

SOUTH EASTERN ONTARIO

INDUSTRY INSIGHTS SURVEY

Wave 1 Fall 2019

Final Report

November 30, 2019

For more information please contact:

Erica D'souza, Tourism Strategist
ericaf@twenty31.org
+1 647 889 4763

Oliver Martin, Partner
oliverm@twenty31.org
+1 416 721 3544

Twenty31 Consulting Inc.
Tourism.Defined.
www.Twenty31.org

The findings reported herein are provided on a confidential basis to RTO9. RTO9 is free to use the findings in whatever manner it chooses, including releasing them to their travel and tourism industry stakeholders and partners and/or media.

Twenty31 Consulting Inc. subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for studies that are released to the public or the media. The purpose is to maintain the integrity of market research by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

Note: Due to small sample sizes results should be interpreted with caution. Figures in this report are percentages unless indicated. All figures in charts and tables might not add to 100 due to rounding and weighting or multiple response categories.

November 30, 2019

Table of Contents



Introduction	4
Key Takeaways: Summary	5-7
Survey Comparison	8-10
Methodology	10-14
Results	15-38
Appendix: DMO Tables	39-62

Introduction

Tourism is changing and growing rapidly, understanding South Eastern Ontario's stakeholder needs allows RTO9 and its partners to adapt and support the industry.



The fall 2019 Industry Insights Survey was designed on behalf of RTO9 and key destinations across the region to identify tourism issues and understand the outlook and concerns of business owners and organizations linked to the industry. The goal of the study was to create a regular forum to obtain feedback and direction for RTO9 and the Destination Marketing Organizations (DMOs) and Destination Marketing Programs (DMPs).

The study is a primary market research initiative identified in the RTO9 Multi-Year Data and Research Plan ("Plan"), which launched in April 2018. The Plan was designed to address the unmet research needs of destinations and tourism operators in the region, with a key focus on improving the timeliness and reliability of data.

Using the pilot survey conducted by RTO9 in 2018/19, the survey was developed in collaboration with the DMOs/DMPs in the region. This year, the survey will be conducted in two waves to create an opportunity for comparison and tracking of results.

Key Takeaways: Summary

South Eastern Ontario has experienced strong tourism growth, and stakeholders are making investments to increase their competitiveness.

Note: A variety of stakeholder groups are represented in the survey results but the accommodations sector, winery/brewery/other beverage producer and retail stores were the primary respondents (33%). From a destination standpoint, 65% of responses come from Prince Edward County, Cornwall and S,D&G Counties and Lennox & Addington/Frontenac County.

Positive views on tourism: Stakeholders expressed a positive picture of the health of tourism compared to last year, when taking into consideration own business sales and visitor performance. Despite these positive increases, businesses mostly employed the same amount of people compared to last year. Labour shortages continue to be an ongoing challenge for the industry which may have been a factor holding some businesses back from hiring.

Driving competitiveness: Tourism stakeholders have shown that they are driving competitiveness in the region by investing in new physical assets (86%) and technology (83%). For next year, investments in websites, social media and sales systems are at the top of the list. Planned physical upgrades include renovations, equipment upgrades and maintenance/expansion projects. For small businesses, ongoing investments –especially those that improve productivity– are important to achieve economies of scale and greater profits.

Expanding customer base: With a large population base and good proximity, the primary customer source markets are viewed as the region itself, the Greater Toronto Area and Ottawa. Businesses also identified increased international travellers as a growing trend, which holds true across Canada. For RTO9, businesses of all sizes will benefit from expanding services/offerings to more lucrative international markets beyond the US, such as the UK, China, Germany and France. Not only can expansion help the region capture a higher share of tourism growth today but a diversified customer base will also serve as protection during economic shocks and downturns.

Key Takeaways: Summary, continued

Despite some challenges, tourism businesses are adapting to new trends and consumer demands/needs.

Mitigating business challenges: The challenges perceived to have the most negative impact, this year and last, were the state of the economy, road construction and gas prices. Weather was perceived to have the most positive impact on business. While competition from other destinations and Bill 148 were viewed as having minimal impact.

Alignment with global trends: The top three tourism trends noted were, more travellers arriving from international markets, a stronger desire for authentic experiences and local products, and a preference towards outdoor activities. These trends are aligned with changing travel demands and preferences across the globe.

Tackling seasonality: Seasonality remains a challenge for destinations across Canada and Ontario, particularly those outside of Toronto, Ottawa and Niagara Falls. Stakeholders expressed a desire to grow business throughout the year but the key months indicated were April, March and November. Increased collaboration through promotions and products and packages that link together Spring/Fall experiences can help position the destinations as dynamic and with lots to do and see year-round.

Priorities and partnerships: A high level of agreement (78%) is an indication that stakeholders have positive opinions about the priorities of RTO9. However, only 55% of respondents have partnered with RTO9 and the DMOs in the last year. As the industry expands and technology opens new doors, RTO9 and the destinations have an opportunity provide more meaningful support and services to businesses and operators.

Key Takeaways: Summary, continued

With the rise of new technology and ways to reach customers, marketing is an evolving area for the industry.

Understanding marketing tactics: When asked to rank 13 different marketing tactics, the results revealed the top five highest ranked tactics are among the least used. In some cases this may be due to lack of opportunities, high cost or skill gaps. Marketing continues to be an area where RTO9 and the destinations can provide training/education and partnerships to improve alignment with goals and the needs of travel consumers today.

Total	High Importance	High & Medium Importance	Use
Newspaper + Magazine Ads	41%	73%	35%
Radio + Television Ads	39%	70%	27%
Trade Shows	35%	71%	29%
Digital Signage	33%	73%	27%
DMO/DMP Marketing	32%	70%	27%

SURVEY COMPARISON

Survey Comparison

	2018-19 (fall pilot)	2019-20 (fall wave 1)
Primary type of tourism business/ organization (top 3) - responses	Accommodations Retail Stores Historic Site/Museum	Accommodations Winery/brewery/other beverage producer Retail Stores
Customer Source Markets	1. Within RTO9 2. Greater Toronto Area 3. Ottawa	1. Within RTO9 2. Greater Toronto Area 3. Ottawa
Shoulder season sales, much better than last year	13%	19%
High season sales, much better than last year	15%	16%
Number of Visitors, much more than last year	11%	20%
Health of tourism, within own community (shoulder season), much better than last year	8%	11%

Survey Comparison

	2018-19 (fall pilot)	2019-20 (fall wave 1)
Health of tourism, within own community (high season), much better than last year	6%	15%
Business investments (physical), considerable	28%	33%
Business investments (technological), considerable	30%	24%
Employment Contributions, employed more than last year	28%	33%
Growth plans, by month	May, February and October	April, March and November

METHODOLOGY

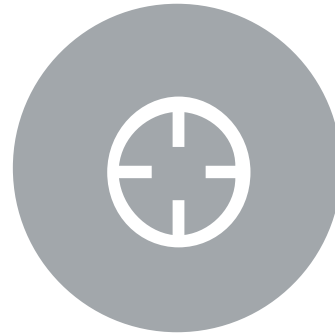
Overview

The Industry Insights Survey was deployed in fall 2019 by RTO9 and key destinations in the region.



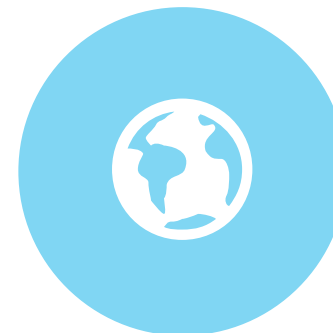
METHOD

- Online
- 11 Minute Questionnaire
- Fieldwork from September 30 – October 31, 2019



TARGET

- Tourism businesses and organizations operating in South Eastern Ontario



COMMUNICATION

- Stakeholder databases of RTO9 and six Destination Marketing Organizations (DMOs), social media and Tourism Talk were used to reach the target group



SAMPLE SIZE

- 215 total respondents
- South Eastern Ontario (38), Bay of Quinte (13), Prince Edward County (88), Lennox & Addington/Frontenac (24), Kingston (14), 1000 Islands Brockville (12) and Cornwall and S,D&G Counties (26)

Reaching Stakeholders

The questionnaires were emailed to approximately 8,500 individuals at tourism businesses and organizations across the region.

Questionnaires

Separate online questionnaires were developed for the South Eastern Ontario region and eight destinations: Bay of Quinte, Prince Edward County, Lennox & Addington/Frontenac County, Rideau Canal, Kingston, 1000 Islands Gananoque, 1000 Islands Brockville and Cornwall and S,D&G Counties. The questionnaires contained two series of questions:

1. Destination specific, to monitor engagement with the DMO/DMP/RTO; and
2. Standard Questions, to permit comparison and tracking. These questions helped us to learn more about the following:
 - Types of businesses
 - Customer source markets
 - Seasonality
 - Factors impacting business
 - Business investments
 - Employment contributions
 - Tourism trends
 - Marketing tactics (importance and use)

Communication

Approximately 8,500 individuals were engaged from across the region, using the stakeholder databases of RTO9 and the six destinations that participated. Twitter, LinkedIn, e-blasts and email distribution via partners helped reach more stakeholders and encourage responses.

Overall, 215 respondents took part in the study by completing the questionnaire. This is almost double the amount achieved during the pilot study in 2018/19, however, increased engagement and survey promotions will be needed to ensure a broader representation of stakeholders for the next survey wave.

