SOUTH EASTERN ONTARIO

INDUSTRY INSIGHTS SURVEY

Wave 2 Winter 2020

Draft Report

March 31, 2020

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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.

March 31, 2020

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Introduction

With the emergence of COVID-19 we are entering uncharted territory which will likely result in a fundamental shift in tourism and the way the industry operates.

RTO9 Regional Tourism ORGANIZATION

The 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 is 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.

The results of our wave two Industry Insights Survey, presented in this report, have been compared against past data to identify trends and understand performance activity within the region where possible. However, the emergence of COVID-19 has drastically changed the global business environment and consumer behaviour at rapid pace. To build our understanding of alternative scenarios, we have been measuring the impact on the industry and the specific economic impact of the disruption through a COVID-19 Industry Survey. For more information and data, please visit our COVID-19 resource webpage: https://tourismtalk.ca/covid-19/.

Key Takeaways: Summary

South Eastern Ontario experienced strong tourism growth in 2019, and stakeholders recognized the potential.

Regional Tourism ORGANIZATION

Note: A variety of stakeholder groups are represented in the survey results but the accommodations sector, event/festival operators and retail stores were the primary respondents (50%). From a destination standpoint, 60% of responses come from Kingston and Cornwall and S,D&G Counties.

Positive views on tourism: Similar to 2018, the past year has largely been viewed as a positive growth year for tourism in South Eastern Ontario. Stakeholders expressed a positive picture of the health of tourism when reflecting on their own business and generally within their community, especially in the high season. Employment levels remained consistent with the previous year, despite improvements.

Driving competitiveness: Tourism stakeholders indicated that they have continued to drive competitiveness in the region by increasing investments in new physical assets (92%) and technology (86%). At the time of this study, the planned 2021 investments in the physical category were of slightly higher priority, with maintenance of damaged/broken items receiving the most mentions.

Expanding customer base: The primary customer source markets continue to be viewed as the region itself, the Greater Toronto Area and Ottawa. With increased visitors, businesses were able to identify trends and gain real experience adapting to the needs of new markets and segments, such as international travellers and millennials/younger audiences. The continued effort to expand services and create tailored offerings for international markets and diversified segments can prove useful for creating new revenue streams and serving as protection during challenging economic periods.

Key Takeaways: Summary, continued

Tourism businesses expressed a high level of agreement with the priorities of RTO9.

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Mitigating business challenges: Weather and competition from other destinations were rated highest for negative impact on business last year, when ranking 13 potential factors. The economy was seen as having a relatively positive impact on business, while passport requirements and the U.S. exchange rate were viewed as having minimal impact.

Alignment with global trends: The top tourism trends noted were travellers expressing a stronger desire for authentic experiences and price conscious behaviour. In addition, stakeholders observed a growing interest in culinary offerings, preference towards AirBnB/rentals over hotels and short-stays.

Tackling seasonality: Tourism in the region is highly seasonal with the majority of visits taking place in July and August. Aligned with previous survey results, stakeholders expressed a desire to grow business in the shoulder season; the key months indicated were March, February and November. Increased collaboration through promotions and strategic product development will help to build awareness and the diversity of offerings.

Priorities and partnerships: Once again a high level of agreement (83%) is an indication that stakeholders have positive opinions about the priorities of RTO9. However, only 50% of respondents have partnered with RTO9 and the DMOs in the last year. Partnerships are a key opportunity to align activities and share resources for the best possible outcomes.

Key Takeaways: Summary, continued

Marketing will continue to evolve and shift as consumers adopt new technologies and change they way they respond to and take in new information.

Understanding marketing tactics: Understanding marketing channels and creating an effective strategy for reaching customers is a challenge all businesses and tourism organizations face. Consistent with our past survey, some of the highest ranked marketing tactics are among the least used. Continued training/education and strong partnerships can improve alignment and support the efficient allocation of marketing resources.

Total	High Importance	High & Medium Importance	Use
Trade Shows	25%	71%	32%
Radio + Television Ads	32%	70%	28%
Digital Signage	28%	73%	32%
DMO/DMP Marketing	25%	70%	33%

SURVEY COMPARISON

Survey Comparison

	2018-19 (fall pilot)	2019-20 (fall wave 1)	2019-20 (winter wave 2)
Primary type of tourism business/organization (top 3) - responses	Accommodations Retail Stores Historic Site/Museum	Accommodations Winery/brewery/other beverage producer Retail Stores	Accommodations sector Event/festival operators Retail stores
Customer Source Markets	1. Within RTO9 2. Greater Toronto Area 3. Ottawa	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%	10%
High season sales, much better than last year	15%	16%	23%
Number of Visitors, much more than last year	11%	20%	14%
Health of tourism, within own community (shoulder season), much better than last year	8%	11%	7%

Survey Comparison

	2018-19 (fall pilot)	2019-20 (fall wave 1)	2019-20 (winter wave 2)
Health of tourism, within own community (high season), much better than last year	6%	15%	11%
Business investments (physical), considerable	28%	33%	39%
Business investments (technological), considerable	30%	24%	33%
Employment Contributions, employed more than last year	28%	33%	24%
Growth plans, by month	May, February and October	April, March and November	March, February, November

METHODOLOGY

Overview

The Industry Insights Survey was deployed in winter 2020 by RTO9 and key destinations in the region.

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METHOD

- Online
- 11 Minute Questionnaire
- Fieldwork from February 3 – March 6, 2020

TARGET

- Tourism businesses and organizations operating in South Eastern Ontario

COMMUNICATION

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

SAMPLE SIZE

- 111 total respondents
- South Eastern Ontario (46), Bay of Quinte (3), Prince Edward County (1), Lennox & Addington/Frontenac (1), Kingston (31), 1000 Islands Brockville (12) and Cornwall and S,D&G Counties (29)

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, 111 respondents took part in the study by completing the questionnaire. This is less than half the amount achieved during the fall study this year. Increased engagement and survey promotions will be needed to ensure a broader and consistent representation of stakeholders for future survey waves.

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

Responses primarily came from Kingston, Cornwall and S,D&G Counties and the RTO9 questionnaire.

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To improve results, continued engagement via the destination databases will allow for improved response rates for future surveys.

Destination Name	Database Contacts (#)	Responses (#)	Response Rate (%)
Bay of Quinte	2,257	3	0.13%
Prince Edward County	700	1	0.14%
Lennox & Addington/Frontenac	40	1	2%
Rideau Canal	1,200	0	-
Kingston	95	31	33%
1000 Islands Gananoque	3,000	0	-
1000 Islands Brockville	800	12	2%
Cornwall and S,D&G Counties	-	29	-
South Eastern Ontario	700	46	7%

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.

