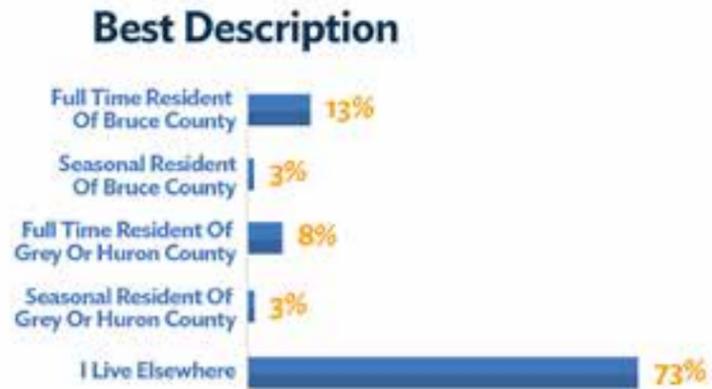
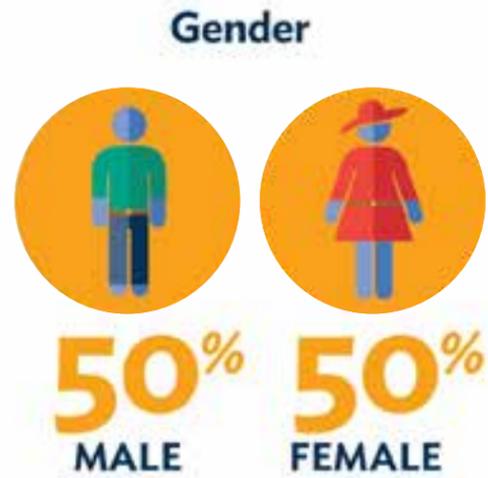


Almost 9 in 10
visitors visited with one other person, while almost one in ten visit on their own. Visitors to Bruce County spent on average **\$592**, and a median of **\$156**.



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



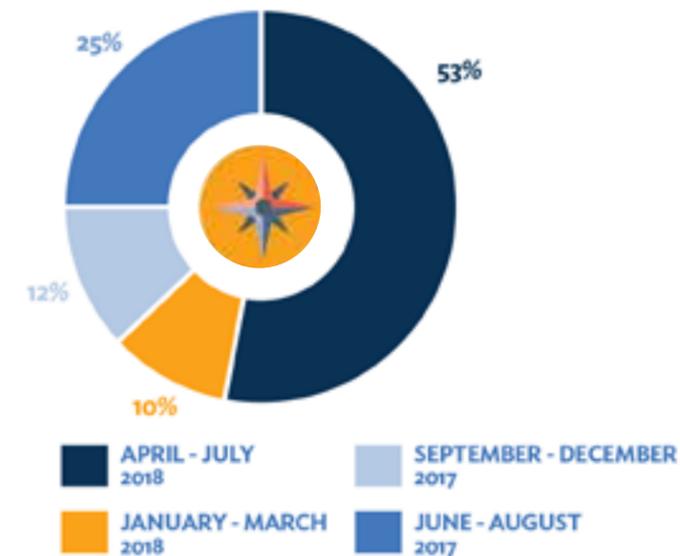
Number of Trips Taken in Past 12 Months – by Reason for Visit

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

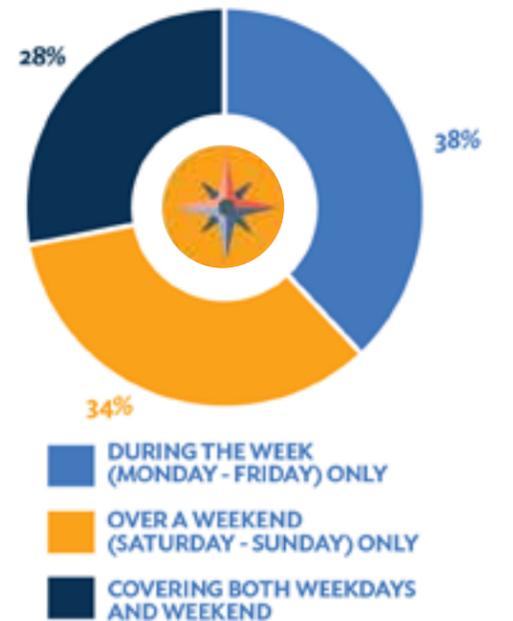
Number of Trips Taken in Past 12 Months – by Where Visitors Are From

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
<i>Base: All Respondents</i>	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%

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
<i>Base: Stayed 5 Or Less Nights</i>	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%

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
<i>Base: All Respondents</i>	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%

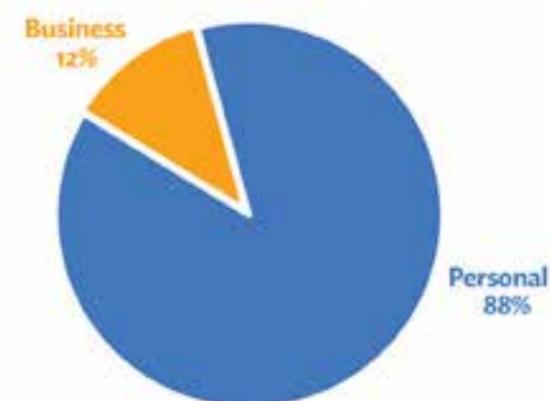
What Was the Reason for Your Most Recent Trip to Bruce County?

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
<i>Base: All Respondents</i>	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
<i>Base: Personal Trip</i>	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			
				
	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: Took Overnight Trip</i>	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

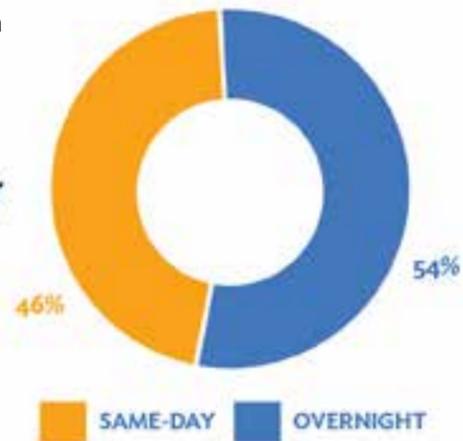
	WHERE VISITORS ARE FROM			
				
	FULL-TIME RESIDENT OF BRUCE COUNTY	FULL-TIME RESIDENT OF GREY OR HURON COUNTY	SEASONAL RESIDENTS OF BRUCE, GREY OR HURON COUNTY/OTHER ONTARIO	
<i>Base: Took Overnight Trip</i>	58	39	433	
Visit people/spend time with friends/ family/ family event	21%	10%	30%	
Participate 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%	-	-	



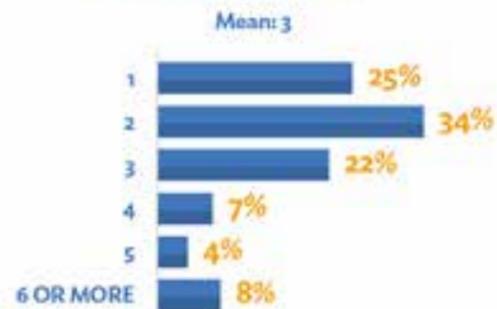
Visitors Staying Overnight

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?



Number of Overnight Trips



Types of Accommodation



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%

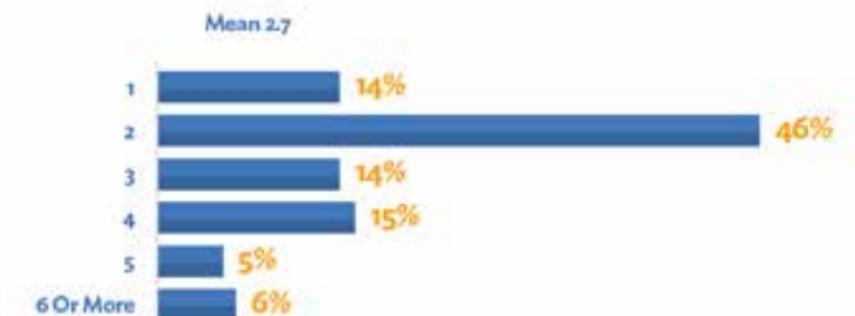
Same-Day or Overnight? – by Where Visitors Are From

	WHERE VISITORS ARE FROM		
	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
Same-day	71%	71%	40%
Overnight	29%	29%	60%

Types of Accommodation – by Age

	AGE		
	18 - 34	35 - 54	55+
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
<i>Base: All Respondents</i>	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

Mean (Including those that stated zero spending)	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	
<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

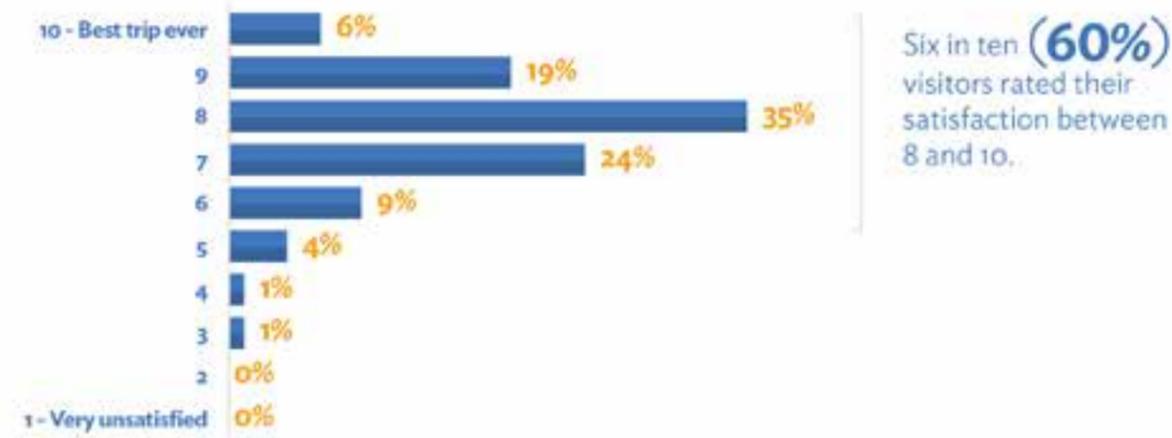
*Including and excluding those that spent zero dollars.