Anticipating that stakeholder databases will be used for research initiatives, all destinations should ensure they have a viable database management strategy to accurately keep track of contacts and to boost the number of contacts on their lists.

Response Rates by Destination

Almost half of all responses came from the Prince Edward County questionnaire.

Continued engagement via the destination databases will allow for improved response rates for future surveys, including the planned 2019/20 winter wave.

Destination Name	Database Contacts (#)	Responses (#)	Response Rate (%)
Bay of Quinte	2,257	13	1%
Prince Edward County	700	88	13%
Lennox & Addington/Frontenac	40	24	60%
Rideau Canal	1,200	0	-
Kingston	95	14	15%
1000 Islands Gananoque	3,000	0	-
1000 Islands Brockville	800	12	2%
Cornwall and S,D&G Counties	-	26	-
South Eastern Ontario	700	38	5%

RESULTS

Where is South Eastern Ontario?

To provide a reference point, a regional map was included for respondents to identify destinations relative to other well-known cities in Ontario.

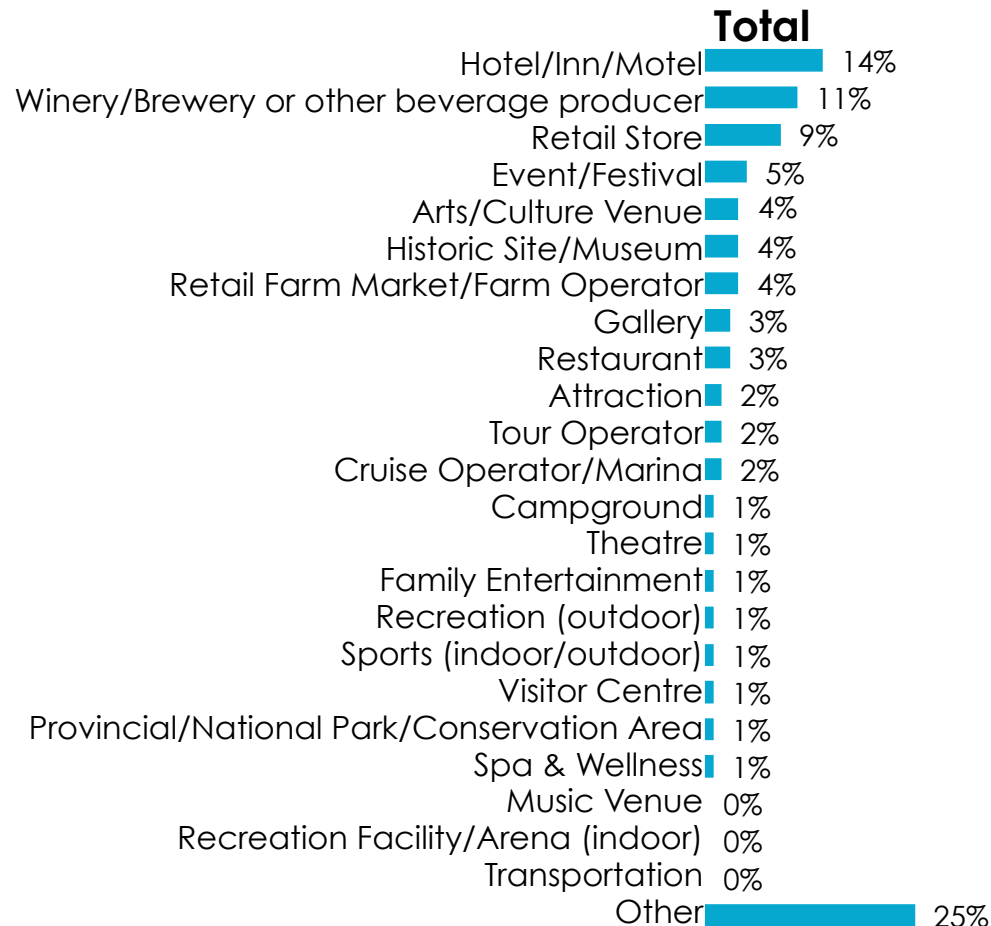


South Eastern Ontario includes the region east of the Bay of Quinte to the Ontario/Quebec border as shown on this map.

Types of tourism businesses and organizations

The accommodations sector showed the highest engagement amongst the stakeholder groups.

Q1: What is the primary type of tourism business or organization you operate? n= 215



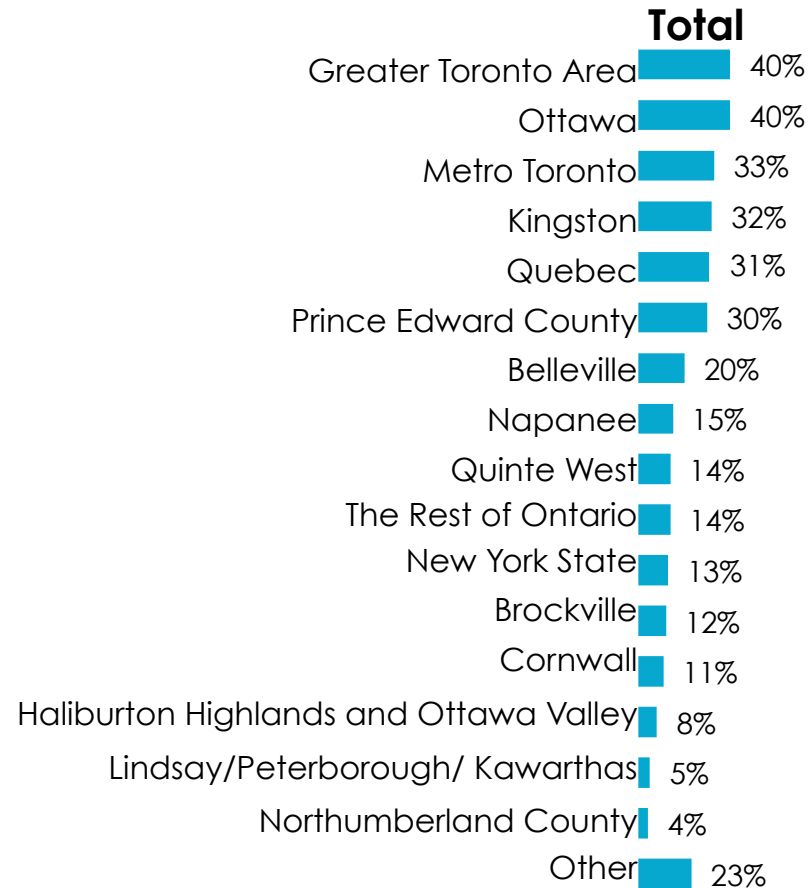
INSIGHT

Accommodations, winery/brewery and other beverage producer and retail sectors have the highest representation within the survey results. Aside from these top groups, there is a varied mix of other respondent types.

Customer Source Markets

Visitors from within RTO9, the Greater Toronto Area, Ottawa and Quebec continue to be viewed as solid customer source markets.

Q2: Where do the majority of your customers come from? n= 215



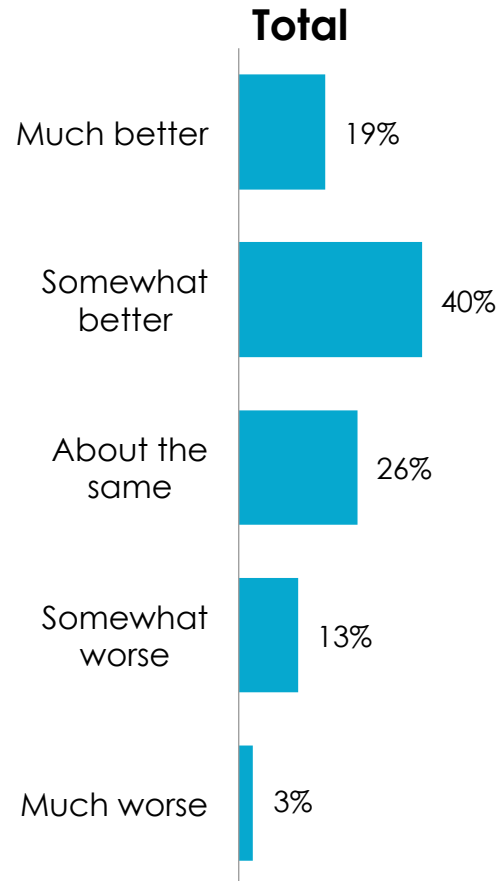
INSIGHT

The perception is that customers are more likely to come from within the region, Greater Toronto Area, Ottawa and Quebec.

Seasonality and sales, shoulder season

Sales in the shoulder season keep growing stronger.