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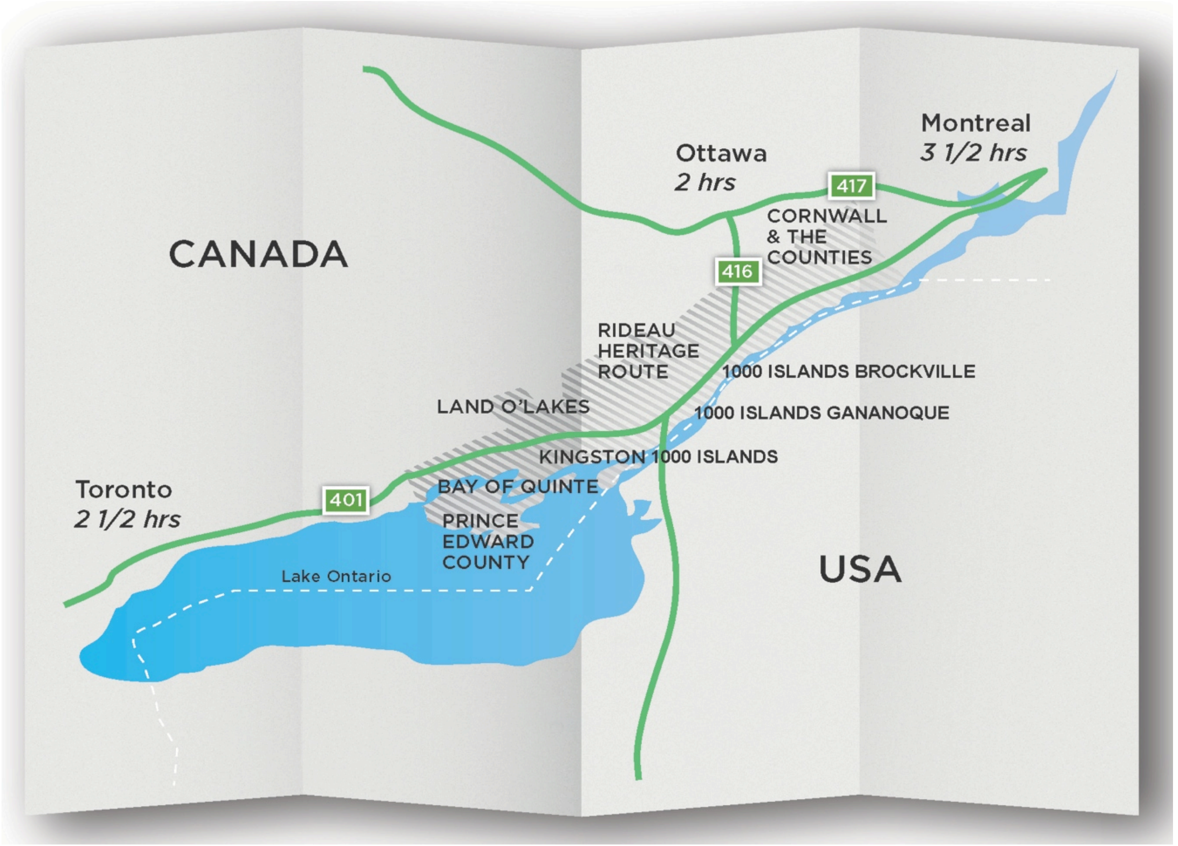
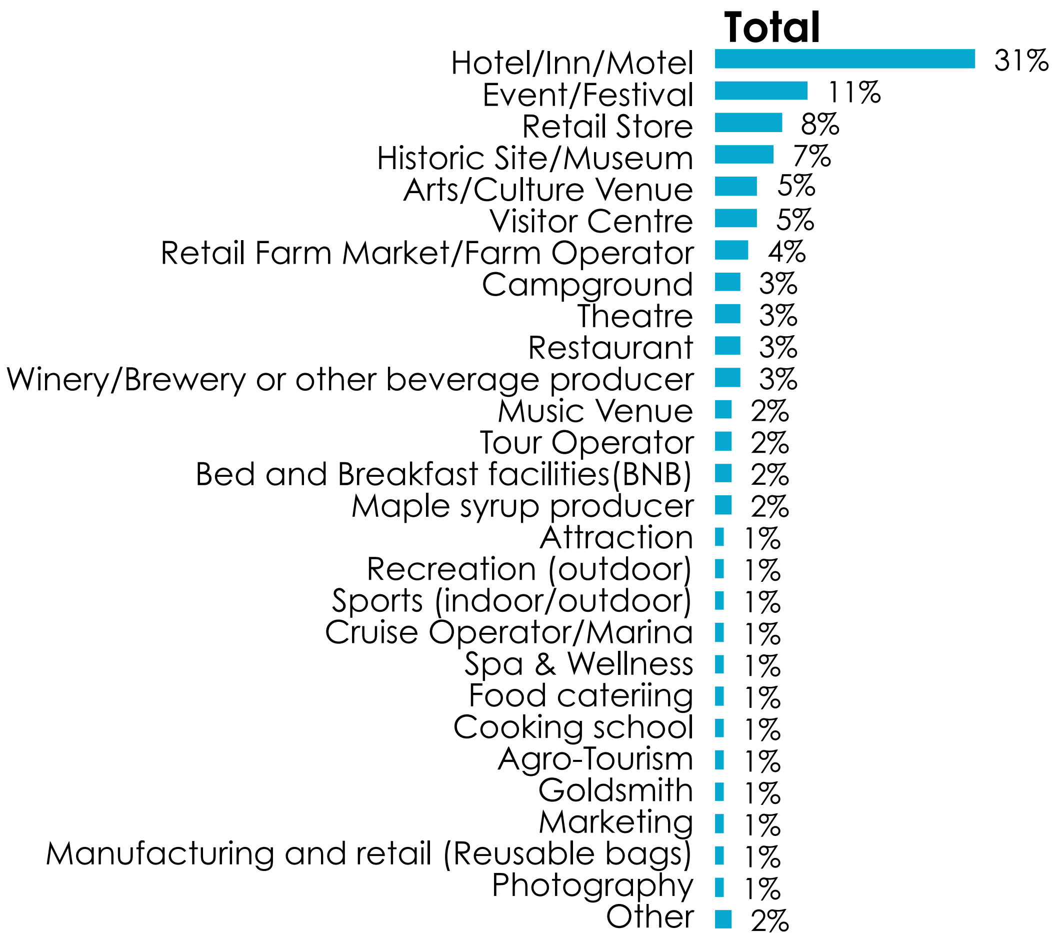


South Eastern Ontario includes the region east of the Bay of Quinte to the Ontario/Quebec border as shown on this map.

Types of tourism businesses and organizations

The accommodations sector continues to show the highest engagement amongst the stakeholder groups.

Q1: What is the primary type of tourism business or organization you operate? n= 111



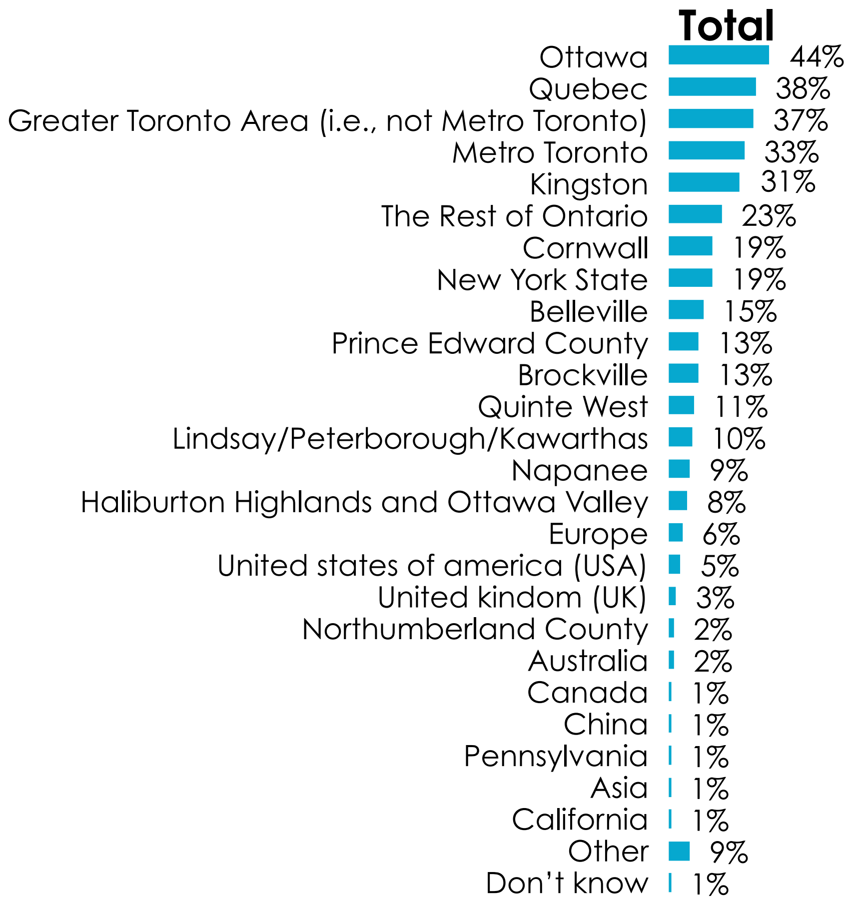
INSIGHT

Accommodations, event/festival operators and retails stores 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 are viewed as solid customer source markets.

Q2: Where do the majority of your customers come from? n= 111



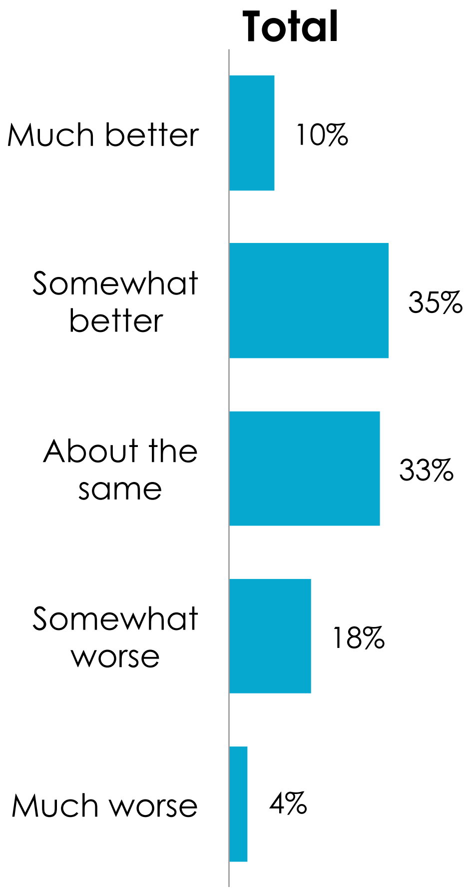
INSIGHT

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 were viewed as positive by almost half of respondents.