Total Amount Spent - by Type of Business

Mean (Including '0')	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
<i>All Respondents</i>	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

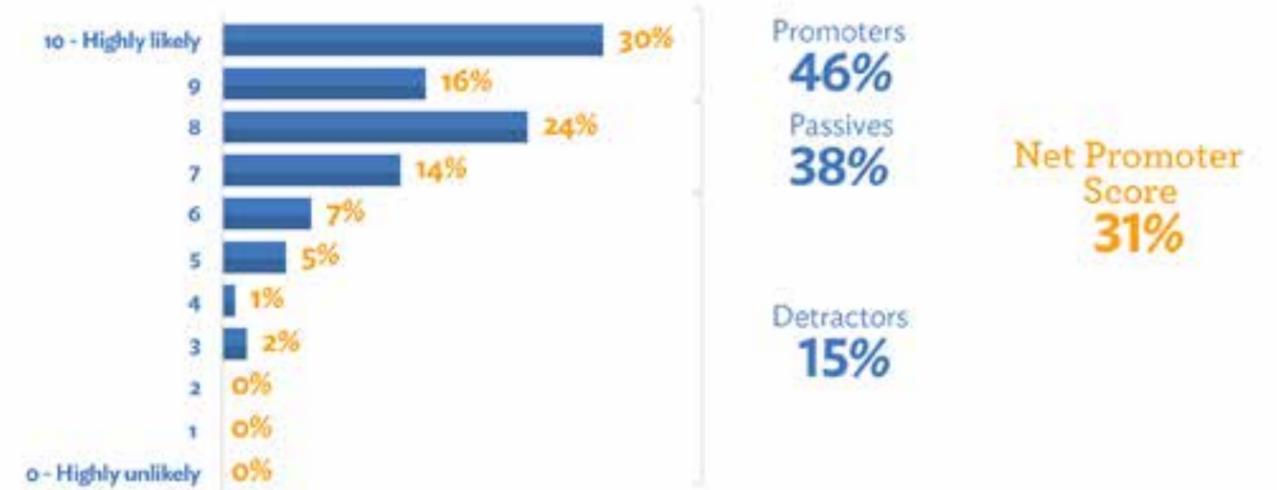
	AGE			HOUSEHOLD	
	18 - 34	35 - 54	55+	KIDS	NO KIDS
Base: All Respondents	136	194	270	188	412
Top Box - 10 - Best trip ever	13%	5%	3%	13%	3%

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

	WHERE VISITORS ARE FROM			
	BRUCE	Grey County	HURON COUNTY	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%



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-416	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
Northern Bruce Peninsula	1	2	3	4
Saugeen Shores	21%	40%	33%	43%
Kincardine	36%	31%	30%	34%
South Bruce Peninsula	34%	27%	26%	30%
Brockton	17%	22%	18%	24%
Arran-Elderslie	31%	13%	19%	11%
Huron-Kinloss	39%	9%	21%	6%
South Bruce	17%	12%	15%	10%
South Bruce	13%	10%	14%	7%

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	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%
Arran-Elderslie	39%	29%	7%
Huron-Kinloss	27%	25%	8%
South Bruce	19%	15%	8%

iv. VISITOR SURVEY RESULTS BY MUNICIPALITY: ONLINE PANEL



The online panel survey finds that **10%** of Ontarians visited Bruce County in the past 12 months.

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.

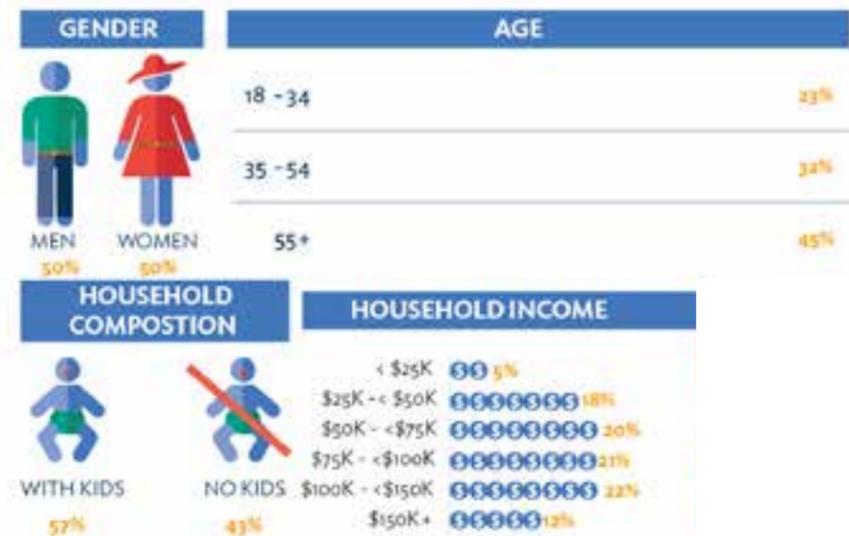
In contrast, visitors to Bruce County are less likely to have visited Brockton, Arran-Elderslie, Huron-Kinloss and South Bruce, and visitors who are more likely to have visited these four municipalities are more likely to be full-time residents of Bruce County.

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



Visitor Survey Online Panel



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%

Number of Trips Taken in Past 12 Months



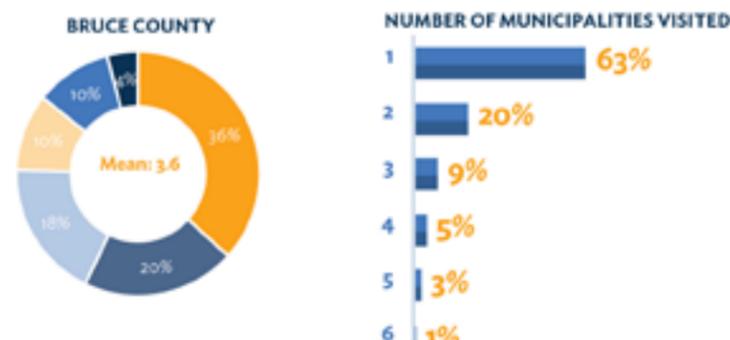
On average, visitors have made 3.6 visits to Bruce County within the past 12 months. About two thirds of visitors have visited only one municipality within Bruce County, while two in ten have visited two, one in ten have visited three, and one in ten four or more.

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	Month 24 SAME - DAY	OVERNIGHT
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%

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).



MUNICIPALITY VISITED IN BRUCE COUNTY



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

	REASON FOR VISIT		MUNICIPALITY VISITED							
	 BUSINESS	 PERSONAL	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							
	 BUSINESS	 PERSONAL	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	 24 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							
	 BUSINESS	 PERSONAL	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									24	
	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	 KIDS	 NO KIDS
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).

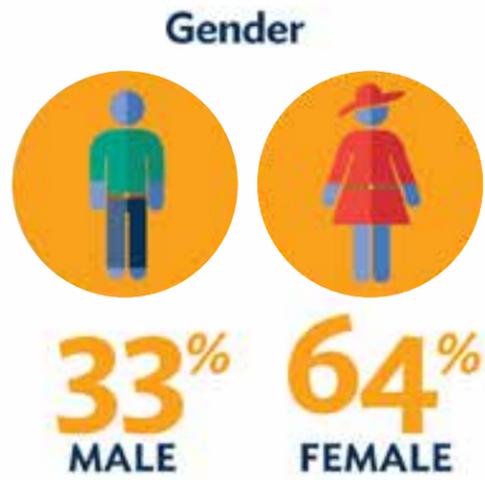


Almost **9 in 10** visitors visited Bruce County with one other person, while 1 in 10 visited on their own. On average, visitors to Bruce County spent \$1,324 (including those who spent nothing).

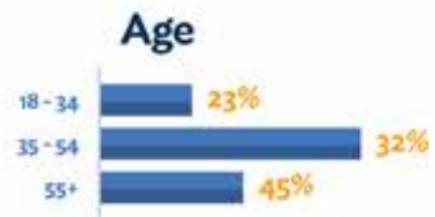
More than nine in ten 95% visitors are satisfied with their trip to Bruce County (rating of 6 or more on a 10-point scale), with the vast majority of these (86%) who are very satisfied with their visit, rating their experience between 8 and 10.



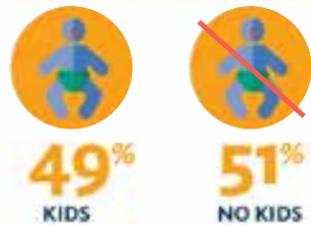
Demographics



*3% left answers blank.



Kids In Household

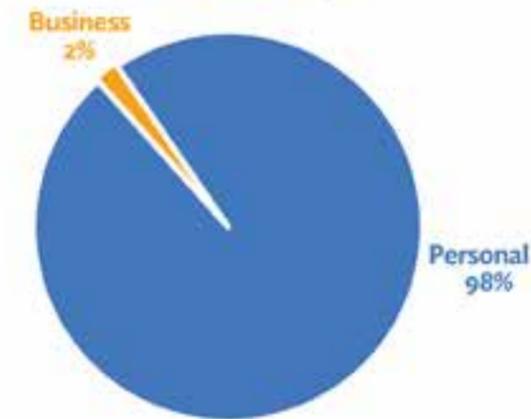


What Was the Reason for Your Most Recent Trip to Bruce County?