Q3: Thinking about last year (i.e., September 2017-May 2018) and this year's (i.e., September 2018-May 2019) shoulder season, how have sales been for your own business? n=215



INSIGHT

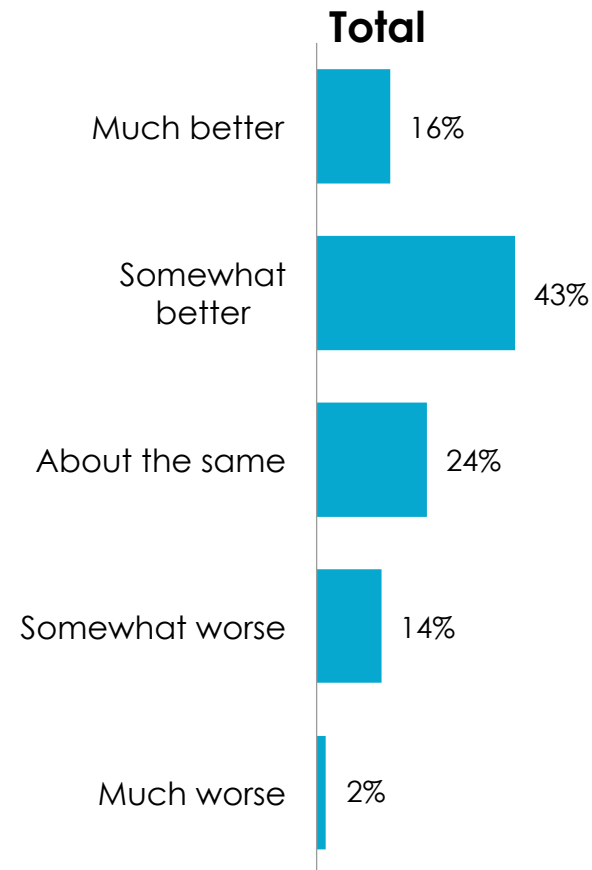
Respondents were more likely to indicate a positive (59%) or neutral view (26%) of this year's shoulder season sales.

Only 16% felt sales were somewhat worse or much worse.

Seasonality and sales, high season

More sales were generated in the high season compared to last year.

Q4: Thinking about last year (i.e., June-August 2018) and this year's (i.e., June-August 2019) high season, how have sales been for your own business? n= 215



INSIGHT

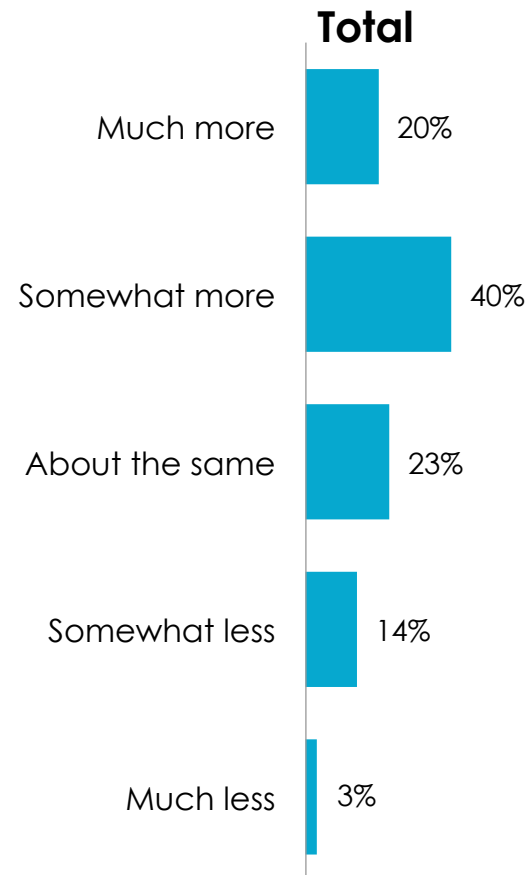
At 59%, more than half of all respondents felt that sales increased this year and some (24%) felt that results were about the same.

Only 16% viewed sales this year as worse than last year.

Visitor Performance

Linked with increasing sales, there were more visitors observed this year compared to last.

Q5: Compared to last year (i.e., 2018 vs. 2019) how many visitors do you have this year so far? n= 215



INSIGHT

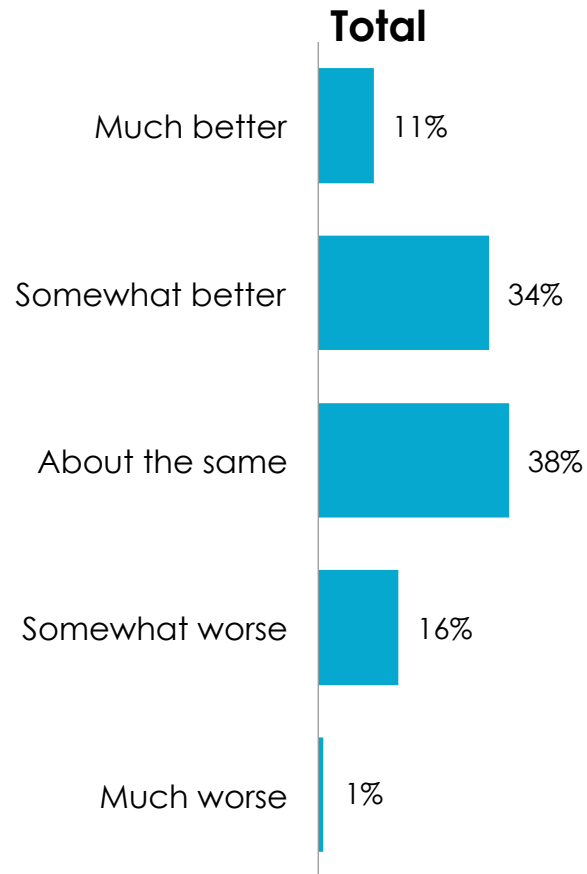
The positive sentiment related to sales was reflected when assessing the number of visitors. Over half of respondents (60%) felt there was an increase in visitors over last year.

Only 16% felt that they had fewer visitors.

Health of tourism, within own community (shoulder season)

At the community level, the perception is that business is stronger than last year.

Q6: Compared to last year's shoulder season (i.e., September 2017-May 2018), rate overall tourism business in your community for this year (i.e., September 2018-May 2019). n= 215



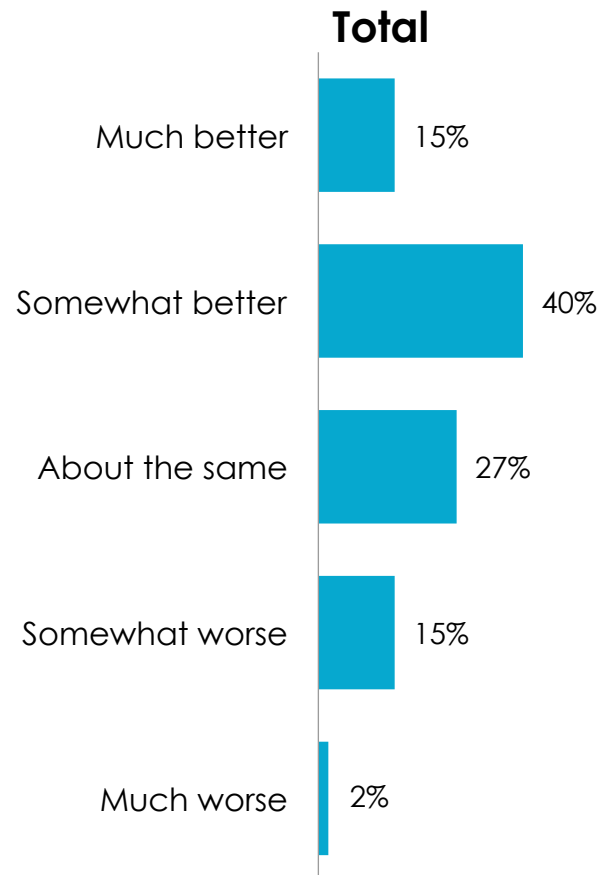
INSIGHT

When thinking about tourism at the community level, perceptions about tourism related business this year was slightly more positive than neutral. Many respondents (38%) felt business was about the same but almost half had a more positive view (45%).

Health of tourism, within own community (high season)

At the community level, this year's high season was viewed more positively than last year.

Q7: Compared to last year's high season (i.e., June-August 2018), rate overall tourism business in your community for this year (i.e., June-August 2019). n= 215