Q3: Thinking about 2018 vs. 2019's shoulder season (January-May and September-December), how were sales for your own business? n=111



INSIGHT

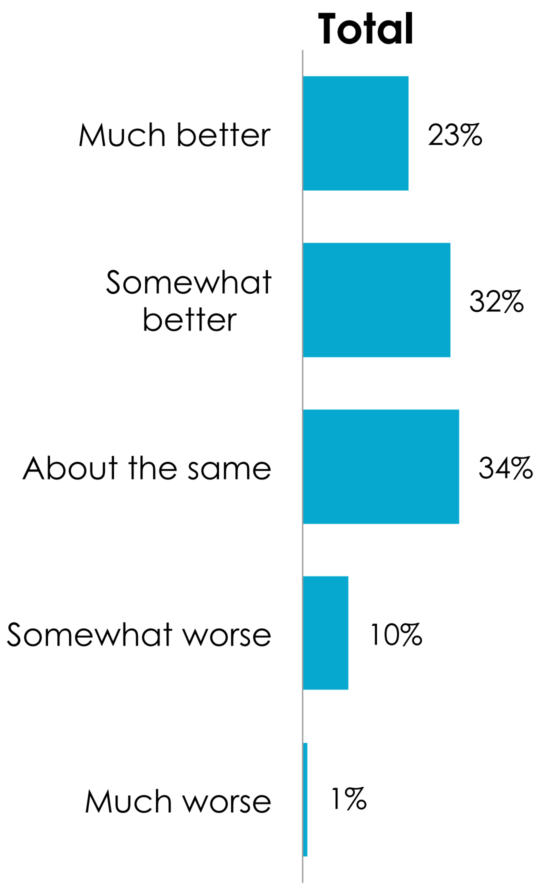
Respondents were more likely to indicate a positive (45%) or neutral view (33%) of 2019's shoulder season sales when compared to the prior year.

Less than a quarter 22% 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 2018 vs. 2019's high season (June-August), how were sales for your own business? n= 111



INSIGHT

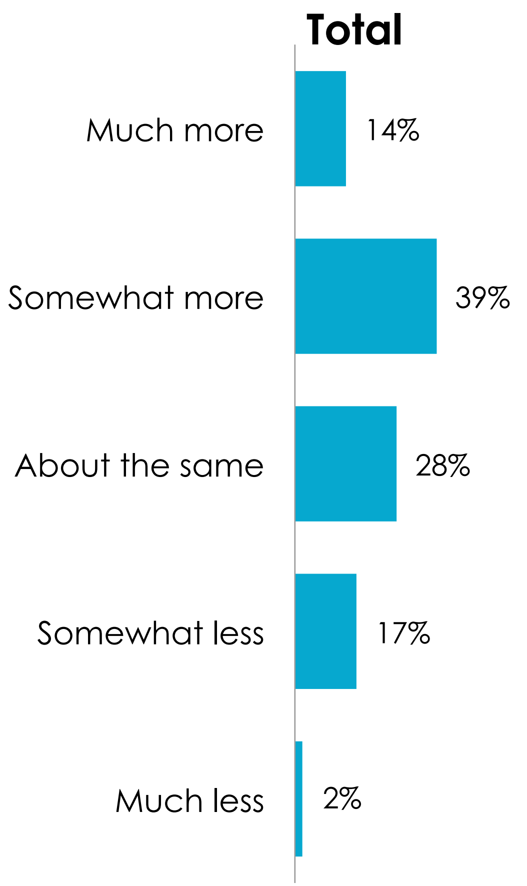
More than half (55%) of all respondents felt that sales increased this year and some (34%) felt that results were about the same.

Only 11% 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: Thinking about 2018 vs. 2019, how many visitors did you have? n= 111



INSIGHT

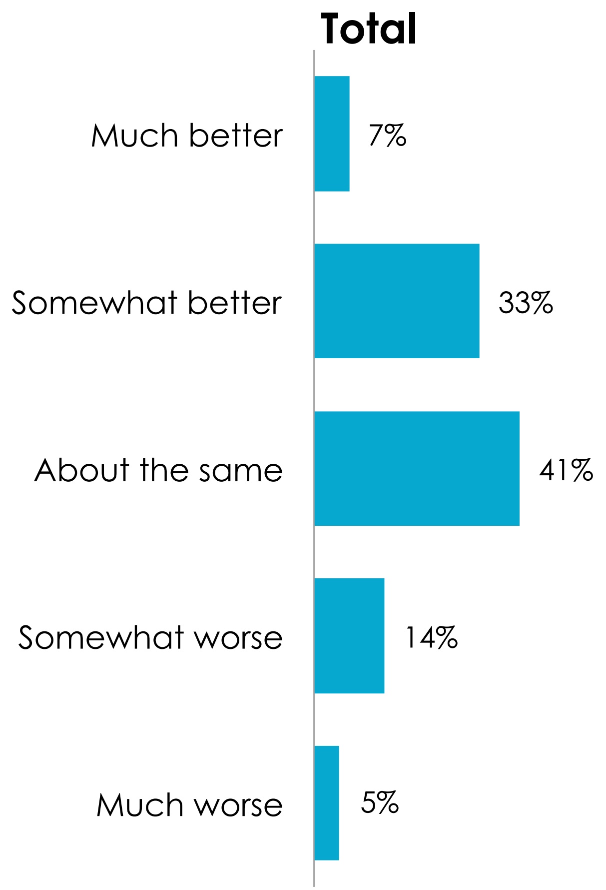
The positive sentiment related to sales was reflected when assessing the number of visitors. Over half of respondents (53%) felt there was an increase in visitors over last year.

Just 19% felt that they had fewer visitors.

Health of tourism, within own community (shoulder season)

At the community level, the perception was that business in 2019 was the same or stronger than in 2018.

Q6: Compared to 2018's shoulder season (January-May and September-December), rate overall tourism business in your community for 2019. n= 111



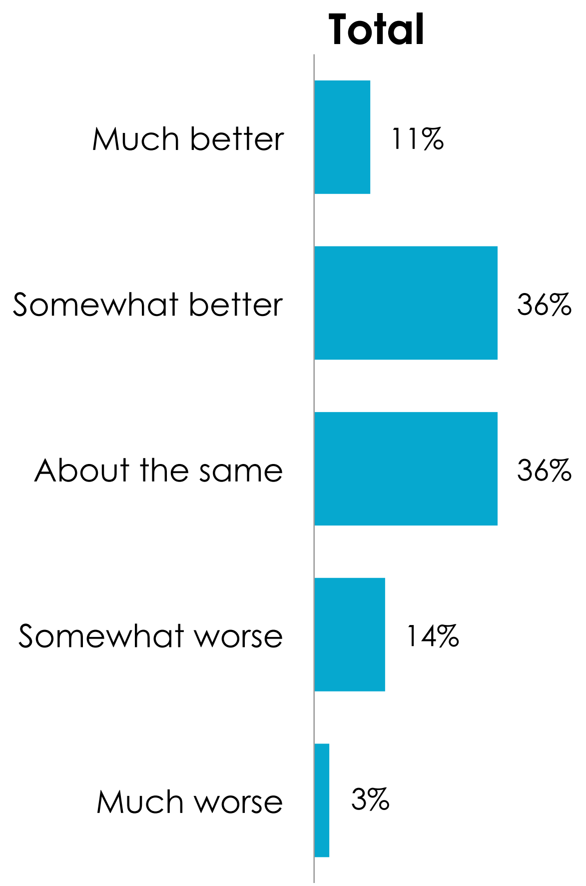
INSIGHT

When thinking about tourism at the community level, perceptions about tourism related business this year was almost equally split between neutral and positive; 41% felt business was about the same and 40% held a more positive view.

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 2018's high season (June-August), rate overall tourism business in your community for 2019. n= 111



INSIGHT

As we have seen before, when comparing views about the health of tourism based on own sales, positive sentiment was higher at 55% vs. 47% for tourism business within own community.

Business Challenges

The factors perceived to have the greatest negative impact was weather and competition from other destinations.