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.

What Was The Reason For Your Trip?

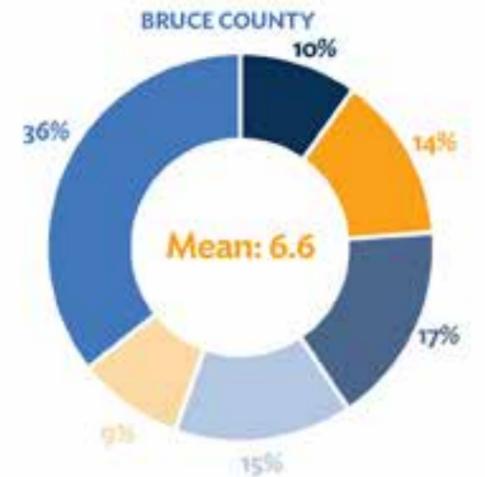


What Was The Primary Reason For Your Personal Trip?



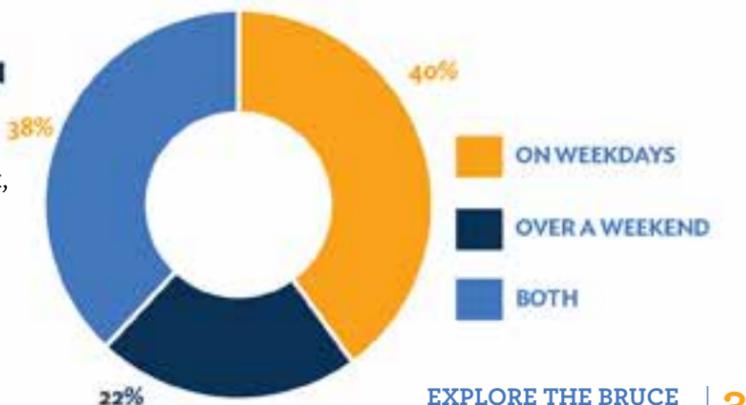
Number of Trips Taken in Past 12 Months

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	
	MARCH 24 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	
				KIDS	NO KIDS
	18 - 34	35 - 54	55+		
Base: All Respondents	93	260	146	246	258
Same-day	73%	79%	85%	16%	28%
Overnight	79%	82%	68%	83%	71%

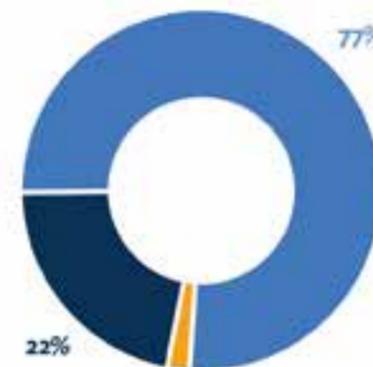
Types of Accommodation – by Age and Kids in Household

	AGE			HOUSEHOLD	
				KIDS	NO KIDS
	18 - 34	35 - 54	55+		
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%

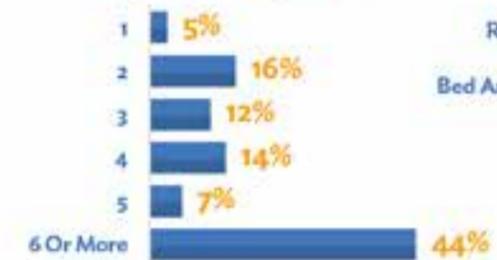
Visitors Staying Overnight

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.

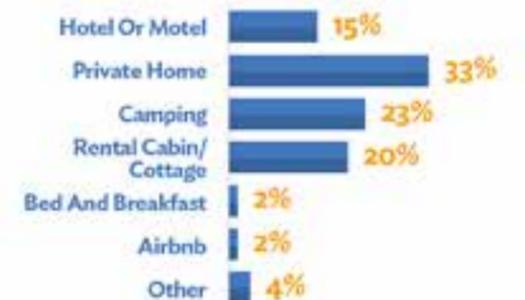
Same-day or Overnight?



Number of Nights Stayed



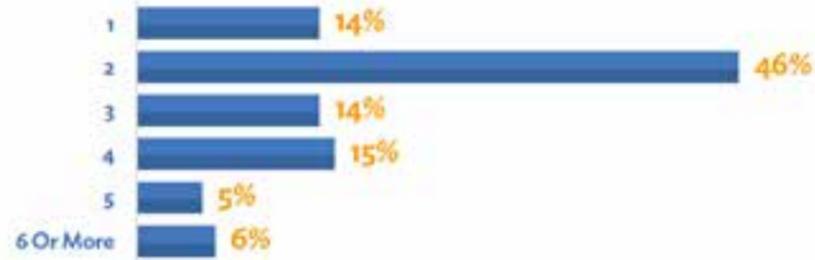
Types of Accommodation



■ SAME-DAY ■ NO ANSWER ■ OVERNIGHT

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

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

Mean (Including '0')	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	
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

Mean (Including '0')	AGE			INCOME				
	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

Total Amount Spent During Entire Stay in Bruce County

MEAN TOTAL SPENDING

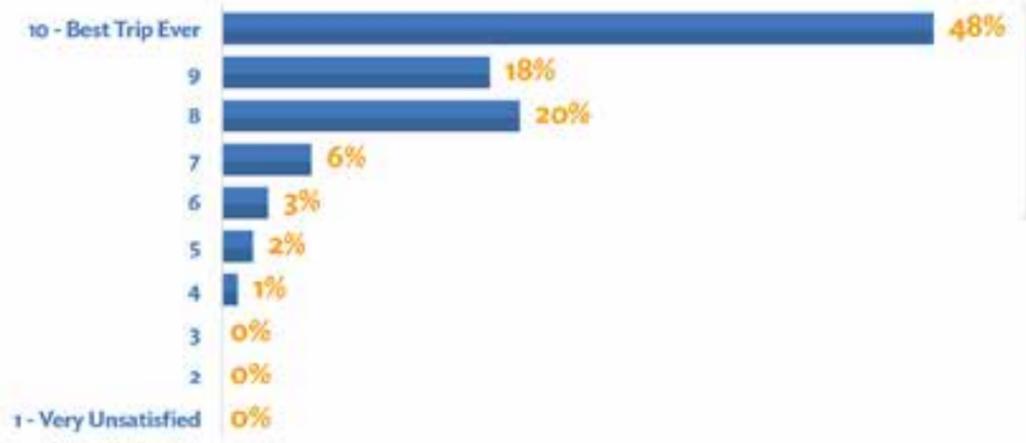
	TOTAL	
	INC. \$0	EXCL. \$0
Accommodation (including overnight park fees)	\$621.1	\$752
Recreation and Entertainment (including entrance/user fees)	\$220	\$241
Transportation	\$127	\$136
Food and Beverage	\$206	\$211
Shopping	\$150	\$169
TOTAL (MEAN)	\$1,324.1	\$1,509



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

	WHERE VISITORS ARE FROM		
	BRUCE county	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
<i>Base: All Respondents</i>	52	8	444
Top Box – 10 – Best trip ever	73%	75%	45%

How Satisfied With Most Recent Trip to Bruce County



Almost nine in ten (86%) visitors rated their satisfaction between 8 and 10.

How Likely to Recommend Bruce County to Others



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

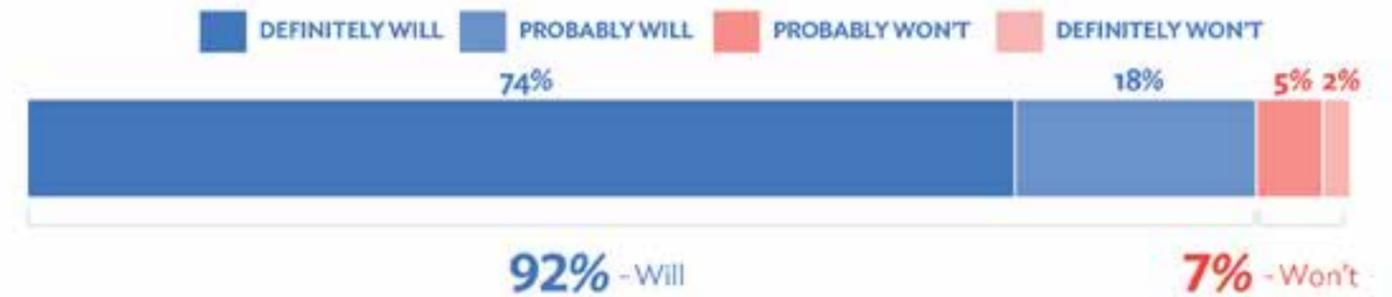
	AGE		
	18 - 34	35 - 54	55+
<i>Base: All Respondents</i>	93	260	146
Top Box - 10 – Best trip ever	38%	45%	59%

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		
	BRUCE COUNTY	Grey County HURON COUNTY	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
<i>Base: All Respondents</i>	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		
	 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>	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%