INSIGHT

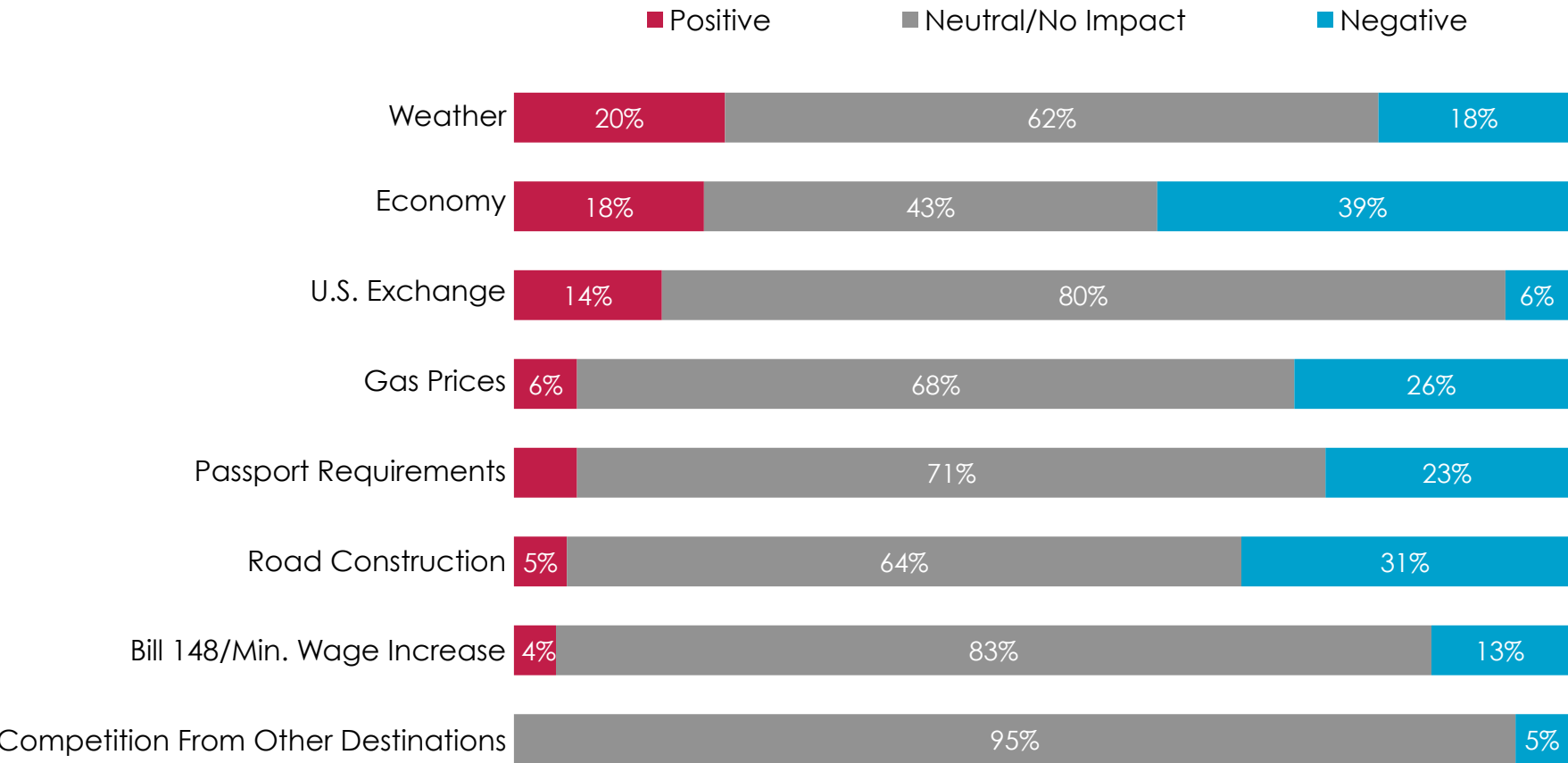
The positive trend continues at the community level. However, when comparing views about the health of tourism based on own sales, positive sentiment was higher at 59% vs. 55% for tourism business within own community.

This could suggest, among other possibilities, that respondents feel their business is performing better than average or the benefits of an improving industry are not as visibly spread across their community.

Business Challenges

The challenges perceived to have the greatest negative impact, this year and last, were the state of the economy and road construction.

Q8: How have the following factors impacted your business last year and this year? n= 215



INSIGHT

The state of the economy, road construction and gas prices were rated highest for negative impact on business.

Competition from other destinations and Bill 148 were viewed as having minimal impact.

Some respondents felt that weather impacted business positively.

Business Investments, physical

The vast majority of businesses have reinvested in their property by making a few improvements or considerable upgrades this year.

Q9: Have you invested in physical upgrades/improvements for your business this year? n= 215

Total		Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
We have made a few improvements, but nothing major	<div></div> 53%	46%	49%	50%	50%	83%	46%	61%
We have made considerable upgrades	<div></div> 33%	23%	35%	46%	36%	8%	27%	32%
We have not made any improvements	<div></div> 13%	31%	16%	4%	14%	8%	27%	8%

INSIGHT

The majority of businesses have invested in physical upgrades/improvements (86%), of this amount 33% cited that they were considerable.

Only 13% did not make any improvements.

Business Investments, technological

To prepare for future growth, the majority of businesses have upgraded/improved their technology.

Q10: Have you invested in technological upgrades/improvements (e.g., website, social media, IT tools) for your business this year? n= 215

Total		Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
We have made a few improvements, but nothing major	<div><div></div></div> 59%	77%	51%	58%	43%	58%	69%	71%
We have made considerable upgrades	<div><div></div></div> 24%	--	30%	17%	43%	33%	19%	18%
We have not made any improvements	<div><div></div></div> 17%	23%	19%	25%	14%	8%	12%	11%

INSIGHT

When it comes to technological upgrades, the majority made either a few improvements (59%) or considerable upgrades (24%).

The proportion of businesses that did not change anything slightly edged up in comparison to physical upgrades/improvements (13% vs. 17%).

Business Investments, urgency

The majority of physical and/or technological upgrades/improvements were completed proactively rather than as a necessity.

Q11: Have any of your investments in physical and/or technological upgrades/improvements been out of necessity only? n= 186

Total		Bay Of Quinte (n=10)	Prince Edward County (n=80)	Lennox & Addington/ Frontenac County (n=21)	Kingston (n=11)	1000 Islands Brockville (n=8)	Cornwall & SDG Counties (n=23)	South Eastern Ontario (n=33)
Yes	<div><div></div></div> 44%	40%	44%	48%	64%	50%	48%	33%
No	<div><div></div></div> 56%	60%	56%	52%	36%	50%	52%	67%

INSIGHT

Many of the upgrades/ improvements were completed proactively rather than as a necessity which means that reinvestments are helping businesses become more competitive.

Future business investments

Future improvements were cited in both categories, however those related to technology were slightly higher.

Q12: Do you have any planned upgrades/improvements (physical and/or technological) for your business next year? n= 215

Type	Upgrade/Improvement	INSIGHT
Physical	<ul style="list-style-type: none">• Room renovations• Equipment upgrades• Property maintenance and expansion• General repairs• Landscaping	<p>Respondents cited examples of the physical and technological upgrades/improvements they planned for next year (2020).</p> <p>Those within the technological category were slightly higher, with website revitalization receiving the most mentions.</p>
Technological	<ul style="list-style-type: none">• Website revitalization• Enhance social media marketing• Online sales model/system• Upgrade hardware	

Employment Contributions

Although sales and visitors increased, businesses mostly employed the same number of people as the year before.

Q13. How has your business contributed to employment compared to last year? n= 215

Total		Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
We employed more employees	<div><div></div></div> 33%	92%	53%	50%	64%	50%	65%	55%
We employed the same number of employees	<div><div></div></div> 58%	8%	39%	29%	29%	42%	31%	32%
We employed less employees	<div><div></div></div> 9%	0%	8%	21%	7%	8%	4%	13%

INSIGHT

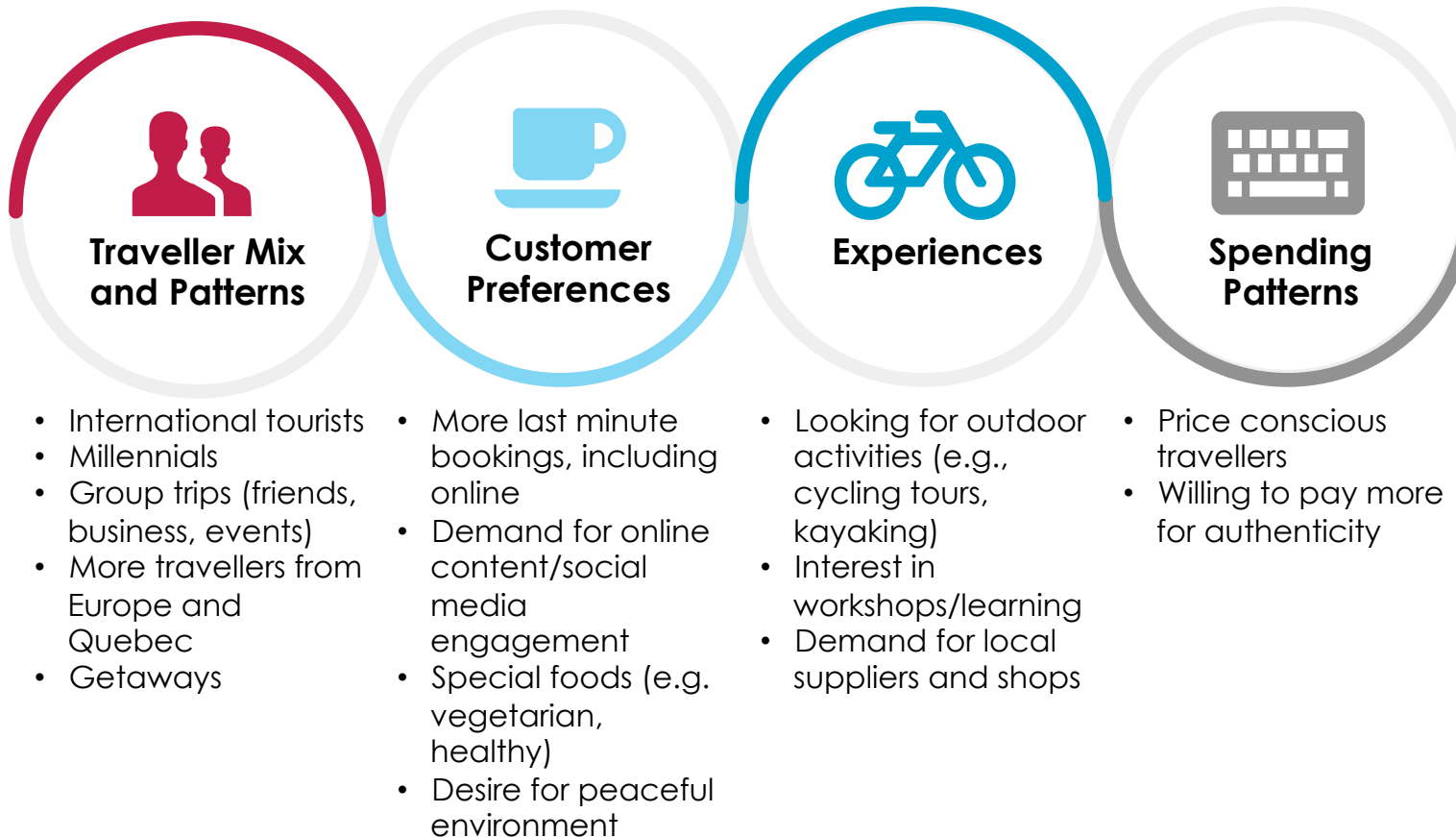
Even with increasing sales and visitors, when compared to last year, businesses have been cautious or unable to fill positions when it comes to hiring. Over half (58%) of the respondents employed the same number people and just a third (33%) employed more.