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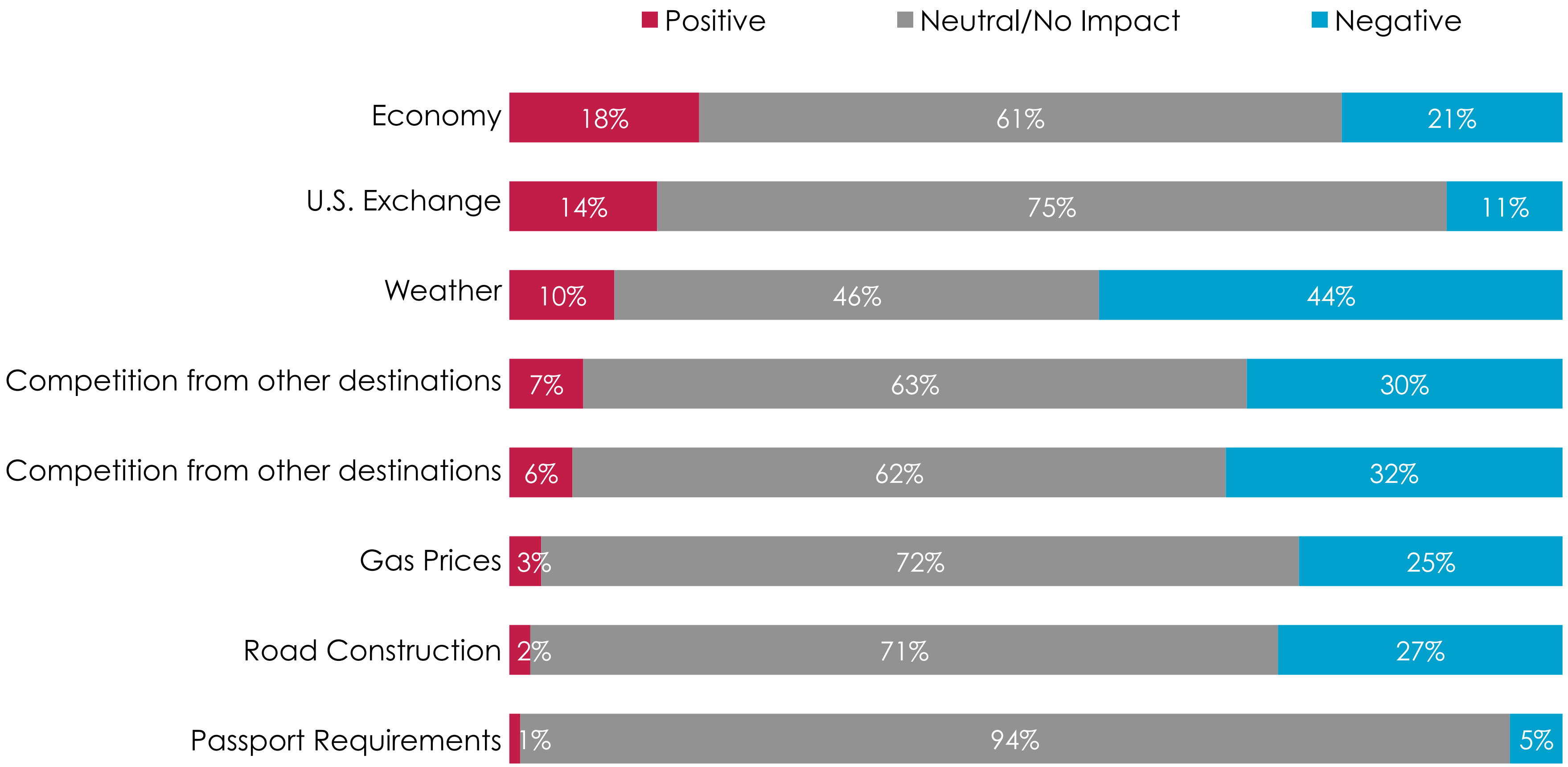
Q8: How have the following factors impacted your business in 2019? n= 111



INSIGHT

Weather factors and competition from other destinations were rated highest for negative impact on business.

Passport requirements and the U.S. exchange rate were viewed as having minimal impact.

The economy was seen as having a relatively positive impact on business.

Business Investments, physical

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

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Q9: Have you invested in physical upgrades/improvements for your business this year? n= 111

	Total	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Kingston (n=31)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
We have made considerable upgrades	39%	33%	-	-	45%	-	34%	39%
We have made a few improvements, but nothing major	53%	67%	-	-	49%	-	63%	52%
We have not made any improvements	8%	-	100%	100%	6%	-	3%	9%

INSIGHT

The vast majority of businesses have invested in physical upgrades/ improvements (92%), of this amount 39% cited that they were considerable.

Only 8% 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= 111

	Total	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Kingston (n=31)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
We have made considerable upgrades	33%	-	-	-	39%	-	34%	33%
We have made a few improvements, but nothing major	53%	100%	-	-	55%	-	52%	50%
We have not made any improvements	14%	-	100%	100%	6%	-	14%	17%

INSIGHT

When it comes to technological upgrades, the majority made either a few improvements (53%) or considerable upgrades (33%).

The proportion of businesses that did not change anything was limited(14%).

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= 111

	Total	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Kingston (n=31)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Yes	35%	33%	-	-	32%	-	45%	33%
No	50%	67%	100%	-	42%	-	48%	54%
Not Applicable	15%	-	-	100%	26%	-	7%	13%

INSIGHT

Businesses indicated that many upgrades/improvements are being completed proactively rather than as a necessity, which once again suggests that investments are helping businesses become more competitive.

Future business investments

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

Q12: Do you have any planned upgrades/improvements (physical and/or technological) for your business next year? n= 111

Type	Upgrade/Improvement
Physical	• Repairing damaged / broken items • Site restoration • Cosmetic upgrades (Paint) • New rooms / bathroom additions • Improved signage
Technological	• Upgrade software programs • Enhance social media marketing • New online sales model / system • Website revitalization / new website • Upgrade hardware systems

INSIGHT

Respondents cited examples of the physical and technological upgrades/improvements they planned for next year (2021).

A change from our wave 1 study, those within the physical category were slightly higher, with maintenance of damaged/broken items receiving the most mentions.

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= 111

Total		Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Kingston (n=31)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
We employed more employees	24%	-	-	-	16%	-	21%	35%
We employed the same number of employees	66%	100%	100%	100%	71%	-	72%	54%
We employed less employees	10%	-	-	-	13%	-	7%	11%

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. The majority (66%) of the respondents employed the same number people and just under a quarter (24%) employed more.

A much smaller amount employed less (10%) than the year before.

Tourism Trends

The top cited trends were a desire for more experiences and price conscious behaviour.

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

Traveller Mix and Patterns

- More International tourists and locals
- Millennials
- Group trips (friends, business, events, families)

Customer Preferences

- More last minute bookings, including online
- Demand for online content/social media engagement
- Special foods (e.g. healthy)

Experiences

- Looking for outdoor activities (e.g., cycling tours, kayaking)
- Drawn by nature and festivals/ events
- Demand for local suppliers and shops
- Desire for well curated and high quality experiences

Spending Patterns

- Price conscious travellers but willing to pay more for authenticity
- Increased mobile / online payments

INSIGHT

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

The top tourism trends noted were travellers with a stronger desire for authentic experiences and price conscious behaviour. In addition, stakeholders observed a growing interest in culinary offerings, preference towards AirBnB and rentals over hotels and short-stays.

Key Marketing Tactics, importance

Trade shows and radio + television ads were ranked lowest among key marketing tactics to attract tourists.

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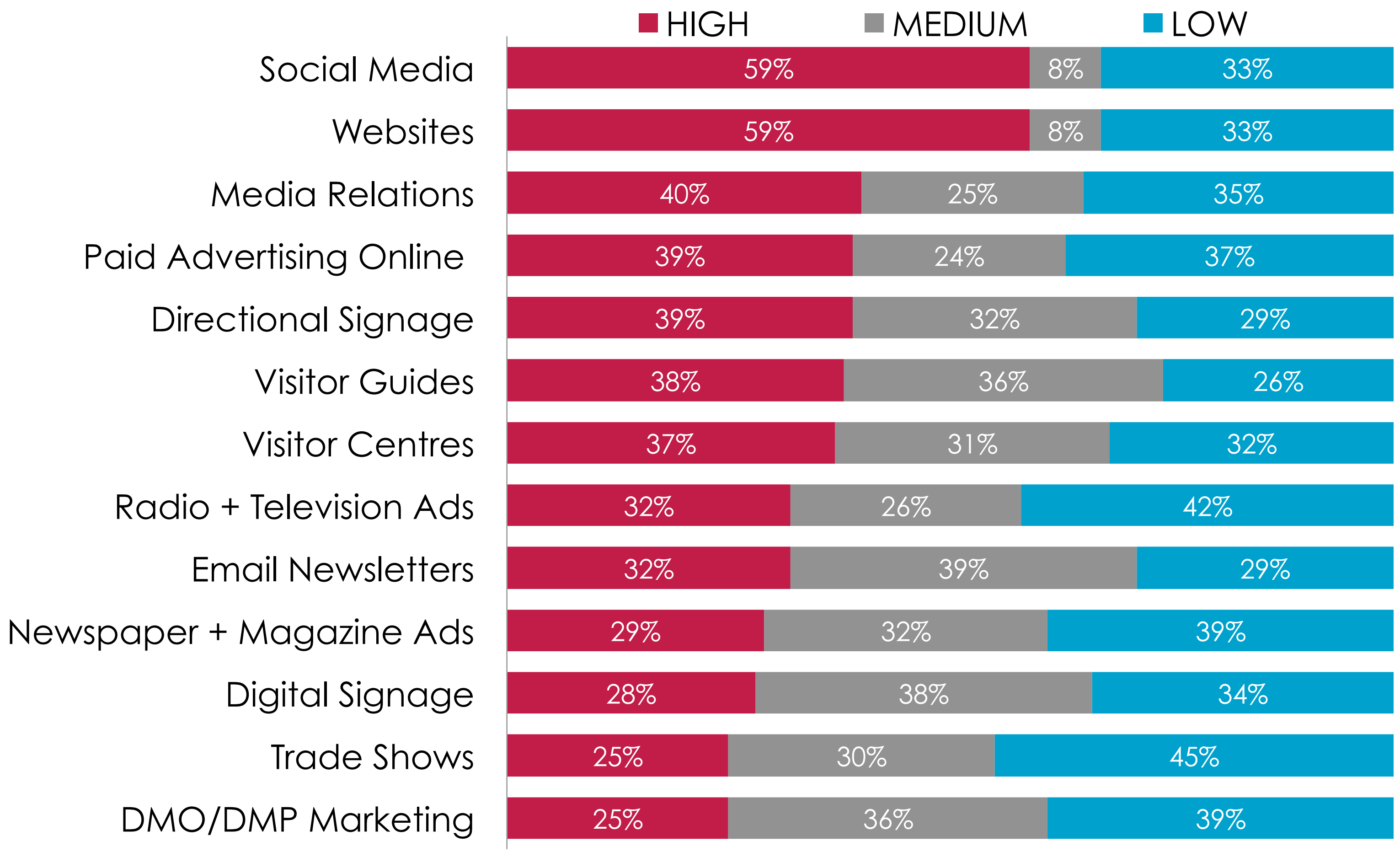
Q15: Rank the importance of these marketing tactics to attract tourists. n= 111