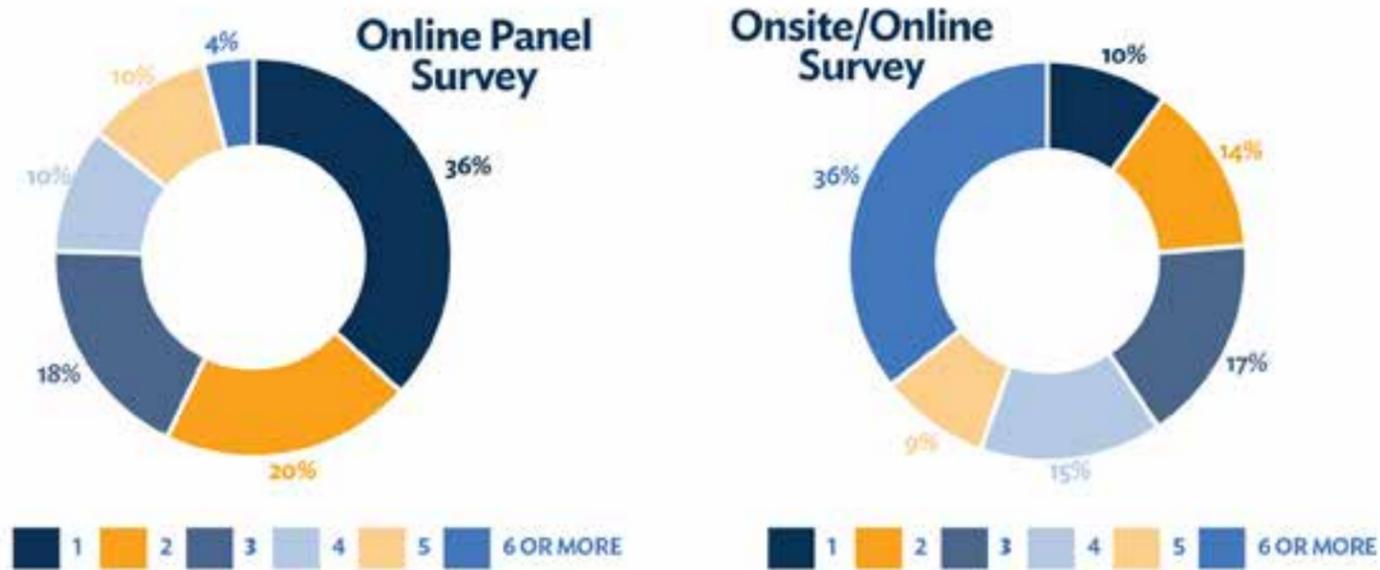
Mean number of trips to Bruce County in past 12 months:

online panel survey vs. onsite/online survey

3.6 vs. 6.6

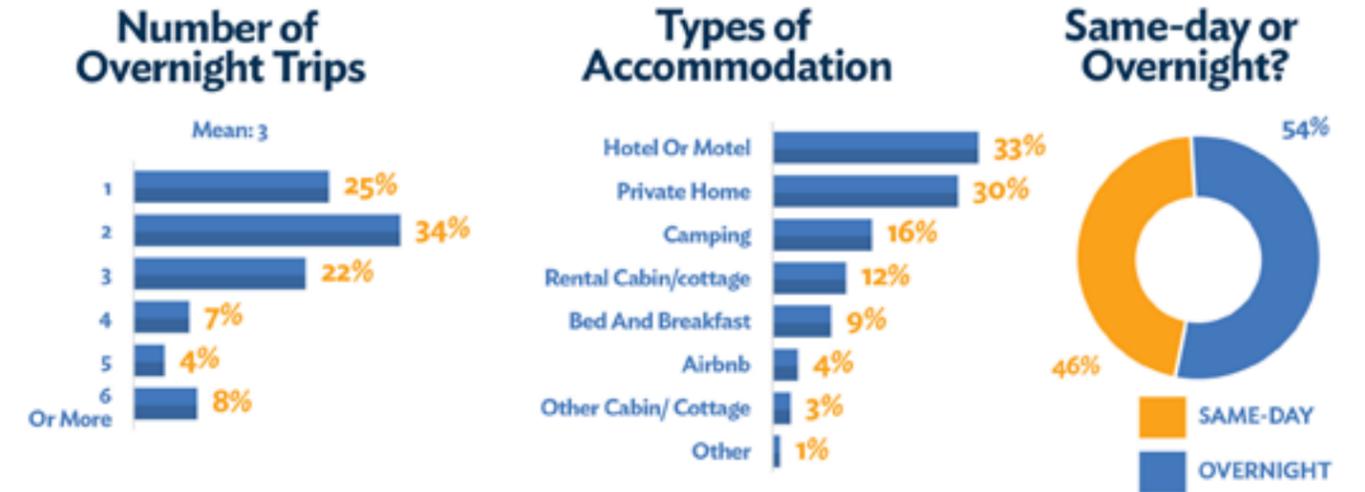
Number of Trips Taken in Past 12 Months – Online Panel vs. Onsite/Online Survey

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

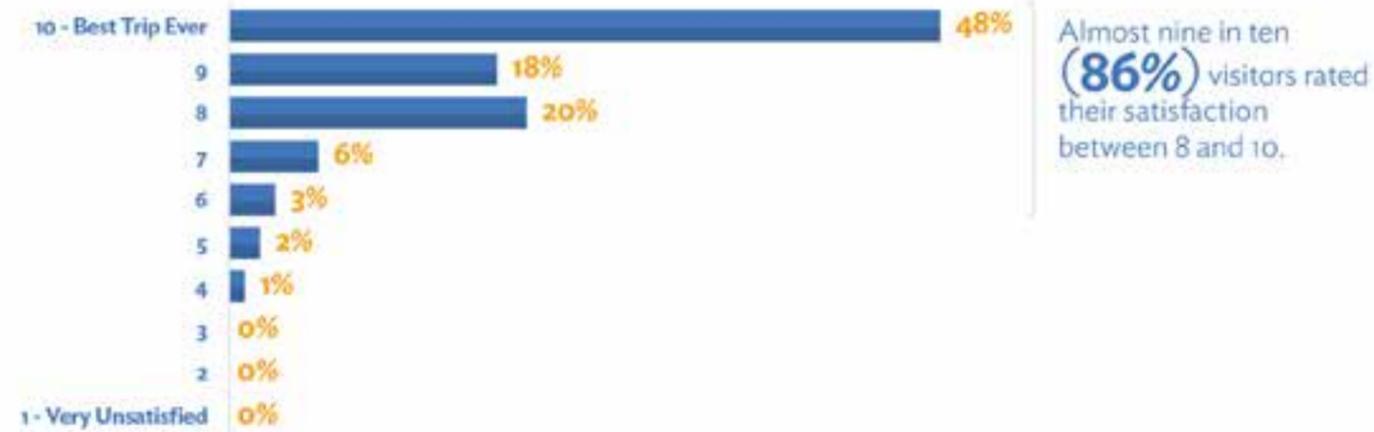


What Was the Reason for Your Most Recent Trip to Bruce County? – Online Panel Versus Onsite/Online Survey



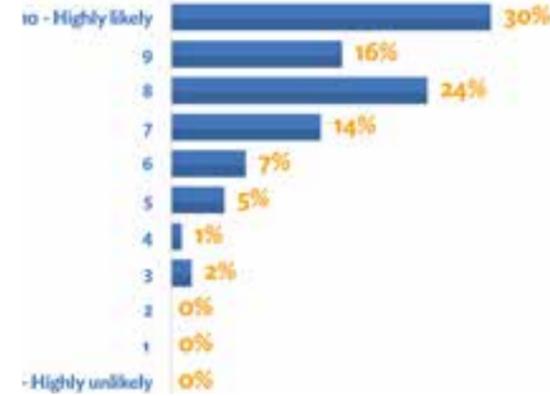
How Satisfied With Most Recent Trip to Bruce County?

Onsite/Online Survey

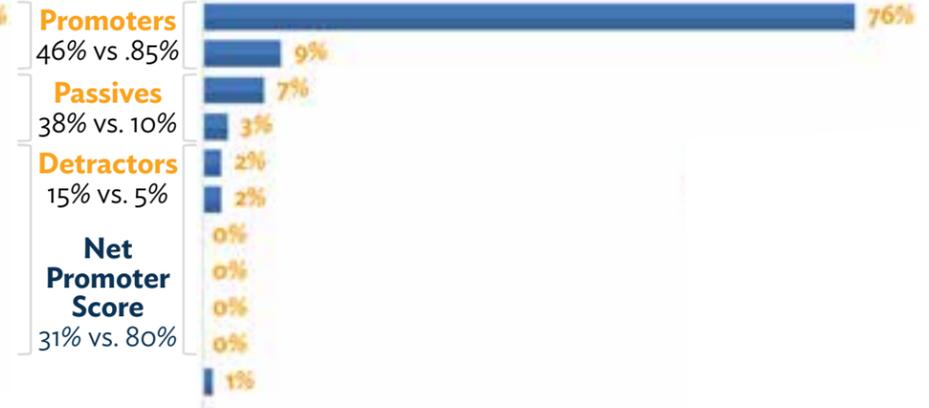


How Likely to Recommend Bruce County to Others?