A much smaller amount employed less (9%) than the year before.

Tourism Trends

The top cited trends were a desire for more experiences and increasing international travellers.

Q14: Are there any new trends in tourism you've noticed? (e.g., travel preferences, special requests, customer demographics, spending patterns, etc.) n= 215



INSIGHT

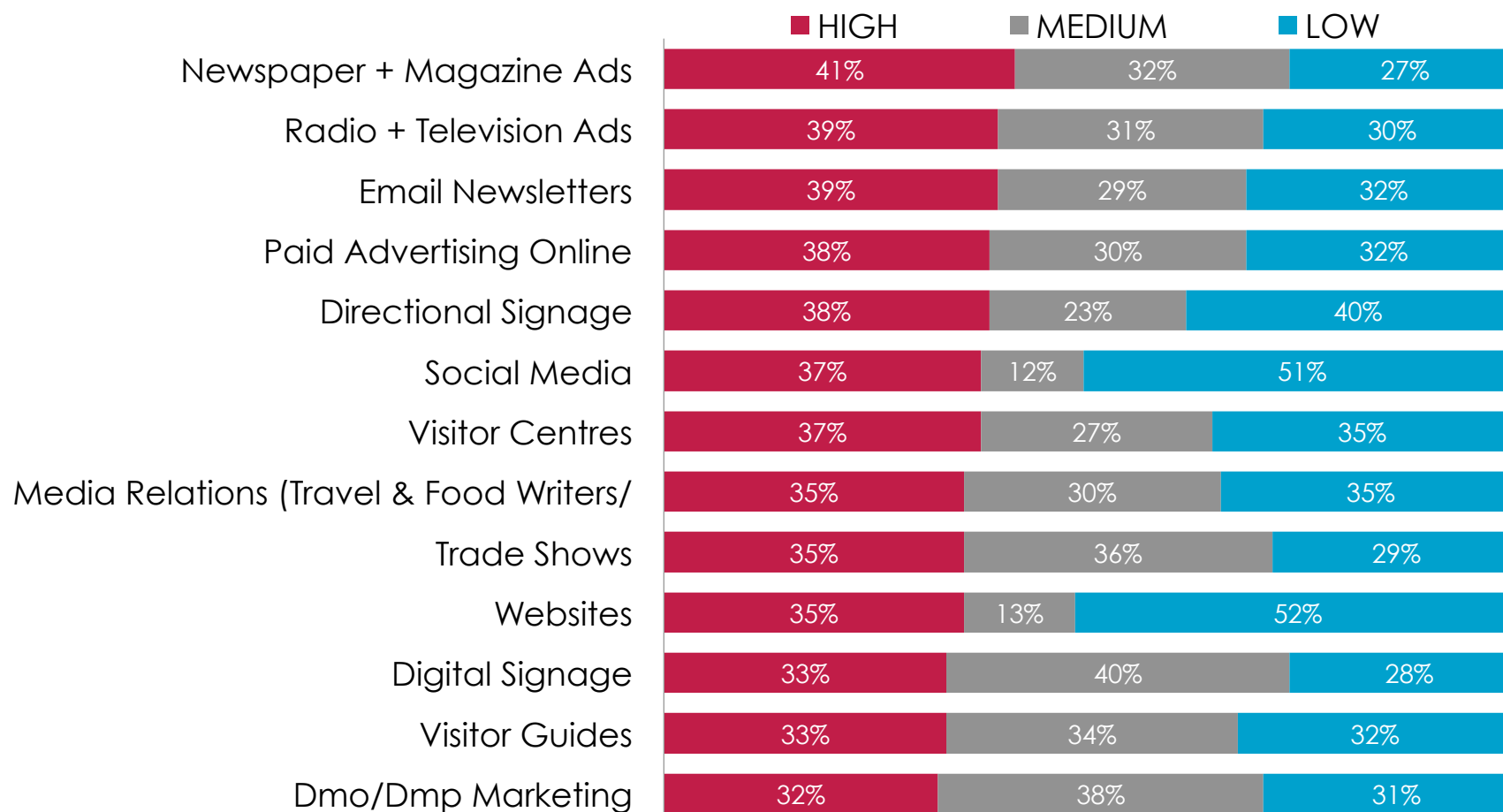
The key trends observed in South Eastern Ontario are aligned with changing travel demands and preferences across the globe.

These trends include: more travellers arriving from international markets, a desire for authentic experiences and local products, and a stronger preference towards outdoor activities.

Key Marketing Tactics, importance

Websites were ranked lowest among key marketing tactics to attract tourists; newspaper + magazine ads were seen as most important.

Q15: Rank the importance of these marketing tactics to attract tourists. n= 215



INSIGHT

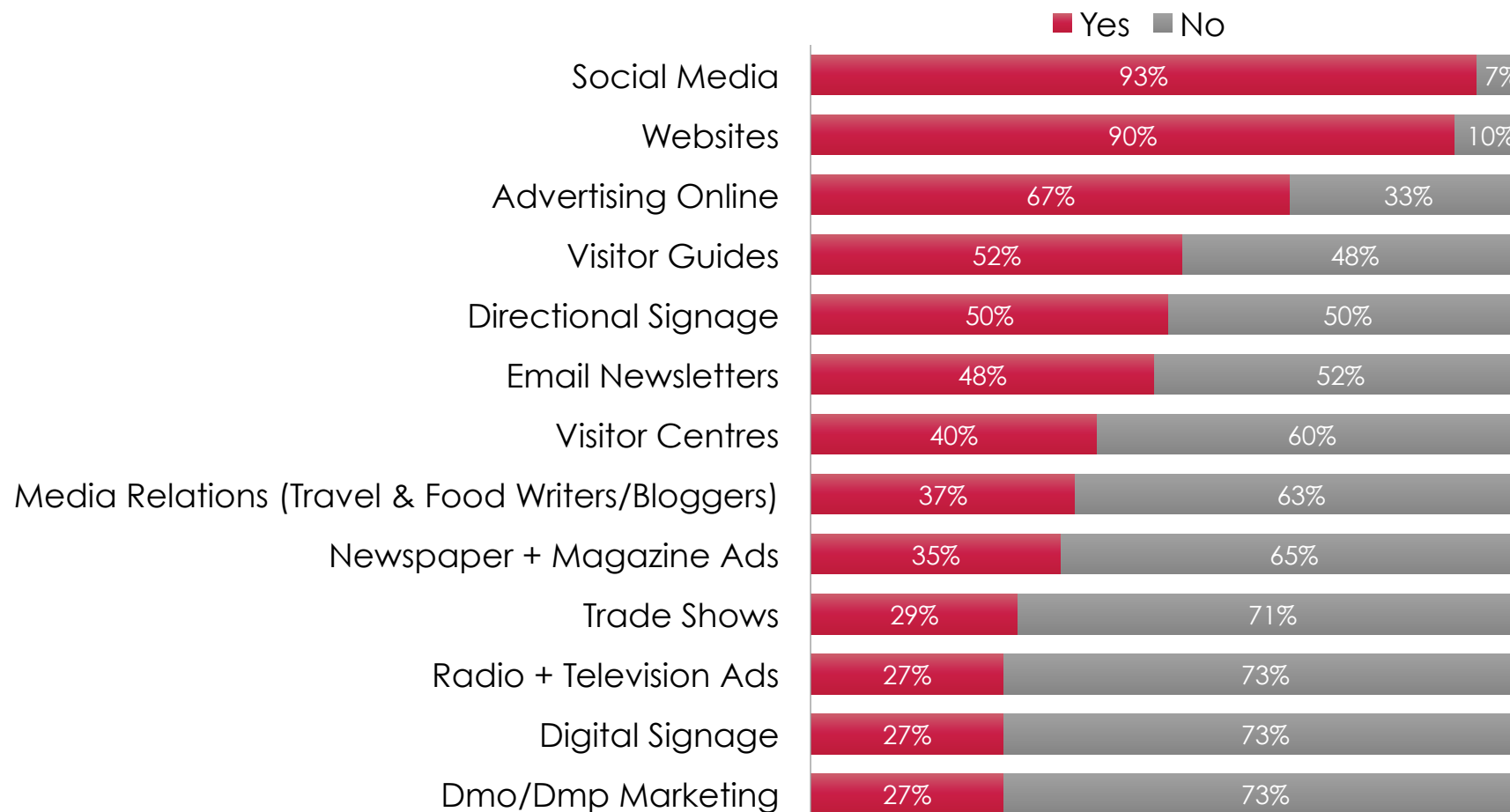
When thinking about the importance of 13 typical marketing tactics to attract tourists, the top three based on a *High* rank only were: Newspaper + Magazine Ads, Radio + Television Ads and Email Newsletters.