INSIGHT

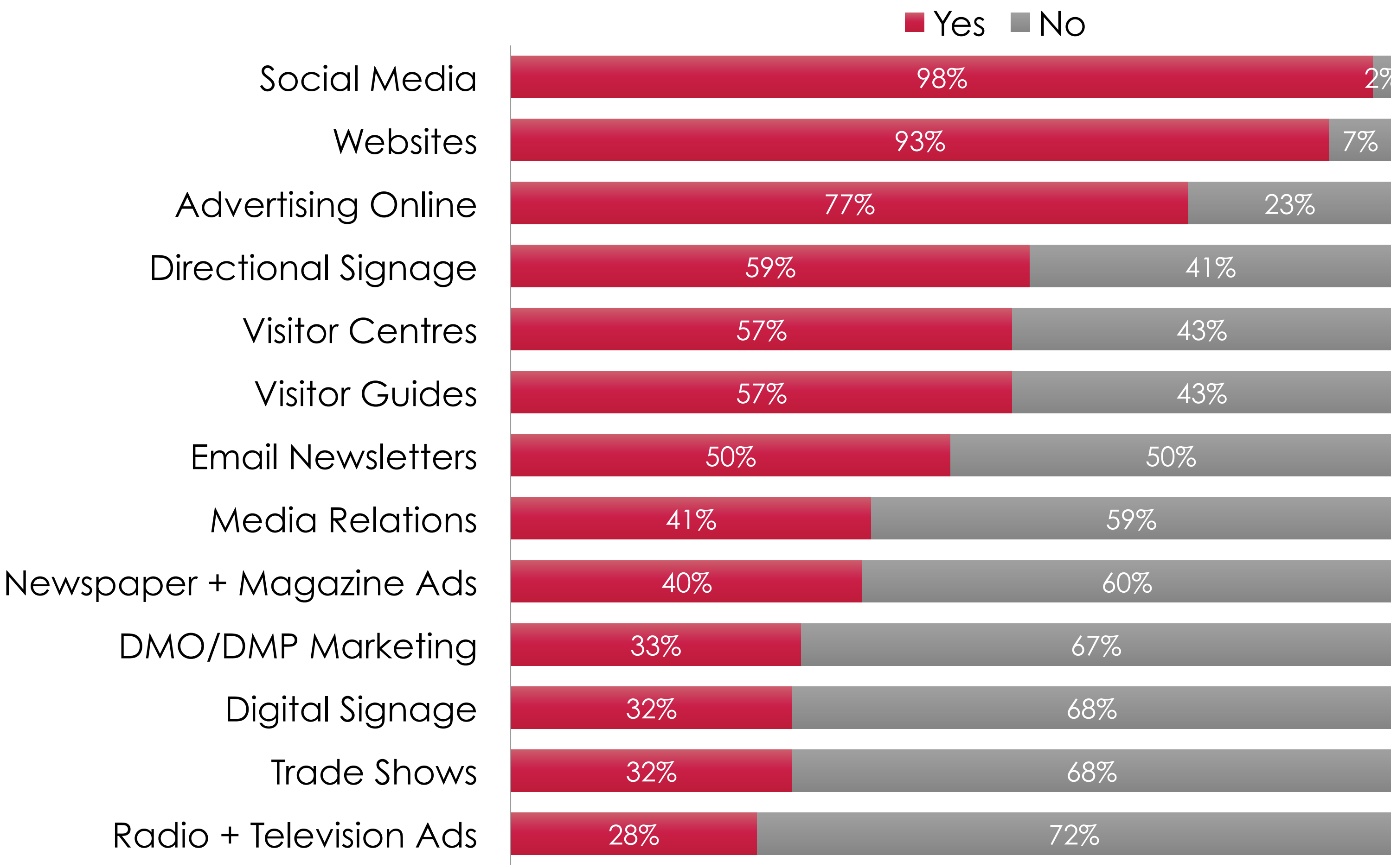
When thinking about the importance of 13 typical marketing tactics to attract tourists, the top three based on a *High rank only* were: social media, websites and media relations.

Tactics like trade shows and radio + television ads 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= 111



INSIGHT

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

Digital signage and radio + television, trade shows and digital signage remain among 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.

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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	29%	73%	40%
Email Newsletters	32%	71%	50%
Radio + Television Ads	32%	70%	28%
Advertising Online	39%	63%	77%
Directional Signage	39%	71%	59%
Social Media	59%	67%	98%
Visitor Centres	37%	68%	57%
Websites	59%	67%	93%
Media Relations (Travel & Food Writers/Bloggers)	40%	65%	41%
Trade Shows	25%	71%	32%
Visitor Guides	33%	74%	57%
Digital Signage	28%	73%	32%
DMO/DMP Marketing	25%	70%	33%

Growth Plans, by month

Tourism businesses continue to show an interest in building out the shoulder season.

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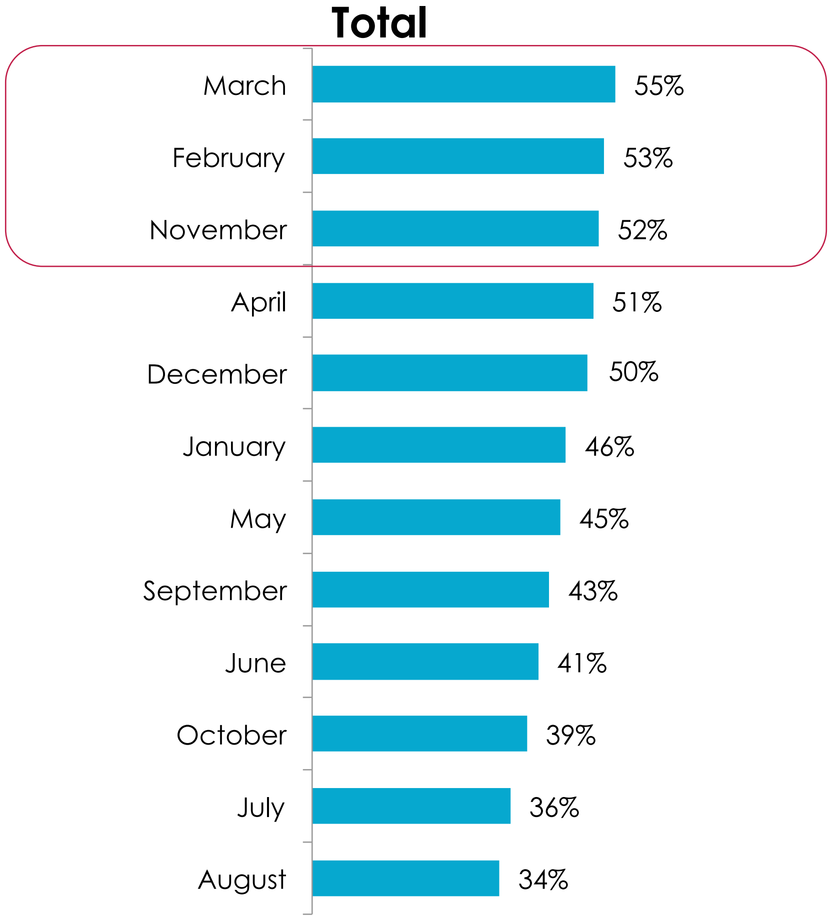
Q17: In what month(s) of the year would you like to grow your business? n= 111



INSIGHT

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

Priorities, agreement

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

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Q18: South Eastern Ontario Region 9 Regional Tourism Organization current strategic priorities include: (listed below) Do you agree with these priorities? n= 111

	Total	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Kingston (n=31)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Yes	83%	100%	100%	-	87%	-	79%	83%
No	17%	-	-	100%	13%	-	21%	17%

INSIGHT

A very high level of agreement (83%) is an indication that stakeholders have positive opinions about the priorities of RTO9.