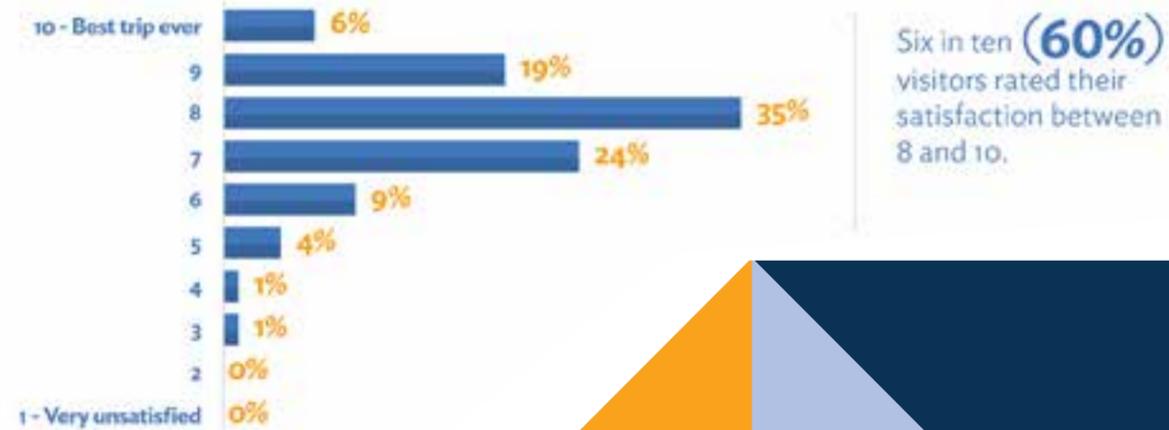
Online Panel Survey



Onsite/Online Survey



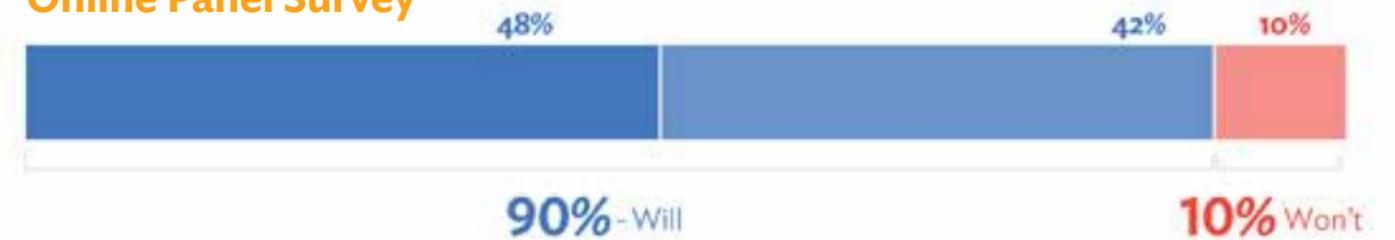
Online Panel Survey



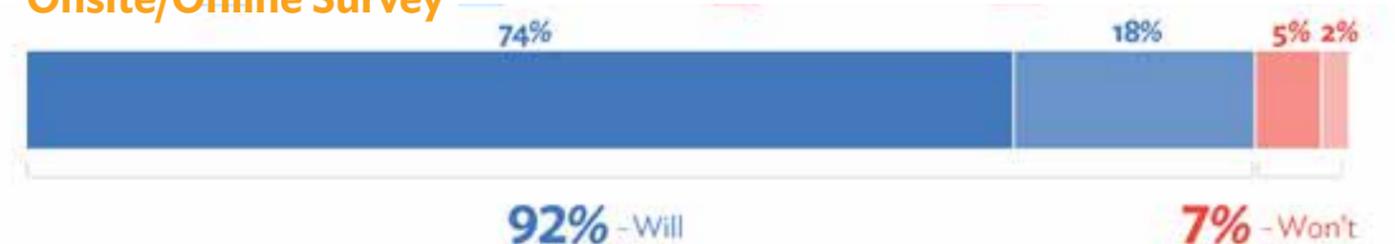
How Likely Are You to Visit Bruce County Next Year?



Online Panel Survey

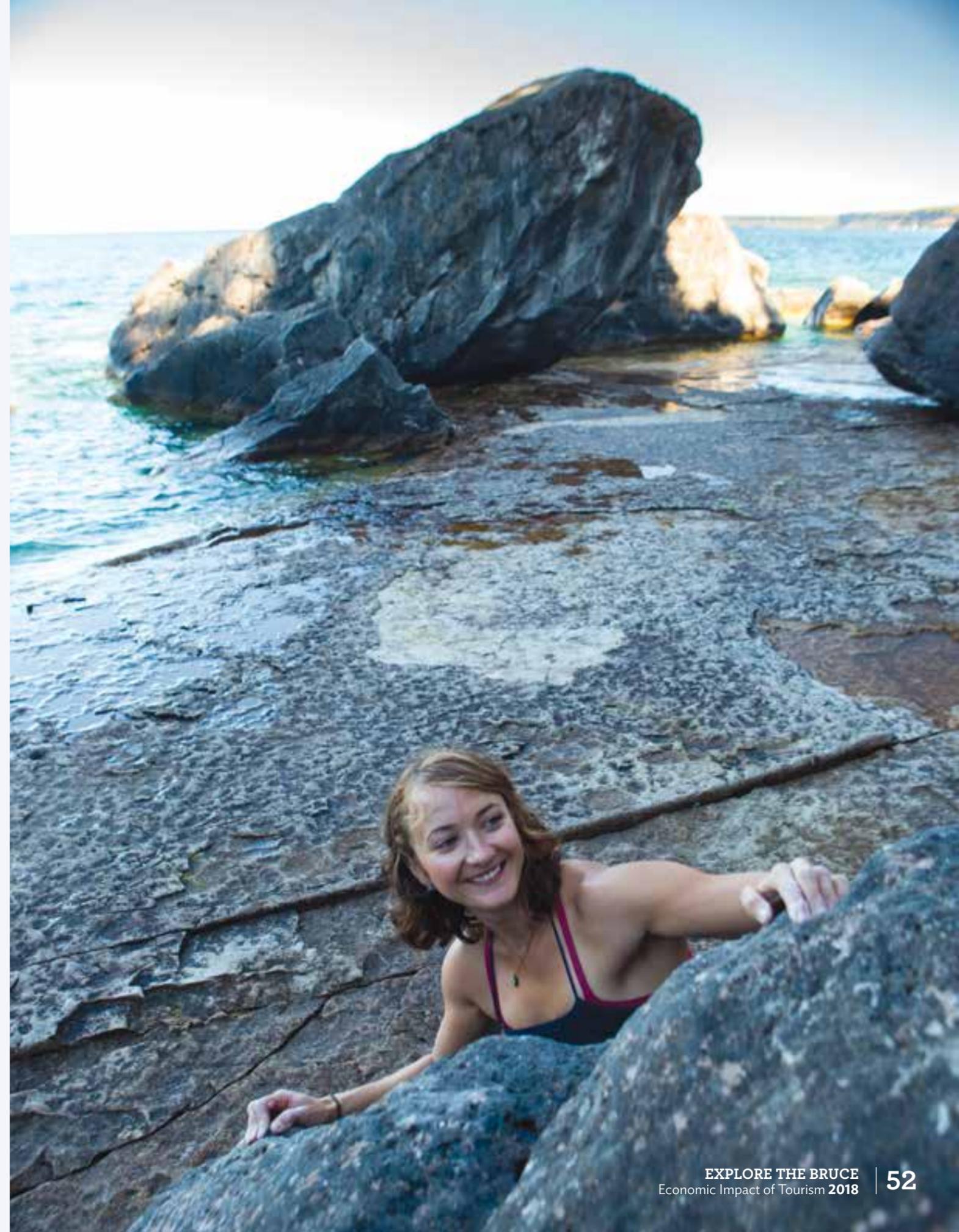
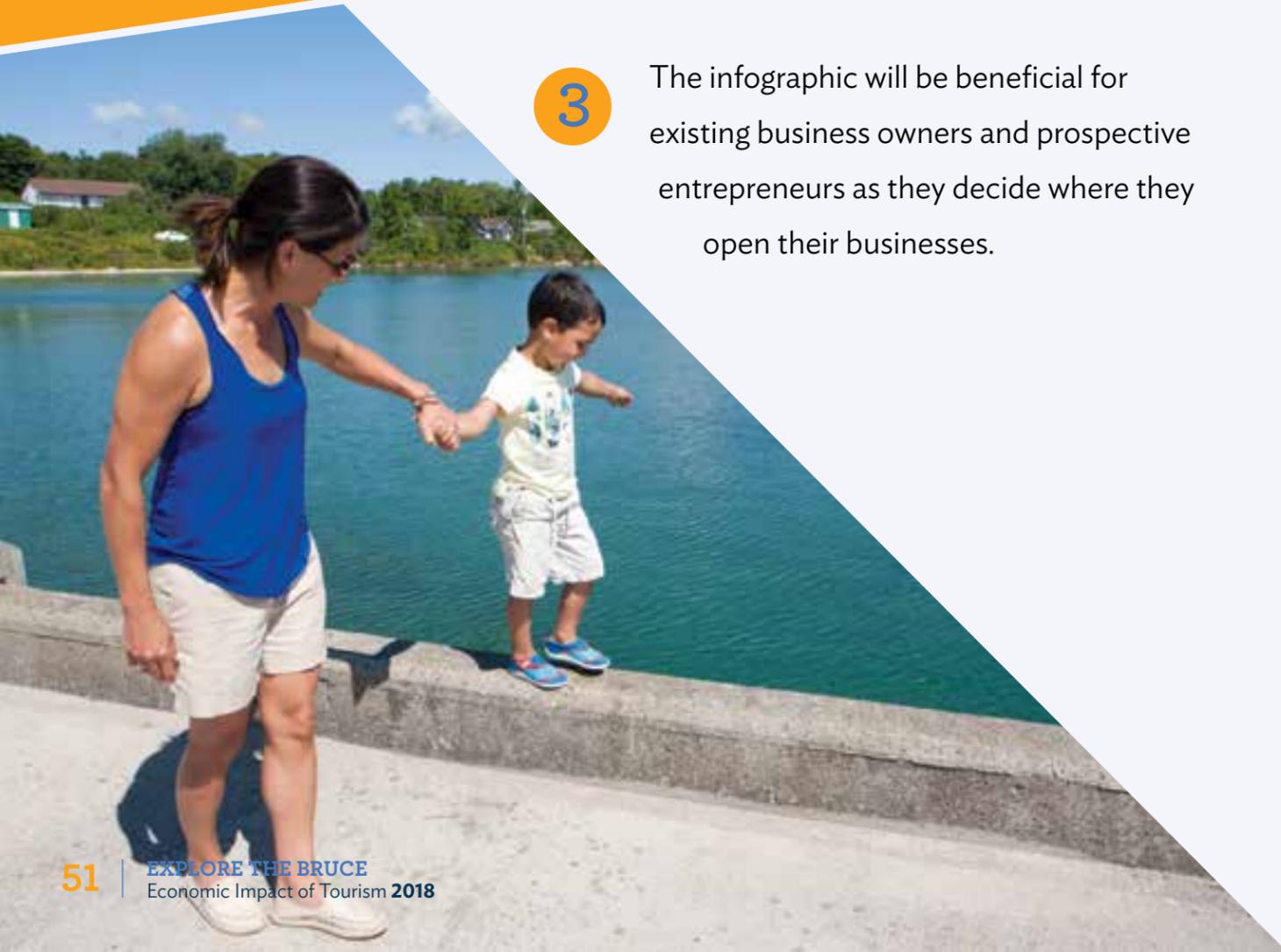


Onsite/Online Survey



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.