Tactics like websites, social media and directional signage were viewed as less important, based on a *Low* rank only.

Key Marketing Tactics, used

Social media, websites and online advertising are the most used marketing tactics.

Q16: Which marketing tactics do you currently use to attract tourists? n= 215



INSIGHT

When asked which marketing tactics are currently used to attract tourists, social media, websites and advertising online made the top three.

DMO/DMP marketing, digital signage and radio + television emerged as the least used.

Key Marketing Tactics, importance vs. use

Comparing the importance and use of tactics reveals future marketing education/training opportunities and potential DMO/DMP support and partnership areas.

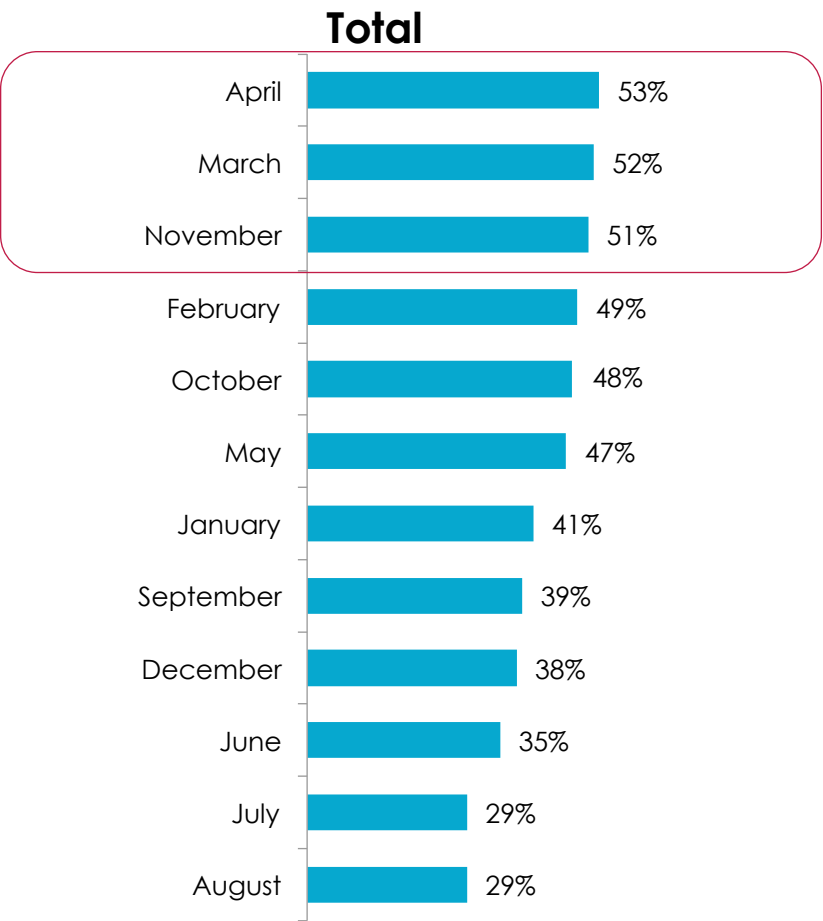
The highlighted rows indicate the marketing tactics with high/medium ranked importance (70% or greater) and low current use (35% or less).

Total	High Importance	High+Medium Importance	Use
Newspaper + Magazine Ads	41%	73%	35%
Email Newsletters	39%	68%	48%
Radio + Television Ads	39%	70%	27%
Advertising Online	38%	68%	67%
Directional Signage	38%	61%	50%
Social Media	37%	49%	93%
Visitor Centres	37%	64%	40%
Websites	35%	48%	90%
Media Relations (Travel & Food Writers/Bloggers)	35%	65%	37%
Trade Shows	35%	71%	29%
Visitor Guides	33%	67%	52%
Digital Signage	33%	73%	27%
DMO/DMP Marketing	32%	70%	27%

Growth Plans, by month

Tourism businesses are eager to grow in the shoulder season.

Q17: In what month(s) of the year would you like to grow your business? n= 215



INSIGHT

There was considerable interest in growing business in every month aside from summer. The top months mentioned were April, March and November.

Priorities, agreement

The majority of respondents feel that RTO9's current priorities are aligned with the needs and expectations of tourism businesses in the region.

Q18: South Eastern Ontario Region 9 Regional Tourism Organization current strategic priorities include: (listed below)
Do you agree with these priorities? n= 215

Total		Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Yes	<div><div></div></div> 78%	69%	77%	79%	86%	67%	85%	79%
No	<div><div></div></div> 33%	31%	23%	21%	14%	33%	15%	21%

INSIGHT

A high level of agreement(78%) is an indication that stakeholders have positive opinions about the priorities of RTO9.

One third (33%) of those surveyed expressed concern as indicated by the No responses.

Priorities

1. RTO 9 is a management organization (formerly marketing)
2. RTO 9 focuses on supporting product development initiatives
3. RTO 9 is the hub for gathering of data and research

Priorities, other

As the industry expands and technology opens new doors, RTO9 and the destinations have an opportunity to provide more meaningful support and services.

Q19: What other priorities would you like South Eastern Ontario Region 9 Regional Tourism Organization to focus on? n=215

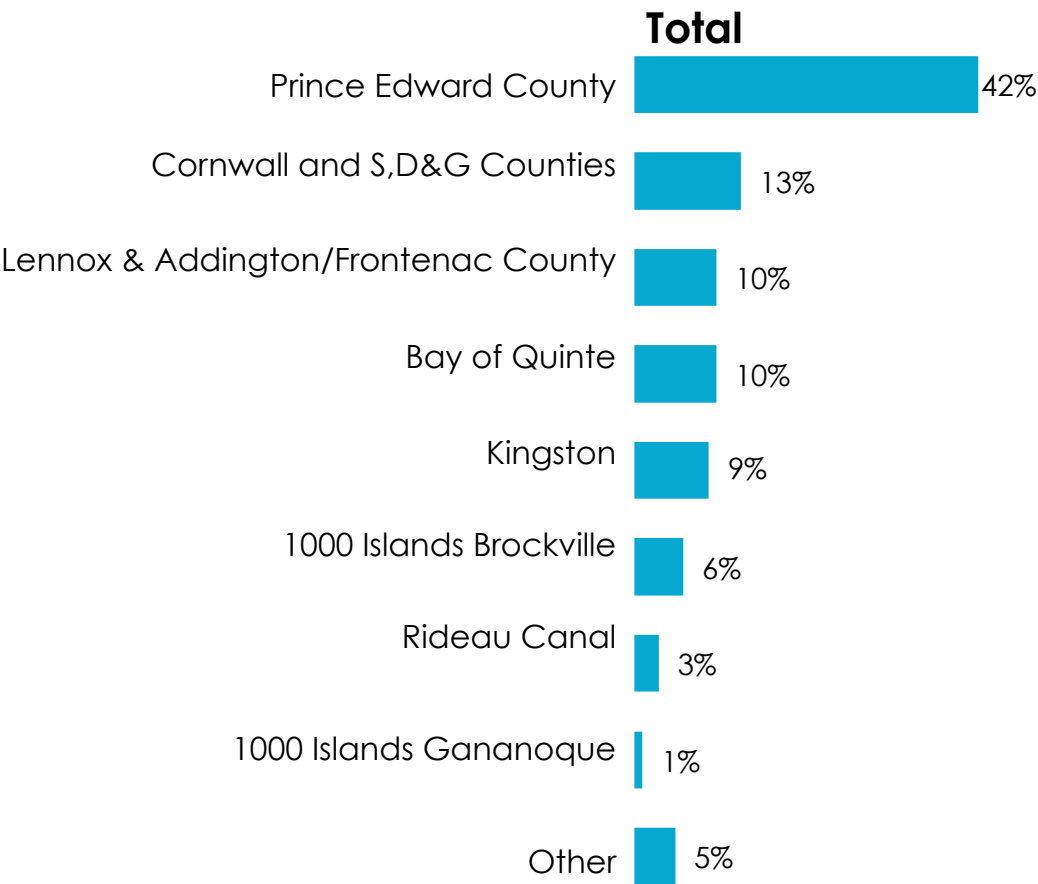
Q20: What else would you like to see from South Eastern Ontario Region 9 Regional Tourism Organization? n=215



Respondent Location

Based on increased engagement with stakeholders to complete the survey, there were more respondents from Prince Edward County.