Only 17% 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

Tourism stakeholders emphasized the need for small business training and financial supports.

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

1. MARKETING

- Shared campaigns and promotions
- Focus on key demand generators/best experiences

2. WORKFORCE DEVELOPMENT

- More networking events
- Provide education for employees through training and webinars
- Support succession planning

3. PRODUCT DEVELOPMENT

- Regular festivals/events
- Support arts/culture/ science
- Winter tourism
- Regional and local development

4. OTHER

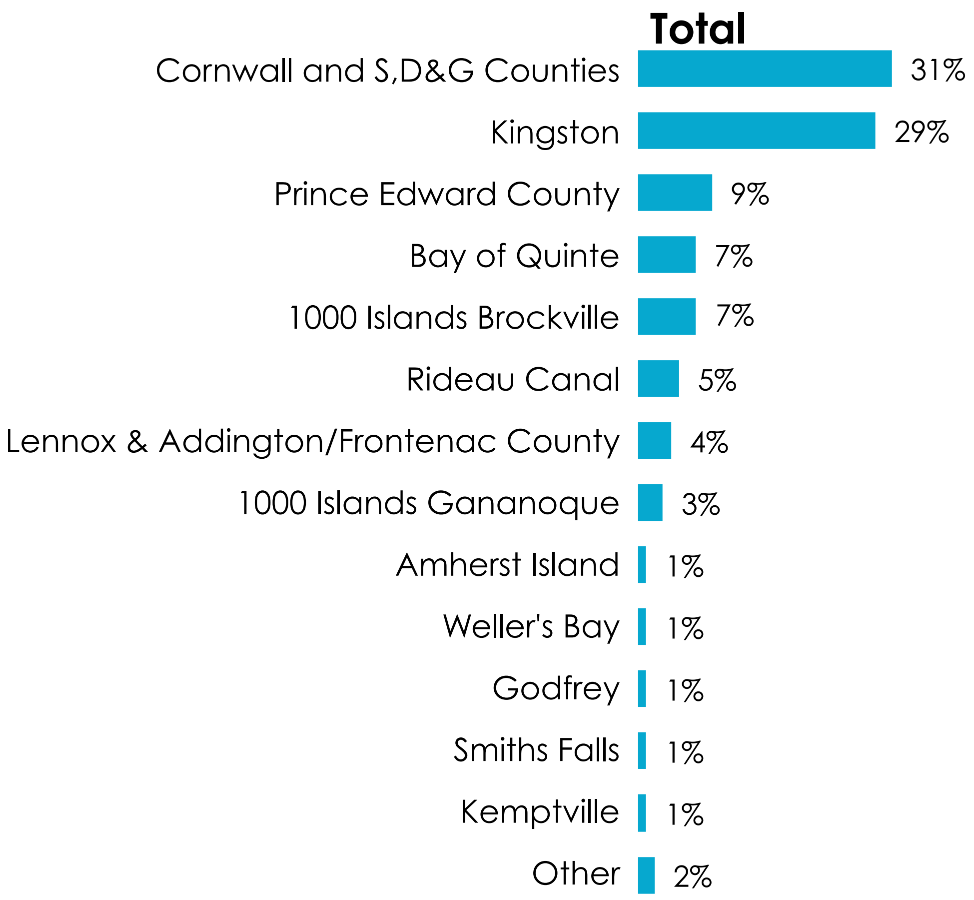
5. ACCESSIBILITY

- Funding/financial assistance
- More collaboration with private sector
- Support for small businesses (hub)
- Improve accessibility
- Build sustainable tourism

Respondent Location

Increased engagement with stakeholders resulted in more respondents from Cornwall and S,D&G Counties and Kingston.

Q21: Where are you located? n= 111



INSIGHT

Over half of the (60%) of the respondents were located in Cornwall and S,D&G Counties and Kingston.

Partner Engagement

Partnerships remain an important opportunity for RTO9 and the DMOs/DMPs to collaborate with and support stakeholders in the region.

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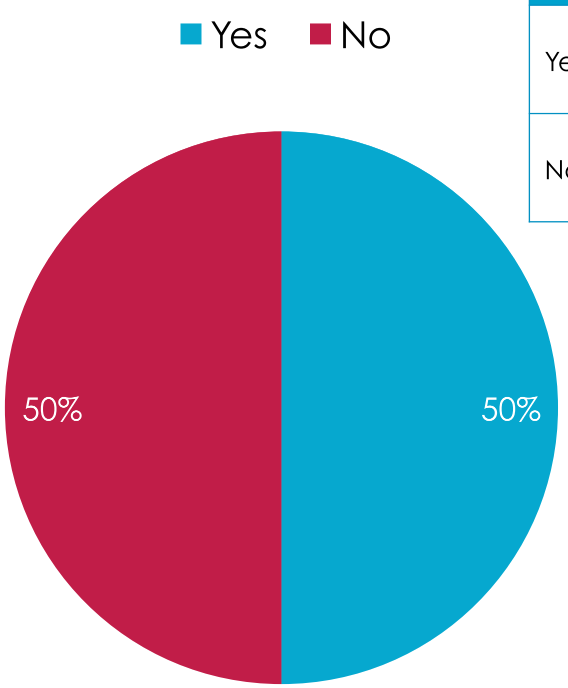
Q22: Have you partnered with (RTO9/DMO/DMP name) in the last year? n= 111

Total



	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Kingston (n=31)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Yes	67%	-	100%	77%	-	52%	28%
No	33%	100%	-	23%	-	48%	72%

INSIGHT

There was an even split between respondents that partnered and did not partner with RTO9 and the DMOs in the last year.

Partnership examples include:

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

DMO TABLES

Overview of Destination Results

Destination specific analysis allow us to explore and measure stakeholder responses across the region.

As each destination deployed their own questionnaire we were able to reveal destination-specific results, where possible and most relevant. The questions that are excluded from this summary, can be found in aggregate within the general Results Section. Due to small sizes, results should be interpreted with caution.

As noted earlier in this report, 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.

Types of tourism businesses and organizations

Q1: What is the primary type of tourism business or organization you operate? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Hotel/Inn/Motel	31%	-	-	-	-	48%	-	-	17%	30%
Event/Festival	11%	-	-	-	-	13%	-	-	21%	4%
Retail Store	8%	-	-	-	-	16%	-	-	7%	4%
Historic Site/Museum	7%	33%	-	-	-	3%	-	-	14%	4%
Arts/Culture Venue	5%	-	-	-	-	-	-	-	10%	4%
Visitor Centre	5%	-	-	-	-	3%	-	-	-	9%
Retail Farm Market/Farm Operator	4%	-	-	-	-	-	-	-	7%	4%
Campground	3%	-	-	-	-	-	-	-	3%	4%
Theatre	3%	-	-	-	-	3%	-	-	3%	2%
Restaurant	3%	33%	-	-	-	3%	-	-	-	2%
Winery/Brewery or other beverage producer	3%	-	-	-	-	-	-	-	3%	4%
Music Venue	2%	-	-	100%	-	-	-	-	-	2%
Tour Operator	2%	-	-	-	-	-	-	-	-	4%
Bed and Breakfast facilities(BNB)	2%	-	-	-	-	-	-	-	-	4%
Maple syrup producer	2%	-	-	-	-	-	-	-	7%	-
Attraction	1%	-	-	-	-	-	-	-	-	2%
Recreation (outdoor)	1%	33%	-	-	-	-	-	-	-	-
Sports (indoor/outdoor)	1%	-	-	-	-	-	-	-	3%	-
Cruise Operator/Marina	1%	-	-	-	-	3%	-	-	-	-
Spa & Wellness	1%	-	-	-	-	-	-	-	-	2%
Food cateriing	1%	-	-	-	-	-	-	-	-	2%
Cooking school	1%	-	-	-	-	-	-	-	-	2%
Agro-Tourism	1%	-	-	-	-	-	-	-	3%	-
Goldsmith	1%	-	-	-	-	3%	-	-	-	-
Marketing	1%	-	-	-	-	3%	-	-	-	-
Manufacturing and retail (Reusable bags)	1%	-	-	-	-	-	-	-	-	2%
Photography	1%	-	100%	-	-	-	-	-	-	-
Other	2%	-	-	-	-	-	-	-	-	4%