Committee Report

To: Warden Mitch Twolan
Members of the Planning and Development Committee

From: Chris LaForest
Director of Planning and Development

Date: September 21, 2017

Re: RED Grant Signing Authority

Recommendation:

That the Warden and Clerk be authorized to sign the Rural Economic Development (RED) Grant agreements between the Province and the County including: 1) Methodology to Assess the Economic Impact of Tourism in Bruce County; and 2) The Business to Bruce Community Enhancement Project.

Background:

On January 31st, 2016, the Ministry of Agriculture, Food and Rural Affairs renewed the Rural Economic Development (RED) Program to support community economic development for those in rural Ontario (with population of less than 100,000 people). The RED Program supports the government's plan to create jobs and grow our economy and provides 50 per cent cost sharing funding to complete projects that otherwise may not have been possible due to resource constraints.

For the renewed RED Program, the County of Bruce Planning and Development department submitted two grant applications to the Ministry of Agriculture, Food and Rural Affairs which will last through 2017 and 2018. Both grant applications were successful and at this point in time, both agreements require signatures to allow Bruce County to formally enter into agreements with the province. Each RED Grant project is outlined below.

Methodology to Assess the Economic Impact of Tourism in Bruce County

(\$80,000 project with equal \$40,000 contributions from Bruce County and the Province)

The purpose of this project is to develop a standardized methodology to measure the economic impact of tourism in Bruce County on an annual basis. Currently, primary data collection is already in place and conducted via our partners. However, collection efforts are not coordinated and do not represent the appropriate data needed for business development purposes. The goal of the proposed 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



BRUCE

and industry supports for prospective business growth opportunities. A standardized and consistent approach to measure the economic impact of tourism has the potential to guide the expansion of tourism and may foster incremental growth in a key economic sector in Bruce County.

Business to Bruce Community Enhancement Project

(\$180,000 project with equal \$90,000 contributions from Bruce County and the Province)

The Business to Bruce (BtoB) Community Enhancement Project is the key component of Bruce County's Business Recruitment and Enhancement (BR&E) Strategy. By engaging and mobilizing the local business communities and municipalities with the support of County-level resources, this project will inspire, attract and support business owners and entrepreneurs. The BtoB website, www.businesstobreuce.com, will serve as the key attraction tool for Bruce County's communities. The Business to Bruce Community Enhancement Project was born following the development of a Bruce County BR&E Strategy, which was made possible through RED Grant Planning funding. This Strategy utilized two Bruce County communities as "pilots": Wiarton and Kincardine. Now the intent is to move beyond Planning to Implementation. With a solid and tested Strategy in place, BtoB is now ready to bring Bruce County's communities on board, as funding allows. This project, when fully implemented, will be the first of its kind in Bruce County and has the potential to provide leadership and best practice modelling to rural communities across Ontario. BtoB will build capacity that ensures that each community: develops strong business positioning; builds business readiness supports; and has the necessary tools to move forward with business recruitment.

Financial/Staffing/Legal/IT Considerations:

As noted above, the Rural Economic Development grant will provide up to 50% of the project eligible costs. The remaining 50% will be funded by the County of Bruce which has already been budgeted. The proposed projects outlined above total \$130,000 for the County of Bruce which through the 2017-2018 budget years.

Interdepartmental Consultation:

No additional staffing, legal or IT considerations are proposed.

Link to Strategic Goals and Elements:

Goal #7 - Stimulate and reward innovation and economic development

Element #C - Create local small business incubation and innovation centre for local economic development.

Element #D - Vocally support all industry in Bruce County.

Element #E - Try small and then go BIG - act on ideas and take calculated risks.

Approved by:



Corporation of the County of Bruce
Planning and Development

brucecounty.on.ca

BRUCE
County

Chief Administrative Officer



Committee Report

To: Warden Mitch Twolan
Members of the Planning and Development Committee

From: Kara Van Myall
Director of Planning and Development

Date: January 17, 2019

Re: 2018 Economic Impact of Tourism Results

Recommendation:

That the 2018 Economic Impact of Tourism Results is for information.

Background:

This project developed a standardized approach to data collection and a model for representative analysis (“the framework”) and reporting on the tourism sector in Bruce County.

Project Update:

In September of 2017, the County received a Rural Economic Development (RED) Grant for the Economic Impact of Tourism Project. The purpose of this project is to develop a standardized methodology to measure the economic impact of tourism in Bruce County on an annual basis. The goal of the proposed 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 standardized and consistent approach to measure the economic impact of tourism has the potential to guide the expansion of tourism and may foster incremental growth in a key economic sector in Bruce County.

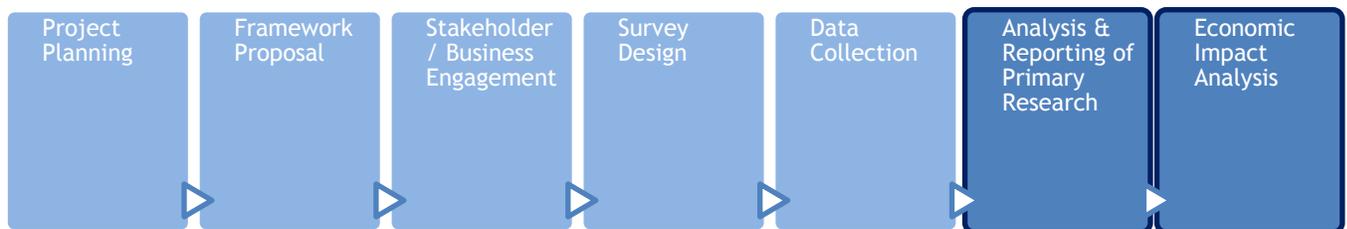
In collaboration with Ipsos and Prism, Bruce County staff have developed the framework for ongoing assessment and representative analysis of the economic impact of tourism in Bruce County. The framework integrates data from multiple sources to evaluate the impact of tourism on Bruce County. These sources can be categorized as follows:

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 [data was supplied by Ontario Parks, Parks Canada and Ontario Ferries

(the Chi-Cheemaun ferry)]. This shared data was used to calculate the Economic Impact numbers;

2. An annual survey of regional businesses that intersect directly with visitors conducted by Bruce County; and
3. A survey of tourists (a panel survey of Ontarians will be re-run every three years by an outside vendor, in the intervening years Bruce County will conduct on-site surveys at different events; during 2018 both methods of visitor data collection took place to support comparison of results, thereby informing the model and assumptions for future years).

This project has seven phases as follows:



We just completed phases 6 and 7, analyzing the primary research and reviewing the Economic Impact Analysis. This report provides an overview of the final results of these phases. (See Appendix ‘A’ for the final report; The 2018 Economic Impact of Tourism)

Survey Result Highlights:

Below are the highlights from each of the three survey datasets:

1. Business Surveys

- More than half of businesses surveyed are collecting or tracking data on 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.
- Two-thirds of businesses indicate that they can distinguish between visitors who are “locals” versus “tourists”. Of these, the most common ways of doing this is by collecting information from guests (e.g., reservation forms). Local are defined as residents who live in Bruce County.
- Four in ten maintain a record of where visitors are from and are willing to share this information with the County of Bruce.
- Businesses surveyed indicate that they have, on average, 1,206 visitors at their establishment each week during the peak (June / July) and on average, 231 visitors each week during the off season (August / September). These figures vary by type of business.

- Businesses report that, on average, visitors spend about \$130 at their establishment but this figure varies 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 are visitors finding out about their business.

2. Visitor Surveys: Onsite / Online

- The online panel survey finds that 10% of Ontarians visited Bruce County in the past 12 months. 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.
- Visitors made an average of 6.6 trips to Bruce County over a 12-month period.
- Almost all (98%) visits are for personal reasons (2% for business). Visiting friends or family, followed by participating in outdoor sport or recreational activity or shopping are the most frequent reasons for the trip.
- Three-quarters were staying overnight. Among these, they stayed an average of 6 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% were staying in a hotel or motel.
- Just over one in ten visitors visited Bruce County on their own, while almost nine in ten visit with one other person. 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.
- A large majority (85%) of visitors are promoters of Bruce County (rating of 9 or 10 on likelihood to recommend the County to family or friends), while only five percent are detractors (rating of 0 to 6 on likelihood to recommend). The NET Promoter score is 80%.
- Three-quarters (74%) of visitors say they “definitely will” visit Bruce County next year.