Q21: Where are you located? n= 215



INSIGHT

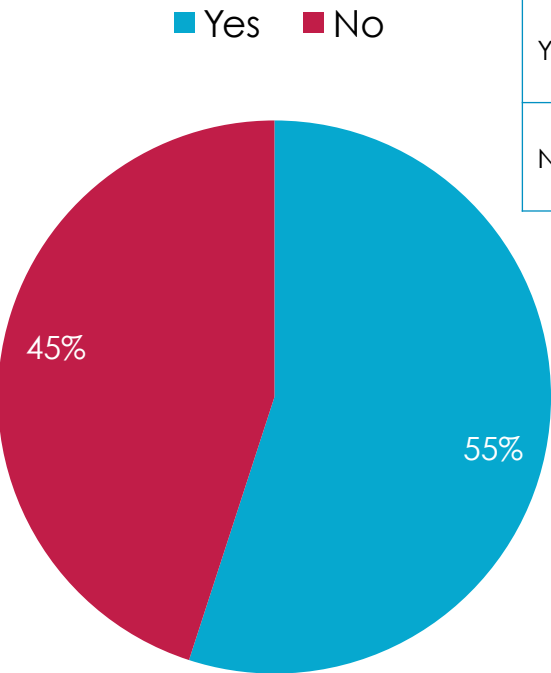
Close to half of the (42%) of the respondents were located in Prince Edward County.

Partner Engagement

RTO9 and the DMOs/DMPs have an opportunity to improve engagement and partnerships with stakeholders in the region.

Q22: Have you partnered with (RTO9/DMO/DMP name) in the last year? n= 215

Total



	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Yes	23%	58%	63%	79%	67%	69%	32%
No	77%	42%	38%	21%	33%	31%	68%

INSIGHT

Over half (55%) of respondents have partnered with RTO9 and the DMOs in the last year.

Partnership examples include:

- Festival/event support
- Marketing collaboration
- Trade show support

DMO TABLES

Types of tourism businesses and organizations

Q1: What is the primary type of tourism business or organization you operate? n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Hotel/Inn/Motel	14%	23%	13%	8%	14%	--	19%	21%
Winery/Brewery or other beverage producer	11%	--	19%	13%	--	--	4%	8%
Retail Store	9%	8%	10%	21%	14%	8%	--	5%
Event/Festival	5%	8%	3%	8%	7%	17%	8%	--
Arts/Culture Venue	4%	--	2%	--	21%	8%	8%	3%
Historic Site/Museum	4%	--	2%	8%	--	8%	8%	5%
Retail Farm Market/Farm Operator	4%	15%	2%	8%	--	--	8%	3%
Gallery	3%	--	5%	--	--	8%	4%	--
Restaurant	3%	--	3%	13%	--	--	--	3%
Attraction	2%	--	--	--	--	8%	4%	8%
Tour Operator	2%	--	6%	--	--	--	--	--
Cruise Operator/Marina	2%	--	1%	--	14%	8%	--	--
Campground	1%	--	1%	--	7%	--	--	--
Theatre	1%	--	--	--	--	--	4%	3%
Family Entertainment	1%	--	--	--	7%	--	4%	--
Recreation (outdoor)	1%	--	1%	--	--	--	--	5%
Sports (indoor/outdoor)	1%	8%	1%	--	7%	--	--	--
Visitor Centre	1%	--	--	--	--	--	4%	3%
Provincial/National Park/Conservation Area	1%	--	--	--	--	8%	--	3%
Spa & Wellness	1%	8%	1%	--	--	--	--	3%
Music Venue	--	--	--	--	--	--	4%	--
Recreation Facility/Arena (indoor)	--	--	--	--	--	--	4%	--
Transportation	--	--	1%	--	--	--	--	--
Other	25%	31%	27%	21%	7%	25%	19%	29%

Customer Source Markets

Q2: Where do the majority of your customers come from? n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Greater Toronto Area	40%	23%	61%	25%	36%	8%	15%	32%
Ottawa	40%	--	51%	33%	29%	17%	35%	47%
Metro Toronto	33%	15%	53%	17%	21%	17%	12%	24%
Kingston	32%	8%	24%	75%	71%	25%	4%	37%
Quebec	31%	8%	47%	21%	21%	17%	27%	18%
Prince Edward County	30%	23%	43%	46%	14%	--	--	29%
Belleville	20%	54%	16%	33%	36%	--	--	26%
Napanee	15%	8%	10%	50%	29%	--	--	16%
Quinte West	14%	15%	14%	17%	14%	--	--	26%
The Rest of Ontario	14%	--	11%	8%	29%	17%	19%	21%
New York State	13%	--	6%	8%	36%	17%	23%	21%
Brockville	12%	--	3%	4%	21%	67%	4%	26%
Cornwall	11%	--	1%	--	14%	25%	58%	5%
Haliburton Highlands and Ottawa Valley	8%	8%	8%	4%	21%	8%	--	11%
Lindsay/Peterborough/ Kawarthas	5%	--	7%	4%	14%	--	--	5%
Northumberland County	4%	--	3%	4%	14%	--	--	5%
Other	23%	15%	14%	13%	29%	17%	50%	37%

Seasonality and sales, shoulder season

Q3: Thinking about last year (i.e., September 2017-May 2018) and this year's (i.e., September 2018-May 2019) shoulder season, how have sales been for your own business? n=215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Much better	19%	23%	18%	17%	7%	25%	27%	16%
Somewhat better	40%	54%	44%	38%	29%	25%	38%	34%
About the same	26%	15%	23%	25%	29%	33%	31%	29%
Somewhat worse	13%	8%	11%	13%	29%	17%	4%	18%
Much worse	3%	--	3%	8%	7%	--	--	--

Seasonality and sales, high season

Q4: Thinking about last year (i.e., June-August 2018) and this year's (i.e., June-August 2019) high season, how have sales been for your own business? n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Much better	16%	23%	17%	13%	--	33%	27%	8%
Somewhat better	43%	46%	47%	42%	43%	17%	38%	45%
About the same	24%	23%	16%	21%	29%	33%	31%	37%
Somewhat worse	14%	8%	16%	25%	21%	17%	4%	11%
Much worse	2%	--	5%	--	7%	--	--	--

Q5: Compared to last year (i.e., 2018 vs. 2019) how many visitors do you have this year so far? n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Much more	20%	38%	20%	17%	--	17%	31%	13%
Somewhat more	40%	31%	42%	50%	43%	33%	38%	34%
About the same	23%	31%	24%	17%	14%	25%	19%	29%
Somewhat less	14%	--	11%	17%	29%	25%	8%	18%
Much less	3%	--	2%	--	14%	--	4%	5%

Health of tourism business, within own community (shoulder season)

Q6: Compared to last year's shoulder season (i.e., September 2017-May 2018), rate overall tourism business in your community for this year (i.e., September 2018-May 2019). n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Much better	11%	--	13%	4%	--	42%	15%	5%
Somewhat better	34%	31%	34%	42%	21%	33%	46%	26%
About the same	38%	62%	35%	38%	50%	8%	35%	45%
Somewhat worse	16%	8%	17%	17%	29%	8%	4%	24%
Much worse	1%	--	1%	--	--	8%	--	--

Health of tourism business, within own community (high season)

Q7: Compared to last year's high season (i.e., June-August 2018), rate overall tourism business in your community for this year (i.e., June-August 2019). n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Much better	15%	15%	14%	13%	7%	42%	19%	13%
Somewhat better	40%	31%	42%	42%	29%	33%	46%	42%
About the same	27%	46%	27%	29%	29%	8%	31%	24%
Somewhat worse	15%	8%	16%	13%	29%	8%	4%	21%
Much worse	2%	0%	1%	4%	7%	8%	--	--

Q8: How have the following factors impacted your business last year and this year? n= 215

Positive	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Economy	20%	23%	24%	21%	21%	8%	15%	13%
Weather	18%	23%	20%	29%	--	25%	8%	16%
U.S. Exchange	14%	8%	5%	17%	21%	17%	15%	34%
Bill 148/Min. Wage Increase	6%	15%	5%	--	7%	8%	12%	3%
Competition From Other Destinations	6%	--	8%	13%	--	--	8%	3%
Road Construction	5%	15%	3%	8%	--	--	8%	3%
Gas Prices	4%	--	5%	4%	7%	--	4%	3%
Passport Requirements	--	--	--	--	--	--	--	--

Q8: How have the following factors impacted your business last year and this year? n= 215

Neutral/No Impact	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Passport Requirements	95%	85%	98%	100%	86%	100%	96%	89%
Gas Prices	83%	69%	88%	88%	71%	92%	77%	79%
U.S. Exchange	80%	92%	90%	79%	79%	75%	81%	53%
Competition From Other Destinations	71%	85%	72%	63%	71%	75%	73%	68%
Bill 148/Min. Wage Increase	68%	62%	69%	54%	71%	58%	69%	79%
Road Construction	64%	54%	57%	58%	79%	75%	69%	76%
Economy	62%	69%	59%	67%	29%	67%	77%	66%
Weather	43%	62%	31%	38%	57%	42%	77%	39%

Q8: How have the following factors impacted your business last year and this year? n= 215

Negative	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Weather	39%	15%	49%	33%	43%	33%	15%	45%
Road Construction	31%	31%	40%	33%	21%	25%	23%	21%
Bill 148/Min. Wage Increase	26%	23%	26%	46%	21%	33%	19%	18%
Competition From Other Destinations	23%	15%	20%	25%	29%	25%	19%	29%
Economy	18%	8%	17%	13%	50%	25%	8%	21%
Gas Prices	13%	31%	8%	8%	21%	8%	19%	18%
U.S. Exchange	6%	--	6%	4%	--	8%	4%	13%
Passport Requirements	5%	15%	2%	--	14%	--	4%	11%