Customer Source Markets

Regional Tourism ORGANIZATION

Q2: Where do the majority of your customers come from? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Ottawa	44%	33%	-	-	-	52%	-	-	38%	46%
Quebec	38%	67%	-	-	-	29%	-	-	45%	39%
Greater Toronto Area (i.e., not Metro Toronto)	37%	100%	100%	-	-	58%	-	-	3%	39%
Metro Toronto	33%	67%	100%	-	-	45%	-	-	10%	37%
Kingston	31%	33%	-	-	-	55%	-	-	3%	33%
The Rest of Ontario	23%	-	-	-	-	19%	-	-	34%	22%
Cornwall	19%	-	-	-	-	3%	-	-	59%	7%
New York State	19%	-	-	-	-	10%	-	-	21%	26%
Belleville	15%	100%	-	-	-	13%	-	-	3%	20%
Prince Edward County	13%	33%	-	-	-	13%	-	-	3%	17%
Brockville	13%	-	-	-	-	13%	-	-	14%	13%
Quinte West	11%	100%	-	-	-	10%	-	-	-	13%
Lindsay/Peterborough/Kawarthas	10%	33%	-	-	-	10%	-	-	-	15%
Napanee	9%	67%	-	-	-	13%	-	-	3%	7%
Haliburton Highlands and Ottawa Valley	8%	-	-	-	-	10%	-	-	7%	9%
Europe	6%	-	-	-	-	10%	-	-	-	9%
United states of america (USA)	5%	-	-	-	-	10%	-	-	3%	2%
United kindom (UK)	3%	-	-	-	-	3%	-	-	3%	2%
Northumberland County	2%	-	-	-	-	3%	-	-	-	2%
Australia	2%	-	-	-	-	3%	-	-	-	2%
Canada	1%	-	-	-	-	-	-	-	3%	-
China	1%	-	-	-	-	3%	-	-	-	-
Pennsylvania	1%	-	-	-	-	-	-	-	-	2%
Asia	1%	-	-	-	-	3%	-	-	-	-
California	1%	-	-	-	-	-	-	-	-	2%
Other	9%	-	-	100%	-	6%	-	-	17%	4%
Don't know	1%	-	-	-	-	-	-	-	3%	-

Seasonality and sales, shoulder season

Q3: Thinking about 2018 vs. 2019's shoulder season (January-May and September-December), how were sales for your own business? n=111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Much better	10%	-	-	-	-	3%	-	-	10%	15%
Somewhat better	35%	67%	-	100%	-	29%	-	-	14%	50%
About the same	33%	-	100%	-	-	29%	-	-	62%	20%
Somewhat worse	18%	33%	-	-	-	26%	-	-	14%	15%
Much worse	4%	-	-	-	-	13%	-	-	-	-

Seasonality and sales, high season

Q4: Thinking about 2018 vs. 2019's high season (June-August), how were sales for your own business? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Much better	23%	33%	-	-	-	19%	-	-	14%	33%
Somewhat better	32%	67%	100%	-	-	29%	-	-	34%	30%
About the same	34%	-	-	100%	-	36%	-	-	45%	26%
Somewhat worse	10%	-	-	-	-	16%	-	-	7%	9%
Much worse	1%	-	-	-	-	-	-	-	-	2%

Visitor Performance

Q5: Thinking about 2018 vs. 2019, how many visitors did you have? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Much better	14%	33%	-	100%	-	3%	-	-	14%	17%
Somewhat better	40%	67%	100%	-	-	26%	-	-	48%	41%
About the same	28%	-	-	-	-	42%	-	-	28%	22%
Somewhat worse	17%	-	-	-	-	23%	-	-	10%	20%
Much worse	2%	-	-	-	-	6%	-	-	-	-

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

RTO 9 Regional Tourism ORGANIZATION

Q6: Compared to 2018's shoulder season (January-May and September-December), rate overall tourism business in your community for 2019. n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Much better	7%	-	-	-	-	3%	-	-	7%	11%
Somewhat better	33%	34%	100%	100%	-	33%	-	-	21%	38%
About the same	41%	33%	-	-	-	29%	-	-	65%	35%
Somewhat worse	14%	-	-	-	-	29%	-	-	7%	9%
Much worse	5%	33%	-	-	-	6%	-	-	-	7%

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

Q7: Compared to 2018's high season (June-August), rate overall tourism business in your community for 2019. n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Much better	11%	33%	-	-	-	3%	-	-	7%	17%
Somewhat better	36%	67%	-	-	-	45%	-	-	38%	28%
About the same	36%	-	100%	100%	-	29%	-	-	48%	35%
Somewhat worse	14%	-	-	-	-	23%	-	-	7%	13%
Much worse	3%	-	-	-	-	-	-	-	-	7%

Business Challenges

Q8: How have the following factors impacted your business in 2019? n= 111

	Total (n=111)			Bay Of Quinte (n=3)			Prince Edward County (n=1)			Lennox & Addington/ Frontenac County (n=1)		
	Positive	Neutral/ No Impact	Negative	Positive	Neutral/ No Impact	Negative	Positive	Neutral/ No Impact	Negative	Positive	Neutral/ No Impact	Negative
Economy	18%	61%	21%	33%	67%	-	-	100%	-	100%	-	-
U.S. Exchange	14%	75%	11%	-	33%	67%	-	100%	-	-	100%	-
Weather	10%	46%	44%	-	67%	33%	100%	-	-	-	-	100%
Competition from other destinations	7%	63%	30%	-	67%	33%	-	100%	-	-	100%	-
Competition from other destinations	6%	62%	32%	33%	-	67%	-	100%	-	100%	-	-
Gas Prices	3%	72%	25%	-	67%	33%	-	100%	-	-	-	100%
Road Construction	2%	71%	27%	-	33%	67%	-	100%	-	-	100%	-
Passport Requirements	1%	94%	5%	-	67%	33%	-	100%	-	-	100%	-

Business Challenges

Regional Tourism ORGANIZATION

Q8: How have the following factors impacted your business in 2019? n= 111

	Total (n=111)			**Kingston (n=31)**			**Cornwall & SDG Counties (n=29)**			**South Eastern Ontario (n=46)**		
	Positive	Neutral/ No Impact	Negative	Positive	Neutral/ No Impact	Negative	Positive	Neutral/ No Impact	Negative	Positive	Neutral/ No Impact	Negative
Economy	18%	61%	21%	19%	49%	32%	17%	69%	14%	15%	65%	20%
U.S. Exchange	14%	75%	11%	16%	78%	6%	10%	76%	14%	17%	74%	9%
Weather	10%	46%	44%	6%	42%	52%	14%	65%	21%	9%	37%	54%
Competition from other destinations	7%	63%	30%	6%	52%	42%	7%	83%	10%	9%	56%	35%
Competition from other destinations	6%	62%	32%	6%	49%	45%	3%	63%	34%	4%	76%	20%
Gas Prices	3%	72%	25%	3%	65%	32%	7%	69%	24%	-	80%	20%
Road Construction	2%	71%	27%	-	71%	29%	-	72%	28%	4%	72%	24%
Passport Requirements	1%	94%	5%	3%	87%	10%	-	97%	3%	-	100%	-

Twenty31 tourism defined

Business Investments, physical

Q9: Have you invested in physical upgrades/improvements for your business this year? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
We have made considerable upgrades	39%	33%	-	-	-	45%	-	-	34%	39%
We have made a few improvements, but nothing major	53%	67%	-	-	-	49%	-	-	63%	52%
We have not made any improvements	8%	-	100%	100%	-	6%	-	-	3%	9%

Business Investments, technological

Q10: Have you invested in technological upgrades/improvements (e.g., website, social media, IT tools) for your business this year? n= 111

	Total (n=111)	Bay Of Quinte (n=8)	Prince Edward County (n=10)	Lennox & Addington/ Frontenac County (n=4)	Rideau Canal (n=5)	Kingston (n=32)	1000 Islands Gananoque (n=3)	1000 Islands Brockville (n=8)	Cornwall & SDG Counties (n=34)	Other (n=7)
We have made considerable upgrades	33%	25%	20%	-	60%	38%	33%	50%	32%	29%
We have made a few improvements, but nothing major	53%	62%	50%	50%	40%	53%	67%	25%	56%	57%
We have not made any improvements	14%	13%	30%	50%	-	9%	-	25%	12%	14%

Business Investments, urgency

Q11: Have any of your investments in physical and/or technological upgrades/improvements been out of necessity only? n= 111

	Total (n=111)	Bay Of Quinte (n=8)	Prince Edward County (n=10)	Lennox & Addington/ Frontenac County (n=4)	Rideau Canal (n=5)	Kingston (n=32)	1000 Islands Gananoque (n=3)	1000 Islands Brockville (n=8)	Cornwall & SDG Counties (n=34)	Other (n=7)
Yes	35%	25%	30%	-	20%	31%	33%	25%	50%	42%
No	50%	75%	60%	50%	60%	44%	67%	62%	44%	29%
Not Applicable	15%	-	10%	50%	20%	25%	-	13%	6%	29%