3. Ipsos Survey Panel - Visitor Surveys:

- Based on survey results, 10% of Ontarians visited Bruce County in the past 12 months. Visitors made an average of 3.6 trips to some municipality in Bruce County over the past 12 months, with the most number made to South Bruce Peninsula (average of 6.1 trips over the past 12 months) and Saugeen Shores (5.8 trips). There is some cross-over within the eight municipalities in Bruce County. Four in ten (38%) visitors to Bruce County visited at least two municipalities within the County in the past 12 months.
- More than half of visitors (53%) indicate that their most recent trip was between April and July 2018, while one-quarter last visited between June and August 2017.
- 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.
- 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.
- Just over one in ten visitors visited Bruce County on their own, while almost nine in ten visit with one other person. Visitors to Bruce County spent on average \$592, and a median of \$156.
- More than nine in ten (93%) visitors are satisfied with their trip to Bruce County (rating of 6 or more on a 10-point scale), including six in ten (60%) who are very satisfied with their visit, rating their experience between 8 and 10.
- Almost half (46%) of visitors are promoters of Bruce County (rating of 9 or 10 on likelihood to recommend the County to family or friends), while only 15% are detractors (rating of 0 to 6 on likelihood to recommend). The NET Promoter score is 31%.
- Half (48%) of visitors say they “definitely will” visit Bruce County next year.

The Economic Impact of Tourism in Bruce County surveys of visitors found many significant differences between the online panel survey of Ontarians conducted by Ipsos (which will be used as a baseline) and the onsite/online survey conducted by Bruce County volunteers. In general, the results from the online panel survey (baseline) are lower than the onsite/online survey. The main reason for this is because of the difference in the methodology used to gather the data. Respondents who are being interviewed face-to-face by an interviewer are generally more likely to respond more positively. The online panel survey data is based on a more representative sample and provides a more conservative estimate of the data, thus will be used as a baseline.

Economic Impact - 2018:

The definition of “visitor” in the Online Panel survey is someone who has visited Bruce County within the past 12 months. Based on the results from the survey, in 2018, there were 2,545,254 visitors to Bruce County and \$299 million in overall visitor spending.

Total Visitor Spending (in millions of dollars)

Expenditure Category	TOTAL
Accommodation (including overnight park fees)	\$51.7
Transportation	\$58.5
Food and Beverage	\$115.3
Recreation and Entertainment (including entrance/user fees)	\$31.0
Shopping	\$42.6
TOTAL	\$299.1

Total Impact on the Economy (in millions of dollars)

Impact Category	Direct	Indirect	Induced	Total
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

Conclusion:

This report illustrates the standardized approach to data collection that will be used on an annual basis to report on the tourism sector in Bruce County. The 2018 results will act as the baseline and will be compared against annually going forward. This will continue to be a collaborative effort with partner organizations (Ontario Parks, Parks Canada and Ontario Ferries). The results of the Economic Impact of Tourism Report will be shared with municipalities, partner organizations and prospective entrepreneurs on an annual basis.

Financial/Staffing/Legal/IT Considerations:

Staff will work with IT staff to transition the database from IPSOS to Bruce County. This project completed on schedule and within budget.

No Financial/Legal Considerations at this time.

Interdepartmental Consultation:

Collaboration with units engaged in tourism (for example the Museum & Cultural Centre) will be ongoing in support of visitor surveying.

Link to Strategic Goals and Elements:

- Goal #10 Develop Key Performance Indicators (KPIs) that are meaningful and report on them
- B. Build in accountability and evaluation mechanisms

Written by: Vicki Ly, Economic Development Officer, Planning and Development

Approved by:



Murray Clarke
Acting Chief Administrative Officer

Economic Impact of Tourism

Final Report 2018

January 17, 2019



Outline

1. The Methodology / Research
2. Survey Results:
 - i. Business Survey Results
 - ii. Visitor Survey Results: Online Panel
 - iii. Visitor Survey Results: Onsite
3. Results by Municipality
4. Economic Impact of Tourism
5. Next Steps

1. The Methodology / Research

- Sources of Data:
 - Shared data from partnered organizations
 - Businesses
 - Online / Onsite Surveys
- Surveyed:
 - Visitors: 500
 - Businesses: 170



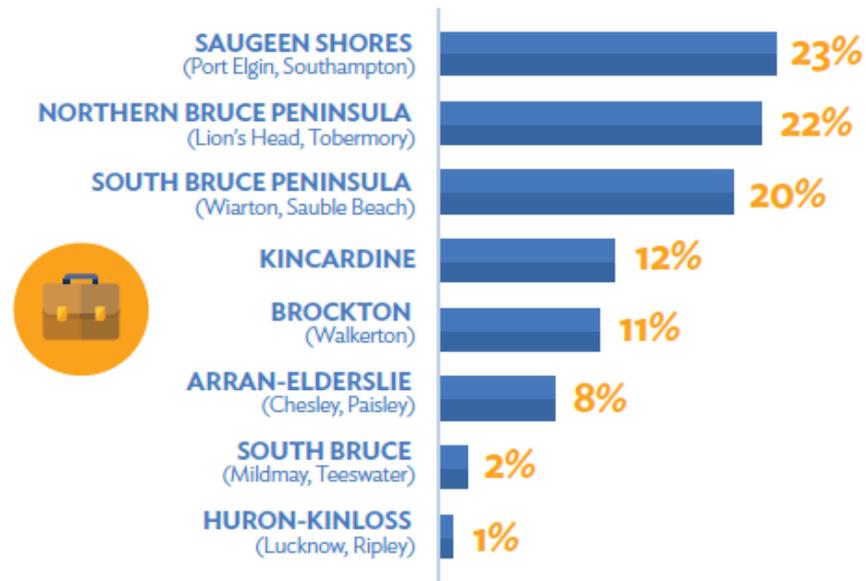
BRUCE
county

2. Survey Results: Business





Business Surveys by Municipality



SURVEY RESULTS: BUSINESS



45.0°N 81.3°W

BRUCE
county

Types of Businesses Surveyed



SURVEY RESULTS: BUSINESS



Business Survey: Highlights

2/3 of businesses

Indicate that they can distinguish between visitors who are locals versus tourists. Of these, the most common ways 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.



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.



4 in 10

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



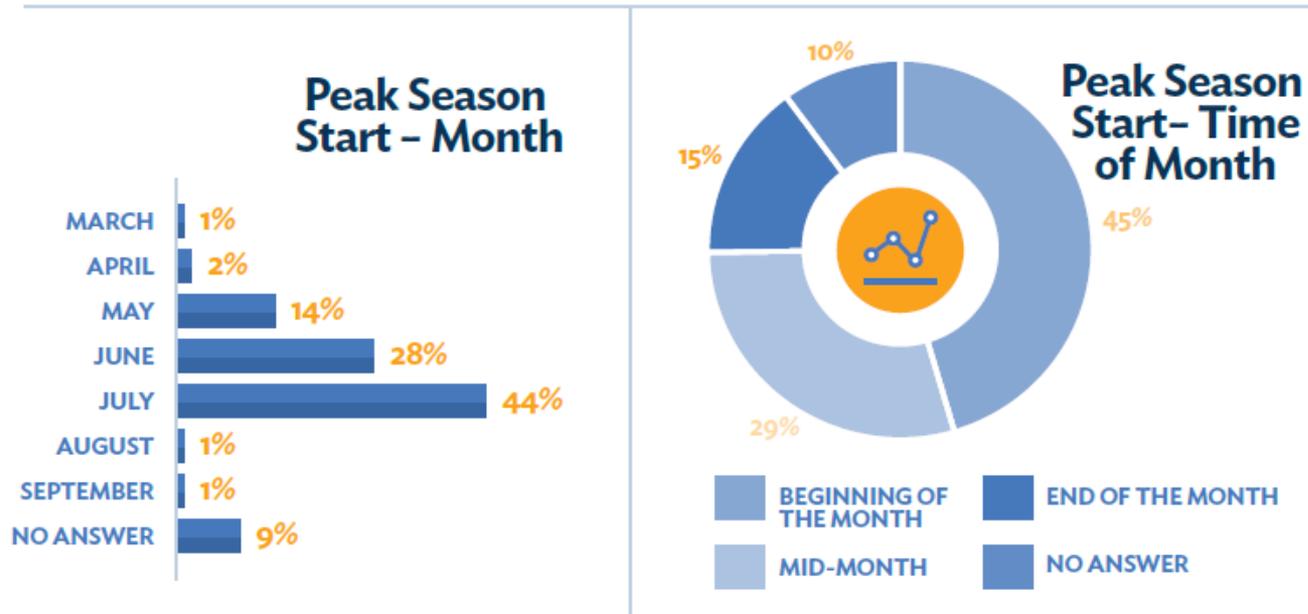
Businesses report that, on average, visitors spend about **\$130** at their establishment, but this figure varies by type of business.



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



When Does Your Peak Season Start?



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

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



BRUCE
county

2. Survey Results: Visitor (Panel)



Visitor Survey Results (Panel): Highlights

More than half of visitors
53% indicate 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.



More than 9 in 10
93% visitors are satisfied with their trip to Bruce County (rating of 6 or more on a 10-point scale), including six in ten (60%) who are very satisfied with their visit, rating their experience between 8 and 10.

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 1 in ten visit on their own. Visitors to Bruce County spent on average **\$592**, and a median of **\$156**.





45.0°N 81.3°W

BRUCE
county

2. Survey Results: Visitors (Onsite)



Visitor Survey Results (Onsite): Highlights

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



Almost all **98%** visits are for personal reasons

(2% for business). Visiting friends or family, followed



Just over **1 in 10**

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

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.

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.