Q9: Have you invested in physical upgrades/improvements for your business this year? n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
We have made a few improvements, but nothing major	53%	46%	49%	50%	50%	83%	46%	61%
We have made considerable upgrades	33%	23%	35%	46%	36%	8%	27%	32%
We have not made any improvements	15%	31%	16%	4%	14%	8%	27%	8%

Q10: Have you invested in technological upgrades/improvements (e.g., website, social media, IT tools) for your business this year? n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
We have made a few improvements, but nothing major	59%	77%	51%	58%	43%	58%	69%	71%
We have made considerable upgrades	24%	--	30%	17%	43%	33%	19%	18%
We have not made any improvements	17%	23%	19%	25%	14%	8%	12%	11%

Q11: Have any of your investments in physical and/or technological upgrades/improvements been out of necessity only? n= 186

	Overall (n=186)	Bay Of Quinte (n=10)	Prince Edward County (n=80)	Lennox & Addington/ Frontenac County (n=21)	Kingston (n=11)	1000 Islands Brockville (n=8)	Cornwall & SDG Counties (n=23)	South Eastern Ontario (n=33)
Yes	44%	40%	44%	48%	64%	50%	48%	33%
No	56%	60%	56%	52%	36%	50%	52%	67%

Q13. How has your business contributed to employment compared to last year? n= 215

	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
We employed more employees	58%	92%	53%	50%	64%	50%	65%	55%
We employed the same number of employees	33%	8%	39%	29%	29%	42%	31%	32%
We employed less employees	9%	0%	8%	21%	7%	8%	4%	13%

Key Marketing Tactics, importance

Q15: Rank the importance of these marketing tactics to attract tourists. n= 215

High Score	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Newspaper + Magazine Ads	41%	38%	50%	29%	57%	33%	35%	29%
Radio + Television Ads	39%	23%	45%	29%	43%	33%	38%	37%
Email Newsletters	39%	23%	39%	42%	57%	33%	42%	34%
Paid Advertising Online	38%	15%	39%	50%	43%	67%	35%	29%
Directional Signage	38%	23%	40%	38%	43%	33%	42%	34%
Social Media	37%	31%	35%	42%	43%	33%	38%	39%
Media Relations	35%	46%	31%	33%	36%	25%	46%	37%
Trade Shows	35%	31%	43%	33%	14%	33%	35%	29%
Websites	35%	23%	31%	46%	50%	33%	38%	34%
Digital Signage	33%	46%	34%	29%	50%	25%	23%	29%
Visitor Centres	33%	46%	38%	17%	29%	25%	42%	29%
Visitor Guides	33%	46%	38%	17%	29%	25%	42%	29%
Dmo/Dmp Marketing	32%	23%	32%	21%	50%	25%	35%	34%

Key Marketing Tactics, importance

Q15: Rank the importance of these marketing tactics to attract tourists. n = 215

Medium Score	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Digital Signage	40%	23%	40%	50%	36%	42%	42%	37%
Dmo/Dmp Marketing	38%	38%	38%	63%	14%	25%	27%	42%
Trade Shows	36%	15%	26%	46%	57%	50%	54%	34%
Visitor Centres	34%	23%	26%	67%	36%	42%	35%	34%
Visitor Guides	34%	23%	26%	67%	36%	42%	35%	34%
Newspaper + Magazine Ads	32%	23%	26%	46%	43%	25%	38%	32%
Radio + Television Ads	31%	23%	30%	46%	21%	25%	27%	34%
Paid Advertising Online	30%	15%	35%	33%	21%	8%	23%	37%
Media Relations	30%	15%	26%	38%	29%	25%	23%	45%
Email Newsletters	29%	31%	28%	46%	36%	17%	19%	29%
Directional Signage	23%	23%	22%	29%	7%	17%	19%	32%
Websites	13%	15%	14%	29%	14%	8%	4%	8%
Social Media	12%	15%	14%	13%	7%	17%	4%	11%

Key Marketing Tactics, importance

Q15: Rank the importance of these marketing tactics to attract tourists. n = 215

Low Score	Overall (n=215)	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Websites	52%	62%	56%	25%	36%	58%	58%	58%
Social Media	51%	54%	51%	46%	50%	50%	58%	50%
Directional Signage	40%	54%	39%	33%	50%	50%	38%	34%
Media Relations	35%	38%	43%	29%	36%	50%	31%	18%
Paid Advertising Online	32%	69%	26%	17%	36%	25%	42%	34%
Email Newsletters	32%	46%	33%	13%	7%	50%	38%	37%
Visitor Centres	32%	31%	36%	17%	36%	33%	23%	37%
Visitor Guides	32%	31%	36%	17%	36%	33%	23%	37%
Dmo/Dmp Marketing	31%	38%	31%	17%	36%	50%	38%	24%
Radio + Television Ads	30%	54%	25%	25%	36%	42%	35%	29%
Trade Shows	29%	54%	31%	21%	29%	17%	12%	37%
Digital Signage	28%	31%	26%	21%	14%	33%	35%	34%
Newspaper + Magazine Ads	27%	38%	24%	25%	--	42%	27%	39%

Key Marketing Tactics, used

Q16: Which marketing tactics do you currently use to attract tourists? n= 215

Yes - Total	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Social Media	92%	92%	96%	86%	92%	100%	95%
Websites	77%	89%	92%	86%	92%	96%	92%
Advertising Online	69%	66%	63%	71%	67%	73%	66%
Visitor Guides	23%	50%	38%	50%	75%	62%	63%
Directional Signage	54%	43%	54%	36%	58%	50%	66%
Email Newsletters	62%	43%	42%	50%	67%	54%	50%
Visitor Centres	23%	35%	17%	50%	50%	46%	58%
Media Relations (Travel & Food Writers/Bloggers)	31%	42%	21%	50%	33%	31%	39%
Newspaper + Magazine Ads	23%	28%	38%	50%	50%	50%	34%
Trade Shows	31%	24%	17%	43%	33%	54%	26%
Radio + Television Ads	15%	24%	33%	29%	58%	31%	24%
Digital Signage	31%	19%	29%	50%	50%	23%	29%
Dmo/ Dmp Marketing	23%	28%	4%	43%	50%	23%	29%

Key Marketing Tactics, used

Q16: Which marketing tactics do you currently use to attract tourists? n= 215

No - Total	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Radio + Television Ads	85%	76%	67%	71%	42%	69%	76%
Digital Signage	69%	81%	71%	50%	50%	77%	71%
Dmo/Dmp Marketing	77%	72%	96%	57%	50%	77%	71%
Trade Shows	69%	76%	83%	57%	67%	46%	74%
Newspaper + Magazine Ads	77%	72%	63%	50%	50%	50%	66%
Media Relations (Travel & Food Writers/Bloggers)	69%	58%	79%	50%	67%	69%	61%
Visitor Centres	77%	65%	83%	50%	50%	54%	42%
Email Newsletters	38%	57%	58%	50%	33%	46%	50%
Directional Signage	46%	57%	46%	64%	42%	50%	34%
Visitor Guides	77%	50%	63%	50%	25%	38%	37%
Advertising Online	31%	34%	38%	29%	33%	27%	34%
Websites	23%	11%	8%	14%	8%	4%	8%
Social Media	8%	8%	4%	14%	8%	0%	5%

Growth Plans, by month

Q17: In what month(s) of the year would you like to grow your business? n= 215

	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
April	31%	58%	58%	50%	50%	50%	53%
March	31%	57%	50%	43%	42%	46%	58%
November	46%	67%	46%	29%	33%	27%	47%
February	31%	49%	50%	57%	33%	58%	53%
October	77%	52%	50%	36%	42%	27%	50%
May	38%	50%	46%	71%	67%	35%	39%
January	38%	36%	50%	43%	33%	42%	47%
September	69%	34%	63%	36%	25%	35%	32%
December	46%	50%	21%	14%	25%	23%	39%
June	38%	31%	50%	50%	58%	23%	32%
July	54%	19%	50%	36%	25%	31%	29%
August	54%	18%	46%	36%	42%	35%	24%

Q18: South Eastern Ontario Region 9 Regional Tourism Organization current strategic priorities include:

- RTO 9 is a management organization (formerly marketing)
- RTO 9 is the hub for gathering of data and research
- RTO 9 focusses on supporting product development initiatives

Do you agree with these priorities? n= 215

	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Yes	69%	77%	79%	86%	67%	85%	79%
No	31%	23%	21%	14%	33%	15%	21%

Q22: Have you partnered with RTO9 in the last year? n= 215

	Bay Of Quinte (n=13)	Prince Edward County (n=88)	Lennox & Addington/ Frontenac County (n=24)	Kingston (n=14)	1000 Islands Brockville (n=12)	Cornwall & SDG Counties (n=26)	South Eastern Ontario (n=38)
Yes	23%	58%	63%	79%	67%	69%	32%
No	77%	42%	38%	21%	33%	31%	68%

Twenty31 Consulting is a research and innovation based management consultancy working with senior leaders of travel and tourism organizations to define and build sustainable, competitive advantage.

twenty31.org