Employment Contributions

Q13. How has your business contributed to employment compared to last year? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
We employed more employees	24%	-	-	-	-	16%	-	-	21%	35%
We employed the same number of employees	66%	100%	100%	100%	-	71%	-	-	72%	54%
We employed less employees	10%	-	-	-	-	13%	-	-	7%	11%

Key Marketing Tactics, importance

Q15: Rank the importance of these marketing tactics to attract tourists. n= 111

	Total (n=111)			Bay Of Quinte (n=3)			Prince Edward County (n=1)			Lennox & Addington/ Frontenac County (n=1)		
	High (1-3)	Medium (4-6)	Low (7-9)	High (1-3)	Medium (4-6)	Low (7-9)	High (1-3)	Medium (4-6)	Low (7-9)	High (1-3)	Medium (4-6)	Low (7-9)
Social Media	59%	8%	33%	100%	-	-	-	-	100%	-	-	100%
Websites	59%	8%	33%	100%	-	-	-	-	100%	-	-	100%
Media Relations (Travel & Food Writers/Bloggers)	40%	25%	35%	33%	67%	-	-	-	100%	-	100%	-
Paid Advertising Online	39%	24%	37%	67%	33%	-	-	-	100%	-	-	100%
Directional Signage	39%	32%	29%	33%	67%	-	-	100%	-	-	-	100%
Visitor Guides	38%	36%	26%	33%	67%	-	-	-	100%	-	100%	-
Visitor Centres	37%	31%	32%	33%	67%	-	-	-	100%	-	100%	-
Radio + Television Ads	32%	26%	42%	34%	33%	33%	100%	-	-	-	-	100%
Email Newsletters	32%	39%	29%	34%	33%	33%	-	-	100%	-	100%	-
Newspaper + Magazine Ads	29%	32%	39%	-	33%	67%	-	100%	-	-	-	100%
Digital Signage	28%	38%	34%	-	67%	33%	100%	-	-	-	-	100%
Trade Shows	25%	30%	45%	-	67%	33%	-	-	100%	-	-	100%
DMO/DMP Marketing	25%	36%	39%	-	33%	67%	-	-	100%	-	100%	-

Key Marketing Tactics, importance

Q15: Rank the importance of these marketing tactics to attract tourists. n= 111

	Total (n=111)			Kingston (n=31)			Cornwall & SDG Counties (n=29)			South Eastern Ontario (n=46)		
	High (1-3)	Medium (4-6)	Low (7-9)	High (1-3)	Medium (4-6)	Low (7-9)	High (1-3)	Medium (4-6)	Low (7-9)	High (1-3)	Medium (4-6)	Low (7-9)
Social Media	59%	8%	33%	48%	10%	42%	76%	7%	17%	56%	7%	37%
Websites	59%	8%	33%	52%	6%	42%	72%	7%	21%	54%	11%	35%
Media Relations (Travel & Food Writers/Bloggers)	40%	25%	35%	39%	29%	32%	52%	20%	28%	35%	22%	43%
Paid Advertising Online	39%	24%	37%	42%	29%	29%	41%	28%	31%	35%	20%	45%
Directional Signage	39%	32%	29%	32%	26%	42%	49%	34%	17%	39%	33%	28%
Visitor Guides	38%	36%	26%	39%	32%	29%	48%	38%	14%	33%	35%	32%
Visitor Centres	37%	31%	32%	42%	29%	29%	34%	38%	28%	37%	26%	37%
Radio + Television Ads	32%	26%	42%	45%	26%	29%	20%	21%	59%	28%	31%	41%
Email Newsletters	32%	39%	29%	35%	45%	20%	41%	34%	25%	24%	37%	39%
Newspaper + Magazine Ads	29%	32%	39%	42%	35%	23%	28%	31%	41%	24%	28%	48%
Digital Signage	28%	38%	34%	23%	48%	29%	27%	45%	28%	33%	26%	41%
Trade Shows	25%	30%	45%	36%	19%	45%	21%	34%	45%	24%	33%	43%
DMO/DMP Marketing	25%	36%	39%	42%	26%	32%	21%	38%	41%	20%	41%	39%

Key Marketing Tactics, used

Q16: Which marketing tactics do you currently use to attract tourists? n= 111

	Total (n=111)		Bay Of Quinte (n=3)		Prince Edward County (n=1)		Lennox & Addington/ Frontenac County (n=1)		Kingston (n=31)		Cornwall & SDG Counties (n=29)		South Eastern Ontario (n=46)	
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Social Media	98%	2%	100%	-	100%	-	100%	-	100%	-	97%	3%	98%	2%
Websites	93%	7%	100%	-	100%	-	100%	-	97%	3%	90%	10%	91%	9%
Advertising Online	77%	23%	67%	33%	-	100%	100%	-	81%	19%	86%	14%	72%	28%
Directional Signage	59%	41%	67%	33%	-	100%	100%	-	55%	45%	76%	24%	50%	50%
Visitor Centres	57%	43%	67%	33%	100%	-	-	100%	74%	26%	38%	62%	57%	43%
Visitor Guides	57%	43%	100%	-	100%	-	-	100%	68%	32%	52%	48%	50%	50%
Email Newsletters	50%	50%	67%	33%	100%	-	-	100%	71%	29%	34%	66%	46%	54%
Media Relations	41%	59%	33%	67%	100%	-	-	100%	55%	45%	28%	72%	39%	61%
Newspaper + Magazine Ads	40%	60%	67%	33%	-	100%	100%	-	39%	61%	38%	62%	39%	61%
DMO/DMP Marketing	33%	67%	-	100%	100%	-	-	100%	61%	39%	14%	86%	28%	72%
Digital Signage	32%	68%	-	100%	-	100%	-	100%	39%	61%	38%	62%	28%	72%
Trade Shows	32%	68%	-	100%	100%	-	100%	-	48%	52%	24%	76%	26%	74%
Radio + Television Ads	28%	72%	67%	33%	-	100%	-	100%	29%	71%	24%	76%	28%	72%

Growth Plans, by month

Q17: In what month(s) of the year would you like to grow your business? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
March	55%	100%	-	-	-	65%	-	-	41%	57%
February	53%	100%	-	-	-	65%	-	-	38%	54%
November	52%	100%	100%	-	-	68%	-	-	28%	54%
April	51%	100%	-	-	-	68%	-	-	38%	48%
December	50%	33%	100%	100%	-	68%	-	-	24%	54%
January	46%	67%	-	-	-	65%	-	-	31%	43%
May	45%	67%	100%	-	-	61%	-	-	38%	37%
September	43%	67%	-	100%	-	39%	-	-	55%	37%
June	41%	33%	-	-	-	48%	-	-	41%	39%
October	39%	100%	100%	-	-	42%	-	-	31%	37%
July	36%	33%	-	100%	-	35%	-	-	38%	35%
August	34%	33%	-	100%	-	29%	-	-	41%	33%

Priorities, agreement

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= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Yes	83%	100%	100%	-	-	87%	-	-	79%	83%
No	17%	-	-	100%	-	13%	-	-	21%	17%

Partner Engagement

Q21: Where are you located? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Cornwall and S,D&G Counties	31%	-	-	-	-	-	-	-	100%	11%
Kingston	29%	-	-	-	-	94%	-	-	-	7%
Prince Edward County	9%	-	100%	-	-	-	-	-	-	20%
Bay of Quinte	7%	100%	-	-	-	-	-	-	-	11%
1000 Islands Brockville	7%	-	-	-	-	-	-	-	-	17%
Rideau Canal	5%	-	-	-	-	-	-	-	-	11%
Lennox & Addington/Frontenac County	4%	-	-	100%	-	3%	-	-	-	4%
1000 Islands Gananoque	3%	-	-	-	-	-	-	-	-	7%
Amherst Island	1%	-	-	-	-	-	-	-	-	2%
Weller's Bay	1%	-	-	-	-	-	-	-	-	2%
Godfrey	1%	-	-	-	-	-	-	-	-	2%
Smiths Falls	1%	-	-	-	-	3%	-	-	-	-
Kemptville	1%	-	-	-	-	-	-	-	-	2%
Other	2%	-	-	-	-	-	-	-	-	4%

Partner Engagement

Q22: Have you partnered with RTO9 in the last year? n= 111

	Total (n=111)	Bay Of Quinte (n=3)	Prince Edward County (n=1)	Lennox & Addington/ Frontenac County (n=1)	Rideau Canal (n=-)	Kingston (n=31)	1000 Islands Gananoque (n=-)	1000 Islands Brockville (n=-)	Cornwall & SDG Counties (n=29)	South Eastern Ontario (n=46)
Yes	50%	67%	-	100%	-	77%	-	-	52%	28%
No	50%	33%	100%	-	-	23%	-	-	48%	72%

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.

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