45.0°N 81.3°W
BRUCE
county

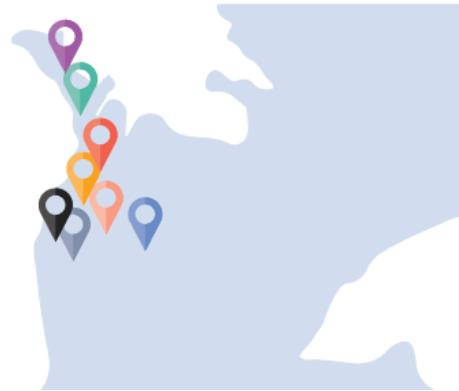
3. Results by Municipality



RESULTS BY MUNICIPALITY



Municipality Visited in Bruce County



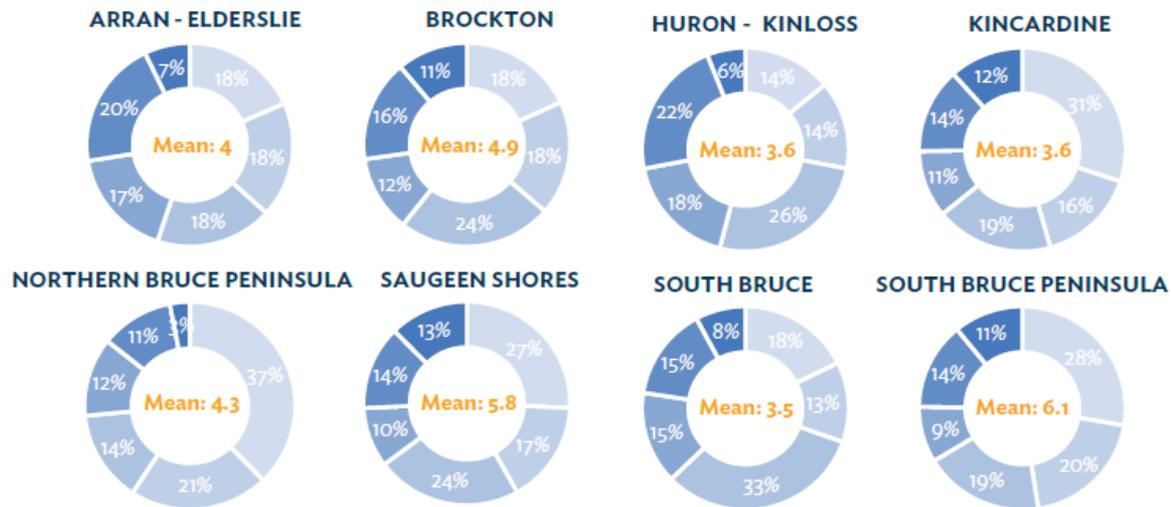
Arran-Elderslie (Chesley, Paisley)	13%
Brockton (Walkerton)	15%
Huron-Kinloss (Lucknow, Ripley)	12%
Kincardine	28%
Northern Bruce Peninsula (Lion's Head, Tobermory)	38%
Saugeen Shores (Port Elgin, Southampton)	32%
South Bruce (Mildmay, Teeswater)	10%
South Bruce Peninsula (Warton, Sauble Beach)	22%

What **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 416	GTA 905	Central	East	North	South West	Kids	No Kids
<i>Base: All Respondents</i>	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%

RESULTS BY MUNICIPALITY

Number of Trips Taken in Past 12 Months

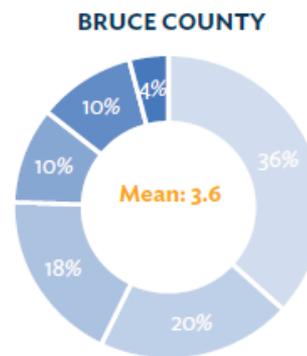


On average, visitors have made 3.6 visits to Bruce County within the past 12 months. About two thirds of visitors have visited only one municipality within Bruce County, while two in ten have visited two, one in ten have visited three, and one in ten four or more.

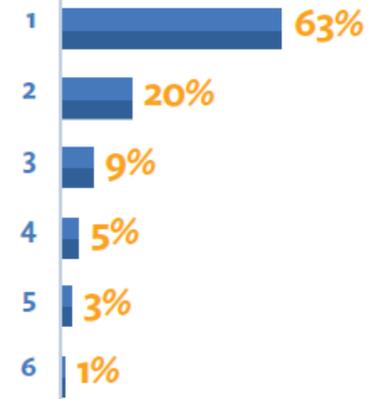
RESULTS BY MUNICIPALITY

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).



NUMBER OF MUNICIPALITIES VISITED



RESULTS BY MUNICIPALITY



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
<i>Base: Personal Trip</i>	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/ traveling/ 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%
DK/NS	2%	3%	2%	-	-	1%	2%	1%	1%	-

RESULTS BY MUNICIPALITY

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
<i>Base: All Respondents</i>	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 & 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 & 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

RESULTS BY MUNICIPALITY



BRUCE
county

4. Economic Impact of Tourism



4. Economic Impact of Tourism

Visitors

2.5
MILLION



Over **90%** are likely to visit
Bruce County again next year.

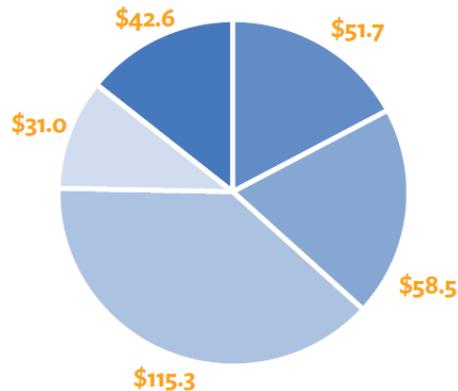
Economic Impact
Of Tourism

299.1
MILLION



4. Economic Impact of Tourism

Total Visitor Spending
(in millions of dollars)



- TRANSPORTATION
- SHOPPING
- ACCOMMODATION
(including overnight park fees)
- FOOD AND BEVERAGE
- RECREATION AND ENTERTAINMENT
(including entrance/user fees)

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

5. Next Steps

- Information provided to:
 - Regional Working Group / Municipality
 - As part of Ec. Dev. Annual Report
 - Existing Businesses & Prospective Entrepreneurs
- 2019 Economic Impact of Tourism Report
 - 500 surveys
 - Data from partnered organizations



BRUCE
county

Thank You

Target Audience Descriptions

AUDIENCE 1 PROFILE: NATURE LOVERS

PROFILE

35 - 54 year old couples, with young children, budget conscious, love outdoors.

Nature lovers have a passion for experiencing the great outdoors together. Travel for them is all about exploring new, undiscovered places off the beaten path. Bruce County is the perfect place for this segment who are looking to be dazzled by awe-inspiring nature. With a lower than average travel budget, these travelers are happy with the basics—camping in a tent, spending time as a family, and taking in all the beauty around them. Because spending time outdoors means an opportunity to enrich family bonds.

AUDIENCE 2 PROFILE: MEMORY MAKERS

PROFILE

35 - 50 year old couples, often sandwich generation with elementary aged children.

These Gen X-ers are parents who have built their lives around their kids. Leisure for them is all about spending quality time as a family—at home and on vacation. Travel is an opportunity to come together and bond through playful activities. When their kids are having fun, they are having fun too—and ultimately building memories together as a family.

AUDIENCE 3 PROFILE: MELLOW VACATIONERS

PROFILE

55+ year old, quiet, introverted, working couples without children, seek rest and relaxation.

Mellow vacationers are fairly quiet, low energy people looking for a home away from home where they can relax and find tranquility. Traveling is often a chance to visit family and friends. They are natural homebodies and when on vacation want to enjoy some simple R&R. Relaxation for them isn't found through a particular activity or passion, but rather simply getting away from it all.

AUDIENCE 4 PROFILE: KNOWLEDGE SEEKERS

PROFILE

55+ females with grown children, employed, higher levels of education.

Knowledge seekers are entering a new phase of life as empty-nesters with the time and money to enjoy themselves, and travel is a part of this new lifestyle. They are looking to understand the places they visit by getting exposure to local customs. Trips usually last 8 days as they want to fully appreciate where they are and explore all aspects of history, art and culture. Travel for them is about expanding their knowledge and stimulating the mind.

AUDIENCE 5 PROFILE: NEW CANADIANS

PROFILE

25 - 34 year old couples with young kids, high levels of education, influenced by trends, large networks, majority identify as part of visible minority/immigrant segment.

New Canadians have a diverse background—45% are visible minorities and 40% are immigrants. This group is recently affluent and emerging into a new life phase that includes fresh experiences such as travel. As they define a new life for themselves, travel is an opportunity to learn and explore as a nuclear family. Visiting friends and family is not a primary travel driver for them. While this group often wants to be adventurous and energetic, their travel experiences usually start with what is nearby and typically considered a core tourist attraction.

Appendix E

Media Attention:

Bayshore Broadcasting: http://www.bayshorebroadcasting.ca/news_item.php?NewsID=107252

101.7 the One: <https://blackburnnews.com/midwestern-ontario/midwestern-ontario-news/2019/01/18/visitors-pump-millions-bruce-county/>

Owen Sound Sun times: <https://www.owensoundsuntimes.com/news/local-news/study-finds-millions-flocked-to-bruce-county-in-2018>

Bruce Peninsula Press: <https://brucepeninsulapress.com/2019/02/05/bruce-county-releases-tourism-report-visitors-contribute-almost-300-million-to-local-economy/>

Bruce County News: <https://brucecounty.on.ca/news/2019-jan-17/economic-impact-tourism-study-reveals-25-million-people-visited-bruce-county-2018>

Shoreline Today: <https://shorelinetoday.ca/rss/tourism-key-for-bruce-county/>

Kincardine Record: <http://kincardinerecord.com/story.php?id=6939>

The Hanover Post: <https://www.thepost.on.ca/news/local-news/bruce-county-issues-tourism-impact-study>

Southwestern Ontario: <https://www.southwesternontario.ca/news-story/9171837-bruce-county-tourism-brings-in-nearly-300m-to-local-economy/>